



RETURN BIDS TO:

RETOURNER LES SOUMISSIONS À:

Attn: Drew Johnson

Email: drew.johnson@canada.ca

**REQUEST FOR PROPOSAL
DEMANDE DE PROPOSITION**

Proposal To: Public Health Agency of 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 thereof.

Proposition à:

Agence de la santé publique du 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).

Instructions : See Herein

Instructions: Voir aux présentes

Issuing Office – Bureau de distribution

Public Health Agency of Canada
200, Eglantine Driveway
Tunney's Pasture
Ottawa Ontario K1A 0K9

| | |
|--|---|
| Title – Sujet AMENDMENT #1 - Strategic Planning | |
| Solicitation No. – N° de l'invitation 1000223854 | Date 2021-03-09 |
| Solicitation Closes at 2 :00PM L'invitation prend fin à on / le – March 25, 2021 | Time Zone Fuseau horaire EST |
| F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input checked="" type="checkbox"/> Other-Autre: <input type="checkbox"/> | |
| Address Enquiries to: - Adresser toutes questions à : Name: Drew Johnson Email: drew.johnson@canada.ca Telephone – téléphone : 613-941-2102 | |
| Destination – of Goods, Services, and Construction: Destination – des biens, services et construction : See Herein – Voir ici | |
| Delivery required - Livraison exigée See Herein – Voir ici | |
| Vendor/firm Name and address Raison sociale et adresse du fournisseur/de l'entrepreneur | |
| Facsimile No. – N° de télécopieur : Telephone No. – N° de téléphone : | |
| Name and title of person authorized to sign on behalf of Vendor/firm Nom et titre de la personne autorisée à signer au nom du fournisseur/de l'entrepreneur | |
| <hr/> (type or print)/ (taper ou écrire en caractères d'imprimerie) | |
| <hr/> Signature | <hr/> Date |



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PART 1 - GENERAL INFORMATION

1.1 Security Requirements

1.1.1 At the date of bid closing, the following conditions must be met:

- (a) the Bidder must hold a valid organization security clearance as indicated in Part 6 - Resulting Contract Clauses;
- (b) the Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work sites must meet the security requirements as indicated in Part 6 - Resulting Contract Clauses;
- (c) the Bidder must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites.

1.1.2 For additional information on security requirements, bidders should refer to the [Contract Security Program](http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html) of Public Works and Government Services Canada (<http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>) website.

1.2 Summary

This bid solicitation is being issued by the Public Health Agency of Canada (PHAC) for the requirement of one (1) consultant to assist in the development of the Aging and Seniors Unit's (ASU) 10-year strategic plan aimed at fostering healthy aging in Canada. The work to be performed is detailed under Appendix "A" Statement of Work.

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) (<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.

2.2 Submission of Bids

Bids must be submitted only to drew.johnson@canada.ca by the date, time and place indicated on page 1 of the bid solicitation.

Due to the nature of the bid solicitation, bids transmitted by facsimile to Health Canada 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, the [Defence 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.



PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

Canada requests that bidders provide their bid in separate attachments as follows:

- Section I: Technical Bid – one electronic copy by email;
- Section II: Financial Bid – one electronic copy by email;
- Section III: Certifications – one electronic copy by email; and

Due to the nature of the bid solicitation, bids transmitted by epost Connect service and by facsimile will not be accepted.

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 explain and demonstrate how they propose to meet the requirements and how they will carry out the Work.

Section II: Financial Bid

Bidders must submit their financial bid in accordance with the Basis of Payment.

Section III: Certifications

Bidders must submit the certifications and additional information required under Part 5.



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.

4.1.1 Technical Evaluation

4.1.1.1 Mandatory Technical Criteria

The Mandatory Requirements listed below will be evaluated on a simple pass/fail (i.e. compliant/non-compliant) basis. Proposals which fail to meet the Mandatory Requirements will be deemed non-compliant and given no further consideration.

Proposals **must** clearly demonstrate compliance with all of the following Mandatory Requirements and **must** provide the necessary documentation to support compliance.

IMPORTANT NOTE: In order to qualify as experience, services must have been rendered as of bid closing date.

| Item | Mandatory Technical Criteria | Compliant (Yes/No) | Reference to Bidder's Proposal |
|-----------|---|---|--------------------------------|
| M1 | The Bidder must propose a resource or a team of resources to perform the work detailed in Annex "A". The Bidder must include a detailed CV for all proposed resources. If the Bidder, proposes a team of resources, the Bidder must identify one resource as the Project Lead. | <input type="checkbox"/> Yes <input type="checkbox"/> No | |
| M2 | <p>The bidder must demonstrate, by providing a client reference or client attestation letter which states the proposed resource identified as the Project Lead is fluent in both English and French.</p> <p>To demonstrate the required experience the following information should be identified in the client reference or attestation letter:</p> <ul style="list-style-type: none"> a) The name of the client organization (to whom the services were provided); b) A brief description of the type and scope of services provided as it relates to the criteria; c) The dates and duration of the project (indicating the years/months of engagement and the start and end dates of the work) clearly indicating the period of continuous | <input type="checkbox"/> Yes <input type="checkbox"/> No | |



