



RETURN BIDS TO : - RETOURNER LES SOUMISSION À:

Canada Revenue Agency
Agence du revenu du Canada
See herein / Voir dans ce document

Proposal to: Canada Revenue Agency
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 and/or attached hereto, the goods and/or services listed herein and on any attached sheets at the price(s) set out therefor.

Proposition à : l'Agence du revenu du Canada
Nous offrons par la présente de vendre à Sa Majesté la Reine du Chef du Canada, en conformité avec les conditions énoncées dans la présente incluses par référence dans la présente et/ou incluses par référence aux annexes jointes à la présente et ci-jointes, les biens et/ou services énumérés ici sur toute feuille ci-annexée, au(x) prix indiqué(s).

Bidder's Legal Name and Address - (ensure the Bidder's complete legal name is properly set out)
Raison sociale et adresse du Soumissionnaire - (s'assurer que le nom légal au complet du soumissionnaire est correctement indiqué)

Blank lines for bidder information

Bidder is required to identify below the name and title of the individual authorized to sign on behalf of the Bidder - Soumissionnaire doit identifier ci-bas le nom et le titre de la personne autorisée à signer au nom du soumissionnaire

Name /Nom

Title/Titre

Signature

Date (yyyy-mm-dd)/(aaaa-mm-jj)

Telephone No. - No de téléphone

Fax No. - No de télécopieur

E-mail address - Adresse de courriel

AMENDMENT TO REQUEST FOR PROPOSAL / MODIFICATION DE DEMANDE DE PROPOSITION

Form containing fields: Title - Sujet (EMPLOYEE ASSISTANCE PROGRAM (EAP) NATIONAL SERVICES), Solicitation No. (1000355036A), Date (2021-03-31), Amendment No. (002), Solicitation closes (2021-04-08 at 14:00:00 PM), Time zone (EDT/HAE Eastern Daylight Time), Contracting Authority (Stephanie Riley), Telephone No. (343) 553-0646, Fax No. (), Destination (See herein / Voir dans ce document), and a security requirement notice.



SOLICITATION AMENDMENT # 002

This solicitation amendment is raised to:

1. Address the following questions submitted during the solicitation period as per RFP; and
2. Amend the RFP.

1. QUESTIONS AND ANSWERS

Question 002

Part 3 Proposal Preparation Instructions, 3.1 Bid – Number of Copies

“Canada requests that bidders provide their bid in separate sections as follows: Section I, II, III, and IV: Bidders must submit their bid on one USB drive. The bid must be organized with each section clearly marked (do not password protect).”

- a. Our understanding is that CRA requests that bidders provide all 4 Sections of the Proposal on one single USB drive, and does not want each of the 4 Sections to be provided on a different USB drive. Please confirm that our understanding is correct?
- b. We would like to request permission to include one backup USB drive. Would this be allowed?

Answer 002

Yes, all sections detailed in article 3.1 are to be provided on 1 USB drive, however a Bidder may submit an additional USB drive as back-up, containing all four sections, with each section clearly marked as a separate file.

Bidders are hereby advised that the Bid Receiving Unit of CRA is open Monday to Friday inclusive, between the hours of 0730 and 1530 (EDT), excluding those days that the federal government observes as a holiday.

Question 003

Can CRA please confirm if the five (5) amendments and answers provided to questions from the initial Employee Assistance Program (EAP) National Services RFP SOLICITATION NO.1000355036 are all valid unless the question is specific to updated content or requirements on the updated Solicitation No. 1000355036A?

Answer 003

Canada confirms that the amendments and related questions and answers from the previous RFP solicitation No. 1000355036 are valid, unless the question is specific to updated content or requirements on the current solicitation No. 000355036A.

Question 004

Annex A (Statement of Work), Section 9 – v) Retention and Disposal: The 2 year disposal standard contradicts Council Of Accreditation (COA) standards which is a mandatory requirement (MT2) for this bid. For reference, COA standards require file retention for 7 years.

Can CRA please confirm that this would not apply to the provision of EAP services for this RFP?

Answer 004

Section 9 (v) further states that files can, however, be kept longer, according to the standards of the professional association to which the counsellor belongs, to the *Privacy Act* that states operational requirements of each Department/Agency (Department of Justice Canada, 1985), or the accreditation organization of the Contractor.

Contractors can therefore retain files in accordance with the Council Of Accreditation standards.



Question 005

Section 7.13 provides that all deliverables are subject to inspection and acceptance by the Project Authority. The inclusion of this clause directly conflicts with the confidentiality obligations that are set out in the Statement of Work (which correctly require confidentiality of all EAP information), can CRA please confirm that this would not apply to the provision of EAP services for this RFP?

Answer 005

Information that the Project Authority may reasonably require for carrying out the inspection and acceptance of deliverables, would be shared in accordance with the provisions of the Statement of Work, therefore protecting confidentiality. For example, the information would be shared anonymously, in aggregate form or with the signed consent of the client.

Question 006

Page 86 – 87 of 112 – H. Promotional and Information Materials.

Would CRA be open to accepting digital formats of promotional materials to be printed or produced on site as required for this RFP?

Answer 006

Canada would be open to accepting digital formats of promotional materials, however these must not replace the requirement to provide one promotional item per employee (e.g. fridge magnet).

