Public Works and Government Services Canada / Travaux publics et Services gouvernementaux Canada

**RETURN BIDS TO:**
**RETOURNER LES SOUMISSIONS À:**

**Bid Receiving - PWGSC / Réception des soumissions - TPSGC**
**11 Laurier St. / 11, rue Laurier**
**Place du Portage, Phase III**
**Core 0B2 / Noyau 0B2**
**Gatineau**
**Québec**
**K1A 0S5**
**Bid Fax: (819) 997-9776**

| | |
|---|---|
| **Title - Sujet** POR - Quantitative<br>ROP - Quantitatif | |
| **Solicitation No. - N° de l'invitation**<br>HT372-203492/A | **Date**<br>2020-12-07 |
| **Client Reference No. - N° de référence du client**<br>HT372-20-3492 | |
| **GETS Reference No. - N° de référence de SEAG**<br>PW-$$CY-031-79414 | |
| **File No. - N° de dossier**<br>cy031.HT372-203492 | **CCC No./N° CCC - FMS No./N° VME** |

## Solicitation Closes - L'invitation prend fin

**at - à 02:00 PM** Eastern Standard Time EST
**on - le 2021-01-04** Heure Normale du l'Est HNE

**F.O.B. - F.A.B.**
**Plant-Usine:** ☐ **Destination:** ☐ **Other-Autre:** ☐

| | |
|---|---|
| **Address Enquiries to: - Adresser toutes questions à:**<br>Brad, Giulia | **Buyer Id - Id de l'acheteur**<br>cy031 |
| **Telephone No. - N° de téléphone**<br>(613) 990-3814 ( ) | **FAX No. - N° de FAX**<br>( ) - |

**Destination - of Goods, Services, and Construction:**
**Destination - des biens, services et construction:**
DEPARTMENT OF HEALTH
200 Eglantine Driveway
A.L. 1915C
OTTAWA
Ontario
K1A0K9
Canada

# REQUEST FOR PROPOSAL
# DEMANDE DE PROPOSITION

**Proposal To: Public Works and Government Services Canada**

We hereby offer to sell to Her Majesty the Queen in right of Canada, in accordance with the terms and conditions set out herein, referred to herein or attached hereto, the goods, services, and construction listed herein and on any attached sheets at the price(s) set out therefor.

**Proposition aux: Travaux Publics et Services Gouvernementaux Canada**

Nous offrons par la présente de vendre à Sa Majesté la Reine du chef du Canada, aux conditions énoncées ou incluses par référence dans la présente et aux annexes ci-jointes, les biens, services et construction énumérés ici sur toute feuille ci-annexée, au(x) prix indiqué(s).

**Comments - Commentaires**

**Instructions: See Herein**

**Instructions: Voir aux présentes**

**Vendor/Firm Name and Address**
**Raison sociale et adresse du fournisseur/de l'entrepreneur**

| | |
|---|---|
| **Delivery Required - Livraison exigée**<br>See Herein – Voir ci-inclus | **Delivery Offered - Livraison proposée** |

**Vendor/Firm Name and Address**
**Raison sociale et adresse du fournisseur/de l'entrepreneur**

**Telephone No. - N° de téléphone**
**Facsimile No. - N° de télécopieur**

**Name and title of person authorized to sign on behalf of Vendor/Firm (type or print)**
**Nom et titre de la personne autorisée à signer au nom du fournisseur/ de l'entrepreneur (taper ou écrire en caractères d'imprimerie)**

**Signature** **Date**

**Issuing Office - Bureau de distribution**
Communication Procurement Directorate/Direction de l'approvisionnement en communication
360 Albert St./ 360, rue Albert
12th Floor / 12ième étage
Ottawa
Ontario
K1A 0S5

Canada

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## PART 1 - GENERAL INFORMATION

### 1.1 Introduction

The bid solicitation is divided into seven parts plus attachments and annexes, as follows:

Part 1 General Information: provides a general description of the requirement;

Part 2 Bidder Instructions: provides the instructions, clauses and conditions applicable to the bid solicitation;

Part 3 Bid Preparation Instructions: provides Bidders with instructions on how to prepare their bid;

Part 4 Evaluation Procedures and Basis of Selection: indicates how the evaluation will be conducted, the evaluation criteria that must be addressed in the bid, and the basis of selection;

Part 5 Certifications and Additional Information: includes the certifications and additional information to be provided;

Part 6 Resulting Contract Clauses: includes the clauses and conditions that will apply to any resulting contract.

The Annexes include the Statement of Work, the Basis of Payment, the Evaluation Criteria, the Electronic Payment Instruments, the Federal Contractors Program for Employment Equity - Certification, and all other annexes.

### 1.2 Summary

Public Works and Government Services Canada (PWGSC), on behalf of Health Canada (HC), has a requirement to conduct a large-scale quantitative survey twice per year to understand Canadians' attitudes, knowledge, patterns of use, and perceptions with respect to vaping and tobacco products.

The requirement is subject to the Canadian Free Trade Agreement (CFTA).

The requirement is limited to Canadian services.

The Federal Contractors Program (FCP) for employment equity applies to this procurement; refer to Part 5 – Certifications and Additional Information, Part 6 - Resulting Contract Clauses and the annex titled Federal Contractors Program for Employment Equity - Certification.

This bid solicitation allows bidders to use the epost Connect service provided by Canada Post Corporation to transmit their bid electronically. Bidders must refer to Part 2 entitled Bidder Instructions, and Part 3 entitled Bid Preparation Instructions, of the bid solicitation, for further information.

The Phased Bid Compliance Process (PBCP) applies to this requirement.

### 1.3 Debriefings

Bidders may request a debriefing on the results of the bid solicitation process. Bidders should make the request to the Contracting Authority within 15 working days from receipt of the results of the bid solicitation process. The debriefing may be in writing, by telephone or in person.

## PART 2 - BIDDER INSTRUCTIONS

### 2.1 Standard Instructions, Clauses and Conditions

All instructions, clauses and conditions identified in the bid solicitation by number, date and title are set out in the Standard Acquisition Clauses and Conditions Manual (https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) issued by Public Works and Government Services Canada.

Bidders who submit a bid agree to be bound by the instructions, clauses and conditions of the bid solicitation and accept the clauses and conditions of the resulting contract.

The 2003 (2020-05-28) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

Subsection 5.4 of 2003, Standard Instructions - Goods or Services - Competitive Requirements, is amended as follows:

Delete: 60 days
Insert: 120 days

#### 2.1.1 *SACC* Manual Clauses

*SACC* Manual Clause A3050T (2020-07-01) – Canadian Content Definition

### 2.2 Submission of Bids

Bids must be submitted only to Public Works and Government Services Canada (PWGSC) Bid Receiving Unit by the date, time and place indicated in the bid solicitation.

Note: For bidders choosing to submit using epost Connect for bids closing at the Bid Receiving Unit in the National Capital Region (NCR) the email address is:

tpsgc.dgareceptiondessoumissions-abbidreceiving.pwgsc@tpsgc-pwgsc.gc.ca

Note: Bids will not be accepted if emailed directly to this email address. This email address is to be used to open an epost Connect conversation, as detailed in Standard Instructions 2003, or to send bids through an epost Connect message if the bidder is using its own licensing agreement for epost Connect.

Due to the nature of the bid solicitation, bids transmitted by facsimile to PWGSC will not be accepted.

### 2.3 Former Public Servant

Contracts awarded to former public servants (FPS) in receipt of a pension or of a lump sum payment must bear the closest public scrutiny, and reflect fairness in the spending of public funds. In order to comply with Treasury Board policies and directives on contracts awarded to FPSs, bidders must provide the information required below before contract award. If the answer to the questions and, as applicable the information required have not been received by the time the evaluation of bids is completed, Canada will inform the Bidder of a time frame within which to provide the information. Failure to comply with Canada's request and meet the requirement within the prescribed time frame will render the bid non-responsive.

**Definitions**

For the purposes of this clause,"*former public servant"* is any former member of a department as defined in the *Financial Administration Act,* R.S., 1985, c. F-11, a former member of the Canadian Armed Forces or a former member of the Royal Canadian Mounted Police. A former public servant may be:

a. an individual;
b. an individual who has incorporated;
c. a partnership made of former public servants; or
d. a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.

"*lump sum payment period"* means the period measured in weeks of salary, for which payment has been made to facilitate the transition to retirement or to other employment as a result of the implementation of various programs to reduce the size of the Public Service. The lump sum payment period does not include the period of severance pay, which is measured in a like manner.

"*pension"* means a pension or annual allowance paid under the *Public Service Superannuation Act* (PSSA), R.S., 1985, c.P-36, and any increases paid pursuant to the *Supplementary Retirement Benefits Act,* R.S., 1985, c. S-24 as it affects the PSSA. It does not include pensions payable pursuant to the *Canadian Forces Superannuation Act,* R.S., 1985, c. C-17, theDefence *Services Pension Continuation Act,* 1970, c. D-3, the *Royal Canadian Mounted Police Pension Continuation Act* , 1970, c. R-10, and the *Royal Canadian Mounted Police Superannuation Act,* R.S., 1985, c. R-11, the *Members of Parliament Retiring Allowances Act,* R.S. 1985, c. M-5, and that portion of pension payable to the *Canada Pension Plan Act,* R.S., 1985, c. C-8.

**Former Public Servant in Receipt of a Pension**

As per the above definitions, is the Bidder a FPS in receipt of a pension? **Yes** ( ) **No** ( )

If so, the Bidder must provide the following information, for all FPSs in receipt of a pension, as applicable:

a. name of former public servant;
b. date of termination of employment or retirement from the Public Service.

By providing this information, Bidders agree that the successful Bidder's status, with respect to being a former public servant in receipt of a pension, will be reported on departmental websites as part of the published proactive disclosure reports in accordance with Contracting Policy Notice: 2012-2 and the Guidelines on the Proactive Disclosure of Contracts.

**Work Force Adjustment Directive**

Is the Bidder a FPS who received a lump sum payment pursuant to the terms of the Work Force Adjustment Directive? **Yes** ( ) **No** ( )

If so, the Bidder must provide the following information:

a. name of former public servant;
b. conditions of the lump sum payment incentive;
c. date of termination of employment;
d. amount of lump sum payment;
e. rate of pay on which lump sum payment is based;

f. period of lump sum payment including start date, end date and number of weeks;
g. number and amount (professional fees) of other contracts subject to the restrictions of a work force adjustment program.

For all contracts awarded during the lump sum payment period, the total amount of fees that may be paid to a FPS who received a lump sum payment is $5,000, including Applicable Taxes

## 2.4 Enquiries - Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than five (5) calendar days before the bid closing date. Enquiries received after that time may not be answered.

Bidders should reference as accurately as possible the numbered item of the bid solicitation to which the enquiry relates. Care should be taken by Bidders to explain each question in sufficient detail in order to enable Canada to provide an accurate answer. Technical enquiries that are of a proprietary nature must be clearly marked "proprietary" at each relevant item. Items identified as “proprietary” will be treated as such except where Canada determines that the enquiry is not of a proprietary nature. Canada may edit the question(s) or may request that the Bidder do so, so that the proprietary nature of the question(s) is eliminated and the enquiry can be answered to all Bidders. Enquiries not submitted in a form that can be distributed to all Bidders may not be answered by Canada.

## 2.5 Applicable Laws

Any resulting contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario.

Bidders may, at their discretion, substitute the applicable laws of a Canadian province or territory of their choice without affecting the validity of their bid, by deleting the name of the Canadian province or territory specified and inserting the name of the Canadian province or territory of their choice. If no change is made, it acknowledges that the applicable laws specified are acceptable to the Bidders.

## 2.6 Basis for Canada's Ownership of Intellectual Property

The Treasury Board of Canada Secretariat has determined that any intellectual property rights arising from the performance of the Work under the resulting contract will belong to Canada, for the following reasons, as set out in the *Policy on Title to Intellectual Property Arising Under Crown Procurement Contracts*: the main purpose of the Contract, or of the deliverables contracted for, is to generate knowledge and information for public dissemination.

## 2.7 Bid Challenge and Recourse Mechanisms

(a) Several mechanisms are available to potential suppliers to challenge aspects of the procurement process up to and including contract award.

(b) Canada encourages suppliers to first bring their concerns to the attention of the Contracting Authority. Canada’s Buy and Sell website, under the heading “Bid Challenge and Recourse Mechanisms” contains information on potential complaint bodies such as:

- Office of the Procurement Ombudsman (OPO)
- Canadian International Trade Tribunal (CITT)

(c) Suppliers should note that there are **strict deadlines** for filing complaints, and the time periods vary depending on the complaint body in question. Suppliers should therefore act quickly when they want to challenge any aspect of the procurement process.

## PART 3 - BID PREPARATION INSTRUCTIONS

### 3.1 Bid Preparation Instructions

- If the Bidder chooses to submit its bid electronically, Canada requests that the Bidder submits its bid in accordance with section 08 of the 2003 standard instructions. The epost Connect system has a limit of 1GB per single message posted and a limit of 20GB per conversation.

The bid must be gathered per section and separated as follows:

Section I: Technical Bid
Section II: Financial Bid
Section III: Certifications
Section IV: Additional Information

Prices must appear in the financial bid only. No prices must be indicated in any other section of the bid.

**Section I: Technical Bid**

In their technical bid, Bidders should demonstrate their understanding of the requirements contained in the bid solicitation and explain how they will meet these requirements. Bidders should demonstrate their capability and describe their approach in a thorough, concise and clear manner for carrying out the work.

The technical bid should address clearly and in sufficient depth the points that are subject to the evaluation criteria against which the bid will be evaluated. Simply repeating the statement contained in the bid solicitation is not sufficient. In order to facilitate the evaluation of the bid, Canada requests that Bidders address and present topics in the order of the evaluation criteria under the same headings. To avoid duplication, Bidders may refer to different sections of their bids by identifying the specific paragraph and page number where the subject topic has already been addressed.

**Section II: Financial Bid**

**3.1.1** Bidders must submit their financial bid in accordance with the Basis of Payment in Annex "B".

**3.1.2 Electronic Payment of Invoices – Bid**

If you are willing to accept payment of invoices by Electronic Payment Instruments, complete Annex “D” Electronic Payment Instruments, to identify which ones are accepted.

If Annex “D” Electronic Payment Instruments is not completed, it will be considered as if Electronic Payment Instruments are not being accepted for payment of invoices.

Acceptance of Electronic Payment Instruments will not be considered as an evaluation criterion.

**Section III: Certifications**
Bidders must submit the certifications and additional information required under Part 5.

**3.1.3** In accordance with the *Treasury Board Contracting Policy* and the *Accessible Canada Act*, federal departments and agencies must consider accessibility criteria and features when procuring goods or services. Therefore, bidders are encouraged to highlight all the accessibility features and components of their proposal for this Statement of Work (SOW) and must:

(i) demonstrate how the bidder's proposed goods and/or services meet the accessibility requirement at delivery; or

(ii) describe how the bidder would deliver its goods and/or services under any resulting contract in a way that satisfies the mandatory requirement.

## PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

### 4.1 Evaluation Procedures

(a) Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial) evaluation criteria.

(b) An evaluation team composed of representatives of Canada will evaluate the bids.

(c) Canada will use the Phased Bid Compliance Process described below.

#### 4.1.1 Phased Bid Compliance Process

##### 4.1.1.1 General

(a) Canada is conducting the PBCP described below for this requirement.

(b) Notwithstanding any review by Canada at Phase I or II of the PBCP, Bidders are and will remain solely responsible for the accuracy, consistency and completeness of their Bids and Canada does not undertake, by reason of this review, any obligations or responsibility for identifying any or all errors or omissions in Bids or in responses by a Bidder to any communication from Canada.

THE BIDDER ACKNOWLEDGES THAT THE REVIEWS IN PHASE I AND II OF THIS PBCP ARE PRELIMINARY AND DO NOT PRECLUDE A FINDING IN PHASE III THAT THE BID IS NON-RESPONSIVE, EVEN FOR MANDATORY

REQUIREMENTS WHICH WERE SUBJECT TO REVIEW IN PHASE I OR II AND NOTWITHSTANDING THAT THE BID HAD BEEN FOUND RESPONSIVE IN SUCH EARLIER PHASE. CANADA MAY DEEM A BID TO BE NON-RESPONSIVE TO A MANDATORY REQUIREMENT AT ANY PHASE.
THE BIDDER ALSO ACKNOWLEDGES THAT ITS RESPONSE TO A NOTICE OR A COMPLIANCE ASSESSMENT REPORT (CAR) (EACH DEFINED BELOW) IN PHASE I OR II MAY NOT BE SUCCESSFUL IN RENDERING ITS BID RESPONSIVE TO THE MANDATORY REQUIREMENTS THAT ARE THE SUBJECT OF THE NOTICE OR CAR, AND MAY RENDER ITS BID NON-RESPONSIVE TO OTHER MANDATORY REQUIREMENTS.

(c) Canada may, in its discretion, request and accept at any time from a Bidder and consider as part of the Bid, any information to correct errors or deficiencies in the Bid that are clerical or administrative, such as, without limitation, failure to sign the Bid or any part or to checkmark a box in a form, or other failure of format or form or failure to acknowledge; failure to provide a procurement business number or contact information such as names, addresses and telephone numbers; inadvertent errors in numbers or calculations that do not change the amount the Bidder has specified as the price or of any component thereof that is subject to evaluation. This shall not limit Canada's right to request or accept any information after the bid solicitation closing in circumstances where the bid solicitation expressly provides for this right. The Bidder will have the time period specified in writing by Canada to provide the necessary documentation. Failure to meet this deadline will result in the Bid being declared non-responsive.

(d) The PBCP does not limit Canada's rights under Standard Acquisition Clauses and Conditions (SACC) 2003 (2020-05-28) Standard Instructions – Goods or Services – Competitive Requirements nor Canada's right to request or accept any information during the solicitation period or after bid solicitation closing in circumstances where the bid solicitation expressly provides for this right, or in the circumstances described in subsection (c).

(e) Canada will send any Notice or CAR by any method Canada chooses, in its absolute discretion. The Bidder must submit its response by the method stipulated in the Notice or CAR. Responses are deemed to be received by Canada at the date and time they are delivered to Canada by the method and at the address specified in the Notice or CAR. An email response permitted by the Notice or CAR is deemed received by Canada on the date and time it is received in Canada's email inbox at Canada's email address specified in the Notice or CAR. A Notice or CAR sent by Canada to the Bidder at any address provided by the Bidder in or pursuant to the Bid is deemed received by the Bidder on the date it is sent by Canada. Canada is not responsible for late receipt by Canada of a response, however caused.

**4.1.1.2 (2018-03-13) Phase I: Financial Bid**

(a) After the closing date and time of this bid solicitation, Canada will examine the Bid to determine whether it includes a Financial Bid and whether any Financial Bid includes all information required by the solicitation. Canada's review in Phase I will be limited to identifying whether any information that is required under the bid solicitation to be included in the Financial Bid is missing from the Financial Bid. This review will not assess whether the Financial Bid meets any standard or is responsive to all solicitation requirements.

(b) Canada's review in Phase I will be performed by officials of the Department of Public Works and Government Services.

(c) If Canada determines, in its absolute discretion that there is no Financial Bid or that the Financial Bid is missing all of the information required by the bid solicitation to be included in the Financial Bid, then the Bid will be considered non-responsive and will be given no further consideration.

(d) For Bids other than those described in c), Canada will send a written notice to the Bidder ("Notice") identifying where the Financial Bid is missing information. A Bidder, whose Financial Bid has been found responsive to the requirements that are reviewed at Phase I, will not receive a Notice. Such Bidders shall not be entitled to submit any additional information in respect of their Financial Bid.

(e) The Bidders who have been sent a Notice shall have the time period specified in the Notice (the "Remedy Period") to remedy the matters identified in the Notice by providing to Canada, in writing, additional information or clarification in response to the Notice. Responses received after the end of the Remedy Period will not be considered by Canada, except in circumstances and on terms expressly provided for in the Notice.

(f) In its response to the Notice, the Bidder will be entitled to remedy only that part of its Financial Bid which is identified in the Notice. For instance, where the Notice states that a required line item has been left blank, only the missing information may be added to the Financial Bid, <u>except that,</u> in those instances where the addition of such information will necessarily result in a change to other calculations previously submitted in its Financial Bid, (for example, the calculation to determine a total price), such necessary adjustments shall be identified by the Bidder and only these adjustments shall be made. All submitted information must comply with the requirements of this solicitation.

(g) Any other changes to the Financial Bid submitted by the Bidder will be considered to be new information and will be disregarded. There will be no change permitted to any other Section of the Bidder's Bid. Information submitted in accordance with the requirements of this solicitation in response to the Notice will replace, in full, **only** that part of the original Financial Bid as is permitted above, and will be used for the remainder of the bid evaluation process.

(h) Canada will determine whether the Financial Bid is responsive to the requirements reviewed at Phase I, considering such additional information or clarification as may have been provided by the Bidder in accordance with this Section. If the Financial Bid is not found responsive for the requirements reviewed at Phase I to the satisfaction of Canada, then the Bid shall be considered non-responsive and will receive no further consideration.

(i) Only Bids found responsive to the requirements reviewed in Phase I to the satisfaction of Canada, will receive a Phase II review.

**4.1.1.3 (2018-03-13) Phase II: Technical Bid**

(a) Canada's review at Phase II will be limited to a review of the Technical Bid to identify any instances where the Bidder has failed to meet any Eligible Mandatory Criterion. This review will not assess whether the Technical Bid meets any standard or is responsive to all solicitation requirements. Eligible Mandatory Criteria are all mandatory technical criteria that are identified in this solicitation as being subject to the PBCP. Mandatory technical criteria that are not identified in the solicitation as being subject to the PBCP, will not be evaluated until Phase III.

(b) Canada will send a written notice to the Bidder (Compliance Assessment Report or "CAR") identifying any Eligible Mandatory Criteria that the Bid has failed to meet. A Bidder whose Bid has been found responsive to the requirements that are reviewed at Phase II will receive a CAR that states that its Bid has been found responsive to the requirements reviewed at Phase II. Such Bidder shall not be entitled to submit any response to the CAR.

(c) A Bidder shall have the period specified in the CAR (the "Remedy Period") to remedy the failure to meet any Eligible Mandatory Criterion identified in the CAR by providing to Canada in writing additional or different information or clarification in response to the CAR. Responses received after the end of the Remedy Period will not be considered by Canada, except in circumstances and on terms expressly provided for in the CAR.

(d) The Bidder's response must address only the Eligible Mandatory Criteria listed in the CAR as not having been achieved, and must include only such information as is necessary to achieve such compliance. Any additional

information provided by the Bidder which is not necessary to achieve such compliance will not be considered by Canada, except that, in those instances where such a response to the Eligible Mandatory Criteria specified in the CAR will necessarily result in a consequential change to other parts of the Bid, the Bidder shall identify such additional changes, provided that its response must not include any change to the Financial Bid.

(e) The Bidder’s response to the CAR should identify in each case the Eligible Mandatory Criterion in the CAR to which it is responding, including identifying in the corresponding section of the original Bid, the wording of the proposed change to that section, and the wording and location in the Bid of any other consequential changes that necessarily result from such change. In respect of any such consequential change, the Bidder must include a rationale explaining why such consequential change is a necessary result of the change proposed to meet the Eligible Mandatory Criterion. It is not up to Canada to revise the Bidder’s Bid, and failure of the Bidder to do so in accordance with this subparagraph is at the Bidder’s own risk. All submitted information must comply with the requirements of this solicitation.

(f) Any changes to the Bid submitted by the Bidder other than as permitted in this solicitation, will be considered to be new information and will be disregarded. Information submitted in accordance with the requirements of this solicitation in response to the CAR will replace, in full, **only** that part of the original Bid as is permitted in this Section.

(g) Additional or different information submitted during Phase II permitted by this section will be considered as included in the Bid, but will be considered by Canada in the evaluation of the Bid at Phase II only for the purpose of determining whether the Bid meets the Eligible Mandatory Criteria. It will not be used at any Phase of the evaluation to increase any score that the original Bid would achieve without the benefit of such additional or different information. For instance, an Eligible Mandatory Criterion that requires a mandatory minimum number of points to achieve compliance will be assessed at Phase II to determine whether such mandatory minimum score would be achieved with such additional or different information submitted by the Bidder in response to the CAR. If so, the Bid will be considered responsive in respect of such Eligible Mandatory Criterion, and the additional or different information submitted by the Bidder shall bind the Bidder as part of its Bid, but the Bidder’s original score, which was less than the mandatory minimum for such Eligible Mandatory Criterion, will not change, and it will be that original score that is used to calculate any score for the Bid

(h) Canada will determine whether the Bid is responsive for the requirements reviewed at Phase II, considering such additional or different information or clarification as may have been provided by the Bidder in accordance with this Section. If the Bid is not found responsive for the requirements reviewed at Phase II to the satisfaction of Canada, then the Bid shall be considered non-responsive and will receive no further consideration.

(i) Only Bids found responsive to the requirements reviewed in Phase II to the satisfaction of Canada, will receive a Phase III evaluation.

#### 4.1.1.4 (2018-03-13) Phase III: Final Evaluation of the Bid

(a) In Phase III, Canada will complete the evaluation of all Bids found responsive to the requirements reviewed at Phase II. Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria.

(b) A Bid is non-responsive and will receive no further consideration if it does not meet all mandatory evaluation criteria of the solicitation.

### 4.1.2 Technical Evaluation

#### 4.1.2.1 Mandatory Technical Criteria

The Mandatory Technical Criteria are fully described in Annex C.

The Phased Bid Compliance Process will apply to mandatory technical criteria included in Annex “C” M1 to M4.

#### 4.1.2.2 Point Rated Technical Criteria

The Point Rated Technical Criteria are fully detailed in Annex C.

### 4.1.3 Financial Evaluation

Financial evaluation is fully described in Annex “B3”.

## 4.2 Basis of Selection

### 4.2.1 Basis of Selection – Highest Combined Rating of Technical Merit and Price

1. To be declared responsive, a bid must:

   a. comply with all the requirements of the bid solicitation; and

   b. meet all mandatory criteria; and

   c. obtain the required minimum points specified for each criterion for the technical evaluation, and

   d. obtain the required minimum of **980** points overall for the technical evaluation criteria which are subject to point rating. The rating is performed on a scale of **1400** points.

   1. Bids not meeting (a) or (b) or (c) and (d) will be declared non-responsive.

2. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be **70%** for the technical merit and **30%** for the price.

3. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of **70%**.

4. To establish the pricing score, each firm price or rate will be prorated against the lowest firm price or rate for each individual category of service. The ratio of **30%** will be calculated as follows: Lowest Average Firm Contract Price *multiplied by* 30 points *divided by* Bidder’s Average Firm Contract Price = Weighted Financial Score for Firm Contract Price for Initial and Optional Contract Periods.

5. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.

6. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.

The table below illustrates an example where all three bids are responsive and the selection of the contractor is determined by a 70/30 ratio of technical merit and price, respectively. The total available points equals 135 and the lowest evaluated price is $55,000.00.

**Basis of Selection – Highest Combined Rating Technical Merit (70%) and Price (30%)**

| | | Bidder A | Bidder B | Bidder C | Bidder D |
|---|---|---|---|---|---|
| **Overall Technical Score** | | 115/135 | 89/135 | 107/135 | 92/135 |
| **Average Bid Evaluation Price** | | $55,000.00 | $64,298.00 | $69,996.87 | $71,409.33 |
| **Calculations** | **Technical Merit Score** | 115/135 x 70 = 59.63 | 89/135 x 70 = 46.148 | 107/135 x 70 = 55.48 | 92/135 x 70 = 47.703 |
| | **Total Weighted Financial Score** | 30.000 | 25.661 | 23.572 | 23.106 |
| **Combined Rating** | | 89.63 | 71.809 | 79.052 | 70.809 |
| **Overall Rating** | | 1st | 3rd | 2nd | 4th |

## PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

Bidders must provide the required certifications and additional information to be awarded a contract.

The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Unless specified otherwise, Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.

The Contracting Authority will have the right to ask for additional information to verify the Bidder's certifications. Failure to comply and to cooperate with any request or requirement imposed by the Contracting Authority will render the bid non-responsive or constitute a default under the Contract.

### 5.1 Certifications Required with the Bid

Bidders must submit the following duly completed certifications as part of their bid.

#### 5.1.1 Integrity Provisions - Declaration of Convicted Offences

In accordance with the Integrity Provisions of the Standard Instructions, all bidders must provide with their bid, **if applicable**, the Integrity declaration form available on the Forms for the Integrity Regime website (http://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-eng.html), to be given further consideration in the procurement process.

### 5.2 Certifications Precedent to Contract Award and Additional Information

The certifications and additional information listed below should be submitted with the bid but may be submitted afterwards. If any of these required certifications or additional information is not completed and submitted as requested, the Contracting Authority will inform the Bidder of a time frame within which to provide the information. Failure to provide the certifications or the additional information listed below within the time frame specified will render the bid non-responsive.

#### 5.2.1 Integrity Provisions – Required Documentation

In accordance with the section titled Information to be provided when bidding, contracting or entering into a real property agreement of the Ineligibility and Suspension Policy *(*http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html), the Bidder must provide the required documentation, as applicable, to be given further consideration in the procurement process.

#### 5.2.2 Federal Contractors Program for Employment Equity - Bid Certification

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "FCP Limited Eligibility to Bid" list available at the bottom of the page of the Employment and Social Development Canada (ESDC) - Labour's website (https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html#).