| Item | Mandatory Technical Criteria | Compliant (Yes/No) | Reference to Bidder's Proposal |
|-----------|--|---|--------------------------------|
| | <p>work; and</p> <p>d) The name and telephone number or e-mail address (or both, if available) of the client Project Authority to whom the Bidder reported.</p> <p>Canada reserves the right to contact client references to validate experience and deliverable quality.</p> | | |
| M3 | <p>The bidder must demonstrate, by providing detailed project descriptions, that the proposed resource identified as the Project Lead has facilitated strategic planning exercises and processes on 3 projects (each with a minimum length of 3 months) in the past 10 years.</p> <p>For each of the relevant projects cited, to demonstrate the required experience the following information should be identified:</p> <ul style="list-style-type: none"> a) The name of the client organization (to whom the services were provided); b) A brief description of the type and scope of services provided as it relates to the criteria; c) The dates and duration of the project (indicating the years/months of engagement and the start and end dates of the work) clearly indicating the period of continuous work; and d) The name and telephone number or e-mail address (or both, if available) of the client Project Authority to whom the Bidder reported. <p>Canada reserves the right to contact client references to validate experience and deliverable quality.</p> <p>The information provided for each project must give sufficient detail to assess how the work relates to facilitating strategic planning exercises and processes.</p> | <input type="checkbox"/> Yes <input type="checkbox"/> No | |
| M4 | <p>The bidder must demonstrate, by providing a copy of the degree in their bid, that the proposed resource identified as the Project Lead has a graduate degree in social sciences from a recognized Canadian university, <u>or the equivalent as established by a</u></p> | <input type="checkbox"/> Yes <input type="checkbox"/> No | |



| Item | Mandatory Technical Criteria | Compliant (Yes/No) | Reference to Bidder's Proposal |
|------|--|--------------------|--------------------------------|
| | <u>recognized Canadian academic credentials assessment service</u> , if obtained outside Canada. | | |

Point Rated Technical Criteria

The bids that meet all the mandatory technical criteria will be evaluated and scored as specified in the tables inserted below.

| Item | Criteria | Points allocated for the criteria | Score | Page # |
|------|--|-----------------------------------|-------|--------|
| R1 | <p>The Bidder should demonstrate, by providing detailed project descriptions, that the proposed resource identified as the Project Lead has experience working on multi-year (a minimum length of greater than 1 year) projects which provided advice on a range of social policy issues within the last 15 years.</p> <p>Points Allocation: 4+ projects= 10 points 2 to 3 projects= 5 points 1 project= 2 points 0 projects= 0 points</p> <p>For each of the relevant projects cited, to demonstrate the required experience the following information should be identified:</p> <ul style="list-style-type: none"> a) The name of the client organization (to whom the services were provided); b) A brief description of the type and scope of services provided as it relates to the criteria; c) The dates and duration of the project (indicating the years/months of engagement and the start and end dates of the work) clearly indicating the period of continuous work; and d) The name and telephone number or e-mail address (or both, if available) of the client Project Authority to whom the Bidder reported. <p>Canada reserves the right to contact client references to validate experience and deliverable quality.</p> <p>The information provided for each project must give sufficient detail to assess how the work relates to providing advice on a range of social policy issues.</p> | /10 | | |



| Item | Criteria | Points allocated for the criteria | Score | Page # |
|------|--|-----------------------------------|-------|--------|
| R2 | <p>The Bidder should demonstrate, by providing detailed project descriptions, that the proposed resource identified as the Project Lead has experience working on multi-year projects (a minimum length greater than 1 year) which designed, gathered and analyzed both quantitative and qualitative information within the last 15 years.</p> <p>Points Allocation: 4+ projects= 10 points 2 to 3 projects= 5 points 1 project= 2 points 0 projects= 0 points</p> <p>For each of the relevant projects cited, to demonstrate the required experience the following information should be identified:</p> <ul style="list-style-type: none"> a) The name of the client organization (to whom the services were provided); b) A brief description of the type and scope of services provided as it relates to the criteria; c) The dates and duration of the project (indicating the years/months of engagement and the start and end dates of the work) clearly indicating the period of continuous work; and d) The name and telephone number or e-mail address (or both, if available) of the client Project Authority to whom the Bidder reported. <p>Canada reserves the right to contact client references to validate experience and deliverable quality.</p> <p>The information provided for each project must give sufficient detail to assess how the work relates to designing, gathering and analyzing both quantitative and qualitative information</p> | /10 | | |



