Environment Canada / Environnement Canada

0 **RETURN BIDS TO:** **RETOURNER LES SOUMISSIONS À:** **Bid Receiving - Environment Canada / Réception des soumissions – Environnement Canada** **Electronic Copy:** ec.soumissions-bids.ec@canada.ca	**Title – Titre** **Flow of plastic packaging in business to business operations: how do grocery stores in canada manage plastic waste?**
	EC Bid Solicitation No. /SAP No. – Nº de la demande de soumissions EC / Nº SAP 5000061310
	Date of Bid solicitation – Date de la demande de soumissions 2021-10-13
	Bid Solicitation Closes - La demande de soumissions prend fin **at – à 2:00 P.M.** **on – le 2021-10-28** **Time Zone – Fuseau horaire** Eastern Daylight Time
BID SOLICITATION **DEMANDE DE SOUMISSONS** **PROPOSAL TO: ENVIRONMENT CANADA**	**F.O.B – F.A.B** Destination.
	Address Enquiries to - Adresser toutes questions à Annie Emard Annie.emard@canada.ca
	Telephone No. – Nº de téléphone / **Fax No. – Nº de Fax**
We offer to perform or provide to Canada the services detailed in the document including any attachments and annexes, in accordance with the terms and conditions set out or referred to in the document, at the price(s) provided.	**Delivery Required – Livraison exigée** See Statement of Work herein.
	Destination of Services / Destination des services See Statement of Work herein.
	Security / Sécurité There is a security requirement associated with this requirement.
SOUMISSION À: **ENVIRONNEMENT CANADA**	**Vendor/Firm Name and Address - Raison sociale et adresse du fournisseur/de l'entrepreneur**
Nous offrons d'effectuer ou de fournir au Canada, aux conditions énoncées ou incluses par référence dans le document incluant toutes pièces jointes et annexes, les services détaillés dans le document, au(x) prix indiqué(s).	**Telephone No. – N° de téléphone** / **Fax No. – N° de Fax**
	Name and title of person authorized to sign on behalf of Vendor/Firm: (type or print) / **Nom et titre de la personne autorisée à signer au nom du fournisseur/de l'entrepreneur (taper ou écrire en caractères d'imprimerie)** **Signature** **Date**

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PART 1 - GENERAL INFORMATION

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: includes the certifications to be provided;

Part 6 Security 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 Attachment includes the Financial Bid Presentation Sheet.

The Annexes include the Statement of Work, the Basis of Payment, the Security Requirements Checklist.

2. Summary

2.1 Environment and Climate Change Canada has a requirement to obtain information on the construction, renovation, and demolition (CRD) industry in Canada in relation to the successes, barriers, and futures of existing voluntary plastic recycling programs and plastic recyclability of construction, renovation and demolition waste, as detailed in the Statement of Work, Annex A to the bid solicitation. The period of the contract is from contract award to March 31, 2022.

2.2 There is a security requirement associated with this requirement. For additional information, consult Part 6 – Security Requirements, and Part 7 - Resulting Contract Clauses. For more information on personnel and organization security screening or security clauses, bidders bidders should refer to the Canadian Industrial Security Directorate (CISD), Industrial Security Program of Public Works and Government Services Canada website (http://ssi-iss.tpsgc-pwgsc.gc.ca/index-eng.html).

2.3 Bidders must provide a list of names, or other related information as needed, pursuant to section 01 Integrity Provisions of Standard Instructions 2003.

2.4 For services requirements, bidders in receipt of a pension or a lump sum payment must provide the required information as detailed in article 3 of Part 2 of the bid solicitation.

2.5 This requierement is not subject to any free trade agreement.

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 of receipt of the results of the bid solicitation process. The debriefing will be in writing.

PART 2 - BIDDER INSTRUCTIONS

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 PWGSC *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.

The standard instructions 2003 are modified as follows:

Under "Text" at 02:
Delete: "Procurement Business Number"
Insert: "Deleted"

At Section 02 Procurement Business Number
Delete: In its entirety
Insert: "Deleted"

At Section 05 Submission of Bids, Subsection 05 (2d):
Delete: In its entirety
Insert: "send its bid only to Environment Canada (EC) as specified on page 1 of the bid solicitation or to the address specified in the bid solicitation;"

At Section 06 Late Bids:
Delete: "PWGSC"
Insert: "Environment Canada"

At Section 07 Delayed Bids:
Delete: "PWGSC"
Insert: "Environment Canada"

At Section 08 Transmission by Facsimile, Subsection 08 (1):
Delete: In its entirety
Insert: "Bids may be submitted by facsimile if specified in the bid solicitation."

At Section 12 Rejection of Bid, Subsection 12 (1) a. and b.:
Delete: In their entirety
Insert: "Deleted"

At Section 17 Joint Venture, Subsection 17 (1) b.:
Delete: "the Procurement Business Number of each member of the joint venture,"
Insert: "Deleted"

At Section 20 Further Information, Subsection 20 (2):
Delete: In its entirety
Insert: “Deleted”

At Section 05 Submission of Bids, Subsection 05 (4):
Delete: “sixty (60) days”
Insert: “one hundred and twenty (120) days”

1.1 *PWGSC SACC Manual* Clauses

A7035T (2007-05-25), List of Proposed Subcontractors

2. Submission of Bids

Bids must be submitted to Environment Canada (EC) at the address and by the date, time and place indicated on page 1 of the bid solicitation.

3. Former Public Servant – Competitive Bid

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 FPS, 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 FPS in receipt of a pension, as applicable:

a. name of former public servant;

b. date of termination of employment or retirement from the Public Service.

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

Work Force Adjustment Directive

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

If so, the Bidder must provide the following information:

a. name of former public servant;

b. conditions of the lump sum payment incentive;

c. date of termination of employment;

d. amount of lump sum payment;

e. rate of pay on which lump sum payment is based;

f. period of lump sum payment including start date, end date and number of weeks;

g. number and amount (professional fees) of other contracts subject to the restrictions of a work force adjustment program.

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

4. Enquiries - Bid Solicitation

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

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

5. Applicable Laws

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

6. Basis for Canada's Ownership of Intellectual Property

Environment and Climate Change 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;

PART 3 - BID PREPARATION INSTRUCTIONS

1. Bid Preparation Instructions

Canada requests that bidders provide their bid in separately bound sections as follows:

Section I: Technical Bid (1 electronic copy in PDF format)

Section II: Financial Bid (1 electronic copy in PDF format)

Section III: Certifications (1 electronic copy in PDF format)

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

Note for electronic submission of bids:

In order to be considered, bids must be received no later than **2:00 P.M.** (Eastern Daylight Time) on the date and time indicated on the cover page to herein as the "Closing Date." Bids received after the Closing Date will be considered non-responsive and will not be considered for contract award. Bids submitted by email must be submitted ONLY to the following email address:

Email Address: ec.soumissions-bids.ec@canada.ca
Attention: Annie Emard
Solicitation Number: 5000061310

Bidders should ensure that their name, address, Closing Date of the solicitation and Solicitation Number are clearly indicated in the body of their email. Bids and supporting information may be submitted in either English or French.

