



**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**

**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**

<b>Title - Sujet</b> POR Quantitative / ROP Quantitative	
<b>Solicitation No. - N° de l'invitation</b> EP082-212778/A	<b>Date</b> 2021-03-18
<b>Client Reference No. - N° de référence du client</b> EP082-21-2778	
<b>GETS Reference No. - N° de référence de SEAG</b> PW-\$\$CY-021-79869	
<b>File No. - N° de dossier</b> cy021.EP082-212778	<b>CCC No./N° CCC - FMS No./N° VME</b>
<b>Solicitation Closes - L'invitation prend fin</b> <b>at - à 02:00 PM</b> Eastern Daylight Saving Time EDT <b>on - le 2021-05-04</b> Heure Avancée de l'Est HAE	
<b>F.O.B. - F.A.B.</b> <b>Plant-Usine:</b> <input type="checkbox"/> <b>Destination:</b> <input checked="" type="checkbox"/> <b>Other-Autre:</b> <input type="checkbox"/>	
<b>Address Enquiries to: - Adresser toutes questions à:</b> Amaral, Paola	<b>Buyer Id - Id de l'acheteur</b> cy021
<b>Telephone No. - N° de téléphone</b> (613) 998-8588 ( )	<b>FAX No. - N° de FAX</b> ( ) -
<b>Destination - of Goods, Services, and Construction:</b> <b>Destination - des biens, services et construction:</b> DEPARTMENT OF PUBLIC WORKS AND GOVERNMENT SERVICES CANADA 1451 COLDREY AVE OTTAWA Ontario K1A0S5 Canada	

**Instructions: See Herein**

**Instructions: Voir aux présentes**

**Vendor/Firm Name and Address**

**Raison sociale et adresse du  
fournisseur/de l'entrepreneur**

**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

<b>Delivery Required - Livraison exigée</b> See Herein – Voir ci-inclus	<b>Delivery Offered - Livraison proposée</b>
<b>Vendor/Firm Name and Address</b> <b>Raison sociale et adresse du fournisseur/de l'entrepreneur</b>	
<b>Telephone No. - N° de téléphone</b> <b>Facsimile No. - N° de télécopieur</b>	
<b>Name and title of person authorized to sign on behalf of Vendor/Firm</b> <b>(type or print)</b> <b>Nom et titre de la personne autorisée à signer au nom du fournisseur/ de l'entrepreneur (taper ou écrire en caractères d'imprimerie)</b>	
<b>Signature</b>	<b>Date</b>

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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 Security, Financial and Other Requirements: includes specific requirements that must be addressed by Bidders; and
- Part 7 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 Security Requirements Checklist, the Electronic Payment Instruments, the Federal Contractors Program for Employment Equity - Certification, the Insurance Requirements, and any other annexes.

### **1.2 Summary**

- 1.2.1 Public Works and Government Services Canada (PWGSC), on behalf of the Receiver General and Pension Branch, Pension Excellence Sector, Program and Management Oversight Directorate, has a requirement for the services of a public opinion research firm to conduct the Pension Member Service Feedback Survey. The research will assist the Pension program in strategic planning of future pension services, communication tools or training, as well as use it to make improvements to current services, communications, tools or training.
- 1.2.2 There are security requirements associated with this requirement. For additional information, consult Part 6 - Security, Financial and Other Requirements, and Part 7 - Resulting Contract Clauses. For more information on personnel and organization security screening or security clauses, 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.
- 1.2.3 The requirement is subject to the provisions of the Canadian Free Trade Agreement (CFTA).
- 1.2.4 The requirement is limited to Canadian goods and/or services.
- 1.2.5 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.

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### **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.

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  
SACC Manual Clause [A3015T](#) (2014-06-26) – Certification – Bid

### **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](mailto: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, 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: 2019-01](#) 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.

## 2.4 Enquiries - Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than seven (7) 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 **Public Works and Government Services Canada** 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

If the Bidder chooses to submit its bid in hard copies, Canada requests that the Bidder submits its bid in separately bound sections as follows:

Section I: Technical Bid (one (1) hard copies and one (1) soft copies on a USB key)

Section II: Financial Bid (one (1) hard copies and one (1) soft copies on a USB key)

Section III: Certifications (one (1) hard copies and one (1) soft copies on a USB key)

Section IV: Additional Information (one (1) hard copies and one (1) soft copies on a USB key)

If there is a discrepancy between the wording of the soft copy on electronic media and the hard copy, the wording of the hard copy will have priority over the wording of the soft copy.

If the Bidder is simultaneously providing copies of its bid using multiple acceptable delivery methods, and if there is a discrepancy between the wording of any of these copies and the electronic copy provided through epost Connect service, the wording of the electronic copy provided through epost Connect service will have priority over the wording of the other copies.

Due to the nature of the bid solicitation, bids transmitted 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.

Canada requests that bidders follow the format instructions described below in the preparation of hard copy of their bid:

- (a) use 8.5 x 11 inch (216 mm x 279 mm) paper;
- (b) use a numbering system that corresponds to the bid solicitation.

In April 2006, Canada issued a policy directing federal departments and agencies to take the necessary steps to incorporate environmental considerations into the procurement process [Policy on Green Procurement](https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=32573) (<https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=32573>). To assist Canada in reaching its objectives, bidders should:

- 1) use 8.5 x 11 inch (216 mm x 279 mm) paper containing fibre certified as originating from a sustainably-managed forest and containing minimum 30% recycled content; and
- 2) use an environmentally-preferable format including black and white printing instead of colour printing, printing double sided/duplex, using staples or clips instead of cerlox, duotangs or binders.

### **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 "E" Electronic Payment Instruments, to identify which ones are accepted.

If Annex "E" 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.

### **Section IV: Additional Information**

#### **3.1.3 Bidder's Proposed Sites or Premises Requiring Safeguarding Measures**

**3.1.3.1** As indicated in Part 6 under Security Requirements, the Bidder must provide the full addresses of the Bidder's and proposed individuals' sites or premises for which safeguarding measures are required for Work Performance:

*Street Number / Street Name, Unit / Suite / Apartment Number  
City, Province, Territory / State  
Postal Code / Zip Code  
Country*

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- 3.1.3.2** The Company Security Officer must ensure through the **Contract Security Program** that the Bidder and proposed individuals hold a valid security clearance at the required level, as indicated in Part 6 – Security, Financial and Other Requirements.
- 3.1.3.3** In addition, Bidders are requested to complete and submit the forms found in Annex “H” RFP Submission Form / Subcontractor Information.

## **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**

Mandatory and point rated technical evaluation criteria are included in Annex "C".

#### **4.1.2 Financial Evaluation**

##### **4.1.2.1 Mandatory Financial Criteria**

Financial evaluation is fully described in Annex "B3".

*SACC Manual* Clause [A0220T](#) (2014-06-26), Evaluation of Price-Bid

### **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 **497** points overall for the technical evaluation criteria which are subject to point rating. The rating is performed on a scale of **1096** points.
2. Bids not meeting (a) or (b) or (c) and (d) will be declared non-responsive.
3. 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.
4. 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%**.
5. 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 divided against the five (5) main category services as follows:

- 21/30 - Bid Evaluation Value (BEV)
- 1.5/30 - Option 1: Additional Telephone Surveys
- 3/30 - Option 2: Additional Online Surveys
- 1.5/30 - Option 3: Additional Minutes for Telephone Surveys

3/30 - Option 4: Additional Minutes for Online Surveys

6. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
7. 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 \$49,000.00.

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

		<b>Bidder A</b>	<b>Bidder B</b>	<b>Bidder C</b>	<b>Bidder D</b>
<b>Overall Technical Score</b>		115/135	89/135	107/135	92/135
<b>Average Bid Evaluation Price</b>		\$58,525.00	\$55,330.00	\$49,000.00	\$69,825.00
<b>Calculations</b>	<b>Technical Merit Score</b>	$115/135 \times 70 = 59.630$	$89/135 \times 70 = 46.148$	$107/135 \times 70 = 55.481$	$92/135 \times 70 = 47.704$
	<b>Total Weighted Financial Score</b>	25.524	23.952	25.031	20.283
<b>Combined Rating</b>		85.154	70.100	80.521	67.987
<b>Overall Rating</b>		1 <sup>st</sup>	3 <sup>rd</sup>	2 <sup>nd</sup>	4 <sup>th</sup>

## **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](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 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) (<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 Additional Certifications Precedent to Contract Award**

##### **5.2.2.1 Canadian Content Certification**

*SACC Manual* clause [A3050T](#) (2020-07-01) Canadian Content Definition

This procurement is limited to Canadian services.

The Bidder certifies that:

(        ) the service(s) offered are Canadian services as defined in paragraph 2 of clause [A3050T](#).

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

### 5.2.2.2 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.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

### 5.2.2.3 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.

Solicitation No. - N° de l'invitation  
EP082-212778/A  
Client Ref. No. - N° de réf. du client  
EP082-21-2778

Amd. No. - N° de la modif.  
File No. - N° du dossier  
cy021.EP082-212778

Buyer ID - Id de l'acheteur  
cy021  
CCC No./N° CCC - FMS No./N° VME

---

Signature

Date

#### **5.2.2.4 Bilingual Capabilities**

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

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Signature

---

Date

## **PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS**

### **6.1 Security Requirements**

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 7 - 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 7 - 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;
  - (d) the Bidder's proposed location of work performance and document safeguarding must meet the security requirements as indicated in Part 7 - Resulting Contract Clauses;
  - (e) the Bidder must provide the addresses of proposed sites or premises of work performance and document safeguarding as indicated in Part 3 - Section IV Additional Information.
2. Bidders are reminded to obtain the required security clearance promptly. Any delay in the award of a contract to allow the successful Bidder to obtain the required clearance will be at the entire discretion of the Contracting Authority.
3. 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.