| Item | Criteria | Points allocated for the criteria | Score | Page # |
|------|---|-----------------------------------|-------|--------|
| R3 | <p>The Bidder should demonstrate, by providing detailed project descriptions, that the proposed resource identified as the Project Lead has experience working on multi-year projects (a minimum length greater than 1 year) which synthesized and summarized information from multiple sources and provided recommendations to help inform the development of multi-year strategic plans and their related priorities , within the last 15 years.</p> <p>Points Allocation: 4+ projects= 10 points 2 to 3 projects= 5 points 1 project= 2 points 0 projects= 0 points</p> <p>For each of the relevant projects cited, to demonstrate the required experience the following information should be identified:</p> <ul style="list-style-type: none"> a) The name of the client organization (to whom the services were provided); b) A brief description of the type and scope of services provided as it relates to the criteria; c) The dates and duration of the project (indicating the years/months of engagement and the start and end dates of the work) clearly indicating the period of continuous work; and d) The name and telephone number or e-mail address (or both, if available) of the client Project Authority to whom the Bidder reported. <p>Canada reserves the right to contact client references to validate experience and deliverable quality.</p> <p>The information provided for each project must give sufficient detail to assess how the work relates to synthesizing and summarizing information from multiple sources and providing recommendations to help inform the development of multi-year strategic plans and their related priorities.</p> | /10 | | |



| Item | Criteria | Points allocated for the criteria | Score | Page # |
|------|---|-----------------------------------|-------|--------|
| R4 | <p>The Bidder should demonstrate, by providing detailed project descriptions, that the proposed resource identified as the Project Lead has experience working on multi-year projects (a minimum length greater than 1 year) that worked with all phases of the iterative design thinking process with both small (less than 5) and large (5 or greater) teams, within the last 15 years.</p> <p>Points Allocation: 4+ projects= 10 points 2 to 3 projects= 5 points 1 project= 2 points 0 projects= 0 points</p> <p>For each of the relevant projects cited, to demonstrate the required experience the following information should be identified:</p> <ul style="list-style-type: none"> a) The name of the client organization (to whom the services were provided); b) A brief description of the type and scope of services provided as it relates to the criteria; c) The dates and duration of the project (indicating the years/months of engagement and the start and end dates of the work) clearly indicating the period of continuous work; and d) The name and telephone number or e-mail address (or both, if available) of the client Project Authority to whom the Bidder reported. <p>Canada reserves the right to contact client references to validate experience and deliverable quality.</p> <p>The information provided for each project must give sufficient detail to assess how the work relates to working with all phases of the iterative design thinking process with both small (less than 5) and large (5 or greater) teams.</p> | /10 | | |



| Item | Criteria | Points allocated for the criteria | Score | Page # |
|------|---|-----------------------------------|-------|--------|
| R5 | <p>The Bidder should demonstrate, by providing detailed project descriptions, that the proposed resource identified as the Project Lead has experience working on multi-year projects (a minimum length greater than 1 year) related to seniors and aging issues and landscape in Canada, familiarity with key stakeholders in aging, and knowledge of government priorities related to healthy aging within the last 15 years.</p> <p>Points Allocation: 4+ projects= 10 points 2 to 3 projects= 5 points 1 project= 2 points 0 projects= 0 points</p> <p>For each of the relevant projects cited, to demonstrate the required experience the following information should be identified:</p> <ul style="list-style-type: none"> a) The name of the client organization (to whom the services were provided); b) A brief description of the type and scope of services provided as it relates to the criteria; c) The dates and duration of the project (indicating the years/months of engagement and the start and end dates of the work) clearly indicating the period of continuous work; and d) The name and telephone number or e-mail address (or both, if available) of the client Project Authority to whom the Bidder reported. <p>Canada reserves the right to contact client references to validate experience and deliverable quality.</p> <p>The information provided for each project must give sufficient detail to assess how the work relates to working with all phases of the iterative design thinking process with both small (less than 5) and large (5 or greater) teams.</p> | /10 | | |
| | Minimum overall points required to be deemed compliant | 20 | | |
| | Total available points | 50 | | |



4.1.2 Financial Evaluation

For bid evaluation and contractor(s) selection purposes only, the evaluated price of a bid will be determined in accordance with the Pricing Table detailed in Annex B.

4.2 Basis of Selection

4.2.1 Lowest Price per Point

1. To be declared responsive, a bid must:
 - a. comply with all the requirements of the bid solicitation;
 - b. meet all mandatory technical evaluation criteria; and
 - c. obtain the required minimum of 20 points overall for the technical evaluation criteria which are subject to point rating. The rating is performed on a scale of 50 points
2. Bids not meeting (a) or (b) or (c) will be declared non-responsive. Neither the responsive bid that receives the highest number of points nor the one that proposed the lowest price will necessarily be accepted. The responsive bid with the lowest evaluated price per point will be recommended for award of a contract.



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 declaration form available on the [Forms for the Integrity Regime](http://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-eng.html) 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 provided will render the bid non-responsive.

5.2.3.2 Status and Availability of Resources

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.



5.2.3.4 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.

Compliance with the certifications provided by the Contractor in its bid is a condition of the Contract and subject to verification by Canada during the term of the Contract. If the Contractor does not comply with any certification or it is determined that any certification made by the Contractor in its bid is untrue, whether made knowingly or unknowingly, Canada has the right, pursuant to the default provision of the Contract, to terminate the Contract for default.