Canada will have the right to declare a bid non-responsive if the Bidder, or any member of the Bidder if the Bidder is a Joint Venture, appears on the "FCP Limited Eligibility to Bid list at the time of contract award.

Canada will also have the right to terminate the Contract for default if a Contractor, or any member of the Contractor if the Contractor is a Joint Venture, appears on the "FCP Limited Eligibility to Bid" list during the period of the Contract.

The Bidder must provide the Contracting Authority with a completed annex titled Federal Contractors Program for Employment Equity - Certification, before contract award. If the Bidder is a Joint Venture, the Bidder must provide the Contracting Authority with a completed annex Federal Contractors Program for Employment Equity - Certification, for each member of the Joint Venture.

### 5.2.3 Additional Certifications Precedent to Contract Award

#### 5.2.3.1 Canadian Content Certification

*SACC Manual* clause A3056T (2018-12-06) – Canadian Content Definition.

This procurement is limited to Canadian services.

The Bidder certifies that:

( ) the services offered are Canadian services as defined in paragraph 4 of clause A3050T.

#### 5.2.3.2 Status and Availability of Resources

*SACC Manual* clause A3005T (2010-08-16) – Status and Availability of Resource

The Bidder certifies that, should it be awarded a contract as a result of the bid solicitation, every individual proposed in its bid will be available to perform the Work as required by Canada's representatives and at the time specified in the bid solicitation or agreed to with Canada's representatives. If for reasons beyond its control, the Bidder is unable to provide the services of an individual named in its bid, the Bidder may propose a substitute with similar qualifications and experience. The Bidder must advise the Contracting Authority of the reason for the substitution and provide the name, qualifications and experience of the proposed replacement. For the purposes of this clause, only the following reasons will be considered as beyond the control of the Bidder: death, sickness, maternity and parental leave, retirement, resignation, dismissal for cause or termination of an agreement for default.

If the Bidder has proposed any individual who is not an employee of the Bidder, the Bidder certifies that it has the permission from that individual to propose his/her services in relation to the Work to be performed and to submit his/her résumé to Canada. The Bidder must, upon request from the Contracting Authority, provide a written confirmation, signed by the individual, of the permission given to the Bidder and of his/her availability. Failure to comply with the request may result in the bid being declared non-responsive.

#### 5.2.3.3 Education and Experience

*SACC Manual* clause A3010T (2010-08-16) Education and Experience

The Bidder certifies that all the information provided in the résumés and supporting material submitted with its bid, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Bidder to be true and accurate.

Furthermore, the Bidder warrants that every individual proposed by the Bidder for the requirement is capable of performing the Work described in the resulting contract

#### 5.2.3.4 Bilingual Capabilities

The Bidder certifies that the proposed project team has the ability to conduct research in both official languages.

______________________________ ______________________
Signature Date

## PART 6 - RESULTING CONTRACT CLAUSES

The following clauses and conditions apply to and form part of any contract resulting from the bid solicitation.

**POR # 063-20**

### 6.1 Statement of Work

The Contractor must perform the Work in accordance with the Statement of Work at Annex "A".

### 6.2 Standard Clauses and Conditions

All clauses and conditions identified in the Contract by number, date and title are set out in the Standard Acquisition Clauses and Conditions Manual (https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) issued by Public Works and Government Services Canada.

#### 6.2.1 General Conditions

2035 (2020-05-28), General Conditions - Higher Complexity - Services, apply to and form part of the Contract.

#### 6.2.2 Supplemental General Conditions

*SACC Manual* clause 4008 (2008-12-12) – Personal Information;
*SACC Manual* clause A9122C (2008-05-12) – Protection and security of data stored in databases apply to and form part of the Contract.
*SACC Manual* clause 4007 (2010-08-16) – Canada to Own Intellectual Property Rights in Foreground Information;

### 6.3 Security Requirements

There is no security requirement applicable to the Contract.

### 6.4 Term of Contract

#### 6.4.1 Period of the Contract

The period of the Contract is from date of contract award to **March 31st, 2024 ,** inclusive.

#### 6.4.2 Option to Extend the Contract

The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to two (2) additional one (1) year period(s) under the same conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions as set out in the Basis of Payment.

Canada may exercise this option at any time by sending a written notice to the Contractor at least 30 calendar days before the expiry date of the Contract. The option may only be exercised by the Contracting Authority, and will be evidenced for administrative purposes only, through a contract amendment.

## 6.5 Authorities

### 6.5.1 Contracting Authority

**Giulia Brad**
Supply Officer

Public Works and Government Services Canada
Acquisitions Branch
Communication Procurement Directorate
Constitution Square
360 Albert Street, 12th Floor
Ottawa, Ontario K1A 0S5

Telephone: 613-293-8534
E-Mail: Giulia.brad@pwgsc-tpsgc.gc.ca

The Contracting Authority is responsible for the management of the Contract and any changes to the Contract must be authorized in writing by the Contracting Authority. The Contractor must not perform work in excess of or outside the scope of the Contract based on verbal or written requests or instructions from anybody other than the Contracting Authority.

### 6.5.2 Project Authority

The Project Authority for the Contract is:

Name: _________
Title: _________
Organization: __________
Address: __________

Telephone: ___-___-_____
E-mail address: ____________

The Project Authority is the representative of the department or agency for whom the Work is being carried out under the Contract and is responsible for all matters concerning the technical content of the Work under the Contract. Technical matters may be discussed with the Project Authority; however, the Project Authority has no authority to authorize changes to the scope of the Work. Changes to the scope of the Work can only be made through a contract amendment issued by the Contracting Authority.

### 6.5.3 Contractor's Representative

Name: _________
Title: _________
Organization: __________
Address: __________

Telephone: ___-___-_____
E-mail address: ____________

## 6.6 Proactive Disclosure of Contracts with Former Public Servants

By providing information on its status, with respect to being a former public servant in receipt of a *Public*

*Service Superannuation Act* (PSSA) pension, the Contractor has agreed that this information will be reported on departmental websites as part of the published proactive disclosure reports, in accordance with Contracting Policy Notice: 2012-2 of the Treasury Board Secretariat of Canada

### 6.7 Payment

#### 6.7.1 Basis of Payment

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid the firm lot prices as specified in Annex "B", for a total cost of $ _________ *insert the amount at contract award)*. Customs duties are included and Applicable Taxes are extra.

Canada will not pay the Contractor for any design changes, modifications or interpretations of the Work, unless they have been approved, in writing, by the Contracting Authority before their incorporation into the Work.

#### 6.7.2 Limitation of Price

*SACC Manual* clause C6000C (2017-08-17) Limitation of Price

#### 6.7.3 Schedule of Milestones

| Milestone | Deliverables (approved by Project Authority) | Firm Amount | Due Date or "Delivery Date" |
|---|---|---|---|
| 1 | Completion of wave 1 (March to May 2021) as per the SOW, including tasks and deliverables 1 through 31 for wave 1 as outlined in section "DESCRIPTION, SCOPE OF THE WORK AND DELIVERABLES" of the SOW; | ___ | In accordance with the table in Section "Data Collection" of the SOW |
| 2 | Completion of wave 2 (October to December 2021) as per the SOW, including tasks and deliverables 1 through 31 for wave 1 as outlined in section "DESCRIPTION, SCOPE OF THE WORK AND DELIVERABLES" of the SOW; | ___ | In accordance with the table in Section "Data Collection" of the SOW |
| 3 | Completion of wave 3 (March to May 2022) as per the SOW, including tasks and deliverables 1 through 31 for wave 1 as outlined in section "DESCRIPTION, SCOPE OF THE WORK AND DELIVERABLES" of the SOW; | ___ | In accordance with the table in Section "Data Collection" of the SOW |

| | | | |
|---|---|---|---|
| 4 | Completion of wave 4 (October to December 2022) as per the SOW, including tasks and deliverables 1 through 31 for wave 1 as outlined in section “DESCRIPTION, SCOPE OF THE WORK AND DELIVERABLES” of the SOW; | ____ | In accordance with the table in Section ”Data Collection” of the SOW |
| 5 | Completion of wave 5 (March to May 2023) as per the SOW, including tasks and deliverables 1 through 31 for wave 1 as outlined in section “DESCRIPTION, SCOPE OF THE WORK AND DELIVERABLES” of the SOW; | ____ | In accordance with the table in Section ”Data Collection” of the SOW |
| 6 | Completion of wave 6 (October to December 2023) as per the SOW, including tasks and deliverables 1 through 31 for wave 1 as outlined in section “DESCRIPTION, SCOPE OF THE WORK AND DELIVERABLES” of the SOW; | ____ | In accordance with the table in Section ”Data Collection” of the SOW |

### 6.7.4 Electronic Payment of Invoices – Contract

The Contractor accepts to be paid using any of the following Electronic Payment Instrument(s):
(to be determined at contract award)

## 6.8 Invoicing Instructions

1. The Contractor must submit invoices in accordance with the section entitled "Invoice Submission" of the general conditions. Invoices cannot be submitted until all work identified in the invoice has been completed.

Each invoice must be supported by:
a. a copy of time sheets to support the time claimed;
b. a copy of the release document and any other documents as specified in the Contract;
c. a copy of the invoices, receipts, vouchers for all direct expenses, and all travel and living expenses;
d. a copy of the monthly progress report.

2. Invoices must be distributed as follows:
a. The original and one (1) copy must be forwarded to the address shown on page 1 of the Contract for certification and payment.
b. One (1) copy must be forwarded to the Contracting Authority identified under the section entitled "Authorities" of the Contract.

## 6.9 Identification of the Fieldwork Sub-Contractor

The same sub-contractor will be required to complete all projects for the duration of the Contract unless authorized in writing by Public Works and Government Services Canada (PWGSC).
To replace the Fieldwork Sub-Contractor, the Contractor must submit all required documentation in accordance with the applicable rated requirements of the Request for Proposal (RFP).

The sub-contractor is:
Name of firm:
Address:
Telephone:
E-mail:

**Note: The Contractor is responsible for assuring the quality of the Sub-Contractor's work**

### 6.10 Certifications and Additional Information

#### 6.10.1 Compliance

Unless specified otherwise, the continuous compliance with the certifications provided by the Contractor in its bid or precedent to contract award, and the ongoing cooperation in providing additional information are conditions of the Contract and failure to comply will constitute the Contractor in default. Certifications are subject to verification by Canada during the entire period of the Contract.

#### 6.10.2 Federal Contractors Program for Employment Equity - Default by the Contractor

The Contractor understands and agrees that, when an Agreement to Implement Employment Equity (AIEE) exists between the Contractor and Employment and Social Development Canada (ESDC)-Labour, the AIEE must remain valid during the entire period of the Contract. If the AIEE becomes invalid, the name of the Contractor will be added to the "FCP Limited Eligibility to Bid" list. The imposition of such a sanction by ESDC will constitute the Contractor in default as per the terms of the Contract.

#### 6.10.3 *SACC Manual* Clauses

*SACC Manual* clause A3060C (2008-05-12) Canadian Content Certification
*SACC Manual* clause A3015C (2014-06-26) Certifications -Contract

### 6.11 Applicable Laws

The Contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario.

### 6.12 Priority of Documents

If there is a discrepancy between the wording of any documents that appear on the list, the wording of the document that first appears on the list has priority over the wording of any document that subsequently appears on the list.

(a) the Articles of Agreement;
(b) the supplemental general conditions 4008 (2008-12-12) – Personal Information;
(c) the general conditions 2035 (2016-04-04) – General Conditions - Higher Complexity - Services;
(d) Annex A, Statement of Work;
(e) Annex B, Basis of Payment;
(f) Annex C, Evaluation Criteria;
(g) the Contractor's bid dated ______;

### 6.13 Insurance

*SACC Manual* clause G1005C (2016-01-28) Insurance - No Specific Requirement

### 6.14 Political Neutrality Certification

The Contractor must complete and submit the Political Neutrality Certification in Annex "F" with the final report submitted to the Project Authority.

### 6.15 Protection and Security of Data Stored in Database

1. The Contractor must ensure that all the databases containing any information related to the Work are located in Canada or, if the Contracting Authority has first consented in writing, in another country where:

(a) equivalent protections are given to personal information as in Canada under legislation such as the *Privacy Act,* R.S. 1985, c.P-21, and the *Personal Information Protection and Electronic Documents Act,* S.C. 2000, c.5, and under any applicable policies of the Government of Canada; and

(b) the laws do not allow the government of that country or any other entity or person to seek or obtain the right to view or copy any information relating to the Contract without first obtaining the Contracting Authority's written consent.

In connection with giving its consent to locating a database in another country, the Contracting Authority may, at its option, require the Contractor to provide a legal opinion (from a lawyer qualified in the foreign country) that the laws in that country meet the above requirements, or may require the Contractor to pay for Canada to obtain such a legal opinion. Canada has the right to reject any request to store Canada's data in a country other than Canada if there is any reason to be concerned about the security, privacy, or integrity of Canada's data. Canada may also require that any data sent or processed outside of Canada be encrypted with Canada-approved cryptography and that the private key required to decrypt the data be kept in Canada in accordance with key management and storage processes approved by Canada.

2. The Contractor must control access to all databases on which any data relating to the Contract is stored so that only individuals with the appropriate security clearance are able to access the database, either by using a password or other form of access control (such as biometric controls).

3. The Contractor must ensure that all databases on which any data relating to the Contract is stored are physically and logically independent (meaning there is no direct or indirect connection of any kind) from all other databases, unless those databases are located in Canada (or in an another country approved by the Contracting authority under subsection 1) and otherwise meet the requirements of this article.

4. The Contractor must ensure that all data relating to the Contract is processed only in Canada or in another country approved by the Contracting Authority under subsection 1.

5. The Contractor must ensure that all domestic network traffic (meaning traffic or transmissions initiated in one part of Canada to a destination or individual located in another part of Canada) is routed exclusively through Canada, unless the Contracting Authority has first consented in writing to an alternate route. The Contracting Authority will only consider requests to route domestic traffic through another country that meets the requirements of subsection 1.

6. Despite any section of the General Conditions relating to subcontracting, the Contractor must not subcontract (including to an affiliate) any function that involves providing a subcontractor with access to

any data relating to the Contract unless the Contracting Authority first consents in writing.

### 6.16 Dispute Resolution

(a) The parties agree to maintain open and honest communication about the Work throughout and after the performance of the contract.

(b) The parties agree to consult and co-operate with each other in the furtherance of the contract and promptly notify the other party or parties and attempt to resolve problems or differences that may arise.

(c) If the parties cannot resolve a dispute through consultation and cooperation, the parties agree to consult a neutral third party offering alternative dispute resolution services to attempt to address the dispute.

(d) Options of alternative dispute resolution services can be found on Canada's Buy and Sell website under the heading "Dispute Resolution".