## PART 7 - RESULTING CONTRACT CLAUSES

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

**THIS DOCUMENT CONTAINS A SECURITY REQUIREMENT**

### POR # 130-20

#### 7.1 Statement of Work

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

##### 7.1.1 Optional Goods and/or Services

The Contractor grants to Canada the irrevocable option to acquire the goods, services or both described at Annex "A" of the Contract under the same conditions and at the prices and/or rates stated in the Contract. The option may only be exercised by the Contracting Authority and will be evidenced, for administrative purposes only, through a contract amendment.

The Contracting Authority may exercise the option at any time before the expiry of the Contract by sending a written notice to the Contractor.

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

##### 7.2.1 General Conditions

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

##### 7.2.2 Supplemental General Conditions

The following apply to and form part of the Contract:

*SACC Manual* clause [4007](#) (2010-08-16) - Canada to Own Intellectual Property Rights in Foreground Information

*SACC Manual* clause [4008](#) (2008-12-12) – Personal Information

*SACC Manual* clause [A9122C](#) (2008-05-12) – Protection and security of data stored in databases

#### 7.3 Security Requirements

1. The Contractor/Offeror must, at all times during the performance of the Contract/Standing Offer, hold a valid Designated Organization Screening (DOS) with approved Document Safeguarding at the level of PROTECTED A, issued by the Contract Security Program (CSP), Public Works and Government Services Canada (PWGSC).
2. The Contractor/Offeror personnel requiring access to PROTECTED information, assets or site(s) must EACH hold a valid RELIABILITY STATUS, granted or approved by the CSP, PWGSC.
3. The Contractor MUST NOT utilize its Information Technology systems to electronically process, produce or store PROTECTED information until the CSP, PWGSC has issued written approval. After approval has been granted or approved, these tasks may be performed at the level of PROTECTED A.
4. Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of the CSP, PWGSC.
5. The Contractor/Offeror must comply with the provisions of the:
  - (a) Security Requirements Check List and security guide (if applicable), attached at Annex "D";
  - (b) Industrial Security Manual (Latest Edition)

**7.3.1** The following security requirements (SRCL and related clauses provided by the Contract Security Program) apply and form part of the Contract.

**7.3.2 Contractor's Sites or Premises Requiring Safeguarding Measures**

**7.3.2.1** Where safeguarding measures are required in the performance of the Work, the Contractor must diligently maintain up-to-date the information related to the Contractor's and proposed individuals' sites or premises for the following addresses:

*Street Number / Street Name, Unit / Suite / Apartment Number  
City, Province, Territory / State  
Postal Code / Zip Code  
Country*

**7.3.2.2** The Company Security Officer must ensure through the [Contract Security Program](#) that the Contractor and individuals hold a valid security clearance at the required level.

**7.4 Term of Contract**

**7.4.1 Period of the Contract**

The period of the Contract is from date of contract award to \_\_\_\_\_, 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 at least thirty (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.

## 7.5 Authorities

### 7.5.1 Contracting Authority

The Contracting Authority for the Contract is:

**Paola Amaral**  
Supply Specialist

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

Telephone: 613-998-8588  
Mobile: 343-550-7181  
E-mail: paola.amaral@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.

### 7.5.2 Project Authority

The Project Authority for the Contract is:

Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Organization: \_\_\_\_\_  
Address: \_\_\_\_\_

Telephone: - - -  
Facsimile: - - -  
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.

### 7.5.3 Contractor's Representative

Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Organization: \_\_\_\_\_

Solicitation No. - N° de l'invitation  
EP082-212778/A  
Client Ref. No. - N° de réf. du client  
EP082-21-2778

Amd. No. - N° de la modif.  
File No. - N° du dossier  
cy021.EP082-212778

Buyer ID - Id de l'acheteur  
cy021  
CCC No./N° CCC - FMS No./N° VME

Address: \_\_\_\_\_

Telephone: \_\_\_\_-\_\_\_\_-\_\_\_\_

Facsimile: \_\_\_\_-\_\_\_\_-\_\_\_\_

E-mail address: \_\_\_\_\_

## 7.6 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: 2019-01](#) of the Treasury Board Secretariat of Canada.

## 7.7 Payment

### 7.7.1 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.

### 7.7.2 Limitation of Price

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

### 7.7.3 Schedule of Milestones

Milestone	Deliverables (approved by Project Authority)	Amount	Due Date or "Delivery Date"
1			
2			
3			

### 7.7.4 Electronic Payment of Invoices – Contract

*To be completed at Contract award.*

## 7.8 Identification of the Fieldwork Sub-Contractor

If a sub-contractor is involved, the Authorized Fieldwork Sub-Contractor will be identified within the Contract.

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.**

## **7.9 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 invoices, receipts, vouchers for all direct expenses, and all travel and living expenses;
  - c. 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.

## **7.10 Certifications and Additional Information**

### **7.10.1 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.

### **7.10.2 SACC Manual Clauses**

SACC Manual clause [A3060C](#) (2008-05-12) Canadian Content Certification  
SACC Manual clause [A3015C](#) (2014-06-26) Certifications – Contract

## 7.11 Applicable Laws

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

## 7.12 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](#) (2020-05-28) – General Conditions - Higher Complexity - Services;
- (d) Annex "A", Statement of Work;
- (e) Annex "B", Basis of Payment;
- (f) Annex "D", Security Requirements Check List;
- (g) Annex "F", Political Neutrality Certification;
- (h) Annex "G", Public Opinion Research Final Report Checklist;
- (i) the Contractor's bid dated \_\_\_\_\_.

## 7.13 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.

## 7.14 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 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.

### **7.15 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**

### **STUDY TITLE**

Pension Member Service Feedback Survey 2021-2022

### **BRANCH**

Receiver General and Pension Branch, Pension Excellence Sector, Program and Management Oversight Directorate

### **BACKGROUND**

PSPC provides pension services on behalf of pension plan stakeholders (TBS for the Public Service, RCMP and Canadian Forces). Services are provided through the Government of Canada Pension Centres located in Shediac, NB and Ottawa, ON, as well as online through a secure portal.

Presently, the Government of Canada Pension Centre asks members during calls initiated by the member, if they would like to participate in a simple three question survey at the end of their transaction. The questions asked are:

1. Were you treated in a courteous and professional manner?
2. Was your inquiry addressed to your satisfaction?
3. Was the information that was provided to you easily understood?

### **RATIONALE AND INTENDED USE OF RESEARCH**

Manner in which research supports government or departmental priorities:

1. Consistent with the Pension Centre's client service agenda and the departmental Client Service Strategy, as well as the TBS Policy on Service, the initiative would be undertaken to gauge member satisfaction with the Pension Centre's online services and to identify opportunities for improvements. The research is not prescribed by legislation but supports departmental priorities.
2. The survey is intended to identify potential opportunities to improve and refine the delivery of services by the Pension Centre. This, in turn, supports other government departments in the delivery of their programs and services to Canadians.
3. While operational data can provide some performance measures, there is no substitute to obtaining the feedback of members.
4. There are no risks associated with information gathering and dissemination – information gathered would relate to matters that are of a public nature.

Intended Use:

The research will assist the Pension program in strategic planning of future pension services, communication tools or training, as well as use it to make improvements to current services, communications, tools or training.

## **OBJECTIVES**

The primary objectives of the research are to:

- Assess pension member knowledge of pension plan services and associated benefits
- Assess members' (pension members) satisfaction of services offered by the Canada Pension Centre during service calls or with any services used online by members
- Assess pension members ease of use, understanding and experience with pension online tools or content
- Assess the importance that pension members place on different online web applications and future applications

## **TARGET POPULATION**

The target population for the survey are retired and active pension members, more specifically:

- Public Service Superannuation Plan active employees and retired members (PSSA)
- RCMP Superannuation Plan active officer and retired members (RCMPSA)
- Canadian Forces Superannuation Plan active regular force and reservist and retired members (CFSA)
- Potentially Crown Corporation active employees and retired members

\*The sample will consist of approximately 3,000 members from the target population specified above who have contacted the Pension Centre for assistance with pension services within the past 45 days. Extract will be provided by Pension Excellence Sector.

## **METHODOLOGY**

The work is quantitative research consisting of a mix-mode (telephone, online) survey, with active employees and retired (non-active) members. The sample extract will comprise of approximately 3,000 members from the target populations. This figure is a best estimate based on historical data; the actual figure will depend on the number of members who have contacted the Pension Centre for assistance with pension services within the past 45 days. Each time a member calls the Pension Centre, they are asked to reconfirm their contact information, which will ensure e-mail addresses and phone numbers provided in the extract are up to date. The Supplier is responsible for contacting all members provided in the extract in order to survey customer satisfaction.

### **Methodology Element**

<b>Target Population</b>	Pensions members (active, retired)
<b>Sample size</b>	Up to 3,000 members
<b>Mode, Sample breakdown</b>	45% telephone, 55% online
<b>Sample Source</b>	Member List (Non probability)
<b>Survey duration</b>	Maximum of 15 minutes
<b># of questions</b>	Maximum of 15 with no more than four open ended questions

It's anticipated the survey will consist of a maximum of 15 questions with an estimated completion time of 5-10 minutes. This number takes into account any sub-questions (e.g. Q4a, Q4b, Q4c), and will be primarily made up of close-ended questions, with a maximum of four open ended questions. The survey questions will include demographic questions related to age and active vs. non-active status, as well as an optional self-identification question.

The Project Authority will provide the Supplier with the names, phone numbers and, where applicable, e-mail addresses of members who have recently contacted the Pension Centre to be included in the sample. Pension member data (Protected A) will be transferred to the Supplier by means of Encrypted USB.

The objective of the survey is to rate the level of service provided to active and retired members of the PSSA, RCMP SA and CFSA. The design and administration of the survey will be agreed upon by PSPC and the Supplier. The questionnaire will be developed in consultation with PSPC. The survey interviews will be conducted in English or French.

