



**REQUEST FOR PROPOSAL /
DEMANDE DE PROPOSITION**

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

Marie-Diane Payeur
D Svcs C 3-4-4
Marie-Diane.Payeur@forces.gc.ca

Proposal To: National Defence Canada

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

Proposition à : Défense nationale Canada

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

Title / Titre: Pension Administration Benchmarking Services	Solicitation No / No de l'invitation: W6369-22-A065/B
Date of Solicitation / Date de l'invitation: 26 January 2022	
Address Enquiries to – Adresser toutes questions à: Marie-Diane Payeur D Svcs C 3-4-4 Marie-Diane.Payeur@forces.gc.ca	
Telephone No. / N° de téléphone:	FAX No / No de fax:
Destination: See herein	

Instructions:

Municipal taxes are not applicable. Unless otherwise specified herein all prices quoted must include all applicable Canadian customs duties, GST/HST, excise taxes and are to be delivered Delivery Duty Paid including all delivery charges to destination(s) as indicated. The amount of the Goods and Services Tax/Harmonized Sales Tax is to be shown as a separate item.

Instructions:

Les taxes municipales ne s'appliquent pas. Sauf indication contraire, les prix indiqués doivent comprendre les droits de douane canadiens, la TPS/TVH et la taxe d'accise. Les biens doivent être livrés «rendu droits acquittés», tous frais de livraison compris, à la ou aux destinations indiquées. Le montant de la taxe sur les produits et services/taxe de vente

Solicitation Closes / L'invitation prend fin:	
At / à :	2:00 PM, Eastern Standard Time (EST)
On / le : 11 February 2022	

Delivery required / Livraison exigée:	Delivery offered / Livraison proposée:
Vendor Name and Address / Raison sociale et adresse du fournisseur:	
Name and title of person authorized to sign on behalf of vendor (type or print) / Nom et titre de la personne autorisée à signer au nom du fournisseur (caractère d'imprimerie):	
Name / Nom: _____	Title / Titre: _____
Signature: _____	Date: _____



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PART 1 - GENERAL INFORMATION

1.1 Introduction

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

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

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

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

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

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

Part 6 Security 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.

B. The Attachments include the Pricing Schedule, the Technical Evaluation, and any other attachments.

C. The Annexes include the Statement of Work, the Basis of Payment, the Security Requirements Checklist, the COVID-19 Vaccination Requirement Certification, and any other annexes.

1.2 Summary

A. This bid solicitation is being issued to satisfy the requirement of the Department of National Defence (the “Client”) for the provision of professional services in the area of pension benchmarking for the Director General Human Resources Strategic Directions (DGHRSD).

B. It is intended to result in the award of one (1) Contract for one (1) year, plus three (3) one-year irrevocable options allowing Canada to extend the term of the contract.

C. There are security requirements associated with this requirement. For additional information, consult Part 6 - Security, Financial and Other Requirements, and Part 7 - Resulting Contract Clauses. For more information on personnel and organization security screening or security clauses, Bidders should refer to the [Contract Security Program](http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html) of Public Works and Government Services Canada (<http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>) website.

D. The requirement is subject to the provisions of the World Trade Organization Agreement on Government Procurement (WTO-AGP), the Canada Korea Free Trade Agreement (CKFTA), the Canada-European Union Comprehensive Economic and Trade Agreement (CETA), Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP); Canada-



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Chile Free Trade Agreement (CCFTA); Canada-Colombia Free Trade Agreement; Canada-Honduras Free Trade Agreement; Canada-Panama Free Trade Agreement; Canada-Peru Free Trade Agreement (CPFTA); Canada-Ukraine Free Trade Agreement (CUFTA); and the Canadian Free Trade Agreement (CFTA).

1.3 Debriefings

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

1.4 COVID-19 Vaccination Requirement

- A. This requirement is subject to the COVID-19 Vaccination Policy for Supplier Personnel. Failure to complete and provide the COVID-19 Vaccination Requirement Certification as part of the bid will render the bid non-responsive.



PART 2 - BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

- A. All instructions, clauses and conditions identified in the bid solicitation by number, date and title are set out in the *Standard Acquisition Clauses and Conditions (SACC) Manual* (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.
- B. 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.
- C. The 2003 (2020-05-28), Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation, with the following modification(s):
- (i) Section 02, Procurement Business Number, is deleted in its entirety;
 - (ii) Section 05, Submission of bids, subsection 2, paragraph d., is deleted in its entirety and replaced with the following:
 - d. send its bid only to the Department of National Defence location specified on page 1 of the bid solicitation or to the address specified in the bid solicitation.
 - (iii) Section 05, Submission of bids, subsection 2, paragraph e., is deleted in its entirety and replaced with the following:
 - e. ensure that the Bidder's name, return address, the bid solicitation number, and bid solicitation closing date and time are clearly visible on the bid; and
 - (iv) Section 05, Submission of bids, subsection 4, is amended as follows:
 - Delete: 60 days
 - Insert: 90 days
 - (v) Section 06, Late bids, is deleted in its entirety;
 - (vi) Section 07, Delayed bids, is deleted in its entirety and replaced with the following:
 - 07 Delayed bids
 - 1. It is the Bidder's responsibility to ensure that the Contracting Authority has received the entire submission. Misrouting or other electronic delivery issues resulting in late submission of bids will not be accepted.
 - (vii) Section 08, Transmission by facsimile, is deleted in its entirety; and
 - (viii) Section 20, Further information, is deleted in its entirety.