The total size of the email, including all attachments, must be less than **15 megabytes (MB).** It is each Bidder's responsibility to ensure that the total size of the email does not exceed this limit.

Bids sent by fax will not be accepted.

It is important to note that emails systems can experience systematic delays and, at times, large attachments may cause systems to hold or delay transmission of emails. It is solely the Bidder's responsibility to ensure that the Contracting Authority receives a bid on time, in the mailbox that has been identified for bid receipt purposes. Date stamps for this form of transmission are not acceptable.

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.

Part 4, Evaluation Procedures, contains additional instructions that bidders should consider when preparing their technical bid.

Section II: Financial Bid

Section II: Financial Bid

1.1 Bidders must submit their financial bid in accordance with the Financial Bid Presentation Sheet. The total amount of Applicable Taxes must be shown separately.

1.2 Bidders must submit their financial bid in Canadian funds and in accordance with the Financial Bid Presentation Sheet in Attachement 1 to Part 3 The total amount of Applicable Taxes must be shown separately.

1.3 Bidders must submit their *prices* FOB destination; Canadian customs duties and excise taxes included, as applicable; and Applicable Taxes excluded.

1.4 Price Breakdown

In their financial bid, the bidders are requested to provide a detailed breakdown of the price for the following elements for performance of the Work, as applicable:

(a) Professional fees: For each individual and (or) labour category to be assigned to the Work, the bidders should indicate: i) the firm hourly rate or the firm daily rate, inclusive of overhead and profit; and ii) the estimated number of hours or days, as applicable. The bidders should indicate the number of hours in one working day.

(b) Equipment (if applicable): The bidders should specify each item required to complete the Work and provide the pricing basis of each one, Canadian customs duty and excise taxes included, as applicable.

(c) Materials and Supplies (if applicable): The bidders should identify each category of materials and supplies required to complete the Work and provide the pricing basis. The Bidder should indicate, on a per category basis, whether the items are likely to be consumed during the performance of any resulting contract.

(d) Travel and Living Expenses (if applicable): The bidders should indicate the number of trips and the number of days for each trip, the cost, destination and purpose of each journey, together with the basis of these costs without exceeding the meal, private vehicle and incidental expenses provided in Appendices B, C and D of the *National Joint Council Travel Directive* and with the other provisions of the directive referring to "travellers", rather than those referring to "employees".

(e) Subcontracts (if applicable): The bidders should identify all of the proposed subcontractors and provide in their financial bid for each one a price breakdown.

(f) Other Direct Charges (if applicable): The bidders should identify all of the categories of other direct charges anticipated, such as long distance communications and rentals, providing the pricing basis for each and explaining the relevance to the work described in Part 7 of the bid solicitation.

(g) Applicable Taxes: The bidders should indicate the Applicable Taxes separately.

1.5 Bidders should include the following information in their financial bid:

(a) Their legal name; and
(b) The name of the contact person (including this person's mailing address, phone and facsimile numbers and email address) authorized by the Bidder to enter into communications with Canada with regards to their bid; and any contract that may result from their bid.

Section III: Certifications

Bidders must submit the certifications required under Part 5.

ATTACHMENT 1 TO PART 3
FINANCIAL BID PRESENTATION SHEET

The Bidder must complete the Financial Bid Presentation Sheet and include it in its financial bid. Prices must appear only in the financial submission and nowhere else in the submission.

The price of the bid will be evaluated in Canadian dollars, the Goods and Services Tax or the Harmonized Sales Tax excluded, FOB destination, Canadian customs duties and excise taxes included.

Goods and Services Tax (GST) or Harmonized Sales Tax (HST) amounts must appear separately, if applicable.

Price Breakdown of the Financial Bid Presentation Sheet

The Bidder must provide a detailed breakdown of the price for the following elements for the performance of the Work, as applicable:

Item	Deliverable	Due Date	Firm price per deliverables
1	Project Initiation Kick off meeting	Within 5 working days of the Contract Award Date (**CAD**)	$(a)__________
2	Detailed Methodology and Work Plan	3 weeks after the CAD	
3	Task 1 Report	6 weeks after the CAD	$(b)__________
4	Task 2 Report	18 weeks after the CAD	
5	Draft Report	20 weeks after the CAD	$(c)__________
6	Final Report and Presentation	22 weeks after the CAD	
		Total Cost excluding taxes(a+b+c)	$_________

<u>Definition of a Day/Proration</u>

A day is defined as 7.5 hours exclusive of meal breaks. Payment will be for days actually worked with no provision for annual leave, statutory holidays and sick leave.
Time worked which is more or less than a day will be prorated to reflect actual time worked in accordance with the following formula:

(Hours worked × applicable firm per diem rate) ÷ 7.5 hours.

i. All proposed personnel must be available to work outside normal office hours during the duration of the Contract.

ii. No overtime charges will be authorized under the Contract. All time worked will be compensated according to paragraph above.

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

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.

1.1 Technical evaluation

Unless expressly stated otherwise, the experience described in the bid must be that of the bidder itself (with the experience of any company that has trained the bidder by way of merger, but without the experience gained from purchasing assets or awarding contracts). The experience of the companies related to the tenderer (parent company, subsidiary or sister), subcontractors and suppliers is not taken into consideration.

Listing experience without providing any supporting data to describe where and how such experience was obtained will result in the experience not being included for evaluation purposes.

2. Basis of Selection - Highest Combined Rating Technical Merit (65%) and Price (35%)

2.1 To be declared responsive, a bid must:

(a) comply with all the requirements of the bid solicitation;

(b) meet all mandatory financial criteria;

and

(c) obtain the following required minimum points in the technical evaluation criteria: (an overall minimum score of 56 points or higher out of 80)

(d) Meet the mandatory financial criterion

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

2.3 The evaluation will be based on the highest responsive combined rating of technical merit and price. The ratio will be 65% for the technical merit and 35% for the price.

2.4 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 65%.

2.5 To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 35%

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

2.7 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 sum of the technical and financial scores is used to determine the final score. The contract will be awarded to the firm obtaining the highest overall score. Where several bids are equal, the one with the highest technical rating will be selected.

$$\text{Technical Score} = \frac{\text{Bidder's Points}}{100} \times 65\% = XXX$$

$$\text{Financial Score} = \frac{\text{Lowest Bid}}{\text{Bidder's Cost}} \times 35\% = XXX$$

Total Score = Technical Score + Financial Score

Example of calculation

	Bidder 1	bidder 2	bidder 3
Overall Technical Score	115/135	89/135	92/135
Bid Evaluated Price	$55,000.00	$50,000.00	$45,000.00
Calculation			
Technical Merit Score	115/135 x 65 = 55.37	89/135 x 65 = 42.85	92/135 x 65 = 44.30
Pricing Score	45/55 x 35 = 28.64	45/50 x 35 = 31.50	45/45 x 35 = 35.00
Combined Rating	84.01	74.35	79.30
Overall Rating	1er	3^{e}	2^{e}

ATTACHMENT 1 TO PART 4
MANDATORY AND RATED TECHNICAL CRITERIA

The proposal must describe in sufficient detail the skills and relevant experience of the proposed resources. Each proposal that meets the mandatory requirements will be evaluated and rated according to the criteria described below, and the weighting described in the table 2. All relevant information that would enable Environment and Climate Change Canada to properly rate the proposal against the criteria listed below must be included. Information not included in the proposal will not be considered.