PART 6 - RESULTING CONTRACT CLAUSES

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

6.1 Security Requirements

1. The Contractor must, at all times during the performance of the Contract, hold a valid Facility Security Clearance at the level of SECRET, with approved Document Safeguarding at the level of PROTECTED B, issued by the Contract Security Program (CSP), Public Works and Government Services Canada (PWGSC).
2. The Contractor personnel requiring access to CLASSIFIED/PROTECTED information, assets or sensitive site(s) must EACH hold a valid personnel security screening at the level of SECRET or RELIABILITY, as required, granted or approved by the CSP, PWGSC.
3. The Contractor MUST NOT utilize its Information Technology systems to electronically process, produce or store any sensitive CLASSIFIED/PROTECTED information until the CSP, PWGSC has issued written approval. After approval has been granted, these tasks may be performed at the level of PROTECTED B.
4. Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of the CSP, PWGSC.
5. The Contractor must comply with the provisions of the:
 - (a) Security Requirements Check List, attached at Annex C;
 - (b) *Industrial Security Manual* (Latest Edition).

6.2 Statement of Work

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

6.3 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) (https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) issued by Public Works and Government Services Canada.

6.3.1 General Conditions

[2010B](#) (2020-05-28), General Conditions - Professional Services (Medium Complexity) apply to and form part of the Contract.

6.3.2 Supplemental General Conditions

6.3.2.1 Specific Person(s)

The Contractor must provide the services of the following person(s) to perform the Work as stated in the Contract: _____ (*insert name(s) of person(s)*).



6.4 Term of Contract

6.4.1 Period of the Contract

The period of the Contract is from date of Contract to March 31, 2022 inclusive.

7.4.2 Option to Extend the Contract

The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to one (1) 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 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

The Contracting Authority for the Contract is:

Name: Drew Johnson

Telephone: 613-941-2102

E-mail address: drew.johnson@canada.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:

(To be inserted at contract award)

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

(To be inserted at contract award)

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 – Firm Lot Price

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid firm lot prices, as specified in Annex B for a cost of \$ _____ ([insert the amount at contract award](#)). Customs duties 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 Method of Payment

[H3010C](#) (2016-01-28) Milestone Payments - Not subject to holdback, apply to and form part of the Contract.

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 is completed.

Each invoice must be supported by:

- a. a copy of the release document and any other documents as specified in the Contract;
- b. a copy of the quarterly progress report.

2. Invoices must be distributed as follows:

- a. One (1) electronic copy must be forwarded to the Project Authority and to hc.p2p.east.invoices-factures_est.sc@canada.ca for certification and payment.

6.9 Certifications and Additional Information

6.9.1 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 Applicable Laws

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

6.11 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 [A9014C](#) (2006-06-16) Specific Person(s);
- (c) the general conditions [2010B](#) (2020-05-28), General Conditions - Professional Services (Medium Complexity);
- (d) Annex A, Statement of Work;
- (e) Annex B, Basis of Payment;
- (f) Annex C, Security Requirement Check List;
- (g) the Contractor's bid dated _____ (*insert date of bid*)



ANNEX "A" STATEMENT OF WORK

1. STRATEGIC PLANNING FOR THE AGING AND SENIORS UNIT, DIVISION OF AGING, SENIORS AND DEMENTIA, CENTRE FOR HEALTH PROMOTION, PUBLIC HEALTH AGENCY OF CANADA (PHAC)

2. SCOPE

2.1. Introduction

The Aging and Seniors Unit, Division of Aging, Seniors and Dementia, Centre for Health Promotion, Public Health Agency of Canada (PHAC) requires a consultant to inform a strategic priority setting and planning exercise. The contract will be delivered in three discrete phases:

- **Phase 1:** Review, assess and evaluate the current priorities and areas of focus for the Aging and Seniors Unit (ASU) as they fit within the broader context of healthy aging in Canada. Review must include: PHAC and Government of Canada priorities related to older adults as well as healthy aging priorities of provinces and territories and stakeholders; international obligations; current and future public health needs and issues facing older Canadians. This review must also include data collection such as quantitative surveys and qualitative interviews with senior managers in the Health Portfolio and other government departments and agencies, as well as key aging and seniors partners and stakeholders;
- **Phase 2:** Lead a design thinking process with members of the Division of Aging, Seniors and Dementia and other key partners to help ASU consider the results of Phase 1 and identify and/or reframe areas of focus and priorities for a new 10-year strategic plan to foster healthy aging in Canada; and
- **Phase 3:** Draft a final report providing an overview of Phases 1 and 2 and summarizing the key elements which will inform the development of ASU's 10-year strategic plan.

2.2. Objectives of the Requirement

This work will inform the development of the Aging and Seniors Unit's (ASU) 10-year **strategic plan** aimed at fostering healthy aging in Canada. It will enable the Unit to examine and reassess its priorities in order to provide the Minister of Health, other officials, key partners and stakeholders with evidence-based advice to promote the health and wellbeing of Canadian seniors.

2.3. Background and Specific Scope of the Requirement

Nearly one in four Canadians will be age 65 or older by 2036. PHAC is seeking to change the discourse on the aging population to one which is modern and non-ageist. PHAC is aiming to frame aging as an opportunity for all communities across Canada. ASU can play an important role in influencing this narrative while promoting healthy aging in Canada.