2.2 Submission of Bids

- A. Bids must be submitted only to the Department of National Defence (DND) by the date, time, and



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place indicated on page 1 of the bid solicitation.

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

2.2.1 Electronic Submissions

- A. **Individual e-mails that may include certain scripts, formats, embedded macros and/or links, or those that exceed five (5) megabytes may be rejected by Canada's e-mail system and/or firewall(s) without notice to the Bidder or Contracting Authority.** Larger bids may be submitted through more than one e-mail. Canada will confirm receipt of documents. It is the Bidder's responsibility to ensure that their entire submission has been received. Bidders should not assume that all documents have been received unless Canada confirms receipt of each document. In order to minimize the potential for technical issues, bidders are requested to allow sufficient time before the closing date and time to confirm receipt. Bid documents **submitted** after the closing time and date will not be accepted.

2.3 Former Public Servant

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

2.3.1 Definitions

- A. 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.
- B. "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.
- C. "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](#)



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[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.

2.3.2 Former Public Servant in Receipt of a Pension

A. As per the above definitions, is the Bidder a FPS in receipt of a pension?

Yes () No ()

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

(i) Name of former public servant; and

(ii) Date of termination of employment or retirement from the Public Service.

C. By providing this information, Bidders agree that the successful Bidder's status, with respect to being a former public servant in receipt of a pension, will be reported on departmental websites as part of the published proactive disclosure reports in accordance with [Contracting Policy Notice: 2019-01](#) and the [Guidelines on the Proactive Disclosure of Contracts](#).

2.3.3 Work Force Adjustment Directive

A. Is the Bidder a FPS who received a lump sum payment pursuant to the terms of the Work Force Adjustment Directive?

Yes () No ()

B. 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; and

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

2.4 Enquiries - Bid Solicitation

A. All enquiries must be submitted in writing to the Contracting Authority no later than 15 calendar days before the bid closing date. Enquiries received after that time may not be answered.



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

2.5 Applicable Laws

- A. Any resulting contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in **Ontario OR [insert the name of the province or territory]**.
- B. Bidders may, at their discretion, substitute the applicable laws of a Canadian province or territory of their choice without affecting the validity of their bid, by deleting the name of the Canadian province or territory specified and inserting the name of the Canadian province or territory of their choice. If no change is made, it acknowledges that the applicable laws specified are acceptable to the Bidders.

2.6 Improvement of Requirement During Solicitation Period

- A. Should bidders consider that the specifications or Statement of Work contained in the bid solicitation could be improved technically or technologically, bidders are invited to make suggestions, in writing, to the Contracting Authority named in the bid solicitation. Bidders must clearly outline the suggested improvement as well as the reason for the suggestion. Suggestions that do not restrict the level of competition nor favour a particular bidder will be given consideration provided they are submitted to the Contracting Authority at least 15 days before the bid closing date. Canada will have the right to accept or reject any or all suggestions.

2.7 Bid Challenge and Recourse Mechanisms

- (a) Several mechanisms are available to potential suppliers to challenge aspects of the procurement process up to and including contract award.
- (b) Canada encourages suppliers to first bring their concerns to the attention of the Contracting Authority. Canada's [Buy and Sell](#) website, under the heading "[Bid Challenge and Recourse Mechanisms](#)" contains information on potential complaint bodies such as:
- Office of the Procurement Ombudsman (OPO)
 - Canadian International Trade Tribunal (CITT)
- (c) Suppliers should note that there are **strict deadlines** for filing complaints, and the time periods vary depending on the complaint body in question. Suppliers should therefore act quickly when they want to challenge any aspect of the procurement process.



PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

- A. Canada requests that Bidders provide their bid in separately bound sections as follows:
 - Section I: Technical Bid: one (1) soft copy in PDF format by e-mail;
 - Section II: Financial Bid: one (1) soft copy in PDF format by e-mail;
 - Section III: Certifications: one (1) soft copy in PDF format by e-mail; and
 - Section IV: Additional Information: one (1) soft copy in PDF format by e-mail.
- B. Prices must appear in the financial bid only. No prices must be indicated in any other section of the bid.
- C. Canada requests that Bidders follow the format instructions described below in the preparation of their bid:
 - (i) Use 8.5 x 11 inch (216 mm x 279 mm) paper; and
 - (ii) Use a numbering system that corresponds to the bid solicitation.

3.2 Section I: Technical Bid

- A. 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 in a thorough, concise and clear manner for carrying out the work.
- B. 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.

3.3 Section II: Financial Bid

- A. Bidders must submit their financial bid in accordance with the Pricing Schedule detailed in Attachment 1 to Part 3.

3.3.1 Electronic Payment of Invoices - Bid

- A. If you are willing to accept payment of invoices by Electronic Payment Instruments, complete Attachment 2 to Part 3, Electronic Payment Instruments, to identify which ones are accepted.
- B. If Attachment 2 to Part 3, Electronic Payment Instruments is not completed, it will be considered as if Electronic Payment Instruments are not being accepted for payment of invoices.