Table 1: Mandatory Criteria

Item	Mandatory Requirement	Compliant (Yes/No)
M1	The Bidders's proposed Project Manager must have: a) at least seven (7) years within the last ten (10) years of experience managing projects, including at least one (1) project of a similar scope and budget and b) at least five (5) years within the last ten (10) years of experience working on projects related to socio-economic and environmental research, as described in the Statement of Work. For each project , the Bidder must provide the following information. • Project objectives, summary, description, and scope • Role and responsibility of the proposed resource • Total duration of the project in months (month/year to month/year) • Total individual's level of effort in days • Name, title and telephone number and/or **email address** of the client's project and/or Technical Authority for whom the work was performed	☐ Yes ☐ No
M2	The Bidder's proposed Project Manager, must have a university degree in one of the following fields: Engineering, Environmental Sciences, or Economics. Proof of degree must be included in the proposal.	☐ Yes ☐ No
M3	The Bidder must assign at least two (2) Technical Leads, to lead the analysis for each task (1, 2, and 3). Each Technical Lead must have at least two (2) years within the last five (5) years of experience working on projects related to socio-economic and environmental research, as described in the Statement of Work.	☐ Yes ☐ No
M4	The Bidder must demonstrate that at least one Project Team member is able to communicate with and review documentation from targeted stakeholders or industry representatives in both official languages (oral and written). The team member(s)'s ability must be clearly explained in the proposal, for example: explained in a team member's resume under education or work experiences.	☐ Yes ☐ No

A negative response to any of the mandatory requirements will result in the disqualification of the bid without any other consideration.

2.2 Point-Rated Technical Evaluation criteria

Each bid will be rated by assigning a score to the rated requirements, which are identified in the bid solicitation by the word "rated" or by reference to a score. Bidders who fail to submit complete bids with all the information requested by this bid solicitation will be rated accordingly.

within the technical evaluation based on the following grid. Bids that obtain less than 77 points will be considered non-responsive.

1. UNDERSTANDING OF PROJECT REQUIREMENTS **Maximum score: 10 points**		
a. Does the Statement of Understanding indicate a clear understanding of the work?	**(Max. 5)**	
The proposal does not contain an explanation of the Contractor's understanding of the work. Does not demonstrate that the Contractor understands the requirements to complete the project.	**0**	
The proposal is defined but missing minor elements. Demonstrates an understanding of the project objectives and needs.	**3**	
The proposal is defined and all elements are covered. Demonstrates a strong understanding of the project objectives and needs.	**5**	
b. Is the Statement of Understanding clear, concise, well written and easy to understand?	**(Max. 5)**	
The proposal is not concise and contains too much information that is not relevant to this request. Does not clearly demonstrate that the Contractor is able to synthesize the information requested.	**0**	
The proposal is concise, but information could have been better synthesized and/or provided only essential information. Demonstrates an acceptable ability to develop a written document that is easy to understand.	**3**	
The proposal is concise and the information is well synthesized. Demonstrates a strong ability to develop a written document that is easy to understand.	**5**	
2. METHODOLOGY, WORK PLAN AND SCHEDULE **Maximum score: 25 points**		
a. Methodology	**(Max. 5)**	
The methodology is not defined. Potential challenges are not identified or lack descriptions of how they will be addressed.	**0**	
The methodology is defined and describes how project objectives will be achieved and how each activity, described in the Statement of Work Annex A, will be fulfilled. Potential challenges are identified and descriptions of how they will be addressed are described.	**3**	
The methodology is well defined, comprehensive and exceeds expectations in meeting		

project objectives and fulfilling each task under the Statement of Work, Annex A. Potential challenges are identified and accompanied by descriptions of how they will be addressed with realistic and innovative solutions.	**5**	
b. Work Plan and Schedule The proposal is missing information related to the team members, milestones, timelines and deliverables for the requirements identified in the Statement of Work. The proposal breaks down the time requirements for each member, but not per task. The proposal is missing information related to the milestones, timelines and deliverables for some of the requirements identified in the Statement of Work. The proposal clearly assigns tasks and timeframes to each team member. The proposal is missing information related to milestones, timelines and deliverables for some of the requirements identified in the Statement of Work. The proposal clearly assigns tasks and required timeframes to each team member. It also clearly identifies the milestones, timelines and deliverables for all of the requirements in the Statement of Work.	**(Max. 10)** **0** **3** **6** **10**	
c. Methodological and analytical challenges and contingencies Assessment of methodological and analytical challenges and/or proposed contingencies are not define. A plan has not been considered to mitigate risks posed by data gaps or other challenges. Assessment of methodological and analytical challenges and proposed contingencies appears are define but is insubstantial . A plan has been considered to mitigate risks posed by data gaps and other challenges. Assessment of methodological and analytical challenges and proposed contingencies is well-defined and comprehensive. A clear plan has been considered to mitigate risks posed by data gaps or other challenges.	**(Max. 5)** **0** **3** **5**	
d. Proposed Quality Assurance / Quality Control approach and how it has been applied successfully in previous projects Proposed approach to ensure quality control throughout the project and/or how it has been applied successfully in previous projects is weak and/or not considered to be reasonable. Proposed approach to ensure quality control throughout the project and how it has been applied successfully in previous projects appears to be reasonable but is not well-defined. Proposed approach to ensure quality control throughout the project and how it has been applied successfully in previous projects is comprehensive, reasonable and well-defined.	**(Max. 5)** **0** **3** **5**	
3. EXPERIENCE AND QUALIFICATIONS OF THE BIDDER AND PROJECT TEAM MEMBERS **Maximum score: 75 points**		

a. The Bidder should demonstrate the project team's experience (with in the last three (3) years) and expertise in undertaking national inquiries and compilation of data, including economic and environmental analysis, primarily related to the industrial, commercial, and institutional sector by providing Project Summaries. For each project, the Bidder must provide the following information. • Project objectives, summary, description, and scope • Role and responsibility of the proposed resource • Total duration of the project in months (month/year to month/year) • Total individual's level of effort in days • Budget • Name, title and telephone number and/or **email address** of the client's project and/or Technical Authority for whom the work was performed **Allocation of Points:** **5 points per project up to a maximum of 5 projects.**	**(Max. 25)**	
The Bidder should demonstrate their experience with analyzing socioeconomic and scientific data from various sources primarily related to the industrial, commercial, and institutional sector, within the last 10 years. For each project, the Bidder must provide the following information. • Project objectives, summary, description, and scope • Role and responsibility of the proposed resource • Total duration of the project in months (month/year to month/year) • Total individual's level of effort in days • Budget • Name, title and telephone number and/or **email address** of the client's project and/or Technical Authority for whom the work was performed **Allocation of Points:** **5 points per project up to a maximum of 5 projects.**	**(Max. 25)**	
c. The Bidder should demonstrate the Project Manager's capacity manage large teams (more than 5 people) to undertake a significant volume of work under tight deadlines. **The Bidders should demonstrate this criterion by providing projects completed within the last 10 years. Each project must have a team of more than 5 people.** For each project, the Bidder must provide the following information. • Project objectives, summary, description, and scope • Role and responsibility of the proposed resource • Total duration of the project in months (month/year to month/year) • Total individual's level of effort in days • Budget • Number of people in working team, roles and responsibility of each team member. • Name, title and telephone number and/or **email address** of the client's project and/or Technical Authority for whom the work was performed	**(Max. 25)**	