The survey may be conducted online for any members who have an e-mail address on file. Telephone surveys are only required for any pension members who have not provided an e-mail address to the Pension Centre, or for any pension members who require a telephone interview to accommodate their accessibility needs. The number of telephone versus e-mail surveys will vary depending on the members who have accessed the Pension Centre within the past 45 days, however historical figures estimate that approximately **55%** of members have an e-mail address on file while **45%** have a telephone number only. Leading up to the survey, the Pension Centre will request e-mail addresses from those who call in, with the goal of increasing the percentage of members with e-mail addresses on-file. When the survey is conducted by telephone, data collection must be conducted using live agents in the official language of the respondent\*. Any method for interacting with respondents other than a live agent at any point in the process cannot be used\*\*;

\*a live agent is a person making the call.

\*\*This does not include using a predictive dialler to connect answered dials to live agents.

### **OPTIONAL SURVEYS**

In addition to the survey described in the Methodology section above, the contractor, if requested by the Project Authority, must carry out up to three (3) additional surveys, each of the same scope and sample size indicated above.

### **RESEARCH REQUIREMENTS AND SCOPE OF WORK**

The Supplier will be required to carry out the following tasks:

- Provide client liaison in either official language
- 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](#);
- Attend meetings (video meeting or via conference call) with the Project Authority to discuss research purpose and objectives, design issues, research schedule and draft report, etc.
- Advise on sample design, including size and definition of survey respondents and other aspects of the research methodology
- Provide an analysis plan that relates the survey questions and analytical methods to the research objectives
- Draft, review and advise on questionnaires, translate them into the other official language and revise them as required
- Program a questionnaire using a computer assisted telephone interviewing (CATI) system (or otherwise reproduce the questionnaire for interviews)

- Program a questionnaire using a computer assisted web interviewing (CAWI) system (or otherwise reproducing the questionnaire for an online survey)
- Test individual departmental firewalls and security features to allow for acceptance of email invitations
- Test the survey links to ensure that they are functional.
- Ensure the online survey allows respondents to toggle between the English and French versions of the questionnaire, at any point in the survey.
- Test the online questionnaire to ensure it is optimized for and easy to use with mobile devices, as per the Standard on Optimizing Websites and Applications for Mobile Devices; address any usability issues.
- 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.
- Carry out a probing pre-test of the questionnaire by conducting 20 interviews in each official language (totalling 40 pre-tests); the 20 pre-tests must be made up of 10 telephone interviews and 10 e-mail surveys. The Pension Excellence Sector will provide contact information for pre-test volunteers. Provision is to be made for the Project Authority to monitor pre-tests and receive the results.
- Provide test links to the Project Authority and address any issues raised by the Project Authority.
- Provide a briefing on the pre-test results;
- Provide respondents with a means to verify the legitimacy of the survey as a research initiative sponsored by the Government of Canada, by providing a contact at the department or research firm or by using an industry-based research registration system.
- Create and send e-mail invitations to all respondents with an e-mail address, complete with a link to the survey and an embedded unique access code
- Host the online survey
- Administer telephone surveys for respondents that do not have an e-mail address or have accessibility needs, conducted by a live agent in the respondent's language of choice (English or French).
- Collect and verify bounce-back e-mail invitations.
- Ensure the number of phone or email reminders and procedures for doing so are consistent with those outlined in the National Standing Offer (maximum 5 for home telephone and cellular, and a maximum of 3 email reminders), [Telephone standards](#) and [Online standards](#)
- The Supplier must conduct data entry for telephone interviews
- Enter results to create tables and coding procedures defined in consultation with the Project Authority;
- Provide the Project Authority with partial results during fieldwork, if requested
- Ensure effective quality control measures; The Supplier must validate and edit all deliverables (in French and English) before they are sent to the Project Authority (this includes all reports, memos, and datasets). The Supplier's assigned senior researcher for the project must perform final validation.
- Conduct fieldwork in the official language of the respondent supervised by bilingual personnel to achieve the required number of 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
- Highlight any concerns, and potential recommendations, if any, with fielding this survey on a weekly basis. Examples of potential issues could include, but are not limited to: (a) fielding the survey during holiday periods, e.g. Christmas/New Year period, March Break, Thanksgiving, etc., (b) data and report deliveries during holiday periods, (c) any other potential issues, etc.
- Include any tracking tools to help the project authority read the data on a weekly, or three-week rolling basis, in addition to the SPSS.
- Provide respondent support in both official languages

- Provide top-line results (written and verbal) within 48 hours of completion of the fieldwork.
- Produce an analysis plan for the data tables (also known as tabs or cross tabulations)
- Ensure that all aspects of data processing are conducted and only accessible in Canada, including fieldwork
- Conduct dataset quality control
- Provide the response rates and the method of calculation
- Meet with the Project Authority, in person or via teleconference call, to discuss the outline and presentation of the report prior to preparing the draft.
- Provide a written report in the official language chosen by the Project Authority, providing a draft copy and a final electronic copy following receipt of the Project Authority's comments on the draft report. The written report must include relevant content as per the [Requirements for public opinion research reports](#)
- Complete a written Executive Summary in both languages
- Translate the final report into the other official language
- After confirmation of the acceptance of the report, translation of the executive summary and full report into French.
- Submit the required electronic and printed versions of the report as outlined under the Report Requirements section below, with appropriate appendices.
- Ensure that the final report complies with the following:
  - a. [Financial Administration Act](#);
  - b. [Library and Archives of Canada Act](#);
  - c. [Public Opinion Research Contract Regulations](#);
  - d. [Policy on Communications and Federal Identity](#);
  - e. [Directive on the Management of Communications](#);
  - f. [Web Content Accessibility Guidelines \(WCAG\) 2.0](#);
  - g. [The Standards for the Conduct of Government of Canada – Telephone Public Opinion Research](#)
  - h. [Standards for the Conduct of Government of Canada Public Opinion Research- Online Surveys](#)
- Ensure that, for contracted public opinion research, the Supplier's senior officer certifies upon delivery that the final deliverables comply with the political neutrality requirement (see requirement 6.3.4 of the *Directive on the Management of Communications* at <http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=30682>).
- Perform other functions essential to the administration of the research

## **PRIVACY AND SECURITY REQUIREMENTS**

- The Supplier must acknowledge that PSPC is bound by the Privacy Act with respect to the protection of personal information as defined in the Act. The Supplier must keep private and confidential any such personal information collected, created or handled by the Supplier under the contract, and must not collect, use, copy, disclose, dispose of or destroy such personal information except in accordance with the *Privacy Act* and *Library and Archives Act* and the delivery provisions of the contract.
- The Supplier is required to adhere to all aspects of the Privacy Act and 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 Supplier is required to protect the information until it has been destroyed or rendered completely anonymous.
- The Supplier 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.

- Provision of the personal information is collected on a voluntary basis pursuant to the Personal Information Protection and Electronic Documents Act, and is kept anonymously by the system. The anonymous data will be used to confirm the views of Public Services and Procurement Canada employees about the Receiver General and Pension Branch services (RGPB). The anonymous data will solely be used by the RGPB. Personal information is protected, used, and disclosed in accordance with the Privacy Act.
- The Supplier must not collect IP addresses unless absolutely necessary to administer the survey. If IP addresses are deemed necessary, the Supplier must inform the Project Authority of reasons for collecting IP addresses, seek the Project Authority's approval, and delete all records of IP addresses at the time the online survey closes.
- The Supplier will use up-to-date technologies to protect survey data collected or stored on Web sites or servers against illegal or unsanctioned access by third parties (i.e. "hacking").
- The Supplier will control access to all databases on which any data relating to the survey 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).
- In the event of a privacy breach, the Supplier must:
  1. Notify the Project Authority immediately; and
  2. Report, respond to and manage any privacy breach in accordance with the Personal Information Protection and Electronic Documents Act.
- The Supplier will 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.

The Supplier must abide by the requirements outlined in the *Standards for the Conduct of Government of Canada Public Opinion Research*, including but not limited to:

#### *Data Processing*

1. Describe safeguards to ensure respondent confidentiality and protection of personally identifiable information throughout data processing and data management.

#### *Informed consent and use of information*

1. In obtaining the necessary agreement from respondents to participate, the researcher must inform them of the study sponsor and of the general subject and purpose of the survey, and that their participation is voluntary and confidential.
2. Survey questions must be limited to gathering information relevant to the stated research objectives. The researcher must ensure that the data collected will not be used for any other purpose unless the respondent provides explicit informed consent for that additional use (for example, to help resolve a customer complaint).
3. The survey data and personal information must not, under any circumstances, be used for direct marketing or other sales approaches to the respondent or the respondent's household.
4. Researchers must provide respondents with a means to ask questions about the research, and answer any questions in a clear, honest and non-deceptive manner.
5. Informing respondents that the information provided will be administered according to the requirements of the *Privacy Act*, *the Access to Information Act*, and any other pertinent legislation.

#### *Protection of anonymity and confidentiality*

1. The anonymity of respondents must be preserved unless they have given their informed and explicit consent to the contrary. The researcher must ensure that the information will be used for research purposes only, or, if requested by the respondent, to resolve a customer complaint. The same holds true when respondents' answers are, with their informed consent, linked or merged with pre-existing data that allows their identification (for example, with administrative data from a Government of Canada program). Information must not be used for any non-

- research purpose, such as direct marketing, list-building, credit rating, fund-raising, or any marketing activities directed at those individual respondents.
2. Completed questionnaires or other material (for example, digital media) containing respondents' identity, or information that might allow respondents to be identified, must not be released by researchers to clients or other third parties.
  3. When verbatim comments are collected, they must not be attributed to the respondent, directly or indirectly, without the respondent's explicit informed consent. Care must be taken when reporting verbatim comments, to ensure that nothing in the comment, including content, vocabulary and/or style of writing, could be used to identify the individual respondent.