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

3.3.2 Exchange Rate Fluctuation

A. The requirement does not offer exchange rate fluctuation risk mitigation. Requests for exchange rate fluctuation risk mitigation will not be considered. All bids including such provision will render the bid non-responsive.

3.4 Section III: Certifications

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

3.5 Section IV: Additional Information

A. In Section IV of their bid, bidders should provide:

- (i) A completed, signed, and dated Page 1 of this solicitation;
- (ii) The name of the contact person (provide also this person's title, mailing address, phone number, 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;
- (iii) For Part 2, article 2.3, Former Public Servant, of the bid solicitation: the required answer to each question; and, if the answer is yes, the required information;
- (iv) For Part 2, article 2.5, Applicable Laws, of the bid solicitation: the province or territory if different than specified; and
- (v) For Part 6, article 6.1, Security Requirement, of the bid solicitation, for each individual who will require access to classified or protected information, assets, or sensitive work sites:
 - (a) the name of the individual;
 - (b) the date of birth of the individual; and
 - (c) if available, information confirming the individual meets the security requirement as indicated in Part 7 - Resulting Contract Clauses; and
- (vi) Any other information submitted in the bid not already detailed.



ATTACHMENT 1 TO PART 3 - PRICING SCHEDULE

- A. The Bidder must complete this pricing schedule and include it in its financial bid.
- B. The volumetric data included in this pricing schedule are provided for bid evaluated price determination purposes only. They are not to be considered as a contractual guarantee. Their inclusion in this pricing schedule does not represent a commitment by Canada that Canada's future usage of the services described in the bid solicitation will be consistent with this data.
- C. The firm rates specified below includes all expenses that may need to be incurred to satisfy the terms of any contract that may result from its bid, including the total estimated cost of any travel and living expenses that may need to be incurred for the Work described in Annex A, Statement of Work of the bid solicitation.
- D. Under any resulting contract, Canada will not accept travel and living expenses that may need to be incurred by the contractor for any relocation of resources required to satisfy its contractual obligations.
- E. All prices and costs must be submitted in Canadian Dollars.

1. Pricing Schedule

Currency	Canadian
-----------------	----------

Milestone No.	Description or "Deliverable"	Sub-total	HST/GST	Total Firm Price
	Contract Period: 1 April 2022 to 31 March 2023			
1	Final Benchmarking Report for 2021/2022	\$	\$	\$
	Option Period 1: 1 April 2023 to 31 March 2024			
2	Final Benchmarking Report for 2022/2023	\$	\$	\$
	Option Period 2: 1 April 2024 to 31 March 2025			
3	Final Benchmarking Report for 2023/2024	\$	\$	\$
	Option Period 3: 1 April 2025 to 31 March 2026			
4	Final Benchmarking Report for 2024/2025	\$	\$	\$
Total Value (Milestones 1+2+3+4)				

Total Evaluated Cost (for bid evaluation purposes)	
Total Evaluated Cost (Milestones 1+2+3+4)	\$



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ATTACHMENT 2 TO PART 3 - ELECTRONIC PAYMENT INSTRUMENTS

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

- VISA Acquisition Card;
- MasterCard Acquisition Card;
- Direct Deposit (Domestic and International);
- Wire Transfer (International Only); and
- Large Value Transfer System (LVTS) (Over \$25M).



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PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

- A. Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria.
- B. An evaluation team composed of representatives of Canada will evaluate the bids.

4.1.1 Technical Evaluation

4.1.1.1 Mandatory Technical Criteria

- A. The Bidder must comply with the mandatory technical criteria specified in Attachment 1 to Part 4 - Evaluation Criteria. The Bidder must provide in their proposal the necessary documentation to support and demonstrate compliance with each mandatory technical criteria (MTC).
- B. Bidders which fail to meet each of the MTC will be declared non-responsive and will receive no further evaluation. Each MTC must be addressed separately.

4.1.2 Financial Evaluation

- A. The price of the bid will be evaluated as follows:
 - (i) Canadian-based bidders must submit firm prices, Canadian customs duties and excise taxes included, and Applicable Taxes excluded; and
 - (ii) Foreign-based bidders must submit firm prices, Canadian customs duties, excise taxes and Applicable Taxes excluded. Canadian customs duties and excise taxes payable by Canada will be added, for evaluation purposes only, to the prices submitted by foreign-based bidders.
- B. Unless the bid solicitation specifically requires bids to be submitted in Canadian currency, bids submitted in foreign currency will be converted to Canadian currency for evaluation purposes. The rate given by the Bank of Canada in effect on the bid solicitation closing date, or on another date specified in the bid solicitation, will be applied as a conversion factor to the bids submitted in foreign currency.
- C. Although Canada reserves the right to award the Contract either on an FOB plant or FOB destination, Canada requests that bidders provide prices FOB their plant or shipping point and FOB destination. Bids will be assessed on an FOB destination basis.
- D. For the purpose of the bid solicitation, bidders with an address in Canada are considered Canadian-based bidders and bidders with an address outside of Canada are considered foreign-based bidders.

4.2 Basis of Selection - Lowest Evaluated Price, Mandatory Technical Criteria

- A. A bid must comply with the requirements of the bid solicitation and meet all mandatory technical evaluation criteria to be declared responsive. The responsive bid with the lowest evaluated price will be recommended for award of a contract.