Allocation of Points: **5 points per project up to a maximum of 5 projects.**		
Total maximum Score: 110 points **Minimum passing mark: 77 points (70%)**		

3. Financial Bid Evaluation

The maximum funding available for the contract resulting from the bid solicitation is **$70,000.00**/ per year in Canadian dollars, Applicable Taxes not included.

The bid must meet the mandatory financial criteria specified in the table inserted below. Any bid which fail to meet the mandatory financial criteria will be declared non-responsive. Disclosing the maximum funding available does not represent a commitment by Canada to pay this amount.

Item	Evaluation Criteria	Met	Not Met
MF1	The maximum budget allocated for this project must not exceed $70,000.00, applicable taxes extra, including all labour, associated costs and subcontractors. Bids valued in excess of this amount will be considered non-responsive. This disclosure of project funds does not commit Environment and Climate Change to pay such an amount.		

Once the technical evaluation scores have been established for all bids, the financial bid will be opened and evaluated by the contracting authority. The technical scores will not be changed once the financial bids are opened.

The bid price will be evaluated in Canadian dollars, exclusive of Goods and Services Tax or Harmonized Sales Tax, FOB destination, Canadian customs duties and excise taxes.

PART 5 - CERTIFICATIONS

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

The certifications provided by bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default in carrying out any of its obligations under the Contract, 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 may render the bid non-responsive or constitute a default under the Contract.

1. Certifications Required Precedent to Contract Award

1.1 Integrity Provisions - Associated Information

By submitting a bid, the Bidder certifies that the Bidder and its Affiliates are in compliance with the provisions as stated in Section 01 Integrity Provisions - Bid of Standard Instructions 2003. The associated information required within the Integrity Provisions will assist Canada in confirming that the certifications are true.

1.2 Federal Contractors Program for Employment Equity - Bid Certification

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "FCP Limited Eligibility to Bid" list (http://www.labour.gc.ca/eng/standards_equity/eq/emp/fcp/list/inelig.shtml) available from Employment and Social Development Canada (ESDC) - Labour's website.

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

2. Additional Certifications Required Precedent to Contract Award

The certifications listed below should be completed and submitted with the bid but may be submitted afterwards. If any of these required certifications 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 comply with the request of the Contracting Authority and to provide the certifications within the time frame provided will render the bid non-responsive.

2.1 Status and Availability of Resources

The Bidder certifies that, should it be awarded a contract as a result of the bid solicitation, every individual proposed in its bid will be available to perform the Work as required by Canada's representatives and at the time specified in the bid solicitation or agreed to with Canada's representatives. If for reasons beyond its control, the Bidder is unable to provide the services of an individual named in its bid, the Bidder may propose a substitute with similar qualifications and experience. The Bidder must advise the Contracting Authority of the reason for the substitution and provide the name, qualifications and experience of the proposed replacement. For the purposes of this clause, only the following reasons will be considered as beyond the control of the Bidder: death, sickness, maternity and parental leave, retirement, resignation, dismissal for cause or termination of an agreement for default.
If the Bidder has proposed any individual who is not an employee of the Bidder, the Bidder certifies that it has the permission from that individual to propose his/her services in relation to the Work to be performed and to submit his/her résumé to Canada. The Bidder must, upon request from the Contracting Authority, provide a written confirmation, signed by the individual, of the permission given to the Bidder and of his/her availability. Failure to comply with the request may result in the bid being declared non-responsive.

2.2 Education and Experience

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

2.3 Former Public Servant

PWGSC SACC Guide Clause A3026T (26-06-2014) Former Public Servant – Competitive Bid

PART 6 – SECURITY REQUIREMENTS

6.1 Security Requirements

The Contractor/Offeror MUST adhere to the following clauses:

1. The Contractor/Offeror MUST, at all times during the performance of the Contract/Standing Offer, hold a valid **Designated Organization Screening (DOS)** (CSM 3.2.1) issued by the Contract Security Program (CSP), Public Services and Procurement Canada (PSPC).
2. The Contractor/Offeror personnel requiring access to **PROTECTED B** information, assets or sensitive site(s) MUST EACH hold a valid personnel security screening at the level of **RELIABILITY STATUS** (CSM 4.2), granted or approved by the CSP, PSPC.
3. The Contractor/Offeror MUST have been granted a Document Safeguarding Capability (DSC) (CSM 3.2.2.b) at the level of **PROTECTED B** by the CSP, PSPC before they can possess or store protected information or assets at their facilities.
4. The Contractor/Offeror MUST NOT utilize Information Technology systems to electronically process, produce or store **PROTECTED** information until they have either: completed PSPC's CSP's Information Technology Security Inspection (CSM Annex D) and received written approval from PSPC's CSP (CSM 7.1) OR written approval has been issued by ECCC. After approval has been granted, these tasks may be performed at the level of **PROTECTED B**.
5. The Contractor/Offeror MUST ensure that the Information Technology systems used to electronically process, produce or store **PROTECTED** information on behalf of Environment and Climate Change Canada are:
   a. Physically located in Canada
   b. Physically and remotely accessible only by Contractor/Offeror/Subcontractor personnel with the required personnel security screening, training, and for purposes related to the execution of this contract.
6. The Contractor/Offeror MUST report to ECCC any security incidents and changes in circumstances and behaviors that may impact the ability of the Contractor/Offeror to maintain the confidentiality of ECCC provided protected information.
7. Subcontracts which contain security requirements MUST NOT be awarded without the prior written permission of CSP/PSPC or ECCC.
8. The Contractor/Offeror MUST comply with the provisions of the:
   a. {choose}
   b. Contract Security Manual (CSM, Latest Edition), located at www.tpsgc-PSPC.gc.ca/esc-src/msc-csm/index-eng.html.
   c. CSP website: Security requirements for contracting with the Government of Canada, located at www.tpsgc-PSPC.gc.ca/esc-src

PART 7 - RESULTING CONTRACT CLAUSES

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

1. Statement of Work

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

2. Standard Clauses and Conditions

All clauses and conditions identified in the Contract by number, date and title are set out in the PWGSC *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.