#### *Respondent confidentiality*

To ensure respondent confidentiality, tabulated data must not show demographic or respondent characteristic categories with a column or row total of fewer than 10 respondents. Particular care must be taken when respondent verbatim statements are included in data files.

### **ACCESSIBILITY**

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](#). Procurement documents will specify the accessibility criteria and standards to be met and provide guidelines for the evaluation of proposals with respect to those criteria and standards.

In support of the [principles outlined in the Accessible Canada Act](#), PSPC's goal is to ensure that the public opinion research services that the Government of Canada buys are inclusive by design and accessible by default. As such, the Supplier will be expected to adhere to the following accessibility requirements:

#### *Telephone Public Opinion Research*

- The Supplier must respond to the accessibility needs expressed by any eligible participants including persons with disabilities and actively address barriers to their participation when conducting telephone research.
- The Supplier must allow a person with a disability to opt to participate in the survey via an alternative mode (e.g., online, via email) or by facilitating another solution that addresses the person's accessibility needs, such as through an accessible format or communication support as identified under the Accessible Formats and Communications Support listed below.

#### *Online Public Opinion Research*

- The Supplier's online research tools and participant materials including questionnaires, online focus groups, and online discussion platforms must comply with the requirements of the [Treasury Board Standard on Web Accessibility](#) that is most current at the time of call-up issuance. As of August 18, 2020, the Treasury Board standard requires compliance with the Web Content Accessibility Guidelines (WCAG) 2.0 Level AA or higher.
- In the event that the Treasury Board Standard on Web Accessibility is updated with new or different requirements, the Supplier must submit an updated proof-of-concept in accordance with the process outlined in Section 6 below within 30 days of Canada's publication of the updated standard.

#### *Accessible Formats and Communications Support*

- Upon request from a participant, the Supplier must use communication methods and provide materials in formats accessible to the individual. The Supplier must adapt formats and

communication support. Examples of accessible formats and communication support may include:

- a) Accessible electronic formats;
- b) A message or video Relay Service;
- c) Braille;
- d) Audio Files;
- e) Large Print;
- f) Text transcripts of visual and audio information;
- g) Reading the written information aloud to a person;
- h) Exchanging hand-written notes;
- i) Providing a note taker or communication assistant;
- j) Captioning and audio description;
- k) Assistive listening systems;
- l) Augmentative and alternative communication methods;
- m) The use of letter, word or picture sign language interpretation;
- n) Repeating, clarifying, or restating information;
- o) Or another solution that addresses a barrier to participation.

## **DELIVERABLES**

1. An approved project schedule.
2. Draft survey instruments in English.
3. Translated and finalized invitations and research instruments (including screeners if necessary).
4. Topline results within 48 hours of completion of the fieldwork.
5. A draft overall final report (MS Word format) in English by two weeks after close of field, and final report in English (PDF, HTML5 and MS Word formats) by one week after comments from the Project Authority. Please note that there potentially may be more than one draft in order for the report to be finalized.
6. The final report translated into the other official language and provided in PDF, HTML5 and MS Word formats within one week following approval of the final report by PSPC. All translations and conversions are the responsibility of the Supplier.
7. An Executive Summary in English and French, submitted as separate documents (MS Word, HTML5 and PDF/A formats).
8. A complete copy of the data tables in English and French (MS Word and CSV formats) and raw data in machine-readable format (SAS, Excel and CSV). As per the *Personal Information Protection and Electronic Documents Act*, the supplier must remove all personal identifiers from the files that could identify specific individuals before delivering to PSPC. For more information see the Online Standards for Public Opinion Research – section 11. Delivery of Data Tables

**NOTE:** It is now a requirement for the Government of Canada to submit reports, charts, tables, graphs, and any other electronic document to Library and Archives Canada in PDF/A and HTML5. When preparing the final report, please ensure that all reports, charts, tables, graphs, and any other electronic documents also comply with the current *Government of Canada standards on Web Accessibility (WCAG 2.0)*. 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.

## **REPORT REQUIREMENTS**

The final report must include all mandatory elements listed under *Appendix A.1*, as outlined by *The Requirements for Public Opinion Research Reports*.

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Consistent with the [Government of Canada's Procedures for Publishing](#), the Public Services and Procurement Canada Project Authority will submit these reports to the Publishing and Depository Services Directorate at Public Services and Procurement Canada and the Digital Legal Deposit Unit at Library and Archives Canada.

### **PROJECT SCHEDULE**

The Supplier is expected to provide a schedule with their proposal.

A tentative schedule is as follows:

- Contract – Two weeks after bid closing date
- Kick-off meeting – Within one week of contract signing
- Pre-test – Within two weeks of kick-off meeting
- Fieldwork – Following approval of survey instruments
- Summary data tables for a subset of variable, 5 business days after the close of field work
- Draft analysis report – Within two weeks of submitting summary data tables
- Final report – Should be completed within one month of the close of field work

## **APPENDIX A: REQUIREMENTS FOR PUBLIC OPINION RESEARCH REPORTS AND EXECUTIVE SUMMARIES**

### **A.1. Report Requirements**

The final report must include the below mandatory elements, as outlined in *The Requirements for Public Opinion Research Reports* (<https://www.tpsgc-pwgsc.gc.ca/rop-por/lvfp-or-porfr-eng.html#s12>):

#### **A.1.1. Cover Page**

The final report must include a cover page that includes:

- i. Title of the research project, with a specification indicating that it is the final report
- ii. Name of the research firm that entered into the contract
- iii. Contract number, the contract value and the award and delivery dates
- iv. Registration number provided by the Public Opinion Research Directorate
- v. The PSPC project registration number
- vi. Name and email address of the client department sponsoring the research study
- vii. Departmental signature and the Canada wordmark
- viii. Alternative language statement:
  - English, use: "Ce rapport est aussi disponible en français"
  - French, use: "This report is also available in English"

#### **A.1.2. Copyright Section**

The copyright section must include the report's corresponding:

- i. Government of Canada catalogue number
- ii. International Standard Book Number (ISBN)
- iii. Copyright notice with the year of publication
- iv. Departmental notice on the rights to reproduce the report

#### **A.1.3. Narrative Executive Summary**

A narrative executive summary must be submitted separately and include:

- i. Title of the research project, with a specification indicating it is an executive summary
- ii. A cover page that includes the same elements listed in Appendix A.1.1.
- iii. A statement of the research purpose and objectives
- iv. A summary of key findings
- v. A brief description of the methodology used
- vi. Statement as to the extent to which the findings can be extrapolated to a broader audience
- vii. An outline of how the results were used or how the information is expected to be used
- viii. The contract value of the public opinion research study

#### **A.1.4. Political Neutrality Certification**

The Supplier must provide a political neutrality certification.

#### **A.1.5. Research Findings**

Full research findings must be included.

#### **A.1.6. Appendices**

For quantitative research and fieldwork and data tabulation projects, appendices must contain:

- i. A full set of tabulated data
- ii. Sample size, sampling procedures and dates of research fieldwork
- iii. A discussion of the potential for non-response bias

- iv. Weighting procedures, the confidence interval and the margin of error
- v. The response rate and method of calculation
- vi. The research instruments used
- vii. All other information about the execution of the fieldwork that would be needed to replicate the research initiative
- viii. A detailed description of the methodology
- ix. Detailed description of background, including purpose, objectives and research questions

#### A.1.7. Final Report Submission

The entire report in French and English, including the French and English executive summaries and all relevant appendices, must be provided by the Supplier in Adobe PDF/A, HTML5, and MS Word formats

#### A.1.8. Data Submission

The data tables will be submitted in MS Word and CSV formats in English and in French as now required by LAC. The microdata submitted in electronic format as follows:

- i. Data files will be in SPSS, Excel and CSV formats
- ii. The SPSS syntax used to produce one representative set of data tables
- iii. The verbatim responses to the open-ended questions will either be included directly in the SPSS data file or as a separate Excel file with the respondent's unique ID
- iv. A data codebook in MS Word
- v. The data tables will be submitted in MS Word and CSV formats in English and in French as now required by LAC.

## A.2. Six-Month Deadline

As per the *August 2014 Directive on the Management of Communications* (<https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=30682>), POR final reports must now be deposited at Library and Archives Canada in both English and French, along with separate English and French executive summaries. Therefore, final reports in English and French entitled "**Pension Member Service Feedback Survey 2020/21**" will be submitted to Public Services and Procurement Canada.

Departments are to provide electronic copies of separate English and French POR final reports and executive summaries to Library and Archives Canada within six months of the fieldwork completion.

The Library and Archives Canada web site for institutions to submit their final reports and the Executive Summary in both English and French and to make them available to the general public is: [www.porr-rop.gc.ca](http://www.porr-rop.gc.ca).

## A.3. Submitting Reports and Executive Summaries to Library and Archives Canada

The following documents must be submitted for each public opinion research (POR) project:

- A.3.1. Narrative executive summary (as a separate file)
- A.3.2. Final report (including in the same file a full description of the methodology used and all appendices)

#### Note:

- All documents must be submitted in both English and French (as separate files)
- Executive summaries and final reports must be submitted in both PDF/A and web-accessible HTML5 formats
- Where relevant, research data must be sent in CSV (Comma Separated Value) format

- For the names of HTML files and any files referred to in the HTML, do not use spaces and letters with accents (à, é, etc.), special characters (#, &, etc.), punctuation marks (parentheses, apostrophes, periods, etc.), or foreign scripts (Chinese characters, Devanagari, etc.); please use the POR report number in the file name (e.g. 123-45\_report.html)

Do not submit:

- POR projects that are not yet finalized (please do not send draft copies)
- Partial POR projects (do not submit a POR project until all its components are available)
- Multimedia files of any type used in a POR project (e.g., digital video files; where relevant, please send storyboards instead)
- Proprietary digital file formats (this is in accordance with Open Government principles)
- Copies of POR in print. Federal organizations must submit electronic copies of their POR narrative executive summaries and final reports

#### **A.4. Executive Summaries submitted to Library and Archives Canada**

Executive summaries must be submitted separately in both official languages. A separate electronic file is required for each of the English and French versions, in both PDF/A and HTML5 formats. Graphics should not be used to convey information in the executive summaries because of accessibility issues.