PHAC focuses on promoting health and wellbeing in later life; ASU is the centre of expertise for older adults' health issues. ASU's current roles include: providing policy leadership on seniors' health issues; integrating a seniors' health perspective on all health issues; identifying effective health promotion policy and program responses throughout the life course and especially in later life; and building capacity through partnerships, knowledge development and exchange.

Over the last decade, ASU has focused on the following priorities:

- Age-Friendly Communities (promote uptake, knowledge exchange, tool and guide development);
- Fall prevention (raise awareness, share evidence, support network);
- Elder abuse (raise awareness);
- Mental health (raise awareness, partnerships); and
- International policy (advance Canadian perspective).



Partnerships with a variety of stakeholders across the country have been created to address these priorities. For example, ASU supports the Age-Friendly Communities Reference Group which includes representatives of provinces and territories managing age-friendly programs and funding in their respective jurisdictions. ASU also convenes the Later Life Team with employees from PHAC's regional offices to facilitate information sharing across the country.

Following the Global Strategy and Action Plan for Aging and Health (2016-2020), the World Health Assembly proposed a Decade of Healthy Ageing 2021–2030, encouraging leadership across the globe to further advance policy priorities in healthy aging. The Decade of Healthy Ageing (2021-2030) was endorsed by the United Nations in December 2020. It represents an opportunity for ASU to examine and reframe its approach to supporting older adults' improved health and wellbeing.

The current COVID-19 pandemic has also revealed significant failures in emergency preparedness with older adults and has identified gaps related to helping older Canadians maintain healthy lifestyles in times of crises or emergencies.

A new ASU strategic plan will help frame the advice and guidance to the Government of Canada toward a common vision for the Decade of Healthy Ageing: older adults are valued for their contributions and supported by environments that optimize their health, resilience, independence and quality of life.

3. REQUIREMENTS

3.1. Tasks and Deliverables

The tasks and activities to be performed for the three phases of the strategic planning contract are described below.

3.1.1 Phase 1: In this review, assessment, and evaluation phase, the Contractor will review the current priorities and work of ASU within the broader context (e.g., current priorities and areas of focus of the Division of Aging, Seniors and Dementia, Government of Canada priorities, priorities of provinces and territories, stakeholder views, international obligations, current and future needs and issues of older Canadians). To complete Phase 1, the Contractor will:

- a) gather and review key documents important to aging and seniors' health in Canada, including international agreements, and policy documents;
- b) use the literature to develop a quantitative online survey to better understand the needs of older Canadians and ASU stakeholders, and the complex issues that should be taken into account in the next 10 years;
- c) administer the survey to ASU stakeholders (e.g., Canadian seniors; partners in the provinces and territories; PHAC regions); a partial list will be provided by the Project Authority (PA);
- d) analyze the survey results and provide an interim report of survey results to PA;
- e) develop a qualitative interview guide for in-depth key informant interviews;
- f) determine with the PA the number and breadth of interviews to be conducted, a partial list will be provided by the PA and the Contractor will be expected to develop the methodology for these interviews and make further recommendations on stakeholders to be contacted;
- g) conduct individual telephone or virtual interviews with ASU staff and with key players and partners knowledgeable of ASU's work and aging issues;
- h) analyze the qualitative data resulting from these interviews;
- i) draft an assessment report which should evaluate the current ASU priorities and areas of focus against the findings from the quantitative and qualitative work;
- j) discuss assessment report with ASU PA; and
- k) finalize Phase 1 report in Microsoft Word and email to the PA.

Estimated time needed: 6 months (April to September 2021)



- 3.1.2 Phase 2:** Lead a design thinking process with the ASU team to help guide ASU priority setting discussions/thinking. The design thinking process will help ASU embrace change and focus on identifying and/or reframing areas of focus and priorities for a new 10-year strategic plan. Ultimately, ASU should be able to effectively address and advance complex issues relating to aging and the older population in Canada. To complete Phase 2, the Contractor will:
- present the findings of Phase 1 using a PowerPoint presentation to PHAC's ASU and management team, as required. This presentation will help inform the design thinking discussions and process;
 - organize eight half day meetings with ASU staff (and others as identified by the PA) to lead them through all the steps of the design thinking process. The Contractor will be responsible for all arrangements, such as scheduling the meetings, determining the meeting agenda, establishing session goals, and facilitating the process and discussions;
 - draft a brief interim report on the decisions and outcomes of the design thinking process to inform additional stakeholder consultations;
 - lead 5-6 expert roundtable sessions with internal and external stakeholders to test and validate outcomes of the design thinking process; and
 - draft a summary of the roundtable sessions.

Estimated time needed: 4 months (October 2021 to January 2022)

- 3.1.3 Phase 3:** Draft a final report providing an overview of Phases 1 and 2 and summarizing the key elements that will inform the development of ASU's 10-year strategic plan. To complete Phase 3, the Contractor will:
- draft a final report;
 - discuss report with PA;
 - present draft findings to ASU team and other PHAC managers using a PowerPoint presentation;
 - revise report as required following ASU and senior management presentations; and
 - submit final report in a Word document by email to the PA.