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- B. Should two (2) or more responsive bids achieve an identical lowest evaluated price, the earliest bid received based on the date and time stamp of the email, will be recommended for award of a contract.



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ATTACHMENT 1 TO PART 4 - EVALUATION CRITERIA

1. Mandatory Technical Criteria

#	MANDATORY CRITERIA	SUBSTANTIATION CROSS REFERENCE WITH BID
MTC1	<p>The Bidder must demonstrate experience managing a minimum of two (2) pension benchmarking projects for organizations other than the Bidder itself within the last five (5) years prior to bid closing. The Bidder must provide a description of the services in which they have led the projects including planning, executing, and analyzing the benchmarking exercise.</p> <p>The description must include the time period (month/year) in which the services were provided.</p>	
MTC1.1	<p>The Bidder must demonstrate that each of the cited projects from MTC1 have benchmarked a minimum of 20 publicly financed international and Canadian organizations participants.</p> <p>The names of each participant must be provided.</p>	
MTC1.2	<p>The Bidder must demonstrate that the participants in the benchmarking projects from MTC1 consisted of a minimum mixture of 10 publicly financed Canadian and international pension plans. Each of these plans must have had a minimum of 100,000 members.</p> <p>The names and membership size of each participant must be provided.</p>	



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PART 5 - CERTIFICATIONS AND ADDITIONAL INFORMATION

- A. Bidders must provide the required certifications and additional information to be awarded a contract.
- B. The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Unless specified otherwise, Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.
- C. The Contracting Authority will have the right to ask for additional information to verify the Bidder's certifications. Failure to comply and to cooperate with any request or requirement imposed by the Contracting Authority will render the bid non-responsive or constitute a default under the Contract.

5.1 Certifications Required with the Bid

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

5.1.1 Certifications – Bid

- A. Compliance with the certifications bidders provide to Canada is subject to verification by Canada during the bid evaluation period (before award of a contract) and after contract award. The Contracting Authority will have the right to ask for additional information to verify bidders' compliance with the certifications before award of a contract. The bid will be declared non-responsive if any certification made by the Bidder is untrue, whether made knowingly or unknowingly. Failure to comply with the certifications or to comply with the request of the Contracting Authority for additional information will also render the bid non-responsive.

5.1.1.1 Integrity Provisions - Declaration of Convicted Offences

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

5.1.1.2 COVID-19 Vaccination Requirement Certification

- A. In accordance with the COVID-19 Vaccination Policy for Supplier Personnel, all Bidders must provide with their bid, the COVID-19 Vaccination Requirement Certification attached in Annex D to this bid solicitation, to be given further consideration in this procurement process. This Certification incorporated into the bid solicitation on its closing date is incorporated into, and forms a binding part of any resulting Contract.

5.2 Certifications Precedent to Contract Award and Additional Information

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



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5.2.1 Integrity Provisions - Required Documentation

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

5.2.2 Federal Contractors Program for Employment Equity - Bid Certification

- A. 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](https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html#)" list available at the bottom of the page of the [Employment and Social Development Canada \(ESDC\) - Labour's](https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html#) website (<https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html#>).
- B. 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



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PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS

6.1 Security Requirements

- A. Before award of a contract, the following conditions must be met:
- (i) The Bidder must hold a valid organization security clearance as indicated in Part 7 - Resulting Contract Clauses;
 - (ii) The Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work sites must meet the security requirements as indicated in Part 7 - Resulting Contract Clauses; and
 - (iii) The Bidder must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites.
- B. Bidders are reminded to obtain the required security clearance promptly. Any delay in the award of a contract to allow the successful Bidder to obtain the required clearance will be at the entire discretion of the Contracting Authority.
- C. For additional information on security requirements, Bidders should refer to the [Contract Security Program](http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html) of Public Works and Government Services Canada (<http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>) website.



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PART 7 - RESULTING CONTRACT CLAUSES

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

ARTICLES OF AGREEMENT

7.1 Statement of Work

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

7.2 Standard Clauses and Conditions

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

7.2.1 General Conditions

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

- (i) Article 01, Interpretation, "Canada", "Crown", "Her Majesty" or "the Government", is deleted in its entirety and replaced with the following:

"Canada", "Crown", "Her Majesty" or "the Government"
means Her Majesty the Queen in right of Canada as represented by the Minister of National Defence and any other person duly authorized to act on behalf of that minister or, if applicable, an appropriate minister to whom the Minister of National Defence has delegated his or her powers, duties or functions and any other person duly authorized to act on behalf of that minister.

7.2.2 Canadian Forces Site Regulations

- A. The Contractor must comply with all standing orders or other regulations, instructions and directives in force on the site where the Work is performed.

7.3 Security Requirements

- A. The following security requirements apply and form part of the Contract:

- (i) The Contractor/Offeror must, at all times during the performance of the Contract/Standing Offer, hold a valid Designated Organization Screening (DOS), issued by the Contract Security Program (CSP), Public Works and Government Services Canada (PWGSC).
- (ii) The Contractor/Offeror personnel requiring access to PROTECTED information, assets or sensitive site(s) must EACH hold a valid RELIABILITY STATUS, granted or approved by the CSP, PWGSC.