**ANNEX "A"**

**STATEMENT OF WORK**

**Multi-year Tobacco and Vaping Surveys**

**(POR 063-20)**

## BACKGROUND

Health Canada is the department of the federal government responsible for helping Canadians maintain and improve their health. Tobacco use is the leading preventable cause of death and disease in Canada. It is a contributing factor to serious chronic diseases such as cancer, respiratory ailments and heart disease. Approximately fifty percent of long-term smokers die prematurely from smoking-related diseases, amounting to over 48,000 deaths and $12.3 billion in costs in Canada each year. The Government of Canada has announced a target of less than 5% tobacco use by 2035, to reduce the staggering death and disease burden of tobacco use. The Strategy will feature broad, population-based approaches needed to achieve this goal, and targeted approaches focused on specific populations suffering from high levels of tobacco use. While we are seeing positive downward trends in tobacco use among Canadians, more work is needed to achieve our targeted goal of less than 5% tobacco use.

Over a short period of time, the prevalence of vaping among Canadian youth has increased dramatically. Data from the Canadian Student Tobacco, Alcohol and Drugs Survey (CSTADS) indicate that the prevalence of e-cigarette use in the past 30 days increased from 10% in 2016-17 to 20% in 2018-19.[1] CSTADS, Canadian Community Health Survey (CCHS), and the Canadian Tobacco Alcohol and Drugs Survey (CTADS) are the tools Health Canada uses to track prevalence of tobacco and vaping product use. These surveys provide robust data regarding rates of tobacco and vaping product use among Canadian youth and adults. However, these tools offer limited insight into the attitudes and beliefs behind product usage. None of the data collected from these surveys explore knowledge, attitudes, and perceptions that underlie these behavioural patterns. This limits the ability of Health Canada to understand the attitudes and perceptions that may influence changes in behaviour. Therefore, Health Canada needs to have timely data on knowledge, attitudes, and behaviours relating to vaping products and their intersection with tobacco products. At the same time, Health Canada needs to understand general public concerns about tobacco use and vaping, irrespective of product usage.

This deep dive into attitudes and behaviours will also be informative for Health Canada's continued efforts to encourage Canadians to quit tobacco. The Government of Canada has announced a target of less than 5% tobacco use by 2035, to reduce the staggering death and disease burden of tobacco use. The Strategy will feature broad, population-based approaches needed to achieve this goal, and targeted approaches focused on specific populations suffering from high levels of tobacco use. While we are seeing positive downward trends in tobacco use among Canadians, more work is needed to achieve our targeted goal of less than 5% tobacco use. This research will help Health Canada continually monitor the attitudes and behaviours of Canadians with respect to tobacco and vaping products, and what impact any potential new measures implemented may have on usage and attitudes. Research findings will inform the development of communication messages, products and dissemination tactics to respond to priority issues. Additionally, the research will allow Health Canada to develop and refine communications activities to meet the specific needs of Canadians with timely, up-to-date, easily understood information based on the current perceptions of Canadians in the requisite areas. Therefore, Health Canada is seeking a supplier to conduct a large-scale quantitative survey twice per year. It is anticipated that the core period of the contract will be for three years, with two one-year option periods.

[1] Canadian Student Tobacco, Alcohol and Drugs Survey, 2018-19: https://www.canada.ca/en/health-canada/services/canadian-student-tobacco-alcohol-drugs-survey/2018-2019-summary.html

## PURPOSE OF THE PROJECT AND OBJECTIVES

The primary objective of this research program is to understand Canadians' attitudes, knowledge, patterns of use, and perceptions with respect to vaping and tobacco products.
Specific research objectives include, but are not limited to, gathering information on:

- Canadians' knowledge of the health hazards of smoking and vaping as well as other substances;
- Tobacco and vaping products use and non-use in Canada;
- Patterns of use of tobacco and vaping products;
- The public's perception of risk and social acceptability of vaping products and tobacco; and
- Understanding behaviour change as captured in our broader surveillance survey tools.

## TARGET POPULATION

This research will be conducted with the general population of Canadians 15 years of age and older across all provinces and territories.

## DATA COLLECTION

This research is to survey Canadians twice per year, with each wave consisting of a final sample of 10,000 Canadians who have not previously completed any wave of the survey. Further details on the sampling strategy and data collection approach are provided below. It is anticipated that one wave would be conducted in the spring of 2021 and the second would be in the fall of 2021. The table below outlines the proposed intervals for data collection.

| Year 1 | Year 2 | Year 3 | Option year 1 | Option year 2 |
|---|---|---|---|---|
| Mar-May 2021 | Mar-May 2022 | Mar-May 2023 | Mar-May 2024 | Mar-May 2025 |
| Oct-Dec 2021 | Oct-Dec 2022 | Oct-Dec 2023 | Oct-Dec 2024 | Oct-Dec 2025 |

To maximize sample size, Health Canada is seeking to conduct a telephone-to-online completion survey. Specifically, a quantitative research approach is required using a two-staged approach: first, respondents are recruited by telephone (both landline and cell-phone) using a short survey of screener questions approved by Health Canada. During the second stage, the potential respondent will be sent a link to an online survey where the core survey data is collected.
A two-stage approach using Random Digit Dialing (RDD) will produce a probability sample and provide greater precision of the population estimates than using an online panel. There are a number of reasons Health Canada is seeking a two-staged approach, as outlined below:

1. It is anticipated the survey will be 20 minutes in length. We believe an online approach will be a more user-friendly experience for the respondent as they will have the ability to complete the survey at their own pace.
2. An online approach provides Health Canada with flexibility should we wish to incorporate any visual testing of concepts or materials. It also allows for more complex questionnaire structures that are more difficult to execute by telephone.
3. The survey will be exploring substance use, including questions to youth. An online survey reduces the potential for social desirability bias.

In order to balance the proportion of younger Canadians (i.e. 15-24) in the sample, so that it represents the Canadian population, the research firm will need to incorporate a cell-phone sample in each wave. The cell-phone sample must also be RDD and probability-based. The Contractor must ensure that a minimum of 50% of the sample with youth aged 15-19 and young adults aged 20-24 be conducted using cell-phone sample. It must also ensure that a minimum of 35% of the sample for adults aged 25 and older will be conducted using cell-phone sample.

The research firm must detail the approach of cell-phone sample and landline sample in its overall description, including the estimated proportions for each. The research firm must also explain how they will ensure there is no overlap between landline and cell-phone sample, i.e. ensuring that no individual is invited to the survey twice (once by landline, and once again by cell). The final sample must consist of 50% women and 50% men for each age group (15-19; 20-24; 25-44 and 45+), and for each of the following regions:

- Atlantic Canada (Newfoundland, Prince Edward Island, Nova Scotia, New Brunswick);
- Quebec;
- Ontario;
- Manitoba/Saskatchewan;
- Alberta;
- British Columbia;
- Territories (Yukon, Northwest Territories, Nunavut).

The online survey is expected to be no longer than twenty (20) minutes in length and will be conducted in both English and French. The sample design must also ensure that the final sample be representative of the Canadian population in terms of age, gender and region. The Contractor must outline the overall data collection strategy to ensure data is collected in relatively equal proportions throughout the data collection period for each wave. The Contractor must also outline any specific strategies that will be used to obtain completions in the Territories.
The table below highlights the desired quotas for costing purposes. This table was created using the most recent census data (currently 2016 census) and the Contractor must update the sampling frame as new census data becomes available.

| Age group (years) | Canada | NL | PE | NS | NB | QC | ON | MB | SK | AB | BC | Terr |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| All age groups | 10000 | 385 | 347 | 472 | 456 | 1985 | 3010 | 510 | 475 | 1032 | 1228 | 100 |
| 15-19 | 1335 | 45 | 35 | 65 | 65 | 275 | 430 | 60 | 55 | 125 | 160 | 20 |
| 20-24 | 1065 | 55 | 47 | 62 | 58 | 170 | 315 | 50 | 70 | 103 | 120 | 15 |
| 25-44 | 2080 | 60 | 55 | 65 | 78 | 420 | 640 | 100 | 120 | 294 | 218 | 30 |
| 45-64 | 3600 | 140 | 130 | 170 | 165 | 720 | 1080 | 190 | 175 | 360 | 445 | 25 |
| 65+ | 1920 | 85 | 80 | 110 | 90 | 400 | 545 | 110 | 55 | 150 | 285 | 10 |

The Contractor must describe in detail its sampling plan, including how it plans to ensure the sample is representative of the population, and how the use of cell-phone sample will be incorporated into the final sampling frame. The Contractor must also detail how it will ensure the quotas for harder-to-reach audiences (i.e. youth) will be met. Lastly, the Contractor must clearly outline its sample weighting procedures and approach following data collection.
Following the administration of the recruitment questionnaire to confirm eligibility and meet sampling quotas, respondents will be directed to the more detailed survey online. The Contractor must provide an SPSS file halfway through recruitment for Health Canada's review to ensure the sample gathered meets the required quotas. The Contractor must outline the steps taken to ensure those agreeing to participate in the online survey follow through. The Contractor must also outline its approach to ensuring the final sample completed online reflects the sample specifications. Lastly, the Contractor must outline steps to be taken to replenish sample should there be a higher than anticipated number of non-responders from the telephone recruitment to the main online survey.
Both the landline and cell-phone sample must adhere to the following requirements:

- Combined data must be weighted by region, age group and gender;
- Probability-based sampling;
- Data collection for respondent recruitment must be conducted via RDD using live agents*. Any method for interacting with respondents other than a live agent at any point in the process cannot be used**; and
- Databases, panels, or catalogues that have been created to identify, classify, and/or recruit individuals in advance cannot be used, even if they have been developed using random probability-based

sampling methods, with either live agents or through the application of any other technologies or methods.

*a live agent is a person making the call.
**This does not include using a predictive dialer to connect answered dials to live agents.

The main online survey questionnaire will be provided by Health Canada in English and the Contractor must provide the translation to French. The Contractor must develop the telephone recruitment survey in both languages and submit to Health Canada for approval.
The Contractor must also outline its detailed procedures for obtaining consent from parents/guardians for respondents who are 15 years of age, that complies with all *Standards for the Conduct of Government of Canada Public Opinion Research – Telephone Surveys* and *Standards for the Conduct of Government of Canada Public Opinion Research – Online Surveys*. The Contractor must provide sufficient detail to demonstrate that it has read and understood all requirements set out in the Standards.

The Contractor must describe how accessibility for persons with disabilities will be taken into consideration during research design and implementation.

The research firm will be responsible for providing results for each wave and cumulative results in the form of an SPSS file, to be sent to the project authority. Data tables in English and French with results will be required after each wave as well as any syntax files used for any variable creation. An English and French methodology report will also be required following the completion of each survey wave.

**DESCRIPTION, SCOPE OF THE WORK AND DELIVERABLES**

The Project Authority will provide the research firm with the research instrument in English. The questionnaire will comprise core tracking questions and rotating questions. The research firm must assume that on average, 25% to 30% of the content will change for each wave of data collection. The research firm must also assume that the questionnaire will include up to six open-ended questions, requiring coding.
The research firm will be required to carry out the following tasks per wave:

1. Attend meetings (in person or via conference call) with the Project Authority to discuss research purpose and objectives, design issues, research schedule and draft report, etc.;
2. Ensure the research complies with the *Standards for the Conduct of Government of Canada Public Opinion Research – Telephone Surveys* and *Standards for the Conduct of Government of Canada Public Opinion Research – Online Surveys*;
3. Provide client liaison in either official language;
4. Develop the telephone recruitment survey in both languages;
5. Review main online survey questionnaire provided by Health Canada, translate it into the other official language and revise it as required;
6. Program a questionnaire using a computer assisted telephone interviewing (CATI) system (or otherwise reproduce the questionnaire for interviews);
7. Program a questionnaire for online data collection;
8. Provide HC a link to the programed questionnaire in English and French to verify the online survey
9. Provide eligible respondents with a means to communicate their specific accessibility needs to enable survey participation, for example through an alternative mode of data collection or assistive technology.[2]
10. Inform respondents of their rights under the *Privacy Act, Personal Information Protection and Electronic Documents Act and Access to Information Act* and ensure that those rights are protected throughout the research process. This includes: informing respondents of the purpose of the research; identifying both the sponsoring department/agency or Government of Canada as a whole; and informing respondents that

[2] The Government of Canada strives to ensure that the goods and services it procures are inclusive by design and accessible by default, in accordance with the Accessible Canada Act, its associated regulations and standards, and Treasury Board Contracting Policy.

their participation is voluntary and the information provided will be administered according to the requirements of the *Privacy Act*, the *Personal Information Protection and Electronic Documents Act*, the *Access to Information Act*, and any other pertinent legislation;

11. Pre-test the questionnaire in both English and French (with probing as per standards). A minimum of 40 probing pre-test sessions are to be completed in English and French with the target audience and the Contractor must ensure sufficient number of completions for the different skip patterns (i.e. user vs. non-user of tobacco and vaping products). The project authority may also ask to monitor pre-tests. Documentation of the pre-test(s) must be provided to the client before the questionnaire is finalized. The documentation must include (at minimum):
   - a description of the pre-test approach and number of interviews completed;
   - findings and any resulting modifications;
   - average survey completion time; and
   - a statement of whether or not pre-test cases will be retained in the final data set.
12. Ensure effective quality control measures;

13. Ensure data is stored on Canadian servers and Canadian back-up servers. The database must be located and only accessible in Canada. It must also be physically independent from all other databases, directly or indirectly, that are located outside Canada;
14. Ensure that all aspects of data processing are conducted and only accessible in Canada, including fieldwork;
15. Conduct fieldwork in the preferred official language of the respondents, supervised by bilingual personnel to achieve the required completions. Calls are to be varied throughout the day, which includes both daytime and evening calls. This is limited to 9 p.m. in any given time zone;
16. Ensure respondents have a mechanism to verify validity of the survey;
17. Ensure effective bilingual quality control measures;
18. Ensure a minimum number of call attempts (i.e. five (5)) and follow the new POR standards in terms of call-backs.);
19. Enter results and create tables and coding procedures defined in consultation with the project authority; code open-ended questions off-line;
20. Identify the senior researchers managing the survey, their experience, and their replacement. Any changes in the project management team needs to be approved by the project authority;
21. If the Contractor also carries out public opinion research for a company that produces, markets, exports or imports tobacco or vaping products of any type, the Contractor must clearly separate the project teams and their reporting structures within the organization. Report in detail the steps taken to complete this step. If the Contractor’s status in this regard changes during the course of the project, a written update must be provided;
22. Submit the required electronic and printed versions of the Methodological Reports as outlined below, with appropriate appendices;

<u>Weekly Deliverables During Data Collection Period</u>

23. Provide the Project Authority with progress reports, including the number of completions against targeted quotas and mitigation strategies must there be challenges with specific quotas;
24. Provide the Project Authority with partial results during fieldwork, if requested;

<u>Deliverables Upon Completion of each Data Collection</u>

25. Provide a draft methodological report in the official language chosen by the project authority, interpreting the results based on the approved analysis plan;