2.1 General Conditions

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

General conditions 2010B is modified as follows:

At Section 12 Transportation Costs
Delete: In its entirety
Insert: "Deleted"

At Section 13 Transportation Carriers" Liability
Delete: In its entirety.
Insert: "Deleted"

At Section 18, Confidentiality:
Delete: In its entirety
Insert: "Deleted"

Insert Subsection: "35 Liability"
"The Contractor is liable for any damage caused by the Contractor, its employees, subcontractors, or agents to Canada or any third party. Canada is liable for any damage caused by Canada, its employees or agents to the Contractor or any third party. The Parties agree that no limitation of liability or indemnity provision applies to the Contract unless it is specifically incorporated in full text in the Articles of Agreement. Damage includes any injury to persons (including injury resulting in death) or loss of or damage to property (including real property) caused as a result of or during the performance of the Contract."

3. Term of Contract

3.1 Period of the Contract

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

4. Authorities

4.1 Contracting Authority

The Contracting Authority for the Contract is:

Annie Emard
A/Team Manager – Procurement – Operations East, NCR
Environment and Climate Change Canada
200 Boulevard Sacré-Coeur, Gatineau
Email address: annie.emard@canada.ca

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

4.2 Technical Authority

The Technical Authority for the Contract is:

(It will be inserted at contract award.)

Name: _________
Title: _________
Organization: __________
Address: __________
Telephone: ___-___-_____
Facsimile: ___-___-_____
E-mail address: ____________

The Technical Authority named above 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 Technical Authority, however the Technical 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.

4.3 Contractor's Representative

The Contractor's Representative for the Contract is:

(It will be inserted at contract award.)

Name: _________
Title: _________
Organization: __________
Address: __________
Telephone: ___-___-_____
Facsimile: ___-___-_____
E-mail address: ____________

5. Proactive Disclosure of Contracts with Former Public Servants

By providing information on its status, with respect to being a former public servant in receipt of a *Public Service Superannuation Act* (PSSA) pension, the Contractor has agreed that this information will be reported on departmental websites as part of the published proactive disclosure reports, in accordance with Contracting Policy Notice: 2012-2 of the Treasury Board Secretariat of Canada.

6. Payment

6.1 Basis of Payment

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid a firm price of $ _________ (*the amount will be inserted at contract award*). Customs duties are included and Applicable Taxes are extra.

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

6.2 Limitation of Expenditure

(a) Canada's total liability to the Contractor under the Contract must not exceed $_________ (*the amount will be inserted at contract award*). Customs duties are included and the Applicable Taxes are extra.

(b) No increase in the total liability of Canada or in the price of the Work resulting from any design changes, modifications or interpretations of the Work, will be authorized or paid to the Contractor unless these design changes, modifications or interpretations have been approved, in writing, by the Contracting Authority before their incorporation into the Work. The Contractor must not perform any work or provide any service that would result in Canada's total liability being exceeded before obtaining the written approval of the Contracting Authority. The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:

   (i) when it is 75 percent committed, or

   (ii) four (4) months before the contract expiry date, or

   (iii) as soon as the Contractor considers that the contract funds provided are inadequate for the completion of the Work,

   whichever comes first.

(c) If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority a written estimate for the additional funds required. Provision of such information by the Contractor does not increase Canada's liability.

6.3 Time Verification

C0711C (2008-05-12) Time Verification

7. Invoicing Instructions

7.1 Milestone Payments

8.1.1 Canada will make milestone payments in accordance with the Schedule of Milestones detailed in Annex B of the Contract and the payment provisions of the Contract if:

(a) an accurate and complete claim for payment and any other document required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;

(b) all such documents have been verified by Canada;

8. Certifications

8.1 Compliance

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

9. Applicable Laws

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

10. 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) 2010B General Conditions - Professional Services (Medium Complexity) (2020-05-28) as modified;
(c) Annex A, Statement of Work;
(d) Annex B, Basis of Payment;
(e) Annex C, Security Requirements Check List;
(f) Annex D, Supplier list of names;
(g) Annex E, Former Public Servant – Competitive Bid Form;
(h) the Contractor's bid dated ________,. (*Will be inserted at contract award.)*

11. Insurance

PWGSC SACC Manual clause G1005C (2016-01-28) Insurance

The Contractor is responsible for deciding if insurance coverage is necessary to fulfill its obligation under the Contract and to ensure compliance with any applicable law. Any insurance acquired or maintained by the Contractor is at its own expense and for its own benefit and protection. It does not release the Contractor from or reduce its liability under the Contract.

ANNEX A
STATEMENT OF WORK

FLOW OF PLASTIC PACKAGING IN BUSINESS TO BUSINESS OPERATIONS: HOW DO GROCERY STORES IN CANADA MANAGE PLASTIC WASTE?

PURPOSE

The purpose of this Contract is to obtain information and better understand the flow of plastic packaging in business to business (B2B) operations, particularly in the food retail industry sector in Canada, and more specifically from grocery stores. This information will help fill data gaps and will help in understanding how grocery stores use and manage plastic waste.

SCOPE

The intended scope of this contract is to cover the flow of plastic packaging from Canadian grocery store back-end operations and excludes all packaging that ends up either in the household waste stream or is disposed of by consumers during consumption outside the home. In this document, these plastics are collectively referred to by the term “industrial, commercial and industrial (ICI) plastic packaging.”

BACKGROUND

The Institutional, Commercial and Industrial (ICI) sector encompasses a wide range of economic activities, locations and organization sizes. In its Waste Management Industry Survey, Statistics Canada describes institutional, commercial and industrial waste as “the waste generated by all non-residential sources in a municipality, and is excluded from the residential waste stream”, and offers the following descriptions:

- **Institutional waste** is generated by institutional facilities such as schools, hospitals, government facilities, senior homes, universities, etc.
- **Commercial waste** is generated by commercial operations such as shopping centres, offices, etc.
- **Industrial waste**, which is generated by manufacturing, and primary and secondary industries, and is managed off-site from the manufacturing operation (Statistics Canada 2018).

Sectors that could be classified as institutional, commercial or industrial using NAICS codes are:

ICI source	Example NAICS codes
Institutional	• 61: educational services • 62: health care and social assistance • 91: public administration

Commercial	• 41: wholesale trade • 44-45: retail trade • 51: information and cultural industries • 52: finance and insurance • 54: professional, scientific and technical services • 72: accommodation and food services
Industrial	• 11: agriculture, forestry, fishing and hunting • 21: mining, quarrying, and oil and gas extraction • 22: utilities • 31-33: manufacturing

Size of organizations: Thresholds or criteria based on the size of an organization can help scope ICI sources of plastic waste by, for example, allowing smaller organizations to receive services while letting larger organizations operate their own waste diversion programs. There are many ways to set thresholds for size. For example, Innovation, Science and Economic Development Canada has defined small, medium, large businesses as follows for statistical purposes:

- a small business has 1-99 paid employees;
- a medium-sized business has 100-499 employees; and
- a large business has 500 or more paid employees (Innovation, Science and Economic Development Canada 2019).