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- (iii) The Contractor/Offeror MUST NOT remove any PROTECTED information or assets from the identified site(s), and the Contractor/Offeror must ensure that its personnel are made aware of and comply with this restriction.
- (iv) Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of the CSP, PWGSC.
- (v) The Contractor/Offeror must comply with the provisions of the:
 - a) Security Requirements Check List and security guide (if applicable), attached at Annex C;
 - b) *Contract Security Manual* (Latest Edition).

7.4 Term of Contract

7.4.1 Period of the Contract

- A. The period of the Contract is from 01 April 2022 to 31 March 2023, inclusive.

7.4.2 Option to Extend the Contract

- A. The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to three (3) additional one (1) year periods under the same conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions as set out in the Basis of Payment.
- B. Canada may exercise this option at any time by sending a written notice to the Contractor at least 30 calendar days before the expiry date of the Contract. The option may only be exercised by the Contracting Authority, and will be evidenced for administrative purposes only, through a contract amendment.

7.5 Authorities

7.5.1 Contracting Authority

- A. The Contracting Authority for the Contract is:

[Contact information to be detailed in the resulting contract]

Name: _____
Title: _____
Organization: _____
Address: Department of National Defence
101 Colonel By Drive
Ottawa ON K1A 0K2
Telephone: _____
E-mail: _____

- B. 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.



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7.5.2 Technical Authority

A. The Technical Authority for the Contract is:

[Contact information to be detailed in the resulting contract]

Name: _____
Title: _____
Organization: _____
Address: Department of National Defence (DND)
101 Colonel By Drive
Ottawa ON K1A 0K2
Telephone: _____
E-mail: _____

B. The Technical Authority is the representative of the department or agency for whom the Work is being carried out under the Contract and is responsible for all matters concerning the technical content of the Work under the Contract. Technical matters may be discussed with the 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.

7.5.3 Contractor's Representative

[Contact information to be detailed in the resulting contract]

Name: _____
Title: _____
Address: _____

Telephone: _____
E-mail: _____

7.6 Proactive Disclosure of Contracts with Former Public Servants

A. By providing information on its status, with respect to being a former public servant in receipt of a [Public Service Superannuation Act](#) (PSSA) pension, the Contractor has agreed that this information will be reported on departmental websites as part of the published proactive disclosure reports, in accordance with [Contracting Policy Notice: 2019-01](#) of the Treasury Board Secretariat of Canada.

7.7 Payment

7.7.1 Basis of Payment - Firm Price, Services

A In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid a firm price as specified in Annex B - Basis of Payment for a cost of \$ _____ (amount to be detailed in the resulting contract). Customs duties are included and Applicable Taxes are extra.



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7.7.2 Limitation of price

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

7.7.3 Milestone Payments - Not subject to holdback

- A. Canada will make milestone payments in accordance with the Schedule of Milestones detailed in the Contract and the payment provisions of the Contract if:
- (i) an accurate and complete claim for payment using [PWGSC-TPSGC 1111](#), Claim for Progress Payment, and any other document required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
 - (ii) all the certificates appearing on form [PWGSC-TPSGC 1111](#) have been signed by the respective authorized representatives; and
 - (iii) all work associated with the milestone and as applicable any deliverable required has been completed and accepted by Canada.

7.7.3.1 Schedule of Milestones

- A. The schedule of milestones for which payments will be made in accordance with the Contract is detailed in Annex B, Basis of Payment.

7.7.4 Electronic Payment of Invoices - Contract

- A. The Contractor accepts to be paid using any of the following Electronic Payment Instrument(s):

List to be updated in the resulting contract

- (i) Visa Acquisition Card;
- (ii) MasterCard Acquisition Card;
- (iii) Direct Deposit (Domestic and International);
- (iv) Wire Transfer (International Only); and
- (v) Large Value Transfer System (LVTS) (Over \$25M).

7.7.5 Discretionary Audit

- A. The following are subject to government audit before or after payment is made:
- (i) The amount claimed under the Contract, as computed in accordance with the Basis of Payment, including time charged.
 - (ii) The accuracy of the Contractor's time recording system.
 - (iii) The estimated amount of profit in any firm-priced element, firm time rate, firm overhead rate, or firm salary multiplier, for which the Contractor has provided the appropriate certification. The purpose of the audit is to determine whether the actual profit earned on



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a single contract if only one exists, or the aggregate of actual profit earned by the Contractor on a series of negotiated contracts containing one or more of the prices, time rates or multipliers mentioned above, during a particular period selected, is reasonable and justifiable based on the estimated amount of profit included in earlier price or rate certification(s).

- (iv) Any firm-priced element, firm time rate, firm overhead rate, or firm salary multiplier for which the Contractor has provided a "most favoured customer" certification. The purpose of such audit is to determine whether the Contractor has charged anyone else, including the Contractor's most favoured customer, lower prices, rates or multipliers, for like quality and quantity of goods or services.

- B. Any payments made pending completion of the audit must be regarded as interim payments only and must be adjusted to the extent necessary to reflect the results of the said audit. If there has been any overpayment, the Contractor must repay Canada the amount found to be in excess.