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**SUGGESTED TEMPLATE – TITLE PAGE FOR FULL ENGLISH REPORT**

The departmental signature

POR number

**Title of Report**

**PSPC POR – xx- xx**

**Delivery Date**

**Prepared for:**

**Public Services and Procurement Canada  
Pension Excellence Sector**

Ce rapport est aussi disponible en français

Contract number

Contract date

Contract value

**Prepared by:**

Research Firm

the Canada wordmark

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## **GABARIT SUGGÉRÉ – PAGE TITRE DU RAPPORT COMPLET EN FRANÇAIS**

signature ministérielle

numéro ROP

**Titre du rapport**  
**PSPC POR – xx-xx**

**Date du rapport (mois/année)**

**Préparé pour :**  
**SPAC**

This report is also available in English.

numéro du contrat

date du contrat

valeur du contrat

**Préparé par :**  
Firme de recherche

Le mot-symbole « Canada »

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cy021  
CCC No./N° CCC - FMS No./N° VME

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**SUGGESTED TEMPLATE – TITLE PAGE FOR ENGLISH SUMMARY DOCUMENT (OPTIONAL):**

The departmental signature

POR number

**Executive Summary**

**Title of Report**

**PSPC-POR-xx-xx**

**Delivery Date (month/year)**

**Prepared for:**

**Public Services and Procurement Canada**

Contract number

Contract date

Contract value

**Ce sommaire est aussi disponible en français.**

**Prepared by:**

Research Firm

the Canada wordmark

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**GABARIT SUGGÉRÉ– PAGE TITRE DES SOMMAIRES DE RAPPORT (FACULTATIVE)**

signature ministérielle

numéro ROP

Sommaire  
**Title of Report**  
**PSPC POR-xx-xx**

**Date du rapport (mois/année)**

**Préparé pour :**

**SPC**

This summary is also available in English.

numéro du contrat

date du contrat

valeur du contrat

**Préparé par :**

Firme de recherche

Le mot-symbole « Canada »

## **APPENDIX B: WCAG REQUIREMENTS FOR HTML REPORTS**

- **Charts/Tables:**
  - Titles and notes (question, Q#, n= etc) should be put as text above or under the chart (outside the image).
  - Only one chart by image (no side by side charts)
  - All tables must have a title (outside the table), including tables in mod guide/exercises, response rate calculation table etc.
  - Each column of a table need a header (no empty cell)
  - No text box. All text should be written as usual text in the report.
  - Tables shouldn't be used for presentation/formatting purposes, like putting a simple numbered list in a two-column table to fill white space. Please avoid split/merged cells, as they confuse screen-readers.
  
- **Long descriptions (provided in a separate document in both languages):**
  - All images should have a long description
  - Data tables that were used to generate the charts can be used as the text descriptions
  
- **Colours**
  - Colours can't be used to identify meaning in the text. Distinctive symbols or numbers/words should be used (✖, ✓, ?, 1-2-3) with a legend if appropriate.
  - Don't use colour or texture to convey information in a table.
  
- **Underlining, Bold, Italics**
  - Use underlining for links only.
  - Use bold for emphasis, but use it sparingly: the more you use it, the less effective it is.
  - Try to don't use italics, because it's difficult for people with dyslexia and other reading disorders to read. This rule:
  
- **Languages**
  - No French text in the English report and vice-versa unless it is part of the analysis (for example, instruments in the appendix should be in the report language only)

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**ANNEX "B"**  
**BASIS OF PAYMENT**

*Please see Excel Spreadsheet labelled "Annex B – Basis of Payment" and available for download on  
[buyandsell.gc.ca](http://buyandsell.gc.ca)*

**ANNEX "C"**  
**TECHNICAL EVALUATION CRITERIA**

<b>EVALUATION SUMMARY</b>		
<b>1. MANDATORY EVALUATION CRITERIA</b>	<input type="checkbox"/> <b>MET</b>	<input type="checkbox"/> <b>NOT MET</b>
<b>2. POINT RATED EVALUATION CRITERIA</b>	Minimum Score	Maximum Score
<b>R.1: Understanding the requirements and tasks listed in Statement of Work and demonstrating ability to carry them out</b>	<b>120</b>	<b>200</b>
<b>R.2: Methodology</b>	<b>300</b>	<b>500</b>
a) Methodology and Research Procedures	60	100
b) Data Collection Procedures	60	100
c) Data Collection Capability and Quality Control	60	100
d) Addressing Methodological Requirements	60	100
e) Addressing Issues and Challenges	60	100
<b>R.3: Resource Qualifications – Survey Manager</b>	<b>20</b>	<b>120</b>
a) Academic qualifications	5	20
b) Work experience	15	30
c) Sample projects	0	70
<b>R.4: Corporate Experience – Project Experience</b>	<b>47</b>	<b>276</b>
a) Experience and expertise of the Bidder	37	111
b) Number of respondents	10	90
c) Target population	0	75
<b>OVERALL TOTAL</b>	<b>487</b>	<b>1,096</b>

## 1. MANDATORY EVALUATION CRITERIA

The Bidder 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.

### M.1: SENIOR RESEARCHER(S)

The Bidder must identify one (1) Senior Researcher responsible for the conduct of all aspects of the project. The Senior Researcher will be evaluated in the Point Rated Technical Evaluation R.3 – Resource Qualifications - Senior Researcher.

The Senior Researcher must have, at a minimum, a relevant\* college diploma or university degree and must possess, at minimum, five (5) years (please state in months/years) of relevant experience conducting quantitative public opinion research projects. Please include a brief description of each role.

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

### M.2: CORPORATE EXPERIENCE — PROJECT EXPERIENCE

To demonstrate the Bidder's experience, the Bidder must submit at least one (1), but no more than three (3), quantitative telephone and online public opinion research (POR) sample projects. Each sample project will be evaluated **separately** in the Point Rated Technical Evaluation R.4 – Corporate Experience – Project Experience. Please use Appendix 1 to Annex "C" - Project Submission Form to submit project samples. Only the first three (3) sample projects submitted in response to M.2 will be evaluated.

**Attestation:** Bidders should include a brief attestation of performance signed by the client for each sample 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 in Annex "I".

- a) **EACH** sample project submitted, must meet the following criteria:
  - I. Final deliverables for all projects submitted must have been completed in the last five (5) years preceding the bid closing date.
  - II. Data collection for all projects must have taken place in both official languages.
- b) **Between all sample projects submitted, ALL** following criteria must be met:
  - III. At least one of the submitted sample projects has a total of at least 1,000 respondents.
  - IV. At least one of the submitted sample projects must be a client satisfaction survey.
  - V. At least one of the submitted sample projects must be a mixed mode of telephone and online surveys.
  - VI. Each of the following tasks must have been carried out in at least one of the submitted sample projects (note that different tasks can be assigned to any of the submitted sample projects, provided that each task was carried out by the Bidder in at least one of the sample projects):
    - i. Programming English and French versions of a Web questionnaire with ability to toggle between English and French versions.
    - ii. Conducting a telephone survey using live agents in the official language of the respondent; can be as part of a mix-mode survey.

- iii. Providing respondent support in both official languages (e.g, telephone help-line, mailbox)
- iv. Ensuring online survey is optimized for and easy to use with mobile devices
- v. Sending email invitations containing a link to the survey with an embedded unique access code
- vi. Collecting and verifying bounce-back email invitations
- vii. Conducting dataset quality control
- viii. The response rates and the method of calculation
- ix. Producing a final report

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

## 2. POINT RATED TECHNICAL EVALUATION CRITERIA

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

### R.1: UNDERSTANDING THE REQUIREMENTS AND TASKS LISTED IN THE STATEMENT OF WORK AND DEMONSTRATING ABILITY TO CARRY THEM OUT

#### Submission Requirements

The Bidder should provide a response to R.1 that reflects its understanding of the following Statement of Work requirements and demonstrates its approach to carrying them out. The Bidder should also provide a description of potential challenges/problems that could arise and how each will be addressed, such as, but not limited to:

- a) Programming English and French versions of a Web questionnaire with option to toggle between English and French
- b) Conducting telephone surveys, using live agents, in the official language of the respondent
- c) Sending email invitations containing a link to the survey with an embedded unique access code
- d) Collecting and verifying bounce-back email invitations
- e) Advise on sample design, including size, weighting and definition of survey respondents and other aspects of the research methodology
- f) Ensure that all aspects of data processing are conducted and only accessible in Canada, including fieldwork
- g) Ensure personal information is protected, used, and disclosed in accordance with the Privacy Act
- h) A complete copy of the data tables in English and French (MS Word and CSV formats) and raw data in machine-readable format (SAS, Excel and CSV)
- i) Final report and Executive Summary that includes all mandatory elements listed in Appendix A.
- j) A detailed description of the methodology

Simply repeating the requirements and tasks listed in the Statement of Work, in whole or in part, does not indicate an understanding of the requirements and tasks, or the ability to carry them out.

#### Evaluation

The response will be evaluated using Scale 1 (Understanding) on the degree to which it demonstrates that the Bidder understands the requirements and tasks listed in the Statement of Work, the likelihood that the Bidder will meet the requirement, as well as the perceived Residual Risk to Canada.