26. Provide a final copy of the methodological report (electronic and hard copy) following receipt of the project authority's comments on the draft copy. The written report must include relevant content as per the *Public Opinion Research Final Report Requirements*;
27. Provide and translate the methodological report(s) into the other official language;
28. Provide a clean, complete copy of the raw data in machine-readable format (in SPSS and M.S. Excel (.xls and .csv) format), including variable names, labels, and values in both English and French;
29. Provide any syntax files used to create variables in the SPSS file;
30. Provide data tables in English and in French; and

General Deliverables

31. Perform other activities or services as per specific project requirements.

**REPORTING DELIVERABLE REQUIREMENTS**

For each report/survey wave, the research firm will be responsible to:

- Meet or exceed the *Standards for the Conduct of Government of Canada Public Opinion Research – Telephone Surveys* and *Standards for the Conduct of Government of Canada Public Opinion Research – Online Surveys* as well as the relevant laws, regulations, and policies, for example, the *Personal Information Protection and Electronic Documents Act*, the *Privacy Act*, the *Federal Accountability Act*, *Official Languages Act,* and the Government of Canada Policy on Communications and Federal Identity; details can be found at http://www.tpsgc-pwgsc.gc.ca/rop-por/telephone-eng.html. Where no relevant Government of Canada standards exist, researchers must meet or exceed industry standards.
- The final Methodological Report entitled "Multi-year Tobacco and Vaping Surveys: Wave xx" will be submitted to Health Canada.
- The methodological reports needs to be in both official languages and in accordance with Library and Archives Canada deposit instructions (http://www.bac-lac.gc.ca/eng/porr/Pages/help-submit-a-report.aspx):
  - A narrative executive summary in English in Word;
  - A narrative executive summary in French in Word;
  - A written final report in English in Word;
  - A written final report in French in Word;
  - All of the above files must also be submitted in PDF/A (PDF/Archivable) format, but LAC does not require these to be web accessible (Health Canada will be responsible for the HTML conversion);
  - All final reports must include a full description of the methodology used and all applicable appendices within the same digital file; and
  - Where relevant, English and French research data must be sent in two different files, in CSV (Comma Separated Value) format (which almost any database software can export) and in both languages.
- The methodological report must also contain a discussion of the potential for non-response bias for the survey as a whole and for key survey variables. Non-response bias is the systematic difference between true population values and the average result from all possible samples owing to non-response.
  - The analysis of non-response bias will consist of a comparison of at least three variables in the survey sample with the equivalent parameters of the population, normally available from Statistics Canada. No extra surveys or interviews are required.
- Provide data tables.
- Provide fully labelled SPSS datasets.

- One for each survey wave and a cumulative data set combining all the results from each wave into one file.

***Report Requirements***

A) The narrative executive summary in English and French must include the following information on the cover page:

1. The title of the project;
2. The name of the research firm that entered into the contract;
3. The contract number, the contract value and the award and delivery dates;
4. The POR Registration Number;
5. The name and email address of the client department or agency sponsoring the research;
6. Departmental signature and the Canada wordmark; and
7. For the English version, the statement “Ce rapport est aussi disponible en français” and for the French version, the statement “This report is also available in English.”

B) The Copyright section must include the report’s corresponding:

1. Government of Canada catalogue number;
2. International Standard Book Number (ISBN);
3. copyright notice with the year of publication; and
4. departmental notice on the rights to reproduce the report.

C) The executive summary must consist of, at a minimum:

1. A statement of the research purpose and objectives;
2. A brief description of the methodology used;
3. A statement as to the extent to which the findings can be extrapolated to a broader audience;
4. An outline of how the results were used or how the information is expected to be used; and
5. The contract value of the public opinion research study.

D) Political neutrality certification: The Contractor must provide a *political neutrality certification*.

E) Each methodological report must have the same elements of the executive summary above and include the appendices listed below:

1. A full set of data tables;
2. A discussion of the potential for non-response bias;
3. The weighting procedures, the confidence interval and the margin of error;
4. The response rate and method of calculation;
5. The research instruments used; and
6. All other information about the execution of the fieldwork that would be needed to replicate the research initiative.

NOTE: It is a requirement for the Government of Canada to submit reports to Library and Archives Canada in a web accessible format (e.g. HTML 5.0). Although the HTML conversion will be done internally at Health Canada, when preparing the final report, the Contractor must ensure that any charts, tables, graphs and images comply with the current T*BS Standards on Web Accessibility* (https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=23601) (WCAG 2.0 Level AA), which includes providing the long descriptions in both languages for each of them. The current standards can be found at this link (https://www.w3.org/TR/WCAG20/) and included in Appendix B are examples of some of the most common types of issues to be aware of when preparing the report.

**Privacy Requirements**

- The Contractor is required to adhere to all aspects of the Privacy Act and Regulations, Treasury Board and PSPC privacy-policies, directives and standards, including https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual/4/4008 (SACC).

- The Contractor must submit the raw data from the research to Health Canada. However the Contractor must not submit any data (names, addresses, IP addresses, etc) that can be used to individually identify participants. As per section 12 of SACC Manual Clause 4008 of the Contract, Canada exercises its rights to request that the Contractor destroy any link between statistical data and individual respondents once the survey is completed and all survey data has been complied and validated.
- The Contractor is required to protect the information until it has been destroyed or rendered completely anonymous.
- The Contractor may only collect the minimum (and only that which is demonstrably necessary) personal information to achieve the requirements of the research described in the SOW.
- If a participant discloses personal information in the collection of research, any identifying information must be removed from the data.
- When warranted, instructions will be provided to participants to remind them not to provide details about specific cases.
- The Contractor must provide the Project Authority with the opportunity to review and approve the research instrument from a privacy perspective.
- The information collected can only be used for the purpose of fulfilling contract deliverables and cannot be used or disclosed for any other purpose without Health Canada's approval.

**Security Requirements:**

- Unscreened contractors must be escorted by an employee or Commissionaire at all times when visiting Government of Canada facilities.
- The personal information in this contract has been previously gathered by the Contractor prior to the intent for use in this contract.
- Information which is to be used in the development of the contracted product, as reference material or otherwise made available to the Contractor must be unclassified material and considered to be releasable to the public by Health Canada, the Public Health Agency of Canada and/or the Government of Canada.

No Protected or Classified information is to be made available to the Contractor, used in the production of the contracted product, or produced as a result of this contract.

**PROJECT SCHEDULE**

The Contractor must conduct the survey twice per year (spring and fall), for a total of six waves over the initial period of three years. An option may be exercised for up to an additional two years, or four added waves of surveying.
The Contractor is expected to provide a detailed schedule for review and approval by the Project Authority, beyond what is presented below. A tentative high-level schedule for one data collection cycle is as follows:

| Task | Tentative Date (Business days) |
|---|---|
| Kick-off meeting | Day 1 post contract award (PCA) |
| Draft online questionnaire to Contractor | Day 3 PCA |
| Feedback on questionnaire | Day 5 PCA |
| Finalize questionnaire | Day 8 PCA |
| Translation of questionnaire by Contractor | Day 11PCA |
| Survey programming and testing | Day 15 PCA |
| Data collection (both phone recruitment and online data collection) | Day 17 – 80 PCA |
| Delivery of data tables and SPSS file | Day 90 PCA |
| Draft methodology report | Day 100 PCA |

| | |
|---|---|
| Final report | One week after comments received from Health Canada |
| Posting of report to LAC | 6 months following the completion of fieldwork |

**ANNEX "B"**

**BASIS OF PAYMENT, PRICING – QUANTITATIVE RESEARCH, AND FINANCIAL EVAUATION**

Annex "B1" – Basis of Payment
Annex "B2" – Pricing – Quantitative Surveys
Annex "B3" – Financial Evaluation

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**ANNEX "B1"**
**BASIS OF PAYMENT**

## B1.1 NOTE TO BIDDERS

Bidders are requested to submit rates and fees, specified below, for all the periods.

- Firm, all inclusive, hourly rates for all Professional Services;
- Firm, all inclusive, rates for online survey, additional minutes and incidence level rates;
- Firm, all inclusive, hourly rates for Other Related Services;

All provided rates and fees under B2 – Pricing will be evaluated under B3 – Financial Evaluation.

The Contractor will be paid in accordance with the following Basis of Payment for work performed pursuant to the resulting Contract.

The names of resources which will be identified in the resulting contract must meet the minimum requirements for the category of service for which they are being proposed, as described in Annex "C" - Technical Evaluation Criteria.

**If pricing is not provided for a component, a price of zero will be assigned for the component and the Bidder will be provided an opportunity to agree with the zero amount.**

**If the Bidder agrees then the Basis of Payment will be considered compliant if it also meets all other requirements. However, if the Bidder disagrees, then the proposal will be found non-compliant and no further evaluation will be done.**

All prices and amounts of money in the Contract are in Canadian currency, inclusive of Customs and duties, and are exclusive of Applicable Taxes unless otherwise indicated. The Applicable Taxes, whichever is applicable, is extra to the price herein and will be paid by Canada. Applicable Taxes, to the extent applicable, will be incorporated into all invoices and progress claims and shown as a separate item on invoices and progress claims. All items that are zero-rated, exempt or to which the Applicable Taxes does not apply, are to be identified as such on all invoices. The Contractor agrees to remit to Canada Customs and Revenue Agency any amounts of Applicable Taxes paid or due.

All deliverables are F.O.B. Destination.

## B1.2 FIRM PRICES

All prices submitted are for all goods and professional services required to complete the Work as defined in the SOW.

### B1.2.1 PROJECT MANAGEMENT - SURVEY FIELD MANAGER

The survey field manager will be responsible to act as:

- Client liaison
- Immediate supervision of all aspects of the fieldwork, including:
- programming of recruitment questionnaire in CATI or equivalent software and data entry;
- programming of online survey questionnaire
- sample and quota management;
- administration of pre-test;
- on-going project support during data collection;
- troubleshooting;
- development of a code list for open ended questions;
- data weighting;
- monitoring of response rates and subsequent reporting;
- provision of deliverables, including data files and detailed tables; and
- Outline variables and cross-tabulation of the requirements for the detailed tables including production of tables.

**B1.2.2 RATES FOR ONLINE COMPLETIONS, INCLUSIVE OF DATA TABULATION**

The rates include costs for the following activities:

- Field window of three months (March to May and October to December); All-inclusive costs related to the use of a panel;
- Provide participants with a contact name and email address at the research firm where participants can verify the legitimacy of the survey and/or register a complaint.;
- Programming a questionnaire;
- Administering the sample;
- Inform respondents of their rights under the *Privacy Act, Personal Information Protection and Electronic Documents Act and Access to Information Act* and ensure that those rights are protected throughout the research process. This includes: informing respondents of the purpose of the research; identifying both the sponsoring department/agency or Government of Canada as a whole; and informing respondents that their participation is voluntary and the information provided will be administered according to the requirements of the *Privacy Act*, the *Personal Information Protection and Electronic Documents Act*, the *Access to Information Act*, and any other pertinent legislation;
- Pre-test the questionnaire in both English and French (with probing as per standards). A minimum of 40 probing pre-test sessions are to be completed in English and French with the target audience and the Contractor must ensure sufficient number of completions for the different skip patterns (i.e. user vs. non-user of tobacco and vaping products).
- Live review of the survey prior to launch, including revision(s);
- Sending electronic invitations and up to two reminders to respondents;
- Hosting the survey;
- Provide secure and confidential links to the online survey for respondents;
- Provision of user IDs/Passwords;
- Respondent support;
- Ensure effective quality control measures;
- Ensure data is stored on Canadian servers and Canadian back-up servers. The database must be located and only accessible in Canada. It must also be physically independent from all other databases, directly or indirectly, that are located outside Canada;

- Ensure that all aspects of data processing are conducted and only accessible in Canada, including fieldwork;
- Conduct fieldwork in the preferred official language of the respondents,
- Data file creation and management;
- Coding of open ended questions off-line;
- Assume the questionnaire will include up to six open-ended questions, requiring coding;
- Create frequencies and cross data tabulation tables;
- Provide a clean, complete copy of the raw data in machine-readable format (in SPSS and M.S. Excel (.xls and .csv) format), including variable names, labels, and values in both English and French;
- Provide any syntax files used to create variables in the SPSS file;
- Provide data tables in English and in French; Certify by the Offeror's senior officer that the final deliverables comply with political neutrality requirements and do not include information on electoral voting intentions, political party preferences, standings with the electorate or ratings of the performance of a political party or its leaders.

### B1.2.3 INCIDENCE RATE: ADDITIONAL COST BASED ON AN INCIDENCE RATE OF 90% OR LESS

Additional cost to Table **B3.1.2** per interview when the incidence rate for the selection and recruitment of participants that are found in the population (of adult Canadians 18 years of age or older) is 90% or less in Canadian households. This does not refer to the incidence rate for landline or cell phone-only households.

### B1.3 OPTION YEARS (CONSUMER PRICE INDEX)

For all option years, if exercised, the Offeror agrees that the prices offered will be adjusted in accordance with Statistics Canada's average Consumer Price Index (CPI) for the **services product group** Table No. 18-10-0004-13 (example: from April 2019 to April 2020 "+ 2.0 %") The adjustment will be made annually, based on the average of the CPI of the most recently reported twelvemonth period using the firm prices of the previous year (increases only).

Statistics Canada's Consumer Price Index by product group:
https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=1810000413.

**Note:** In the event that the percentage change is below 0.00 % for the previous year, the rates will remain unchanged from the previous contract period.

### B1.4 DIRECT EXPENSES – EXTERNAL AND INTERNAL

In certain cases and at the sole discretion of Canada, where services outside of normal overhead expenses and outside of the rates of the basis of payment are required to complete the Work, such expenses may be allowable as direct expenses given the service(s) is/are documented in the approved Contract. All such direct expenses must have prior authorization of the Project Authority and will be invoiced at cost with no allowance for overhead or profit, and must not exceed the ceiling price provided.

### B1.5 PRICE SUPPORT

The Bidder may be required to provide documents in support of the quoted rates such as a copy of the applicable current published price list; or a copy of a paid invoice for like items or services and percentage discount for the Government of Canada.

### B1.6 CONTRACTUAL JOINT VENTURE (if applicable)

The Bidder is a contractual joint venture and the signatories are acting and responsible jointly and severally. The payment of monies under the Contract to the identified lead member, (insert name), shall be deemed a payment to all signatories and furthermore, will act as a release from all parties. In addition, it is agreed that giving notice by Canada to the identified lead member shall be deemed notice to all parties.

## ANNEX "B2"
## PRICING – QUANTITATIVE RESEARCH

The Bidder must provide **Firm Unit Prices**, in Canadian currency, taxes extra, for the initial period of the Contract and for each of the option periods thereafter.

The firm unit prices for the contract period plus options will be calculated under B2.1.