7.8 Invoicing Instructions - Progress Payment Claim - Supporting Documentation not required

- A. The Contractor must submit a claim for payment using form PWGSC-TPSGC 1111, Claim for Progress Payment.

Each claim must show:

- (i) all information required on form PWGSC-TPSGC 1111;
 - (ii) all applicable information detailed under the section entitled "Invoice Submission" of the general conditions
 - (iii) The description and value of the milestone claimed as detailed in the Contract; and
 - (iv) A copy of the release document and any other documents as specified in the Contract.
- B. Applicable Taxes, must be calculated on the total amount of the claim before the holdback is applied. At the time the holdback is claimed, there will be no Applicable Taxes payable as it was claimed and payable under the previous claims for progress payments.
 - C. The Contractor must prepare and certify one original and two (2) copies of the claim on form PWGSC-TPSGC 1111, and forward it to the Technical Authority identified under the section entitled "Authorities" of the Contract for appropriate certification after inspection and acceptance of the Work takes place.
 - D. The Technical Authority will then forward the original and two (2) copies of the claim to the Contracting Authority for certification and onward submission to the Payment Office for the remaining certification and payment action.
 - E. The Contractor must not submit claims until all work identified in the claim is completed.

7.9 Certifications and Additional Information

7.9.1 Compliance



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

7.10 Applicable Laws

- A. The Contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario **or as specified by the bidder in its bid, if applicable.**

7.11 Priority of Documents

- A. 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:
- (i) The Articles of Agreement;
 - (ii) The General Conditions 2035 (2020-05-28), General Conditions - Higher Complexity – Services;
 - (iii) Annex A, Statement of Work;
 - (iv) Annex B, Basis of Payment;
 - (v) Annex C, Security Requirements Check List;
 - (vi) Annex D, COVID-19 Vaccination Requirement Certification; and
 - (vii) the Contractor's bid dated **[date to be specified in the resulting contract]**, as clarified on **[date to be specified in the resulting contract, if required]**, and as amended on **[date to be specified in the resulting contract, if required]**.

7.12 Defence Contract

- A. The Contract is a defence contract within the meaning of the *Defence Production Act*, R.S.C. 1985, c. D-1 (<http://laws-lois.justice.gc.ca/eng/acts/d-1/>), and must be governed accordingly.
- B. Title to the Work or to any materials, parts, work-in-process or finished work must belong to Canada free and clear of all claims, liens, attachments, charges or encumbrances. Canada is entitled, at any time, to remove, sell or dispose of the Work or any part of the Work in accordance with section 20 of the *Defence Production Act*.

One (1) of the following two (2) options will be inserted in the resulting contract, as applicable:

Option 1: A2000C (2006-06-16) when the contract is to be with a Canadian-based supplier; or

7.13 Foreign Nationals (Canadian Contractor)

- A. The Contractor must comply with Canadian immigration requirements applicable to foreign nationals entering Canada to work temporarily in fulfillment of the Contract. If the Contractor wishes to hire a foreign national to work in Canada to fulfill the Contract, the Contractor should



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immediately contact the nearest Service Canada regional office to enquire about Citizenship and Immigration Canada's requirements to issue a temporary work permit to a foreign national. The Contractor is responsible for all costs incurred as a result of non-compliance with immigration requirements.

Option 2: A2001C (2006-06-16) when the contract is to be with a foreign-based supplier.

7.13 Foreign Nationals (Foreign Contractor)

- A. The Contractor must comply with Canadian immigration legislation applicable to foreign nationals entering Canada to work temporarily in fulfillment of the Contract. If the Contractor wishes to hire a foreign national to work in Canada to fulfill the Contract, the Contractor should immediately contact the nearest Canadian Embassy, Consulate or High Commission in the Contractor's country to obtain instructions, information on Citizenship and Immigration Canada's requirements and any required documents. The Contractor is responsible to ensure that foreign nationals have the required information, documents and authorizations before performing any work under the Contract in Canada. The Contractor is responsible for all costs incurred as a result of non-compliance with immigration requirements.

7.14 Insurance

- A. 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.

7.15 Dispute Resolution

- A. The parties agree to maintain open and honest communication about the Work throughout and after the performance of the contract.
- B. The parties agree to consult and co-operate with each other in the furtherance of the contract and promptly notify the other party or parties and attempt to resolve problems or differences that may arise.
- C. If the parties cannot resolve a dispute through consultation and cooperation, the parties agree to consult a neutral third party offering alternative dispute resolution services to attempt to address the dispute.
- D. Options of alternative dispute resolution services can be found on Canada's Buy and Sell website under the heading "[Dispute Resolution](#)".

7.16 Inspection and Acceptance

- A. The Technical Authority is the Inspection Authority. All reports, deliverable items, documents, goods and all services rendered under the Contract are subject to inspection by the Inspection Authority or representative. Should any report, document, good or service not be in accordance with the requirements of the Statement of Work and to the satisfaction of the Inspection Authority, as submitted, the Inspection Authority will have the right to reject it or require its correction at the sole expense of the Contractor before recommending payment.