Other organizations classify businesses according to their structure and ownership. The Government of Canada's Treasury Board Secretariat defines "small business" using both annual gross revenues (less than $5 million) and number of employees (fewer than 100) (Treasury Board of Canada Secretariat 2018).

OBJECTIVES

The Objectives of this Contract are to:

1. Identify the current size and scope of the Canadian grocery store sector.
2. Quantify and qualify plastic packaging that is flowing into and out of the back-end of grocery stores, in order to obtain a better picture of how the grocery sector uses and manages plastic packaging within its operational control.
3. Identify to what extent grocery stores are able to reduce or eliminate unnecessary plastics from its operations, without compromising supply chain/operational efficiencies.

STAKEHOLDER COMMUNICATIONS

The Contractor must conduct all verbal or written interactions with stakeholders/ industry representatives/ subject matter experts in the preferred official language of the person contacted. Furthermore, all documents used for the interactions (e.g. surveys, letters, etc.) must be translated and made available in both official languages.

The Contractor must keep a record of discussion following any communication with industry. These records must contain the industry contact information, the subject of discussion, the questions posed or raised during the discussions and any feedback received on the subject and must be submitted to ECCC on a regular basis (pre-established schedule).

DATA REQUIREMENTS

All the economic information must be presented in 2021 Canadian dollars. When monetary estimates are not available in Canadian dollars, foreign currency estimates must be converted to Canadian dollars and be accompanied by an explanation of the exchange rates used.

Use of Canadian data must be prioritized over those from foreign sources (e.g., United States and European Union). If only foreign data is available, the Contractor should extrapolate the data for the Canadian market and support the extrapolation with valid assumptions (e.g., based on gross domestic product (GDP), market share and demand in North America).

For the purpose of this contract, the following studies and specifications will be provided as references:

- Dillon Consulting and Oakdene Hollins (2021): Waste Plastics Collection and Treatment Infrastructure in Canada: A Needs Analysis to 2030
- Deloitte (2019): Economic study of the Canadian plastic industry, markets and waste

ECCC commissioned a study from Deloitte that provides the foundation for Statistics Canada work characterizing the flow of plastics through the Canadian economy. ECCC will share foundational meta-data with the Contractor, and expects the Contractor to follow its established parameters and naming conventions as much as possible.

The following tasks are listed below and must be completed as indicated in the deliverables and timelines section.

TASK

Task 1: Snapshot of the grocery store sector in Canada

The Contractor must, in a written report, characterize the current socioeconomic state of the grocery sector in Canada. The written report must provide:

1. A brief description of the grocery sector (including the geographical distribution of companies and/or establishments that are involved directly or indirectly with grocery stores, economic relevance, etc.);
2. An estimation of the number of grocery stores in Canada per province, broken down into small, medium, and large grocery stores;
3. A description of any plastic take-back programs being offered in grocery stores; and
4. Other relevant socioeconomic information the Contractor may find pertinent.

The Contractor is encouraged to use this written report to identify targeted grocery stores to survey under the requirements indicated in Task 2.

Task 2: Survey grocery stores/companies in Canada and analysis of results

The Contractor must develop, administer, and provide the results and analysis of a data-gathering survey that will help Environment and Climate Change Canada better understand the flow of ICI plastic packaging to and from grocery stores in Canada.

The Contractor must:

1. Compile a list of grocery stores in Canada to be surveyed;
2. Develop a draft survey to be reviewed by the Departmental Representative. The survey will be translated by the Department following delivery and approval of the final English survey;
3. Send out the bilingual survey to all entities once it is finalized and approved by the Departmental Representative;
4. Review, analyze and summarize all responses and follow-up with entities where needed;
5. Provide relevant statistics regarding the survey responses, including:
    a. Percentage of respondents for each product category;
    b. Aggregated information on market characterization of respondents (including but not limited to number of employees, size, etc.); and
6. Provide an inventory of the grocery stores from survey results. The results must include a breakdown of as many individual grocery stores surveyed as possible, as well as include an aggregate of data into large, medium, and small grocery stores.

The Contractor must include, but is not limited to, the following criteria when developing the survey:

- Company/store name, address;
- Any industry association affiliations;
- Company contact info such as title, telephone number, and email address;
- Number of employees;
- Market share values for each company;
- An estimation of quantities of plastic (in metric tonnes) moved through grocery stores in Canada. This must be broken down into plastic brought into grocery stores through packaging (pallets, skids, food packaging, etc.), and plastic brought out of grocery stores to waste bins through food waste and related packaging, inside operations, as well as from other sources such as packaging from staff and customer drop-off programs.
- A breakdown, where possible, of plastic resin types (e.g. PET, LDPE, etc.) as well as by product type (e.g. foam packaging, plastic film, employee water bottles, etc.).
- An estimation of the quantities and percentage of total plastic diverted to recycling, broken down, where possible, of plastic resin types and product types.

Key concepts the Contractor must address and incorporate into the survey are:

- How typical movement of plastic packaging into and out of grocery stores in Canada is conducted;
- The influence of individual grocery stores or companies to decide the type of packaging used to transport goods to and from their stores;
- How grocery stores dispose of foam, film, or cardboard waste;
- The programs in place to reduce unnecessary packaging for products, and the successes, challenges, or barriers to the implementation of these programs; and
- The use of recycled content in plastic packaging, if any, and the percentage of recycled content versus virgin resin.

The Contractor must, in a written report, analyze, interpret, and provide commentary from the results of the survey that will include, but is not limited to, the identification of any data gaps, margin of error, assumptions and response bias. The written report must include address and analyze the key concepts the Contractor incorporated into the survey described in this Task.

The Contractor must also depict a complete life cycle of plastic packaging, based on the results of the survey, demonstrating how ICI plastic packaging enters and leaves a typical grocery store.

Task 3: Case studies

The Contractor must conduct a minimum of three (3) case studies analyzing plastic flow through major grocery stores in Canada. The selected grocery stores must cover each of the three (3) largest companies by market share in the Canadian grocery sector (i.e. they cannot be from the same company). The Contractor must document, analyze, interpret, and provide meaningful commentary of these case studies in a written report.

The case studies must include, but are not limited to:

1. A description of the grocery store (e.g. economic data, size, location, and other pertinent information).
2. A detailed description of the grocery store's operations in relation to plastic flow.
3. A detailed description of the amount of plastic waste recycled per year for each type of plastic.
4. A description of the successes, challenges, and barriers for programs or policies reducing plastic packaging consumption and plastic waste from the case study.
5. Suggestions and possible measures to overcome challenges and barriers encountered for their specific type of recycled plastic waste.

Task 4: Develop a report and presentation

The Contractor must submit a written report that must include:

1. The detailed methodology used to carry out Task 1, Task 2, and Task 3;
2. The results from Task 1, Task 2, and Task 3;
3. Any other findings not mentioned in Task 1, Task 2, and Task 3;
4. Conclusions and recommendations; and
5. An annex including the raw data report in Microsoft® Excel format (compatible with Microsoft Office Suite 2010).