The Bidder must provide **Firm Rates**, in Canadian currency, taxes extra, and level of effort, in number of hours, for the initial period of the Contract and for each of the option periods thereafter.

The firm rates for the contract period plus options will be calculated under B2.2.
The rates for the option periods will be adjusted for inflation as per the Consumer Price Index (CPI).

### B2.1 FIRM PRICES

All prices are for all goods and professional services required to complete the Work as described in the SOW. Prices include all administrative costs, overhead, profit, and include services required to perform the Work.

#### B2.1.1 PROJECT MANAGEMENT - SURVEY FIELD MANAGER

*(Insert the name of the proposed individual(s) and their hourly rate(s))*

| Survey Field Manager | Initial Contract Period | | First Option Year | | Second Option Year | |
|---|---|---|---|---|---|---|
| | Hourly Rate ($) | Level of Effort (# hours) | Hourly Rate ($) | Level of Effort (# hours) | Hourly Rate ($) | Level of Effort (# hours) |
| | | | | | | |
| *(Add lines if required)* | | | | | | |
| **B2.1.1 TOTAL [3]** | $ ___________ | | $ ___________ | | $ ___________ | |

[3] Total price per wave

### B2.1.2 RECRUITMENT AND PARTICIPANT CONFIRMATION, AND TRANSLATOR

The bidder must provide firm hourly rates and level of effort for the following categories of Personnel typically involved in the quantitative fieldwork.

| Category of Personnel (individual names not required) | Initial Contract Period | | First Option Year | | Second Option Year | |
|---|---|---|---|---|---|---|
| | Hourly Rate ($) | Level of Effort (# hours) | Hourly Rate ($) | Level of Effort (# hours) | Hourly Rate ($) | Level of Effort (# hours) |
| Interviewer / Recruiter | | | | | | |
| Translator | | | | | | |
| B2.1.2 TOTAL [4] | $ ___________ | | $ ___________ | | $ ___________ | |

### B2.1.3 OTHER PROFESSIONAL RATES

This section must be completed by the Bidder who would like to identify other categories of personnel to be used during the initial contract period and the option periods. If, for example, the Bidder intends to use the services of a Junior Researcher, it **must** indicate this category in the table below.

The use of the individual(s) is subject to acceptance by the Project Authority. If applicable, the Bidder **must** provide firm hourly rates for categories of personnel involved in research projects.

| Category of Personnel (Identify) | Initial Contract Period | | First Option Year | | Second Option Year | |
|---|---|---|---|---|---|---|
| | Hourly Rate ($) | Level of Effort (# hours) | Hourly Rate ($) | Level of Effort (# hours) | Hourly Rate ($) | Level of Effort (# hours) |
| | | | | | | |
| | | | | | | |
| *(Add lines if required)* | | | | | | |
| B2.1.3 TOTAL[5] | $ ___________ | | $ ___________ | | $ ___________ | |

[4] Total price per wave
[5] Total price per wave

### B2.1.4 DIRECT EXPENSES AND SUBCONTRACTED EXPENSES

The Bidder must provide a total estimated price, excluding GST/HST, for direct expenses for each contract period. These costs are to be billed at cost, with no allowance for overhead or profit, and must not exceed the ceiling price provided.

| Direct Expenses Breakdown | Initial Contract Period | First Option Year | Second Option Year |
|---|---|---|---|
| | | | |
| | | | |
| *(Add lines if required)* | | | |
| **B2.1.4 TOTAL[6]** | **$ __________** | **$ __________** | **$ __________** |

### B2.1.5 ALL INCLUSIVE PRICE – FOR EVALUATION PURPOSES ONLY

The following table is the firm all-inclusive price submitted by the Bidder for the initial contract period and for each additional option years. The average between all periods will be used as the Bid Evaluation Value.

Please complete the table using the totals from tables B2.1.1, B2.1.2, B2.1.3, and B2.1.4.

| | INITIAL CONTRACT PERIOD | FIRST OPTION PERIOD | SECOND OPTION PERIOD |
|---|---|---|---|
| **B2.1.1 Total** | $ ___________ | $ ___________ | $ ___________ |
| **B2.1.2 Total** | $ ___________ | $ ___________ | $ ___________ |
| **B2.1.3 Total** | $ ___________ | $ ___________ | $ ___________ |
| **B2.1.4 Total** | $ ___________ | $ ___________ | $ ___________ |
| **FIRM ALL INCLUSIVE PRICE (GST/HST EXTRA)** | **$_____________** | **$_____________** | **$_____________** |

[6] Total price per wave

## B2.2 FIRM RATES

The following table is a cost summary submitted by the Bidder for the initial contract period and for each additional option years. The average between all periods will be used as the Bid Evaluation Value (BEV).

### B2.2.1 ONLINE SURVEY – 15 MINUTES

**TABLE B2.2.1 Firm rates for the first 15 minutes of the online survey completions, inclusive of data tabulation and methodological report:**

| Duration | Initial Contract Period Firm Rate ($) for each survey | First Option Year Firm Rate ($) for each survey | Second Option Year Firm Rate ($) for each survey |
|---|---|---|---|
| First 15 minutes of the survey | | | |
| | x 10,000 online surveys | x 10,000 online surveys | x 10,000 online surveys |
| **B2.2.1 TOTAL** | **$ ___________** | **$ ___________** | **$ ___________** |

### B2.2.2 ONLINE SURVEY – ADDITIONAL COST PER EACH SURVEY, INCIDENCE RATE FOR AGE 15 TO 17 YEARS OLD

**TABLE B2.2.2 Firm rates for online per survey completions with 15 to 17 years old public, inclusive of data tabulation and methodological report:**

| | Initial Contract Period Firm Rate ($) for each survey | First Option Year Firm Rate ($) for each survey | Second Option Year Firm Rate ($) for each survey |
|---|---|---|---|
| Price per survey | | | |
| **B2.2.2 TOTAL** | **$ ___________** | **$ ___________** | **$ ___________** |

### B2.2.2.3 OPTION #1: ONLINE SURVEY – EVERY ADDITIONAL MINUTE PAST THE 15 MINUTES

**TABLE B2.2.3 Firm rates for each additional minute of the online survey completions, inclusive of data tabulation and methodological report:**

| Duration | Initial Contract Period Firm Rate ($) for each survey | First Option Year Firm Rate ($) for each survey | Second Option Year Firm Rate ($) for each survey |
|---|---|---|---|
| Price per additional minute | | | |
| **B2.2.3 TOTAL** | **$ ___________** | **$ ___________** | **$ ___________** |

## ANNEX "B3"
## FINANCIAL EVALUATION

The following steps will be followed for the Financial Evaluation using the rates or fees provided in the Annex "B2" of the Basis of Payment:

- **B3.1 Firm All Inclusive Price – For Evaluation Purposes Only**

The entire Financial Evaluation is worth 30% of the total proposal final score. The allotment per step above will be as follows:

**POINTS ALLOTTED TABLE:**

| Steps of Financial Evaluation | Weighting | Points Allotted (for calculation purposes) |
|---|---|---|
| B3.1 Bid Evaluation Value | 75% | 22.5 |
| B3.2 Average Firm Unit Price 15 minute Online Survey | 15% | 4.5 |
| B3.3 Average Firm Unit Price incidence rate for ages 15 to 17 | 5% | 1.5 |
| B3.4 Average Firm Unit Price for each additional minute past the first 15 minutes for the online survey | 5% | 1.5 |
| **TOTAL** | **100%** | **30** |

### B.3.1 FIRM ALL INCLUSIVE PRICE AND BID EVALUATION VALUE

**Step 1:** An average firm contract price will be calculated using the rates submitted for each contract period(initial 3-years contract period, first option period and second option period) in B2.1.1, B2.1.2, B2.1.3, B2.1.4.

**Example of Step 1:**

| Bidder | Firm Price for Initial Contract Period | Firm Price for First Option Period | Firm Price for Second Option Period | Average Firm Contract Price |
|---|---|---|---|---|
| **Bidder A** | $50,000.00 | $55,000.00 | $60,000.00 | $55,000.00 |
| **Bidder B** | $60,000.00 | $64,200.00 | $68,694.00 | $64,298.00 |
| **Bidder C** | $65,000.00 | $69,875.00 | $75,115.62 | $69,996.87 |
| **Bidder D** | $70,000.00 | $71,400.00 | $72,828.00 | $71,409.33 |

**Step 2:**
The weighted Financial Score will be determined for each Bidder.
The multiplier for this calculation is the points allotted per category of service in the table of **Step 1** above.

**Example of Step 2:**
Lowest Average Firm Contract Price X **22.5** *divided by* Bidder's Average Contract Price = Weighted Financial Score for Firm Contract Price for Initial and Contract Periods

| Bidder | Average Firm Contract Price | Total Weighted Financial Score |
|---|---|---|
| **Bidder A** | $55,000.00 | 22.500 |
| **Bidder B** | $64,298.00 | 19.246 |
| **Bidder C** | $69,996.87 | 17.679 |
| **Bidder D** | $71,409.33 | 17.329 |

### B.3.2 AVERAGE FIRM UNIT PRICE 15 MINUTE ONLINE SURVEY

Step 1: An average Firm Rate Price will be calculated using the prices submitted for each year of the contract (initial 1-year period, first option and second option) in section B2.2.1.

**Example of Step 1:**

| Bidder | Initial Contract Period Firm Rate ($) for each survey | First Option Year Firm Rate ($) for each survey | Second Option Year Firm Rate ($) for each survey | Average Firm Unit Price ($) |
|---|---|---|---|---|
| **Bidder A** | $5.00 | $5.15 | $5.25 | **$5.13** |
| **Bidder B** | $3.00 | $3.10 | $3.20 | **$3.10** |
| **Bidder C** | $6.00 | $6.20 | $6.25 | **$6.15** |
| **Bidder D** | $6.50 | $6.55 | $6.60 | **$6.55** |

**Step 2:**
The weighted Financial Score will be determined for each Bidder.
The multiplier for this calculation is the points allotted per category of service in the table of Step 1 above.

**Example of Step 2:**
Lowest Average Firm Unit Price X 4.5 divided by Bidder's Average Firm Unit Price = Weighted Financial Score for each additional survey for Initial and Option Periods.

| Bidder | Average Firm RATE for each survey | Total Weighted Financial Score |
|---|---|---|
| **Bidder A** | $5.13 | 2.719 |
| **Bidder B** | $3.10 | 4.5 |
| **Bidder C** | $6.15 | 2.268 |
| **Bidder D** | $6.55 | 2.129 |

### B.3.3 AVERAGE FIRM UNIT PRICE ONLINE SURVEY – ADDITIONAL COST PER EACH SURVEY, INCIDENCE RATE FOR AGE 15 TO 17 YEARS OLD

Step 1: An average Firm Rate Price will be calculated using the prices submitted for each year of the contract (initial 1-year period, first option and second option) in section B2.2.2.

**Example of Step 1:**

| Bidder | Initial Contract Period Firm Rate ($) for incidence rate | First Option Year Firm Rate ($) for incidence rate | Second Option Year Firm Rate ($) for incidence rate | Average Firm Unit Price ($) |
|---|---|---|---|---|
| **Bidder A** | $4.00 | $4.10 | $4.15 | **$4.08** |
| **Bidder B** | $3.00 | $3.20 | $3.25 | **$3.15** |
| **Bidder C** | $5.00 | $5.20 | $5.40 | **$5.20** |
| **Bidder D** | $4.50 | $4.75 | $4.95 | **$4.73** |

**Step 2:**
The weighted Financial Score will be determined for each Bidder.
The multiplier for this calculation is the points allotted per category of service in the table of Step 1 above.

**Example of Step 2:**
Lowest Average Firm Unit Price X 1.5 divided by Bidder's Average Firm Unit Price = Weighted Financial Score for each additional survey for Initial and Option Periods.

| Bidder | Average Firm Rate for for the incidence rate for ages 15 to 17 years old | Total Weighted Financial Score |
|---|---|---|
| **Bidder A** | $4.08 | 1.158 |
| **Bidder B** | $3.15 | 1.5 |
| **Bidder C** | $5.20 | 0.908 |
| **Bidder D** | $4.73 | 0.998 |

### B.3.4 ONLINE SURVEY – EVERY ADDITIONAL MINUTE PAST THE 15 MINUTES

Step 1: An average Firm Rate Price will be calculated using the prices submitted for each year of the contract (initial 1-year period, first option and second option) in section B2.2.3.

**Example of Step 1:**

| Bidder | Initial Contract Period Firm Rate for each online survey minute past the 15 minutes | First Option Year Period Firm Rate for each online survey minute past the 15 minutes | Second Option Year Period Firm Rate for each online survey minute past the 15 minutes | Average Firm Unit Price ($) |
|---|---|---|---|---|
| **Bidder A** | $5.25 | $5.45 | $6.00 | **$5.57** |
| **Bidder B** | $8.55 | $8.95 | $9.05 | **$8.85** |
| **Bidder C** | $7.35 | $7.75 | $7.15 | **$7.42** |
| **Bidder D** | $5.15 | $5.55 | $5.75 | **$5.48** |

**Step 2:**
The weighted Financial Score will be determined for each Bidder.
The multiplier for this calculation is the points allotted per category of service in the table of Step 1 above.

**Example of Step 2:**
Lowest Average Firm Unit Price X 1.5 divided by Bidder's Average Firm Unit Price = Weighted Financial Score for each additional survey for Initial and Option Periods.

| Bidder | Average Firm Rate for for the incidence rate for ages 15 to 17 years old | Total Weighted Financial Score |
|---|---|---|
| **Bidder A** | $5.57 | 1.475 |
| **Bidder B** | $8.85 | 0.928 |
| **Bidder C** | $7.42 | 1.107 |
| **Bidder D** | $5.48 | 1.5 |

### B.3.5 TOTAL WEIGHTED FINANCIAL SCORE

The sum of the total scores calculated under B.3.1, B.3.2, B.3.3, and B.3.4 will determine the total weighted financial score of the financial proposal.