Estimated time needed: 2 months (February to March 2022)

3.2. Technical, Operational and Organizational

As public safety measures and advice due to the pandemic evolves, the Contractor and the PA will discuss changes to the work location for this contract (e.g., bi-monthly meetings) should there be a need to shift from virtual to in-person meetings. If this were to be the case, prevention measures will be put in place to protect the health and safety of the Contractor, all ASU staff, key informants, and anyone else involved in this project.

3.3. Method and Source of Acceptance

The PA will be responsible for reviewing the Contractor's deliverables and determining if they are complete. Performance and quality of the work will be measured using the following criteria:

- relevance and usefulness: the information provided is necessary for the strategic planning process;
- comprehensiveness: the information is complete and does not exclude key pieces of information;
- spelling and grammar: the deliverables are well written with little to no spelling and grammar mistakes; and
- timeliness: the deliverables are submitted on time.



3.4. Reporting Requirements

The Contractor must attend meetings or participate in teleconferences on a weekly basis with the PA to provide updates as well as discuss the development of the final deliverables. At the end of every quarter (i.e., March 2021, June 2021, September 2021), the Contractor will be required to submit to the PA a revised Gantt chart that includes contract milestones (expected and achieved). The final will be sent by email to the PA.

3.5. Project Management Control Procedures

The Project Authority will monitor the work of the Contractor through their weekly check-ins, by participating in the ASU half day meetings, by reviewing the quarterly reports, and by receiving and reviewing the draft and final deliverables.

4. ADDITIONAL INFORMATION

4.1. Canada's Obligations

In addition to the description of ASU's role in Section 3.3, the Government of Canada will provide the Contractor with:

- comments on key documents within five (5) working days;
- access to Project Authority, key ASU staff; or other staff members, as required;
- existing organizational documents;
- names and emails of ASU staff members and a partial list of partners and stakeholders that should be targeted for participation in the consultations;
- access to a Microsoft Teams or Zoom account to hold the bi-monthly meetings; and
- access to a Government of Canada teleconference line, as needed.

4.2. Contractor's Obligations

While property of the Government of Canada is not expected to be provided to the Contractor, specific obligations are in place if such a situation should arise. If any equipment should be sent to the Contractor, it will be labelled as being the property of Canada. The equipment must remain within the custody and control of the Contractor and be well cared for until the completion of the project, at which time the Contractor must give back all equipment to the Project Authority.

4.3. Location of Work, Work site and Delivery Point

The Contractor will be working off-site at their own facilities

4.4. Language of Work

The Contractor must communicate in French and English, as requested. The deliverables must be submitted in English.

5. PROJECT SCHEDULE

5.1. Schedule and Estimated Level of Effort (Work Breakdown Structure)

Considering the complexity of the design thinking process selected to inform the ASU strategic plan, the contract period is expected to last a total of 12 months, as illustrated in the table below.

Legend:

- X – Work to be conducted
- – Quarterly report due
- ! – Deliverable due

| Year | 2021 | | | | | | | | | 2022 | | |
|---------|------|----|-------------|----|----|-------------|----|----|----|------|---|---|
| Month | 04 | 05 | 06 | 07 | 08 | 09 | 10 | 11 | 12 | 1 | 2 | 3 |
| Phase 1 | X | X | X ○ ! | X | X | X ○ ! | | | | | | |



| | | | | | | | | | | | | |
|---------|--|--|--|--|--|--|---|---|--------|--------|---|--------|
| Phase 2 | | | | | | | X | X | X O | X ! | | |
| Phase 3 | | | | | | | | | | | X | X ! |

6. APPLICABLE DOCUMENTS AND GLOSSARY

6.1. Applicable Documents

- [Global Strategy and Action Plan on Ageing and Health](#)
- [Decade of Healthy Ageing Proposal \(2021-2030\)](#)
- Healthy Aging Narrative – May 2017

Additional documentation will be provided to the contractor, as needed, to complete the work required.

6.2. Relevant Terms, Acronyms and Glossaries

- ASU: Aging and Seniors Unit
- Design Thinking: A methodology that provides a solution-based approach to solving complex problems
- Strategic Plan: A document used to communicate the organization’s goals, the actions needed to achieve those goals, and all other critical elements developed during the planning process



**ANNEX "B"
BASIS OF PAYMENT**

The Bidder should complete the pricing table below and include it in its financial bid once completed.

Under any resulting contract, Canada will not accept travel and living expenses that may need to be incurred by the contractor for any relocation of resources required to satisfy its contractual obligations.

During the period of the Contract, for Work performed in accordance with the Contract, the Contractor will be paid as specified below.