The Contractor must also develop an oral presentation of the key findings and outcomes of the study to ECCC Representatives. The presentation must include findings from Task 1, Task 2, and Task 3, as well as any other findings not mentioned on those tasks.

DELIVERABLES AND SCHEDULE

Regular updates or feedback (at least once every two (2) weeks) must be maintained between the Contractor and the Departmental Representative.

The Contractor must provide the following deliverables:

1- Project Initiation

A meeting will be set up within five (5) working days of Contract award date between the Contractor and the Departmental Representative via teleconference or videoconference. During the meeting, the Departmental Representative and the Contractor will discuss and clarify any matter related to the contract, including the Contractor's work schedule. The Contractor will also be provided with any relevant background materials.

2- Methodology and Work Plan
The detailed methodology and work plan must be due within three (3) weeks of Contract signing. The Contractor will develop a holistic methodology and work plan describing in detail how they intend to accomplish Task 1, Task 2, and Task 3 of this Contract as well as any additional details discussed during the initial meeting. The Departmental Representative will review these documents and provide feedback to the Contractor within one (1) week after receiving the documents. The Contractor must provide feedback on comments received within one (1) week thereafter. The Departmental Representative will acknowledge acceptance of this deliverable via email.

3- Task 1 Report
The deliverable described under Task 1 shall be due within six (6) weeks of Contract signing. This deliverable must also consider and address comments received during regular progress of the project and comments provided on the methodology and work plan. The Departmental Representative will review this report and provide feedback to the Contractor within one (1) week after receiving the document. The Contractor must provide feedback on comments received within one (1) week thereafter. The Departmental Representative will acknowledge acceptance of this deliverable via email.

4- Task 2 Report
The deliverable described under Task 2 shall be due within eighteen (18) weeks of Contract signing. This deliverable must also consider and address comments received during regular progress of the project, comments provided on the methodology and work plan, and comments provided on the Task 1 Report. The Departmental Representative will review this report and provide feedback to the Contractor within one (1) week after receiving the document. The Contractor must provide feedback on comments received within one (1) week thereafter. The Departmental Representative will acknowledge acceptance of this deliverable via email.

5- Draft Report
The draft report must be due within twenty (20) weeks of Contract signing and must contain the findings from the study, including CBI, personal information, names of experts consulted, consultant recommendations and opinions related to the study. The draft report must address all the requirements identified in the Statement of Work. The draft report must include the results and findings from all the tasks identified in the Statement of Work. The Contractor must address all the comments provided on previous deliverables in this report. All information that satisfies the Access to Information Act and Privacy Act exemptions (e.g. third party confidentiality-requested information) must be highlighted in yellow, in revision mode. The Departmental Representative will review this report and provide feedback to the Contractor within one (1) week after receiving the document. The Contractor must provide feedback on comments received within one (1) week thereafter. The Departmental Representative will acknowledge acceptance of this deliverable via email.

6- Final Report and Presentation
The Final Report is the final version of the draft report that incorporates all comments submitted by the Departmental Representative at all stages of the contract. The full report must be, at maximum, 75 pages in length with an additional 25 pages for annexes. The final report must also include an executive summary of no longer than 5 pages. The final report must be due within twenty-two (22) weeks of Contract signing.

The final report must be provided in three versions:

- A complete final report including annexes.
- A report with CBI and third party confidentiality requested information highlighted in revision mode and properly sourced.
- A report that excludes all CBI (CBI free) and complies with federal legislation and policies, specifically the Access to Information Act, the Privacy Act (i.e. CBI-free, free of personal information), and the *Canada.ca Content Style Guide* (i.e. long descriptions and alternative text for all graphs and figures).

The Contractor must also provide an oral presentation of the key findings and outcomes of the study to ECCC Representatives. The Contractor must provide this presentation using Microsoft PowerPoint (Microsoft Office Suite 2010). The Contractor must submit the PowerPoint presentation to ECCC no later than 3 working days before the presentation date. The Contractor must present to ECCC Representatives in person, or via MS Teams video conference.

All deliverables must be provided electronically in Microsoft® Word and Microsoft® Excel (compatible with Microsoft Office Suite 2010) unless stated otherwise.

All deliverables must be provided no later than twenty-two (22) weeks after the first day of Contract and include:

- Raw data spreadsheets and databases used for the delivery of this Contract.
- All of the background material and information provided to the Contractor by the Departmental Representative and/or any other material used to develop the report.

Note that no copies (hard or electronic) of confidential documents/information are to be retained by the Contractor. The contractor must destroy all documentation 30 days after payment of the last deliverable and provide ECCC's technical authority with the proof of destruction.

ACCEPTANCE OF THE DELIVERABLES

All deliverables, documents and reports produced by the Contractor will be subject to review by persons designated by the Departmental Representative. All work is to be performed in accordance to recognized industry or academic standards and to the satisfaction of the Departmental Representative.

TRAVEL

No travel is required for this contract.

ANNEX B
BASIS OF PAYMENT

(to be completed at contract award)

<table>
<tr><th>Item</th><th>Deliverable</th><th>Due Date</th><th>Firm price per deliverables</th></tr>
<tr><td>1</td><td>Project Initiation Kick off meeting</td><td>Within 5 working days of the Contract Award Date (CAD)</td><td rowspan="2">a) $___________</td></tr>
<tr><td>2</td><td>Detailed Methodology and Work Plan</td><td>3 weeks after the CAD</td></tr>
<tr><td>3</td><td>Task 1 Report</td><td>6 weeks after the CAD</td><td rowspan="2">b) $___________</td></tr>
<tr><td>4</td><td>Task 2 Report</td><td>18 weeks after the CAD</td></tr>
<tr><td>5</td><td>Draft Report</td><td>20 weeks after the CAD</td><td rowspan="2">c) $___________</td></tr>
<tr><td>6</td><td>Final Report and Presentation</td><td>22 weeks after the CAD</td></tr>
<tr><td colspan="3">Total Cost excluding taxes(a+b+c)</td><td>$___________</td></tr>
<tr><td colspan="3">Taxes (__%)</td><td>$___________</td></tr>
<tr><td colspan="3">Total Cost</td><td>$___________</td></tr>
</table>

ANNEX C
SECURITY REQUIREMENTS CHECK LIST

Government of Canada Gouvernement du Canada

Contract Number / Numéro du contrat
Security Classification / Classification de sécurité

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	2. Branch or Directorate / Direction générale ou Direction
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

Study on plastic packaging flow through grocery stores in Canada from business to business operations.