**Example:**

| FINANCIAL EVALUATION | BIDDER A | BIDDER B | BIDDER C | BIDDER D |
|---|---|---|---|---|
| **B.3.1** | 22.500 | 19.246 | 17.679 | 17.329 |
| **B.3.2** | 2.719 | 4.5 | 2.268 | 2.129 |
| **B.3.3** | 1.158 | 1.5 | 0.908 | 0.998 |
| **B.3.4** | 1.475 | 0.928 | 1.107 | 1.5 |
| **TOTAL WEIGHTED FINANCIAL SCORE** | **27.852** | **26.174** | **21.962** | **21.956** |

# ANNEX "C"

# EVALUATION CRITERIA

## ANNEX C1 -MANDATORY TECHNICAL EVALUATION CRITERIA

Bidders must meet **ALL** of the Mandatory Evaluation Criteria. If a bidder fails to meet any of the Mandatory Evaluation Criteria the bid will not be evaluated any further.

| | MANDATORY CRITERIA | REFERENCED SECTION IN BIDDER'S PROPOSAL | MET | NOT MET |
|---|---|---|---|---|
| **M.1** | **SURVEY FIELD MANAGER**<br><br>The bidder must identify one (1) survey field manager who is able to communicate with the project authority in English and one (1) survey field manager who is able to communicate with the project authority in French. The individual identified for each language can be the same person. The bidder must provide the curriculum vitae of the proposed fieldwork manager. The curriculum vitae must include:<br><br>a) the candidate's professional experience;<br>b) the candidate's employment history, starting with the present (in months/years), and including a brief description of each role;<br>c) the candidate's education, including the field of study, memberships, publications, certification and training;<br>d) the candidate's oral and written language capabilities or proficiency for each of the two (2) official languages of Canada (i.e. English and French). | | | |
| **Comments:** | | | | |

<table>
<tr><th></th><th>MANDATORY CRITERIA</th><th>REFERENCED SECTION IN BIDDER'S PROPOSAL</th><th>MET</th><th>NOT MET</th></tr>
<tr><td>M.2</td><td>SURVEY FIELD MANAGER – SAMPLE PROJECTS<br><br>The bidder must demonstrate the experience of <u>each</u> of the proposed fieldwork managers in the following way. The bidder must submit the following:<br><br>• two (2) quantitative telephone surveys that <u>each</u> survey field manager has produced and completed* in Canada in the two (2) years preceding the bid closing date.<br><br>• The bidder must submit two (2) quantitative online surveys that <u>each</u> survey field manager has produced and completed* in Canada in the two (2) years preceding the bid closing date.<br><br>The samples submitted will be evaluated in the Point Rated Technical Evaluation R.4 – Survey field manager – Sample Projects. Please use the sample project format in R.4 to submit sample projects.<br><br>If two (2) fieldwork managers were identified in M.1, the bidder must then submit a total of eight (8) projects in R.4. If one (1) survey field manager was identified in M.1, the bidder must submit four (4) projects (2 telephone surveys, 2 online surveys).<br><br>*Completed is defined as when the final data was submitted to the client.<br><br>At least one (1) of the two (2) projects for each telephone and online submitted must be national*** in scope, with a minimum of one thousand (1000) survey completions and must demonstrate that a final sample is representative**** (for the telephone surveys) and reflective (for the online surveys) of the target population in terms of age, gender, and region/province, based on Statistics Canada data at the time of study.<br><br>***National is defined as a project being delivered in at least four (4) regions of Canada. One (1) of these regions must be Quebec. The regions are:</td><td></td><td></td><td></td></tr>
</table>

| | MANDATORY CRITERIA | REFERENCED SECTION IN BIDDER'S PROPOSAL | MET | NOT MET |
|---|---|---|---|---|
| | • British Columbia;<br>• Prairies (Alberta, Saskatchewan, Manitoba);<br>• Ontario;<br>• Quebec;<br>• Atlantic (New Brunswick, Nova Scotia, Prince Edward Island, Newfoundland and Labrador); and<br>• The Territories (Yukon, Northwest Territories, Nunavut).<br><br>**** ***Representative*** is defined as a final sample that is composed of individuals who have been randomly selected from the adult Canadian population, and thus the sample is an accurate reflection of the adult Canadian population. The final sample proportion must be within +/-2% of the population proportion. | | | |
| **Comments:** | | | | |

| | MANDATORY CRITERIA | REFERENCED SECTION IN BIDDER'S PROPOSAL | MET | NOT MET |
|---|---|---|---|---|
| M.3 | **FIELDWORK FIRM / SUB- CONTRACTORS**<br><br>All fieldwork must be completed in Canada. The bidder must identify whether all fieldwork will be conducted with either:<br><br>• in-house resources;<br>• a sub-contractor; or<br>• a combination of in-house resources and a sub-contractor.<br><br>If a firm is using in-house resources, the firm will be required to complete all projects for the duration of the contract using these in-house resources unless authorized in writing by Public Works and Government Services Canada.<br><br>If a sub-contractor is involved, the same sub-contractor will be required to complete all projects for the duration of the contract unless authorized in writing by Public Works and Government Services Canada.<br><br>In the case of the use of a sub-contractor, the bidder must provide:<br><br>• the name of the sub-contractor;<br>• the number of years in business; and<br>• the research components for which they will be responsible. | | | |
| **Comments:** | | | | |

| | MANDATORY CRITERIA | REFERENCED SECTION IN BIDDER'S PROPOSAL | MET | NOT MET |
|---|---|---|---|---|
| M.4 | **FIELDWORK FIRM / SUB- CONTRACTOR – PROJECT SAMPLES**<br><br>The bidder must submit the following:<br>• a minimum of two (2) but no more than four (4) quantitative telephone surveys completed in Canada by the fieldwork firm / sub-contractor identified in M.3.<br>• The bidder must submit a minimum of two (2) but no more than four (4) quantitative online surveys completed in Canada by the fieldwork firm / sub-contractor identified in M.3<br><br>The more projects a bidder submits, the more points will be awarded for a maximum of 4 telephone surveys and 4 online surveys.<br><br>The samples will be evaluated in the Point Rated Technical Evaluation *R.5 – Fieldwork Firm / Sub-Contractor's Experience.* | | | |
| **Comments:** | | | | |

**BIDS NOT MEETING ALL OF THE MANDATORY TECHNICAL EVALUATION CRITERIA WILL BE GIVEN NO FURTHER CONSIDERATION**

## ANNEX C2. POINT RATED TECHNICAL EVALUATION CRITERIA [7]

In addition to meeting all of the mandatory technical evaluation criteria, proposals must achieve the minimum passing marks in each Rated Requirements section of the Technical Evaluation to be considered responsive. Proposals that fail to meet the minimum points in any section will not be evaluated further and will be considered non-responsive.

### R.1: UNDERSTANDING THE REQUIREMENT (Minimum 35, Maximum 50 points):

The response should include a narrative summary that reflects the understanding of the Statement of Work. Simply repeating the Statement of Work, in whole or in part, does not indicate an understanding of the project's aims and objectives or the ability to carry it out. Understanding of the requirement should include:

| Criterion | Percentage (%) | Points |
| --- | --- | --- |
| **a) Understanding the purpose of the research and how it applies to the roles and responsibilities of Health Canada.** The summary includes an understanding of the purpose of the research, and how it applies to the roles and responsibilities of Health Canada as it relates to this project. | | /50 |
| | **TOTAL POINTS** | |
| **Comments:** | | |

| Points | Rating Level |
| --- | --- |
| Unacceptable (0 points) | **Not provided.** |
| Partially Addressed (50% of points) | The summary demonstrates **minimal** understanding of the Statement of Work and of the purpose of the research. Elements are missing or unclear. |

[7] Where applicable, the relevant sections of the Standards for the Conduct of Government of Canada Public Opinion Research—Telephone Surveys and Online Surveys will be used to evaluate the comprehensiveness of the response for rated the criteria.

| Points | Rating Level |
|---|---|
| Well Addressed (70% of points) | The summary provides a **clear** understanding of the Statement of Work. The summary includes a clear understanding of the purpose of the research, and how it applies to the roles and responsibilities of Health Canada as it relates to this project. |
| Outstanding (100% of points) | The summary provides a **clear and comprehensive** understanding of the Statement of Work. The summary includes a **clear and comprehensive** understanding of the purpose of the research, and how it applies to the roles and responsibilities of Health Canada as it relates to this project. |

Relevant sections of the Standards for the Conduct of Government of Canada Public Opinion Research—Telephone Surveys and Online Surveys will be used to evaluate the comprehensiveness of the response for the rated criteria.

**R.2: METHODOLOGY (Minimum 560 points* - Maximum 800 points)**

The response should include a complete description of the methodology and research procedures, including data collection techniques; response should demonstrate how they will achieve the completions required by describing the size of the eligible population, the methodology by which they will locate eligible respondents, the expected response rates and how they will be achieved, and the procedures they intend to follow to obtain the required number of completions.

*Please note that the minimum overall passing mark is 70% of the total. However, **EACH** of the sections below must also achieve the minimum 70% passing mark in order to be responsive.

The following rated criteria will be used for evaluation:

| Criterion | Percentage (%) | Points |
|---|---|---|
| **Section I: Methodology and Research Procedures**<br>• The degree to which the response describes a suitable methodology, including the size of the eligible population, the methodology by which they will locate eligible respondents, the expected response rates and how they will be achieved. The response should also demonstrate how their sample is representative of the population. | | /200 |
| **Section II: Data Collection Procedures**<br>• The degree to which the response describes suitable data collection procedures as it relates to the Data Collection section in the SOW, including a detailed description of how the two-staged approach (telephone to online) will be done | | /150 |

<table>
<tr><th>Criterion</th><th>Percentage (%)</th><th>Points</th></tr>
<tr><td>Section III: Data Collection Capability and Quality Control<ul><li>The degree to which the response describes a suitable data collection capability and all quality control mechanisms that will be in place to ensure the reliability and validity of the results.</li><li>The degree to which the response indicates the anticipated response rate and detail the steps that will be taken to achieve the probability-based sample and response rate.</li></ul></td><td></td><td>/150</td></tr>
<tr><td>Section IV: Addressing Methodological Requirements<ul><li>The degree to which the response describes a suitable rationale for the approach and a description for each of the following:<ul><li>Margin of error,</li><li>non-response bias,</li><li>urban/rural/provincial/territories coverage,</li><li>sampling issues,</li><li>extrapolation to the population,</li><li>response rates,</li><li>ensuring there is no overlap between cell and landline sample for each wave,.</li><li>ensuring each wave contains unique respondents that have not participated in an earlier wave,</li><li>overall data collection strategy to ensure data is collected in relatively equal proportions throughout the data collection period.</li></ul></li></ul></td><td></td><td>/150</td></tr>
<tr><td>Section V: Addressing Issues and Challenges<ul><li>The degree to which the response addresses issues and challenges and proposed solutions for each of the following stages of a data collection period, including:<ul><li>Surveying youth and obtaining consent,</li><li>Ensuring the quotas for harder-to-reach audiences will be met,</li><li>survey programming,</li><li>pre-testing,</li><li>data collection,</li><li>sample replenishment from phone to online,</li><li>coding,</li><li>weighting,</li><li>final data,</li><li>reporting, and</li><li>overall scheduling and project management.</li></ul></li></ul></td><td></td><td>/150</td></tr>
<tr><td colspan="2" align="right">TOTAL POINTS</td><td></td></tr>
<tr><td colspan="3">Comments:</td></tr>
</table>

| Criterion | Percentage (%) | Points |
|---|---|---|
| | | |

| Points | Rating Level for Sections I, II, III, IV, V |
|---|---|
| Unacceptable (0 points) | **Not provided**. |
| Partially Addressed (50% of points) | Information was provided, but with only **partial description** of the Bidder's ability to meet the criteria. There are discrepancies and/or deficiencies that pose some risks to the requirement. |
| Well Addressed (70% of points) | **Complete and clear description** provided that demonstrates the ability to meet the criteria. No weaknesses or deficiencies that would pose any risk to the requirement. The response includes a clear rationale for each proposed idea. |
| Outstanding (100% of points) | **Complete and clear description** provided that goes beyond the ability to meet the criteria. No weaknesses or deficiencies that would pose any risk to the requirement. The response includes a **clear and comprehensive** rationale for each proposed idea. |

**R.3: SURVEY FIELD MANAGER - QUALIFICATIONS (Minimum 105 points, Maximum 150 points):**

The curriculum vitae of each survey field manager proposed in M.1 will be evaluated as follows:

a) **Academic qualifications / training / certifications / publications / awards and memberships** relevant to public opinion research fieldwork management, including communication of survey pre-test and results.

**(Minimum 35 points, Maximum 50 points)**

If more than one (1) senior researcher is included, the points will be averaged across all of them to form a final score. However, the proposed resources that do not meet the minimum points will not be named in the contract.

| | Academic Qualifications | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| **Name of Fieldwork Manager** | High School (25 points)<br><br>College – not relevant* (30 points)<br><br>College – relevant* (35 points)<br><br>University – not relevant* (40 points)<br><br>University – relevant* (46 points) | | | | | **Certifications / Training**<br><br>(Accreditations, certifications, etc. / Courses / Workshops / Seminars / Conferences) Max 1 points | **Publications**<br><br>(Academic papers, professional association articles, reports Max 1 point | **Memberships**<br><br>(ie: Canadian or International POR or marketing research association, or equivalent) Max 1 point | **Awards**<br><br>Max 1 point | |
| | /25 pts | /30 pts | /35 pts | /40 pts | /46 pts | | | | | **Total Points** |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| **Total Points** | | | | | | | | | | |
| **Final Score** (Average points for all fieldwork manager) | | | | | | | | | | |
| **Comments:** | | | | | | | | | | |

*Relevant = specialization/major in disciplines such as: social sciences, economics, and statistics.*

b) **Work experience** –the proposal should state the total number of months and years (ie: 6 years and 4 months of relevant experience for each proposed fieldwork manager.

**(Minimum 70 points, Maximum 100 points)**

If more than one (1) senior researcher is included, the points will be averaged across all of them to form a final score. However, the proposed resources that do not meet the minimum points will not be named in the contract.

| | **Number of years overall of relevant experience** | | | | | |
|---|---|---|---|---|---|---|
| **Name of Fieldwork Manager** | **Less than 5 years** 50 points | **Equal to 5 years but less than or equal to 6 years** 60 points | **Greater than 6 years but less than or equal to 7 years** 70 points | **Greater than 7 years but less than or equal to 8 years** 80 points | **Greater than 8 years** 100 points | **Total Points** |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| **Total Points** | | | | | | |
| **Final Score** (Average points for all fieldwork manager) | | | | | | |

**Comments:**

______________________________________________
______________________________________________
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**R.4: SURVEY FIELD MANAGER – SAMPLE PROJECTS (Minimum 140 points - Maximum 200 points)**

The projects submitted under mandatory requirement M.2 will be evaluated under this point rated evaluation. Bidders are requested to use the following PROJECT SAMPLE FORMAT for each project submitted:

Projects can include any target audience (e.g. Indigenous, ethno-cultural groups, seniors, youth, general population, etc), as long as the project was conducted in Canada with Canadians.

**PROJECT SAMPLE FORMAT**

**SECTION I: BACKGROUND INFORMATION (5 points)**
Project Title:
Client Name:
Delivery Dates of Final Data/Report:
Fieldwork Location(s):
Sample Size. *If a tracking survey, sample size per Wave:*

Attestation: The proposal should include a brief attestation of performance signed by the client for each project submitted. The attestations should clearly reference the specific project and state that the work was conducted to the satisfaction of the client. A client attestation template is included as Annex “I”.

**SECTION II: PROJECT BACKGROUND (15 points)**
Describe your client's requirement, challenge, or opportunity and what your company was hired to do. Include a description of the product/service/social issue and the target audience(s).