1. Firm Lot Price

| Table 1 - Basis of Payment | | |
|-----------------------------------|--|-----------------------|
| A | B | C |
| Item # | Statement of Work Section | Firm Lot Price |
| 1 | Phase 1 interim report | <i>\$ (Insert)</i> |
| 2 | Phase 1 assessment report | <i>\$ (Insert)</i> |
| 3 | Phase 2 brief interim report, presentation, and summary of the roundtable sessions | <i>\$ (Insert)</i> |
| 4 | Phase 3 final report and presentation | <i>\$ (Insert)</i> |

2. Schedule of Milestones

The schedule of milestones for which payments will be made in accordance with the Contract is as follows:

| A | B |
|-------------------------|--|
| Milestone Number | Description or Deliverable |
| 1 | <i>Receipt and approval of the interim report of survey results (Mid Phase 1)</i> |
| 2 | <i>Receipt and approval of the assessment report (End of Phase 1)</i> |
| 3 | <i>Receipt and approval of the summary of the roundtable sessions (End of Phase 2)</i> |
| 4 | <i>Receipt and approval of the final report (End of Phase 3)</i> |



ANNEX "C" SECURITY REQUIREMENTS CHECK LIST

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| |
|---|
| Contract Number / Numéro du contrat 100228854 |
| Security Classification / Classification de sécurité UNCLASSIFIED |

SECURITY REQUIREMENTS CHECK LIST (SRCL) LISTE DE VÉRIFICATION DES EXIGENCES RELATIVES À LA SÉCURITÉ (LVERS)

| PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE | |
|--|--|
| 1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine PHAC | 2. Branch or Directorate / Direction générale ou Direction HPCDP |
| 3. a) Subcontract Number / Numéro du contrat de sous-traitance | |
| 3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant | |
| 4. Brief Description of Work / Brève description du travail Strategic Planning Contract for the Aging and Seniors Unit | |
| 5. a) Will the supplier require access to Controlled Goods? Le fournisseur aura-t-il accès à des marchandises contrôlées? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes Non <input type="checkbox"/> Oui | |
| 5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes Non <input type="checkbox"/> Oui | |
| 6. Indicate the type of access required / Indiquer le type d'accès requis | |
| 6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? (Specify the level of access using the chart in Question 7. c.) (Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c.) <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes Non <input type="checkbox"/> Oui | |
| 6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé. <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes Non <input type="checkbox"/> Oui | |
| 6. c) Is this a commercial courier or delivery requirement with no overnight storage? S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes Non <input type="checkbox"/> Oui | |
| 7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès | |
| Canada <input checked="" type="checkbox"/> | NATO / OTAN <input type="checkbox"/> |
| Foreign / Étranger <input type="checkbox"/> | |
| 7. b) Release restrictions / Restrictions relatives à la diffusion | |
| No release restrictions Aucune restriction relative à la diffusion <input checked="" type="checkbox"/> | All NATO countries Tous les pays de l'OTAN <input type="checkbox"/> |
| Not releasable À ne pas diffuser <input type="checkbox"/> | |
| Restricted to: / Limité à : <input type="checkbox"/> | Restricted to: / Limité à : <input type="checkbox"/> |
| Specify country(ies): / Préciser le(s) pays : | Specify country(ies): / Préciser le(s) pays : |
| 7. c) Level of information / Niveau d'information | |
| PROTECTED A PROTÉGÉ A <input checked="" type="checkbox"/> | NATO UNCLASSIFIED NATO NON CLASSIFIÉ <input type="checkbox"/> |
| PROTECTED B PROTÉGÉ B <input checked="" type="checkbox"/> | NATO RESTRICTED NATO DIFFUSION RESTREINTE <input type="checkbox"/> |
| PROTECTED C PROTÉGÉ C <input type="checkbox"/> | NATO CONFIDENTIAL NATO CONFIDENTIEL <input type="checkbox"/> |
| CONFIDENTIAL CONFIDENTIEL <input type="checkbox"/> | NATO SECRET NATO SECRET <input type="checkbox"/> |
| SECRET SECRET <input checked="" type="checkbox"/> | COSMIC TOP SECRET COSMIC TRÈS SECRET <input type="checkbox"/> |
| TOP SECRET TRÈS SECRET <input type="checkbox"/> | |
| TOP SECRET (SIGINT) TRÈS SECRET (SIGINT) <input type="checkbox"/> | |

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité
UNCLASSIFIED





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Government of Canada / Gouvernement du Canada

| |
|---|
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PART A (continued) / PARTIE A (suite)

8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS? No / Non Yes / Oui
If Yes, indicate the level of sensitivity:
Dans l'affirmative, indiquer le niveau de sensibilité :

9. Will the supplier require access to extremely sensitive INFOSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate? No / Non Yes / Oui

Short Title(s) of material / Titre(s) abrégé(s) du matériel :
Document Number / Numéro du document :

PART B - PERSONNEL (SUPPLIER) / PARTIE B - PERSONNEL (FOURNISSEUR)

10. a) Personnel security screening level required / Niveau de contrôle de la sécurité du personnel requis

- | | | | |
|---|---|--|--|
| <input checked="" type="checkbox"/> RELIABILITY STATUS COTE DE FIABILITÉ | <input type="checkbox"/> CONFIDENTIAL CONFIDENTIEL | <input checked="" type="checkbox"/> SECRET SECRET | <input type="checkbox"/> TOP SECRET TRÈS SECRET |
| <input type="checkbox"/> TOP SECRET - SIGINT TRÈS SECRET - SIGINT | <input type="checkbox"/> NATO CONFIDENTIAL NATO CONFIDENTIEL | <input type="checkbox"/> NATO SECRET NATO SECRET | <input type="checkbox"/> COSMIC TOP SECRET COSMIC TRÈS SECRET |
| <input type="checkbox"/> SITE ACCESS ACCÈS AUX EMPLACEMENTS | | | |

Special comments:

Commentaires spéciaux : _____

NOTE: If multiple levels of screening are identified, a Security Classification Guide must be provided.