	No / Non	Yes / Oui
5. a) Will the supplier require access to Controlled Goods? Le fournisseur aura-t-il accès à des marchandises contrôlées?	☑	☐
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?	☑	☐

6. Indicate the type of access required / Indiquer le type d'accès requis

	No / Non	Yes / Oui
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)	☐	☑
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.	☑	☐
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?	☑	☐

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 ☑	**NATO / OTAN** ☐	**Foreign / Étranger** ☐

7. b) Release restrictions / Restrictions relatives à la diffusion

Canada	NATO / OTAN	Foreign / Étranger
No release restrictions / Aucune restriction relative à la diffusion ☑	All NATO countries / Tous les pays de l'OTAN ☐	No release restrictions / Aucune restriction relative à la diffusion ☐
Not releasable / À ne pas diffuser ☐		
Restricted to: / Limité à : ☐	Restricted to: / Limité à : ☐	Restricted to: / Limité à : ☐
Specify country(ies): / Préciser le(s) pays :	Specify country(ies): / Préciser le(s) pays :	Specify country(ies): / Préciser le(s) pays :

7. c) Level of information / Niveau d'information

Canada		NATO / OTAN		Foreign / Étranger	
PROTECTED A / PROTÉGÉ A	☑	NATO UNCLASSIFIED / NATO NON CLASSIFIÉ	☐	PROTECTED A / PROTÉGÉ A	☐
PROTECTED B / PROTÉGÉ B	☑	NATO RESTRICTED / NATO DIFFUSION RESTREINTE	☐	PROTECTED B / PROTÉGÉ B	☐
PROTECTED C / PROTÉGÉ C	☐	NATO CONFIDENTIAL / NATO CONFIDENTIEL	☐	PROTECTED C / PROTÉGÉ C	☐
CONFIDENTIAL / CONFIDENTIEL	☐	NATO SECRET / NATO SECRET	☐	CONFIDENTIAL / CONFIDENTIEL	☐
SECRET / SECRET	☐	COSMIC TOP SECRET / COSMIC TRÈS SECRET	☐	SECRET / SECRET	☐
TOP SECRET / TRÈS SECRET	☐			TOP SECRET / TRÈS SECRET	☐
TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT)	☐			TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT)	☐

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Canada

PART A *(continued)* / PARTIE A *(suite)*

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

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

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

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

☑ RELIABILITY STATUS / COTE DE FIABILITÉ	☐ CONFIDENTIAL / CONFIDENTIEL	☐ SECRET / SECRET	☐ TOP SECRET / TRÈS SECRET
☐ TOP SECRET– SIGINT / TRÈS SECRET – SIGINT	☐ NATO CONFIDENTIAL / NATO CONFIDENTIEL	☐ NATO SECRET / NATO SECRET	☐ COSMIC TOP SECRET / COSMIC TRÈS SECRET
☐ SITE ACCESS / ACCÈS AUX EMPLACEMENTS			

Special comments:
Commentaires spéciaux : ______________________

NOTE: If multiple levels of screening are identified, a Security Classification Guide must be provided.
REMARQUE : Si plusieurs niveaux de contrôle de sécurité sont requis, un guide de classification de la sécurité doit être fourni.

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

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

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

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

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

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

PRODUCTION

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

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

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

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

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Security Classification / Classification de sécurité

Canada

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				COMSEC					
	A	B	C	CONFIDENTIAL / CONFIDENTIEL	SECRET	TOP SECRET / TRÈS SECRET	NATO RESTRICTED / NATO DIFFUSION RESTREINTE	NATO CONFIDENTIAL / NATO CONFIDENTIEL	NATO SECRET	COSMIC TOP SECRET / COSMIC TRÈS SECRET	PROTECTED / PROTÉGÉ A	B	C	CONFIDENTIAL / CONFIDENTIEL	SECRET	TOP SECRET / TRÈS SECRET
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, classifier 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, classifier le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire et indiquer qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).

ANNEX D
SUPPLIER LIST OF NAMES

Environment and Climate Change Canada has endorsed the Integrity Regime developed and implemented by Public Services and Procurement Canada. By submitting a quote, Contractors agree to comply with the provisions of the Integrity Regime and *Ineligibility and Suspension Policy* as well as the *Code of Conduct for Procurement*. / Environnement et Changement climatique Canada a adopté le régime d'intégrité développé et mis en place par Services publics et Approvisionnement Canada. Les fournisseurs acceptent, en soumettant une proposition, de se conformer aux dispositions du régime d'intégrité et la *Politique d'inadmissibilité et de suspension* ainsi que le *Code de conduite pour l'approvisionnement*.

In accordance with the PWGSC (now PSPC) Ineligibility and Suspension Policy, the following information is to be provided when bidding or contracting.[1] / Selon la Politique d'inadmissibilité et de suspension de TPSGC (maintenant SPAC), les renseignements suivants doivent être fournis lors d'une soumission ou de la passation d'un marché.[1]

*** Mandatory Information /Informations obligatoires**

*** Complete Legal Name of Company / Dénomination complète de l'entreprise**	
*** Operating Name / Nom commercial**	
*** Company's address / Adresse de l'entreprise**	*** Type of Ownership / Type d'entreprise**
	☐ Individual / Individuel ☐ Corporation / Corporation ☐ Joint-Venture / Coentreprise
*** Board of Directors[2]/ Membres du conseil d'administration2 (Or provide the list as an attachement / Ou mettre la liste en pièce-jointe)**	
First name / Prénom Last Name / Nom	**Position (if applicable) / Position (si applicable)**

[1] **List of names:** All suppliers, regardless of their status under the Policy, must submit the following information when participating in a procurement process:

- suppliers that are corporate entities, including those bidding as joint ventures, must provide a complete list of the names of all current directors or, for a privately owned corporation, the names of the owners of the corporation;
- suppliers bidding as sole proprietors, including sole proprietors bidding as joint ventures, must provide a complete list of the names of all owners; or
- suppliers that are a partnership do not need to provide a list of names.

[2] Board of Governors /Conseil des gouverneurs; Board of Managers /Conseil de direction; Board of Regents /Conseil de régents; Board of Trustees / Conseil de fiducie; Board of Visitors /Comité de réception

Liste des noms: Tous les fournisseurs, peu importe leur situation au titre de la Politique, doivent présenter les renseignements ci-dessous au moment de prendre part à un processus d’approvisionnement:

- les fournisseurs constitués en personne morale, y compris ceux qui présentent une soumission à titre de coentreprise, doivent fournir la liste complète des noms de tous les administrateurs actuels ou, dans le cas d’une entreprise privée, des propriétaires de la société;
- les fournisseurs soumissionnant à titre d’entreprise à propriétaire unique, y compris ceux soumissionnant en tant que coentreprise, doivent fournir la liste complète des noms de tous les propriétaires;
- les fournisseurs soumissionnant à titre de société en nom collectif n’ont pas à soumettre une liste de noms.

ANNEX E
FORMER PUBLIC SERVANT – COMPETITIVE BID FORM

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 FPS, 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 FPS in receipt of a pension, as applicable:

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

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

Work Force Adjustment Directive

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

If so, the Bidder must provide the following information:

a. name of former public servant;
b. conditions of the lump sum payment incentive;
c. date of termination of employment;
d. amount of lump sum payment;
e. rate of pay on which lump sum payment is based;
f. period of lump sum payment including start date, end date and number of weeks;
g. number and amount (professional fees) of other contracts subject to the restrictions of a work force adjustment program.

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

____
Name and Signature

____
Date