**Minimum Score:** 120 points

**Maximum Score:** 200 points

**Scoring Rubric:** Scale 1 (Understanding)

SCALE 1	UNDERSTANDING
Points	Rating Level
<b>Unacceptable (0%)</b>	No information provided or the Bidder's Response does not address the RFP requirement.

<b>Minimally addressed (20%)</b>	The Bidder's Response demonstrates little understanding of the requirements. The Response has significant weaknesses, and the Bidder appears unlikely to meet the requirements. The Response poses a perceived large Residual Risk to Canada.
<b>Partially addressed (40%)</b>	The Bidder's Response demonstrates some understanding of the requirements. The Response has weaknesses, and the Bidder appears unlikely to meet the requirements or be effective. The Response poses a perceived medium Residual Risk to Canada.
<b>Satisfactorily addressed (60%)</b>	The Bidder's Response demonstrates an adequate understanding of the requirements. The Response has minor weaknesses but the Bidder appears likely to meet the requirement. The Response poses a perceived medium-low Residual Risk to Canada.
<b>Very well addressed (80%)</b>	The Bidder's Response demonstrates a very good understanding of the requirements. The Response has no significant weaknesses, and the Bidder appears likely to meet requirements, is likely to be effective and yield very good results. The Response poses a perceived low Residual Risk to Canada.
<b>Excellent addressed (100%)</b>	The Bidder's Response demonstrates an excellent understanding of the requirements. The Response has no apparent weaknesses, and the Bidder appears likely to meet the requirements, is likely to be effective, and yield excellent results. The Response poses very little or no apparent Residual Risk to Canada
<i>Interpretation Notes</i>	<b>Residual Risk</b> means the risk that remains after the Bidder's risk mitigations are considered.

## R.2: METHODOLOGY

**Minimum Score (R2a, R2b, R2c, R2d, and R2e):** 300 points

**Maximum Score (R2a, R2b, R2c, R2d, and R2e):** 500 points

The response to R.2 should include a complete description of the methodology and research procedures, including data collection techniques using a list-based, mixed mode approach; demonstrating how the Bidder will achieve the completions required among active government of Canada employees and retired members, the expected response rate and how the Bidder will achieve and maximize this, quality control procedures, as well as the possible issues and challenges that may be encountered during the project and how they will be minimized addressed.

### a) Methodology and Research Procedures

#### Submission Requirements

The degree to which the response describes a suitable methodology, based on a list-based, mix-mode survey that targets active government of Canada employees and retired members, the expected response rates and how they will be achieved.

#### Evaluation

The response will be evaluated using Scale 2 (Methodology).

**Minimum Score:** 60 points

**Maximum Score:** 100 points

**Scoring Rubric: Scale 2 (Methodology)**

**b) Data Collection Procedures**

**Submission Requirements**

The degree to which the response describes suitable data collection procedures as it relates to the Methodology and Research Requirements sections in the SOW.

**Evaluation**

The response will be evaluated using Scale 2 (Methodology).

**Minimum Score:** 60 points

**Maximum Score:** 100 points

**Scoring Rubric:** Scale 2 (Methodology)

**c) Data Collection Capability and Quality Control**

**Submission Requirements**

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.

The degree to which the response indicates the anticipated participation rate.

**Evaluation**

The response will be evaluated using Scale 2 (Methodology).

**Minimum Score:** 60 points

**Maximum Score:** 100 points

**Scoring Rubric:** Scale 2 (Methodology)

**d) Addressing Methodological Requirements**

**Submission Requirements**

The degree to which the response describes a suitable rationale for the approach and a description for each of the following:

- Research methodology
- Sample size and sampling procedures
- The response rate and method of calculation
- The research instruments used

**Evaluation**

The response will be evaluated using Scale 2 (Methodology).

**Minimum Score:** 60 points

**Maximum Score:** 100 points

**Scoring Rubric:** Scale 2 (Methodology)

**e) Addressing Issues and Challenges**

**Submission Requirements**

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:

- As the project requires collecting data from various departments, the Bidder should explain how they plan to test individual departmental firewalls and security features to allow for acceptance of email invitations

- The survey instruments must be available in English and French; the online survey must allow the respondent to toggle between the two official languages at any point in the survey, while the telephone survey must be conducted in the official language of the respondent.
- Ensure the online survey is optimized for mobile devices, as per the Standard on Optimizing Websites and Applications for Mobile Devices
- Ensuring usability of Web questionnaire with adaptive technologies (e.g., screen readers)
- Ensure the number of phone or email reminders and procedures for doing so are consistent with those outlined in the [Standards for Public Opinion Research](#).
- Provide respondents with a means to verify the legitimacy of the survey as a research initiative sponsored by the Government of Canada

#### Evaluation

The response will be evaluated using Scale 2 (Methodology).

**Minimum Score:** 60 points

**Maximum Score:** 100 points

**Scoring Rubric:** Scale 2 (Methodology)

SCALE 2	METHODOLOGY
Points	Rating Level
<b>No Capability (0%)</b>	No information provided or the Bidder's Response does not address the RFP requirement.
<b>Partial Capability (40%)</b>	The Response demonstrates that the Bidder meets some of the criteria with moderate to significant Weaknesses that are not offset by Strengths. The Bidder demonstrates partial capability and an approach and/or experience of some relevance to the Project.
<b>Adequate Capability (60%)</b>	The Response demonstrates that the Bidder meets most of the criteria with few Weaknesses that are not offset by Strengths. The Bidder demonstrates adequate capability and an approach and/or experience that is relevant to the Project.
<b>Good Capability (80%)</b>	The Response demonstrates that the Bidder meets all of the criteria with only minor Weaknesses that are not offset by Strengths. The Bidder demonstrates good capability and an approach and/or experience that is very relevant to the Project.
<b>Excellent Capability (100%)</b>	The Response demonstrates that the Bidder meets all of the criteria with no Weaknesses. The Bidder demonstrates an excellent level of capability and an approach and/or experience that is highly relevant to the Project.

<i>Interpretation Notes</i>	<p><b>Strength</b> means an aspect that has merit or exceeds specified capability requirements in a way that will be advantageous to the Project.</p> <p><b>Weakness</b> means a failure to fully demonstrate capability to meet a requirement.</p>
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**R.3: RESOURCE QUALIFICATIONS – SENIOR RESEARCHER(S)**

**Minimum Score (R.3.a, R.3.b and R.3.c):** 20 points

**Maximum Score (R.3.a, R.3.b and R.3.c):** 120 points

The CV of all Senior Researchers, including, but not limited to, the researcher identified in M.1 will be evaluated as follows:

*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.*

- a) **Academic qualifications / training / certifications / publications / awards and memberships** relevant to the design, conduct and reporting of quantitative public opinion research. **(Minimum 5 points, Maximum 20 points)**

Name of Senior Researcher	Academic Qualifications (10 points)			Certifications / Training (4 points)	Publications ** (4 points)	Awards and Memberships (2 points)	Total Points (20 points)
	College – relevant* (5 points)	University – not relevant* (5 points)	University – relevant* (10 points)	(Accreditations, certifications, etc. / Courses / Workshops / Seminars / Conferences)	(Academic papers, professional association articles, reports)	(e.g., Marketing Research Intelligence Association, etc.)	
	/5	/5	/10				(2 points for each item identified up to the category total)
							/20
Total Average Points							/20

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

\*\*Publications are defined as those written in your own name or under the name of a company

- b) **Work experience** –The Bidder should provide the total number of years of experience relevant to conducting and reporting on quantitative public opinion research. **(Minimum 15 points, Maximum 30 points)**

The points will be for the Senior Researcher working on the project.

Name of Senior Researcher	Overall number of years of relevant experience				Total Points (30 points)
	Equal to 5 years but less than or equal to 8 years (15 points - minimum requirement)	Greater than 8 years but less than or equal to 11 years (20 points)	Greater than 11 years but less than or equal to 15 years (25 points)	Greater than 15 years (30 points)	
					/30
Total Average Points					/30

- c) **Sample project** – The Bidder should provide at least one (1), but no more than three (3), quantitative public opinion research (POR) sample projects completed by the Senior Researcher(s). Any sample projects submitted must have been completed within the last five years; projects completed beyond five years will not be evaluated further. Sample project(s) can be the same as the project(s) submitted as part of M2, but do not have to be. **(Minimum 0 points, Maximum 70 points)**

Bidders should use Appendix 1 to Annex “C” – Project Submission Form for each project submitted.

**Attestation:** Bidders should include a brief attestation of performance signed by the client for each sample 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 in Annex “I”.

The Bidder should demonstrate that the project met the requirements or involved tasks listed the following table.

Senior Researcher Name:					Total Average Points
Statement of Work Requirement		Project 1	Project 2	Project 3	
Mix-mode survey (telephone and online)	/5				
Client satisfaction survey	/5				
English and French versions of online survey	/5				
1000 or more respondents	/5				
Telephone survey in English and French using live agents	/5				
Provided respondent support in both official languages	/5				
Optimized for mobile devices	/5				
Telephone surveys responded to accessibility needs	/5				
Online survey complied with WCAG 2.0, Level AA or higher	/5				
Supplied unique access codes for online surveys	/5				
Collected and verified bounce-back e-mail invitations	/5				
Conducted dataset quality control	/5				

Calculated response rates	/5				
Produced final report	/5				
<b>Total Points</b>		/70	/70	/70	/70

#### R.4: CORPORATE EXPERIENCE - PROJECT EXPERIENCE

**Minimum Score (R.4.a, R.4.b, and R.4.c): 47 points**

**Maximum Score (R.4.a, R.4.b, and R.4.c): 276 points**

The projects submitted under Mandatory requirement M.2 will each be evaluated separately under this point rated evaluation criterion.

The Bidder should demonstrate how the project was relevant to each Statement of Work requirement listed below.