REMARQUE : Si plusieurs niveaux de contrôle de sécurité sont requis, un guide de classification de la sécurité doit être fourni.

10. b) May unscreened personnel be used for portions of the work?
Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail? No / Non Yes / Oui

If Yes, will unscreened personnel be escorted?
Dans l'affirmative, le personnel en question sera-t-il escorté? No / Non Yes / Oui

PART C - SAFEGUARDS (SUPPLIER) / PARTIE C - MESURES DE PROTECTION (FOURNISSEUR)

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

11. a) Will the supplier be required to receive and store PROTECTED and/or CLASSIFIED information or assets on its site or premises?
Le fournisseur sera-t-il tenu de recevoir et d'entreposer sur place des renseignements ou des biens PROTÉGÉS et/ou CLASSIFIÉS? No / Non Yes / Oui

11. b) Will the supplier be required to safeguard COMSEC information or assets?
Le fournisseur sera-t-il tenu de protéger des renseignements ou des biens COMSEC? No / Non Yes / Oui

PRODUCTION

11. c) Will the production (manufacture, and/or repair and/or modification) of PROTECTED and/or CLASSIFIED material or equipment occur at the supplier's site or premises?
Les installations du fournisseur serviront-elles à la production (fabrication et/ou réparation et/ou modification) de matériel PROTÉGÉ et/ou CLASSIFIÉ? No / Non Yes / Oui

INFORMATION TECHNOLOGY (IT) MEDIA / SUPPORT RELATIF À LA TECHNOLOGIE DE L'INFORMATION (TI)

11. d) Will the supplier be required to use its IT systems to electronically process, produce or store PROTECTED and/or CLASSIFIED information or data?
Le fournisseur sera-t-il tenu d'utiliser ses propres systèmes informatiques pour traiter, produire ou stocker électroniquement des renseignements ou des données PROTÉGÉS et/ou CLASSIFIÉS? No / Non Yes / Oui

11. e) Will there be an electronic link between the supplier's IT systems and the government department or agency?
Disposera-t-on d'un lien électronique entre le système informatique du fournisseur et celui du ministère ou de l'agence gouvernementale? No / Non Yes / Oui



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| |
|---|
| Contract Number / Numéro du contrat 100223654 |
| Security Classification / Classification de sécurité UNCLASSIFIED |

PART C - (continued) / PARTIE C - (suite)

For users completing the form **manually** use the summary chart below to indicate the category(ies) and level(s) of safeguarding required at the supplier's site(s) or premises.
 Les utilisateurs qui remplissent le formulaire **manuellement** doivent utiliser le tableau récapitulatif ci-dessous pour indiquer, pour chaque catégorie, les niveaux de sauvegarde requis aux installations du fournisseur.

For users completing the form **online** (via the Internet), the summary chart is automatically populated by your responses to previous questions.
 Dans le cas des utilisateurs qui remplissent le formulaire **en ligne** (par Internet), les réponses aux questions précédentes sont automatiquement saisies dans le tableau récapitulatif.

SUMMARY CHART / TABLEAU RÉCAPITULATIF

| Category / Catégorie | PROTECTED / PROTÉGÉ | | | CLASSIFIED / CLASSIFIÉE | | | NATO | | | | COMSEC | | | | | |
|--|---------------------|---|---|-----------------------------|--------|--------------------------|---|---------------------------------------|-------------|--|---------------------|---|---|--------------|--------|--------------------------|
| | A | B | C | CONFIDENTIAL / CONFIDENTIEL | SECRET | TOP SECRET / TRÈS SECRET | NATO RESTRICTED / NATO DIFFUSION RESTREINTE | NATO CONFIDENTIAL / NATO CONFIDENTIEL | NATO SECRET | COMSEC TOP SECRET / COMSEC TRÈS SECRET | PROTECTED / PROTÉGÉ | | | CONFIDENTIAL | SECRET | TOP SECRET / TRÈS SECRET |
| | | | | | | | | | | | A | B | C | | | |
| Information / Assets / Renseignements / Biens / Production | | ✓ | | | | | | | | | | | | | | |
| IT Media / Support TI | | ✓ | | | | | | | | | | | | | | |
| IT Link / Lien électronique | | | | | | | | | | | | | | | | |

12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED? No / Non Yes / Oui
 La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE?

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification".
 Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire.

12. b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED? No / Non Yes / Oui
 La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE?

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification" and indicate with attachments (e.g. SECRET with Attachments).
 Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire et indiquez qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).