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ANNEX A – STATEMENT OF WORK

1. TITLE

- 1.1. Pension Administration Benchmarking Services

2. BACKGROUND

- 2.1. The Department of National Defence (DND) is the administrator of the Canadian Armed Forces Pension Plans (CAFPP) under the Canadian Forces Superannuation Act (CFSA).
- 2.2. The Public Sector Pension Reform and the Government of Canada's program of "Modern Comptrollership", a reform focused on the sound management of public resources and effective decision-making, have identified benchmarking for the purposes of comparative evaluation of pension administration services in similar Canadian and international (primary public) pension administration organizations on the basis of costs, service levels, and industry standards including the best business practices of participating organisations. Benchmarking services provide plan sponsors and fiduciaries with an independent and objective report comprised of performance insights, detailed costs analysis, best practice benchmarking, and strategic governance and management information. A key component of benchmarking services is the focus on understanding and quantifying how services to members and organizational constraints impact system costs.
- 2.3. Through benchmarking services, DND can examine business processes of CAFPP compared to the best business practices of other similar Canadian and international pension organizations in order to determine if it can improve its management of a viable pension service to active members, annuitants and survivors. Benchmarking also enables DND to compare costs with other similar Canadian and international public and private pension plan administrations and see what exists in the way of better business practices it might incorporate to improve its pension administrative services.
- 2.4. Structure and governance: The CFSA is administered under the auspices of the Canadian Armed Forces Pension Advisory Committee (CAFPAC), which is comprised of pensioners, active contributors, and other personnel. The Deputy Commander Military Personnel Command (MILPERSCOM) is the chair of the CAFPAC. According to CFSA, the Minister of National Defence (MND) is responsible for the overall management of the CAFPP. The president of the Treasury Board is responsible for overall policy oversight of Federal public sector pension plans, which includes the CAFPP. The Treasury Board of Canada Secretariat is responsible for strategic direction, program and policy advice, financial analysis and the development of legislation related to CAFPP.

3. OBJECTIVE

- 3.1. DND, through Directorate of Pension Policy and Social Programs (DPSP), has a requirement to procure benchmarking services to capture performance measures relevant to the pension administration processes of CAFPP, associated systems, and organization structure. These performance measures are required to make better business decisions relating to pension administration service improvements. It will be important for DND to continue monitoring the costs of its service level provided to CAFPP.
- 3.2. DND undertakes to measure performance of CAFPP against other similar Canadian and international public and private pension plans to determine how well it has performed, improved and progressed toward the provision of better pension services.



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- 3.3. The goals of this benchmarking work are improved member satisfaction, increased confidence in service delivery, and improved understanding of our comparison to industry standards. The Contractor must provide ongoing opportunities for networking with industry peers on best practices for pension administration.

4. SCOPE

- 4.1. The focus of the benchmarking analysis will be to quantify and understand what drives the pension administration costs of the CAFPP administrator supported by the service provider, Public Services and Procurement Canada (PSPC). In the case of the CAFPP, data suggests that plan costs are in line with industry standards, when taken on a per member basis. A number of service parameters measured have been identified as being above, the same or below industry standards. Continued benchmarking data will provide ongoing opportunities to improve key aspects of service delivery and identify opportunities for more efficient cost-effective delivery. The benchmarking data obtained will serve to augment the existing baseline for future decisions on resource allocation and cost containment strategies.
- 4.2. Each yearly benchmark is for the period of April 1st to March 31st of the preceding year.

5. APPLICABLE DOCUMENTS

- 5.1. Related subject matter can be accessed at the identified web sites as follows:
- a) CFSA and Regulations: <http://laws.justice.gc.ca/eng/>; and
 - b) General Pension and Insurance Publications & Superannuation Administration Manual: <http://www.forces.gc.ca/en/caf-community-pension/index.page>.

6. TECHNICAL ENVIRONMENT

- 6.1. The Contractor must submit electronic copies in portable document format (PDF).

7. TASKS AND DELIVERABLES

- 7.1. The Contractor must provide the following:
- a) Benchmarking services to compare total costs and service levels against peer group;
 - b) Benchmarking services to compare costs, transaction volumes, and plan complexity for major pension administrative activities, including the following:
 - (i) Issuance of first payment and recurring payments, pension inceptions;
 - (ii) Collection of and record of contributions and other data;
 - (iii) Termination of payment, transfer out or refunds;
 - (iv) Elections for prior services;
 - (v) Mass communications to members and retirees;
 - (vi) Pension benefit entitlement estimate;
 - (vii) Pension transfers-in;



- (viii) Member counselling;
 - (ix) Call center;
 - (x) Major projects;
 - (xi) Employer costs;
 - (xii) Financial control and governance;
 - (xiii) Information Technology (IT), excluding major projects;
 - (xiv) Support services and other;
 - (xv) Plan design and rules development; and
 - (xvi) Disability, if provided by the plan;
- c) Narrative summaries consisting of:
- (i) An executive summary for the highlights of the survey results; and
 - (ii) A comparison of total administration costs, activity costs, service levels, transactional volumes, and plan complexity to a peer group and the overall participants;
- d) Benchmark against comparative companies:
- (i) The overall participants in the benchmarking survey must comprise a minimum of 20 publicly financed Canadian and International organizations. The benchmarking peer group for comparison will embody a minimum mixture of 10 publicly financed pension plans. Peer group should be primarily comprised of Canadian pension plans. The survey report will compare CAFPP against its all participants' pension administration activities against its benchmarking peers for Total administration cost, activity costs, service levels, transactional volumes and plan complexity;
- e) Data collection methodology, including the following:
- (i) Detailed electronic surveys (spreadsheets) for compiling the data of CAFPP plan to send to the Contractor;
 - (ii) Verification that the data DND has submitted for CAFPP pension plan meets the requirements of the benchmarking survey and is correctly allocated within the survey;
 - (iii) Feedback to DND on the quality of the data supplied for CAFPP pension plan to the Contractor in order to enable DND to amend or adjust the placement of data into appropriate areas of the survey; and
 - (iv) Obtaining from DND the material and data for CAFPP pension plan to conduct one annual supplementary survey.