Question 007

Appendix A-2 to Annex C—Security Requirements Check List (SRCL). A question was submitted on SOLICITATION NO. 1000355036 whether a cloud solution can be presented to CRA if the cloud provider has been cleared by Public Services and Procurement Canada (PSPC) to provide services to government. The answer received was: “Yes, a cloud solution, such as an EAP application that includes chat, email and videoconferencing capabilities, can be presented to CRA, provided it is rated for Protected B information, and the cloud provider has been cleared by Public Services and Procurement Canada (PSPC) to provide services to the Government of Canada. Furthermore, the CRA will allow the successful Bidder to submit the contract number to PSPC at the time of contract award, for subsequent clearance.”

Can CRA please confirm that this applies to this solicitation as well?

Answer 007

Yes, Canada confirms that the answer to question 011 provided in Amendment 03 of Solicitation No. 1000355036 pertaining to a cloud solution, applies to the current solicitation as well.

Question 008

There are a number of standard clauses which the RFP states will be included in a resulting contract (see page 57 of the RFP).

If a proponent is not a foreign entity, can CRA confirm that Clause C2000C (Taxes – Foreign-Based Contractor) and C2605C (Canadian Customs Duties & Sales Tax – Foreign-Based Contractor) would not apply?

Answer 008

Canada confirms for the purpose of the bid solicitation, the clauses C2000C and C2605C are applicable to foreign based entity (ies).



Question 009

Annex A (Statement of Work), Section 9 – i) Privacy Act. The records management obligations in the SOW provide that the personal information collected in the delivery of services is under the control of CRA. Further, the inclusion of standard clause A9113C (Handling of Personal information) provides that personal information collected during the provision of services is the property of Canada and must provide such information to Canada and not retain copies. The inclusion of such language for the delivery of EAP services would require a proponent to breach the obligation of confidentiality owed to users of these services.

Can CRA please confirm that this would not apply to the provision of EAP services for this RFP?

Answer 009

The inclusion of such language is to ensure that the Contractor acknowledges that Canada is bound by the *Privacy Act* with respect to the protection of personal information. The Contractor also acknowledges that it must keep private and confidential any such personal information collected, created or handled under the contract, and that it has no right in or to that information. This ensures that the personal information cannot be used for any other purpose than the work outlined in the contract. Canada confirms that the requirement to deliver to Canada all such personal information in whatever form, upon the completion or termination of the contract would not apply to the provision of EAP services for this RFP. CRA does not expect the Contractor to send the CRA client case files when the contract ends. These should be handled according to Section 9, v. (Retention and Disposal). For all other documents (reports, monitoring, stats and training), they should be kept for 5 years following the end of the contract.

Question 010

Would CRA consider the following changes to the required reporting in appendix A1 (external contractor stats template)?

- a. Not displaying the case details by gender (gender can be an identifying feature and also is not something asked at time of intake but rather a voluntary process dependent on the client)
- b. Case adjustments allowance for past reported months
- c. Moving to quarterly and not monthly reporting frequency

Answer 010

- a. Yes, Canada will consider not displaying the case details by gender.
- b. Yes, Canada will consider case adjustments for past reported months. The parameters for submitting case adjustments will be determined in consultation with the successful Bidder.
- c. No, Canada will not consider moving to quarterly reporting frequency.

Question 011

Can you confirm what is the cut-off time to present questions on this solicitation?

Answer 011

As stated in Section 2.4, enquiries or questions are to be submitted no later than 5 calendar days before the bid closing date. Enquiries or questions received after this time may not be answered.

Question 012

2.2.1 Revisions to Standard Instructions 2003 , Section 01 Integrity Provisions– Bid

If we do not have any domestic criminal offences, and other circumstances, as described in the SID that will or may result in a determination of ineligibility or suspension, applicable to us, our affiliates and our proposed first tier subcontractors; and we are not aware of a determination of ineligibility or suspension issued by PWGSC that applies to us, do we still need to download and complete the Declaration of Integrity Form found here? <https://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-eng.html>?

- a. Are the Certifications in Part 5, completed and submitted in the Certifications Section of our bid sufficient?
- b. If the Declaration of Integrity Form has to be completed and submitted with our bid, should it go to Section I – Technical Bid or to Section III – Certifications?



Answer 012

- a. No the form does not require download and completion.
- b. Yes, certifications in Part 5 and the Declaration of Integrity Form if applicable, can be completed and submitted in the Certifications Section III of the bid.



2. **AMENDMENT TO THE RFP**

1. At Page 78, 9. Section 9 (v), **Retention and Disposal**

DELETE:

Retention of EAP Client Case Files must be done in accordance with CRA's retention and disposal standard which is 2 years after the date of the client's most recent contact with EAP. Files can, however, be kept longer according to the standards of the professional association to which the counsellor belongs, to the *Privacy Act* that states operational requirements of each Department/Agency (Department of Justice Canada, 1985), or the accreditation organization of the Contractor.

EAP Client Case Files are to be destroyed 2 years after the date of the client's most recent contact with EAP. Files can, however, be destroyed earlier if requested by the client or with the client's consent.

EAP Client Case Files must be destroyed by commercially available strip shredders (maximum 10 mm width).

INSERT:

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EAP Client Case Files must be destroyed by commercially available strip shredders (maximum 10 mm width).

ALL OTHER TERMS AND CONDITIONS REMAIN UNCHANGED