**SECTION III: METHODOLOGY (30 points)**
Provide a summary of the methodology and describe how it responded to your client's objectives.

If two (2) fieldwork managers are included, the points will be averaged across them to form a final score. However, the proposed resources that do not meet the minimum points will not be named in the contract.

If two (2) fieldwork managers were identified in M.1, the bidder must then submit a total of eight (8) projects (2 telephone surveys and 2 online surveys for each manager). If one (1) survey field manager was identified in M.1, the bidder must submit four (4) projects.

Telephone surveys:

| Name of Fieldwork Manager | Project # 1 (Maximum 50 points) | | | | Project # 2 (Maximum 50 points) | | | | Total Points |
|---|---|---|---|---|---|---|---|---|---|
| | S.I (5) | S.II (15) | S.III (30) | TOTAL (50) | S.I (5) | S.II (15) | S.III (30) | TOTAL (50) | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | **Total Points** | |
| | | | | | | | | **Final Score** (Average points for all fieldwork managers) | |

Online surveys

| Name of Fieldwork Manager | Project # 1 (Maximum 50 points) | | | | Project # 2 (Maximum 50 points) | | | | Total Points |
|---|---|---|---|---|---|---|---|---|---|
| | S.I (5) | S.II (15) | S.III (30) | TOTAL (50) | S.I (5) | S.II (15) | S.III (30) | TOTAL (50) | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | **Total Points** | |
| | | | | | | | | **Final Score** (Average points for all fieldwork managers) | |

| Points | Rating Level for Sections I, II, III |
|---|---|
| Unacceptable (0 points) | Information is **not provided**. |

| Points | Rating Level for Sections I, II, III |
|---|---|
| Partially Addressed (50% of points) | **Minimal** information provided. Elements are missing or unclear. |
| Well Addressed (70% of points) | Information provided is **clear and detailed**. No weaknesses or deficiencies that would pose any risk to the requirement. The response includes a clear description for section. |
| Outstanding (100% of points) | Information provided is **clear and detailed** and goes beyond the ability to meet the criteria. No weaknesses or deficiencies that would pose any risk to the requirement. The response includes a clear and comprehensive description for each section. |

**R.5: FIELDWORK FIRM / SUB-CONTRACTORS – EXPERIENCE (Minimum 140 points - Maximum 200 points)**

The proposal should identify and describe in detail a minimum of two (2) but no more than four (4) quantitative telephone surveys and two (2) but no more than four (4) quantitative online surveys completed by the fieldwork firm / sub-contractors identified in M.3. Each project should have been completed in Canada with a minimum of one thousand (1000) survey completions (or a minimum of 500 per wave if tracking survey) using random digit dialing and should involve a minimum survey duration of five (5) minutes. The projects cited in M.2 and M.4 can be resubmitted for this rated criterion provided they meet all the elements required in R.5. Relevant projects conducted for clients in or outside the Government of Canada will be given equal weight in the evaluation process.

Projects can include any target audience (e.g. Indigenous, ethno cultural groups, seniors, youth, general population, etc.), as long as the project was conducted in Canada with Canadians.

The proposal should use the following layout to describe each project:

- Project title;
- Fieldwork start and end dates (Month/Year). For tracking projects, this should include the start and end dates of each wave;
- Client name and telephone number;
- Methodology including:
  - the number of survey completions and characteristics of respondents;
  - questionnaire duration;
  - sample design; and
  - the number of overall completions, and completions per wave (if a tracking project).

Project experience will be evaluated based on the following criteria:

<u>**Telephone Surveys (2 to 4 projects)**</u>

**a)** <u>**Recency of the Project**</u>: The project fieldwork was completed in the two (2) years preceding the bid closing date by the bidder’s proposed fieldwork firm. **(Minimum 14 points, Maximum 20 points)**

| **a) Recency of the Project** | **Project 1 Yes/No** | **Project 2 Yes/No** | **Project 3 Yes/No** | **Project 4 Yes/No** | **Total points assigned (Maximum 20 points)** |
|---|---|---|---|---|---|
| | | | | | |

| **1 Project** | **2 Projects** | **3 Projects** | **4 Projects** |
|---|---|---|---|
| **7 points** | **14 points** | **17 points** | **20points** |

**b)** **Sample Size and Questionnaire Duration**: There were a) at least one thousand (1000) survey completions using probability sampling (or a minimum of 500 per wave if tracking survey) and b) involving minimum survey duration of at least five (5) minutes**. (Minimum 28 points, Maximum 40 points)**

| **b) Sample Size and Questionnaire Duration** | **Project 1 Yes/No** | **Project 2 Yes/No** | **Project 3 Yes/No** | **Project 4 Yes/No** | **Total points assigned (Maximum 40 points)** |
|---|---|---|---|---|---|
| | | | | | |

| **1 Project** | **2 Projects** | **3 Projects** | **4 Projects** |
|---|---|---|---|
| **14points** | **28 points** | **34 points** | **40 points** |

**c)** **Sampling Distribution**: a) national in scope as defined in M2 and b) the final sample is representative of the target population as defined in M2 by region/province **(Minimum 28 points, Maximum 40 points)**

| **c) Sampling Distribution** | **Project 1 Yes/No** | **Project 2 Yes/No** | **Project 3 Yes/No** | **Project 4 Yes/No** | **Total points assigned (Maximum 40 points)** |
|---|---|---|---|---|---|
| | | | | | |

| **1 Project** | **2 Projects** | **3 Projects** | **4 Projects** |
|---|---|---|---|
| **14 points** | **28 points** | **34 points** | **40 points** |

**Online Surveys (2 to 4 projects)**

a) **Recency of the Project**: The project fieldwork was completed in the two (2) years preceding the bid closing date by the bidder's proposed fieldwork firm. **(Minimum 14 points, Maximum 20 points)**

| a) Recency of the Project | Project 1 Yes/No | Project 2 Yes/No | Project 3 Yes/No | Project 4 Yes/No | Total points assigned (Maximum 20 points) |
|---|---|---|---|---|---|
| | | | | | |

| 1 Project | 2 Projects | 3 Projects | 4 Projects |
|---|---|---|---|
| 7 points | 14 points | 17 points | 20 points |

b) **Sample Size and Questionnaire Duration**: There were a) at least one thousand (1000) survey completions using probability sampling (or a minimum of 500 per wave if tracking survey) and b) involving minimum survey duration of at least five (5) minutes. **(Minimum 28 points, Maximum 80 points)**

| b) Sample Size and Questionnaire Duration | Project 1 Yes/No | Project 2 Yes/No | Project 3 Yes/No | Project 4 Yes/No | Total points assigned (Maximum 40 points) |
|---|---|---|---|---|---|
| | | | | | |

| 1 Project | 2 Projects | 3 Projects | 4 Projects |
|---|---|---|---|
| 14 points | 28 points | 34 points | 40 points |

c) **Sampling Distribution**: a) national in scope as defined in M2 and b) the final sample is representative of the target population as defined in M2 by region/province **(Minimum 28 points, Maximum 40 points)**

| c) Sampling Distribution | Project 1 Yes/No | Project 2 Yes/No | Project 3 Yes/No | Project 4 Yes/No | Total points assigned (Maximum 40 points) |
|---|---|---|---|---|---|
| | | | | | |

| 1 Project | 2 Projects | 3 Projects | 4 Projects |
|---|---|---|---|
| 14 points | 28 points | 34 points | 40 points |

## ANNEX C3- EVALUATION SUMMARY

| EVALUATION SUMMARY | | |
|---|---|---|
| **1. MANDATORY REQUIREMENTS:** ❑ **MET** ❑ **NOT MET** | | |
| **2. RATED REQUIREMENTS:** | **Minimum Points Required** | **Maximum Points** |
| **R.1: Understanding the Requirement** | **35** | **50** |
| a) Understanding the purpose of the research and how it applies to the roles and responsibilities of Health Canada. | 35 | 50 |
| **R.2: Methodology** | **560** | **800** |
| a) Methodology and Research Procedures | 140 | 200 |
| b) Data Collection Procedures | 105 | 150 |
| c) Data Collection and Quality Control | 105 | 150 |
| d) Addressing Methodological Requirements | 105 | 150 |
| e) Addressing Issues and Challenges | 105 | 150 |
| **R.3: Survey field manager – Qualifications** | **105** | **150** |
| a) Academic Qualifications | 35 | 50 |
| b) Work Experience | 70 | 100 |
| **R.4: Survey field manager – Sample Projects** | **140** | **200** |
| Telephone surveys: | | |
| a) Project #1 | 35 | 50 |
| b) Project #2 | 35 | 50 |
| Online surveys: | | |
| a) Project #1 | 35 | 50 |
| b) Project #2 | 35 | 50 |
| **R.5: Fieldwork Firm / Sub-Contractor's Experience** | **140** | **200** |
| Telephone surveys: | | |
| a) Recency of the Project | 14 | 20 |
| b) Sample Size and Questionnaire Duration | 28 | 40 |
| c) Sampling Distribution | 28 | 40 |
| Online surveys: | | |
| a) Recency of the Project | 14 | 20 |
| b) Sample Size and Questionnaire Duration | 28 | 40 |
| c) Sampling Distribution | 28 | 40 |
| **OVERALL TOTAL** | **980*** | **1400** |

*The overall total points must be a minimum of 980 points, including a passing mark of 70% for **each** sub-criteria.

**ANNEX “D” to PART 3 OF THE BID SOLICITATION**

**ELECTRONIC PAYMENT INSTRUMENTS**

The Bidder accepts to be paid by any of the following Electronic Payment Instrument(s):

( ) VISA Acquisition Card;

( ) MasterCard Acquisition Card;

( ) Direct Deposit (Domestic and International);

( ) Electronic Data Interchange (EDI);

## ANNEX "E" to PART 5 OF THE BID SOLICITATION

## FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY – CERTIFICATION

I, the Bidder, by submitting the present information to the Contracting Authority, certify that the information provided is true as of the date indicated below. The certifications provided to Canada are subject to verification at all times. I understand that Canada will declare a bid non-responsive, or will declare a contractor in default, if a certification is found to be untrue, whether during the bid evaluation period or during the contract period. Canada will have the right to ask for additional information to verify the Bidder's certifications. Failure to comply with any request or requirement imposed by Canada may render the bid non-responsive or constitute a default under the Contract.

For further information on the Federal Contractors Program for Employment Equity visit Employment and Social Development Canada (ESDC) – Labour's website.

Date:___________(YYYY/MM/DD) (If left blank, the date will be deemed to be the bid solicitation closing date.)

Complete both A and B.

A. Check only one of the following:

( ) A1. The Bidder certifies having no work force in Canada.

( ) A2. The Bidder certifies being a public sector employer.

( ) A3. The Bidder certifies being a federally regulated employer being subject to the Employment Equity Act.

( ) A4. The Bidder certifies having a combined work force in Canada of less than 100 permanent full-time and/or permanent part-time employees.

A5. The Bidder has a combined workforce in Canada of 100 or more employees; and

( ) A5.1. The Bidder certifies already having a valid and current Agreement to Implement Employment Equity (AIEE) in place with ESDC-Labour.

**OR**

( ) A5.2. The Bidder certifies having submitted the Agreement to Implement Employment Equity (LAB1168) to ESDC-Labour. As this is a condition to contract award, proceed to completing the form Agreement to Implement Employment Equity (LAB1168), duly signing it, and transmit it to ESDC-Labour.

B. Check only one of the following:

( ) B1. The Bidder is not a Joint Venture.

**OR**

( ) B2. The Bidder is a Joint venture and each member of the Joint Venture must provide the Contracting Authority with a completed annex Federal Contractors Program for Employment Equity - Certification. (Refer to the Joint Venture section of the Standard Instructions)

## ANNEX "F" POLITICAL NEUTRALITY CERTIFICATION

### Political Neutrality Certification

This certification is to be submitted with the final report submitted to the Project Authority.
I hereby certify as Senior Officer of ______________________________________ that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the *Policy on Communications and Federal Identify* and *Directive on the Management of Communication – Appendix C – Mandatory Procedures for Public Opinion Research*. Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, standings with the electorate or ratings of the performance of a political party or its leaders.

________________________________ ________________________

Signature Date

## ANNEX “G” PUBLIC OPINION RESEARCH FINAL REPORT CHECKLIST

Public Opinion Research Final Report Checklist:
http://www.tpsgc-pwgsc.gc.ca/rop-por/lvfpor-porfrc-eng.html

## ANNEX "H" RFP SUBMISSION FORM / SUBCONTRACTOR INFORMATION

### TABLE 1 - RFP SUBMISSION FORM

| | Response |
|---|---|
| | Bidder's full legal name |
| **(a)** | PWGSC/TPSGC |
| | Bidder's Procurement Business Number |
| **(b)** | [Procurement Business Number] |
| | Authorized Representative of Bidder for evaluation purposes (e.g. clarifications) |
| **(c)** | Name: |
| | [Name] |
| | Title: |
| | [Title] |
| | Address: |
| | [Address] |
| | Telephone #: |
| | [Telephone] |
| | Email: |
| | [E-mail] |
| | If submitting a bid in response to the RFP as a joint venture, the Bidder must provide the joint venture member's full legal name and address [*Bidder to add more rows if more than two joint venture members*] |
| **(d)** | Joint venture member full legal name: |
| | [Legal name] |
| | Joint venture member address: |
| | [Address] |
| **(e)** | Joint venture member full legal name: |
| | [Legal name] |
| | Joint venture member address: |
| | [Address] |

**TABLE 2 – INTEGRITY PROVISIONS**

In accordance with Article 5.1.1 under Part 5 – Certification and Additional Information, please complete the form below:

| Complete Legal Name of Company | |
|---|---|
| PWGSC/TPSGC | |
| Company's address | |
| [Address] | |
| Company's Procurement Business Number (PBN) | |
| [Procurement Business Number] | |
| Board of Directors (Use Format – first name last name) Or put the list as an attachment | |
| 1. Director | [First name, Last name] |
| 2. Director | [First name, Last name] |
| 3. Director | [First name, Last name] |
| 4. Director | [First name, Last name] |
| 5. Director | [First name, Last name] |
| 6. Director | [First name, Last name] |
| 7. Director | [First name, Last name] |
| 8. Director | [First name, Last name] |
| 9. Director | [First name, Last name] |
| 10. Director | [First name, Last name] |
| Other members | |
| [Other members] | |
| Comments | |
| [Comments] | |

**TABLE 3 – SUBCONTRACTOR LIST**

| Subcontractor List | | | |
|---|---|---|---|
| Bidder's Legal Name: [Legal Name] | | | |
| Name of the Subcontractor (a) | Address of the Subcontractor's headquarters (b) | Portion of the Work that would be performed by the Subcontractor (c) | Full address of location(s) where the Subcontractor would perform the Work (d) |
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