Projects will be evaluated based on the following criteria:

- a. The experience and expertise of the Bidder, as demonstrated in the sample projects, is relevant to the statement of work requirements (**Minimum 37 points - Maximum 111 points**)

Statement of Work Requirement	Point value per project (no partial points)	Project 1	Project 2	Project 3	Total points
Project included 1000 or more respondents	5 points				/15
Project was a mix-mode survey	5 points				/15
Programming English and French versions of a Web questionnaire with ability to toggle between versions	5 points				/15
Telephone survey conducted by live agents in the official language of the respondent	5 points				/15
Providing respondent support in both official languages (e.g, telephone help-line, mailbox)	2 points				/6
Online survey is optimized for mobile devices	2 points				/6
Sending email invitations containing a link to the survey with an embedded unique access code	2 points				/6
Collecting and verifying bounce-back email invitations	2 points				/6
Conducting dataset quality control	2 points				/6
The response rates and the method of calculation	2 points				/6
Producing a final report	5 points				/15
<b>Total Points</b>					<b>/111</b>

b. Number of respondents (**Minimum 10 points - Maximum 90 points**)

Number of respondents	Point value per project	Project 1	Project 2	Project 3	Total
3,000-3,999	30 points per project				
2,000-2,999	20 points per project				
1,000-1,999	10 points per project				
Fewer than 999	0 points per project				
Final Score (total points)					/90

c. Target population (**Minimum 0 points - Maximum 75 points**)

Target population	Point value per project	Project 1	Project 2	Project 3	Total
Canadian federal public servants	25 points per project				
Canadian provincial/territorial or municipal public servants	15 points per project				
Other	0 points per project				
Final Score (total points)					/75

Solicitation No. - N° de l'invitation  
EP082-212778/A  
Client Ref. No. - N° de réf. du client  
EP082-21-2778

Amd. No. - N° de la modif.  
File No. - N° du dossier  
cy021.EP082-212778

Buyer ID - Id de l'acheteur  
cy021  
CCC No./N° CCC - FMS No./N° VME

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**APPENDIX 1 to ANNEX "C"  
PROJECT SUBMISSION FORM**

*Please see Word Document labelled "Appendix 1 to Annex C"  
and available for download on [buyandsell.gc.ca](http://buyandsell.gc.ca)*

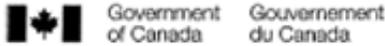
## ANNEX "D" SECURITY REQUIREMENTS CHECK LIST



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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 Public Works and Government Services Canada	2. Branch or Directorate / Direction générale ou Direction RGPB	
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 Pension Member Service Feedback Survey 2020-2022		
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 / Non <input type="checkbox"/> Yes / 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 / Non <input type="checkbox"/> Yes / 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 / Non <input checked="" type="checkbox"/> Yes / 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 / Non <input type="checkbox"/> Yes / 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 / Non <input type="checkbox"/> Yes / 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"/>	No release restrictions / Aucune restriction relative à la diffusion <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 A / PROTÉGÉ A <input type="checkbox"/>
PROTECTED B / PROTÉGÉ B <input type="checkbox"/>	NATO RESTRICTED / NATO DIFFUSION RESTREINTE <input type="checkbox"/>	PROTECTED B / PROTÉGÉ B <input type="checkbox"/>
PROTECTED C / PROTÉGÉ C <input type="checkbox"/>	NATO CONFIDENTIAL / NATO CONFIDENTIEL <input type="checkbox"/>	PROTECTED C / PROTÉGÉ C <input type="checkbox"/>
CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>	NATO SECRET / NATO SECRET <input type="checkbox"/>	CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>
SECRET / SECRET <input type="checkbox"/>	COSMIC TOP SECRET / COSMIC TRÈS SECRET <input type="checkbox"/>	SECRET / SECRET <input type="checkbox"/>
TOP SECRET / TRÈS SECRET <input type="checkbox"/>		TOP SECRET / TRÈS SECRET <input type="checkbox"/>
TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>		TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>



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10070162
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<b>PART A (continued) / PARTIE A (suite)</b>	
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? If Yes, indicate the level of sensitivity: Dans l'affirmative, indiquer le niveau de sensibilité :	<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
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? Short Title(s) of material / Titre(s) abrégé(s) du matériel : Document Number / Numéro du document :	<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
<b>PART B - PERSONNEL (SUPPLIER) / PARTIE B - PERSONNEL (FOURNISSEUR)</b>	
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"/> TOP SECRET - SIGINT / TRÈS SECRET - SIGINT <input type="checkbox"/> SITE ACCESS / ACCÈS AUX EMBLEMES <input type="checkbox"/> CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/> NATO CONFIDENTIAL / NATO CONFIDENTIEL <input type="checkbox"/> SECRET / SECRET <input type="checkbox"/> NATO SECRET / NATO SECRET <input type="checkbox"/> TOP SECRET / TRÈS SECRET <input type="checkbox"/> COSMIC TOP SECRET / COSMIC TRÈS SECRET	
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? If Yes, will unscreened personnel be escorted? Dans l'affirmative, le personnel en question sera-t-il escorté?	<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui <input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
<b>PART C - SAFEGUARDS (SUPPLIER) / PARTIE C - MESURES DE PROTECTION (FOURNISSEUR)</b>	
<b>INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS</b>	
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?	<input type="checkbox"/> No / Non <input checked="" type="checkbox"/> 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?	<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
<b>PRODUCTION</b>	
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?	<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
<b>INFORMATION TECHNOLOGY (IT) MEDIA / SUPPORT RELATIF À LA TECHNOLOGIE DE L'INFORMATION (TI)</b>	
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?	<input type="checkbox"/> No / Non <input checked="" type="checkbox"/> 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?	<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui



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**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 CLASSIFIÉ			NATO				CONSEC					
	A	B	C	CONFIDENTIAL CONFIDENTIEL	SECRET	TOP SECRET TRÈS SECRET	NATO RESTRICTED NATO DIFFUSION RESTRICTION	NATO CONFIDENTIAL NATO CONFIDENTIEL	NATO SECRET	CONSEC TOP SECRET CONSEC TOP SECRET	PROTECTED PROTÉGÉ			CONFIDENTIAL	SECRET	TOP 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?  
 La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE?  No / Non  Yes / Oui

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.

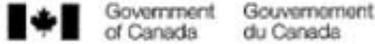
12. b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED?  
 La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE?  No / Non  Yes / Oui

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).

Solicitation No. - N° de l'invitation  
 EP082-212778/A  
 Client Ref. No. - N° de réf. du client  
 EP082-21-2778

Amd. No. - N° de la modif.  
 File No. - N° du dossier  
 cy021.EP082-212778

Buyer ID - Id de l'acheteur  
 cy021  
 CCC No./N° CCC - FMS No./N° VME



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PART D - AUTHORIZATION / PARTIE D - AUTORISATION			
13. Organization Project Authority / Chargé de projet de l'organisme			
Name (print) - Nom (en lettres moulées) Allen, Joel	Title - Titre Sr. Systems Management Officer	Signature 	
Telephone No. - N° de téléphone 819-956-1942	Facsimile No. - N° de télécopieur 819-956-5407	E-mail address - Adresse courriel joel.allen@pwgsc.gc.ca	Date 2020/02/06
14. Organization Security Authority / Responsable de la sécurité de l'organisme			
Name (print) - Nom (en lettres moulées) Fleury, Jean-Michel	Title - Titre SO	Signature Fleury, JeanMichel	Digitally signed by Fleury, JeanMichel Date: 2020.02.06 13:43:10 -05'00'
Telephone No. - N° de téléphone 819-639-9758	Facsimile No. - N° de télécopieur -	E-mail address - Adresse courriel jean-michel.fleury@tpsgc-pwgsc.gc.ca	Date
15. Are there additional instructions (e.g. Security Guide, Security Classification Guide) attached? Des instructions supplémentaires (p. ex. Guide de sécurité, Guide de classification de la sécurité) sont-elles jointes?			<input type="checkbox"/> No / <input type="checkbox"/> Yes Non / Oui
16. Procurement Officer / Agent d'approvisionnement			
Name (print) - Nom (en lettres moulées) Anaral, Paola	Title - Titre Anaral, Paola	Signature 	Digitally signed by: Anaral, Paola DN: CN = Anaral, Paola C = CA O = GC DU = PWGSC-TPSGC Date: 2021.03.17 13:34:07 -04'00'
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date
17. Contracting Security Authority / Autorité contractante en matière de sécurité			
Name Anik Farrell - CSO 613-946-5194 anik.farrell@tpsgc-pwgsc.gc.ca	Title - Titre	Signature Farrell, Anik	Digitally signed by Farrell, Anik Date: 2020.02.07 07:31:29 -05'00'
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité UNCLASSIFIED
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## IT SECURITY GUIDE

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## 1. Introduction

This document outlines the IT Security requirements that the Contractor must meet prior to processing of sensitive data up to and including the level of *Protected B*. In absence of a formal Threat-Risk Assessment (TRA) and due to the IT portion of the Security clearance being contract specific, the intent of this document is to state the minimum safeguards required by the Contractor in order that the processing of sensitive information be approved by the Public Works and Government Services Canada's Canadian Industrial Security Directorate (CISD).

Security is based upon layers of protection; that is, in order for the requirements of the IT Security (ITS) to effectively safeguard the information, they must be preceded and supported by other aspects of security and the associated policies. The physical, personnel and information security safeguards in accordance with the Policy on Government Security and ITS related Standards must exist *prior* to the implementation of ITS safeguards.

## 2. Mandatory Prerequisites

### 2.1. PWGSC Validation for Physical Security

The application of the security safeguards listed in this document are based on the *mandatory requirement* that the physical premises have been inspected to process and store sensitive information by the CISD, PWGSC.

### 2.2. Personnel Security

All personnel who have access to the material being processed must hold valid Government of Canada security clearance at the appropriate level (dictated by the sensitivity of the material) and have the "*need to know*".

All Contractor personnel handling Government of Canada sensitive information must be provided training/briefing session coordinated and delivered by the CSO/ACSO. This training must make reference to the Industrial Security Manual (ISM).

Note: Unless prior approval is granted by the client department and the CISD International section all sensitive government data will only be stored/copied/viewed/processed/or backed-up within Canada.

No foreign national shall have the capability to affect the Confidentiality, Integrity and Availability of the data without the proper security clearance and prior approval from the CISD International section and the client department.

### 2.3. Information Security

All hard copy documents and other media formats must be handled and transported in accordance with the ISM. All hard copy documents and other media will be marked with the appropriate security classification as provided by Treasury Board Secretariat. Any covering letter, transmittal form or circulation slip will be marked to indicate the highest level of classification of the attachments.

Transportation of information associated with this Contract into or out of the physical premises must adhere to RCMP G1-009 "*Transport and Transmittal of Protected and Classified Information*".

### 2.4. Security Policy Compliance Monitoring

On a frequency to be determined by the client department, it retains the right to conduct inspections of the Contractor's facility to ensure compliance with Government of Canada standards and policies with respect to the handling, storage and processing of sensitive information.

### **3. Minimum IT Security Requirements**

#### **3.1. IT Security Policy Compliance and Monitoring**

On a frequency to be determined by client department it retains the right to conduct inspections of the Contractor's facility to ensure compliance with Government of Canada standards and policies with respect to prevention, detection, response and recovery requirements in the *Operational Security Standard: Management of Information Technology Security (MITS)*.

#### **3.2. Adherence to Government of Canada Policies**

All information technology related operations must adhere to the overall requirements outlined in the *Operational Security Standard: Management of Information Technology Security*.

##### **3.2.1. Prevention**

Prevention safeguards protect the confidentiality, integrity, and availability of information and IT assets.

##### **3.2.2. Physical Security within the IT Security Environment**

Contractor shall upon request provide the client department with the list of physical safeguards which are implemented in the facility which is used to process and store sensitive information. All equipment processing sensitive information is to reside in the CISD approved Operations Zone.

The use of wireless technology for the processing of sensitive information may be permitted if the wireless is configured in accords with ITSPSR-21A.

##### **3.2.3. Cryptography, Network Security and Perimeter Defence**

The electronic storage of Protected A and/or Protected "B" information associated with this Contract must be within a CISD approved IT environment.

Electronic transmission of Protected A information should be encrypted when supported by a Threat and Risk Assessment. However, Protected B information must be encrypted.

For Protected B information, the Contractor must segregate its networks into IT security zones and implement perimeter defence and network security safeguards. As well, the Contractor must apply strict control of all access to the Operations Zone where the information associated with this Contract resides.

Network perimeter defence safeguards (e.g. firewalls, routers) must be used to mediate all traffic and to protect servers that are accessible from the internet.

The Contractor must use CSEC approved encryption technology to ensure confidentiality, integrity, authentication and non-repudiation.

The Need-to-Know principle must always be applied for Protected A and Protected B information, and transmission must be restricted only to CISD approved recipients.

#### **3.2.4. Storage, Disposal and Destruction of IT Media**

All material such as CD/DVDs, flash/thumb drives, workstation hard disks, server hard disks, backup tapes and any other devices used to process or store sensitive information must be identified and itemized by model and serial number for hard disks, and labelled with the level of processing. These devices or material must be retained and properly stored, or properly disposed of in the event of failure and replacement of the equipment or termination of the final Contract.

In the event that equipment requires maintenance, support or replacement, no hardware associated with the processing or storage of sensitive information may be given to an outside vendor.

All media, when not in use, must be stored in a storage container which is RCMP-approved for the storage of sensitive information to the level of Protected B. The storage container must be verified by CISD.

Normally external "cloud" storage is not allowed for sensitive government information.

#### **3.2.5. Authorization and Access Control**

The Contractor upon request must provide the client department with a list of all individuals who have access to the sensitive information being processed for the Department, along with Contractor current policies and procedures for adding individuals to the environment and the process followed when an individual is removed from the environment.

In following the 'principle of least-privilege', Contractor must provide only the minimum access required for individuals to perform their duties.

#### **3.2.6. Mobile Computing**

It is important to state that the processing of sensitive information associated the Contract and/or subcontracts *may only* be performed in the facility which has been validated by CISD.

Mobile computing must be approved for use beforehand, and if allowed, must provide appropriate levels of protection and security for Protected B information.

#### **3.2.7. Emanations Security**

Not applicable for information at the PROTECTED level.

#### **3.2.8. Telecommunications Cabling**

In the event a Local Area Network or the Corporate network is used (rather than standalone equipment), the Contractor must control and monitor access to telecommunications wiring, spaces and pathways to avoid inadvertent or deliberate connection to any other network.

#### **3.2.9. Software Integrity and Security Configuration**

The Contractor should configure the security in their operating systems and application software being used to process sensitive information in accordance with security best practices documentation (such as the Microsoft Security Compliance Toolkits for servers and clients). Contractor must implement safeguards to "harden" servers and workstations processing sensitive information.

#### **3.2.10. Malicious Code**

Contractor must install, use and regularly update antivirus software and conduct scans on all electronic files from external systems.

### **3.2.11. Detection**

The Contractor must detect security related issues within the operating environment which processes sensitive information. Security logs associated with virus protection software, event viewer and other system tools what monitor systems are to be reviewed regularly.

In order to adequately protect information the Contractor must detect activity such as unauthorized access, unplanned disruption of systems or services or unauthorized changes to system hardware, firmware, or software. Detection mechanisms which are used by the Contractor must be documented.

### **3.2.12. Response and Recovery**

#### **3.2.12.1 Incident Response**

The Policy on Government Security requires departments to 'establish mechanisms to respond effectively to IT incidents and exchange incident-related information with designated lead departments in a timely fashion'. Similarly, the client department requires the Contractor to have a documented incident response process.

#### **3.2.12.2 Incident Reporting**

It is paramount that the client department, the Canadian Industrial Security Directorate, and the Contracting Authority are made aware of any security-related incidents with respect to the facilities and equipment used to process and store sensitive information associated with the Contract and/or subcontracts if applicable.

The Contractor must report any security-related incidents to the representatives identified above as soon as possible of an incident being detected or reported.

#### **3.2.12.3 Recovery**

The ability to recover systems and information is extremely important in any IT environment. The Contractor must demonstrate the ability to address systems recovery by providing documentation relating to systems and server backup policies (e.g. processes used, test restores, retention periods and storage of backup media).

## **4. Summary**

1. The Supplier is required it ensure that the Information System (IS) utilized to process up to PROTECTED "B" data meets the following requirements;
  - a. An IT Threat and Risk Assessment (TRA) using the Harmonized TRA Methodology to identify the safeguards needed on the IS used to process, produce and store sensitive government data;
  - b. All hardware devices must be identified (e.g. PCs, printers, removable storage media and backup tapes) will be labelled appropriately. (Security Markings);
  - c. When using remote access on the Information System (IS) the company shall utilize a VPN solution that is secure and monitored to prevent cyber attacks and unauthorized

- access. The employee using a VPN must be made aware of the risks and understand the potential threats;
- d. Every individual granted access to the IS must utilize a unique user name and password which shall not be shared;
  - e. All sensitive government data will only be stored/copied/viewed/processed/or backed-up within Canada;
  - f. Printing of PROTECTED documents is authorized, however physical control of the document must be maintained at all times.
  - g. All hard drives and store media will need to be disposed of using security procedures to ensure no residual PROTECTED data can be read off these devices, this would also include printers, multi-function printers and photocopiers which utilize an internal hard drive;
  - h. All equipment will be located "as a minimum" in an Operational Zone to ensure the safe processing of PROTECTED data;
  - i. All personnel with user access rights to the IS are to be security cleared to the highest level of processing authorized. In addition personnel with privileged access must comply with requires stated in MITS 16.3;
  - j. Protected "B" data will not be transmitted via the Internet unless it's encrypted;
  - k. When using wireless, it is to conform to the configuration guidelines in ITSPSR-21A;
  - l. Government contractual data is to be segregated from other contractual data and corporate data in a way which allows all government contractual data to be immediately security wiped upon request of the client;
  - m. Personnel with unescorted access to the processing area (Operations Zone) must hold a valid government security clearance to at least the same level of the highest data authorized for processing;
  - n. Normally all processing/storing/backing-up of sensitive government data must be located within Canada. If the supplier intends to process/store sensitive data outside of Canada then prior written approval will be required from the Security Authority of the Client Department;
  - o. The Operating System (OS) must be a supported product and security patches must be updated on a regular basis;
  - p. If the supplier utilizes a "third party" for contractual work; (e.g. off-site storage, technical support etc) then the supplier must create a sub-contract with that party;
  - q. Encryption software must comply with the FIPS140-2 standard;
  - r. The IS must have a supported anti-virus product with up-to-date definition files; and
  - s. The IS shall have an EAL 4 rated Firewall solution on all external access points.

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2. No sensitive IT processing will be conducted until these requirements are verified by an IT Sec inspection conducted by PWGSC/CISD.

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**ANNEX "E"**  
**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);
- Wire Transfer (International Only);
- Large Value Transfer System (LVTS) (Over \$25M)

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**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 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

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**ANNEX "G"**  
**PUBLIC OPINION RESEARCH FINAL REPORT CHECKLIST**

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

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

*Please see Word Document labelled "Annex H – RFP Submission Form"  
and available for download on [buyandsell.gc.ca](http://buyandsell.gc.ca)*

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**ANNEX "I"**  
**ATTESTATION SAMPLE**

Name of contractor: \_\_\_\_\_

Project title: \_\_\_\_\_

I, \_\_\_\_\_, certify that the contractor performed the services to my satisfaction for the above noted project.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date