7.2. The DND pension services benchmarking process will consist of five (5) distinct phases, which are to occur on an annual cycle.



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7.2.1 Phase 1 – Survey

7.2.1.1 The Contractor must perform the following:

- a) Provide all survey materials (the general survey questionnaires, cost attribution spreadsheets, activity definitions, output data reports, survey explanations), meeting arrangements, and dates at least eight weeks before the survey remit date;
- b) Schedule meeting with DND representatives at least eight weeks before the survey remit date to review survey questions of input material, and explain changes (where applicable) to the methodology for data collection and input, and the significance of the various portions of information to be supplied;
- c) Provide reporting tools, the format must be clearly laid out and easily understood by DND representatives. The format of the reporting tools must be pre-approved by the Technical Authority; and
- d) Provide clear, concise, written, and timely communication of information to DND concerning survey information needed, scheduled meetings, data, etc.

7.2.2 Phase 2 – Report

7.2.2.1 The Contractor must perform the following:

- a) Prepare and provide a draft benchmarking Report:
 - (i) The draft 2021/2022 annual benchmarking report (CAFPP) must be submitted to the Technical Authority by February 2023. The draft annual benchmarking reports (CAFPP) for subsequent years must be submitted by January;
- b) Schedule teleconferencing with DND representative (if needed) to review the data supplied for the annual benchmarking survey report to verify the accuracy of cost and narrative data, and correct any apparent anomalies in the DND data submitted to the Contractor;
- c) Prepare an annual benchmarking survey report for capturing a comparison of DND data to its respective peer group and universe in the following areas:
 - (i) Total Administration Cost;
 - (ii) Activity Costs;
 - (iii) Service Levels;
 - (iv) Transactional Volumes;
 - (v) Plan Complexity; and
 - (vi) CRM Capability;
- d) The survey report for CAFPP, which must include:



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- (i) A summary of key cost and service issues by this organization, refined to reflect work process information and other comparative data highlights;
 - (ii) Consolidated cost tables and charts displaying costs for all member organizations and the average costs of each program activity (direct and support inclusive) for all member organizations;
 - (iii) Background context information (statistical drivers, organizational drivers and e-business services);
 - (iv) Work process highlights with Service Response Measurement charts displaying service standards for that organization (Target and Actual); and
 - (v) A generic CAFPP versus existing benchmarking report group benchmarking survey report, respecting the confidentiality of all participants, while providing benchmarking results that can be shared with the broader spectrum of DND senior management;
- e) Comparisons incorporating the following criteria:
- (i) Costs broken down for all participants;
 - (ii) Average cost per program for each participant;
 - (iii) Cost per transaction per program in each organization;
 - (iv) Number of Full Time Employees, direct and support, devoted to each program for each participating organization; and
 - (v) Average cost for all participating organizations for each of these specific activities;
- f) Provide electronic files and five (5) hardcopies of the final benchmarking report to DND for CAFPP within two (2) to three (3) weeks of delivery of the draft benchmarking report;
- g) Provide One (1) on site presentation for DND of the final benchmarking results at a time convenient to DND.

7.2.3 Phase 3 – Annual Global Conference

7.2.3.1 The Contractor must:

- a) Provide an agenda for the annual conference agenda and conference package for DND delegates to include the following:
 - (i) meeting venue, date, time and location;
 - (ii) scope, purpose and objectives of the conference; and
 - (iii) topics for discussions;
- b) Schedule an annual global conference and provide DND three (3) invitations for CAFPP;



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- c) Prepare a synopsis of notes collected in the breakout sessions after the conference; and send to technical Authority the summary of breakout sessions; and
- d) The registration fees for this conference are included in the overall price of this service. However, all travel related expenses (including hotel and airfare) of DND staff are the responsibility of DND.

7.2.4 Phase 4 – Annual Best Practice Research

7.2.4.1 The Contractor must conduct an Annual Best Practice Research. The Annual Best Practice Research must include the following:

- a) The type and scope of services to be examined;
- b) The services evaluation report outlining best practices and specific examples of the same as practiced by surveyed members;
- c) Any pension administration research conducted and published in the year that DND participate in the Contractor's service; and
- d) Data, information, and materials that the Contractor requires to conduct this supplementary evaluation service, to be provided by DND.

7.2.5 Phase 5 – Peer Online Network:

- a) The Contractor must provide DND with access to Contractor's online peer network in the year that DND participates in Contractor's service.

7.3 Project Management

7.3.1 The Contractor must provide project management service to the contract. The Contractor is responsible, but not limited to the following:

- a) To the execution of the Contract and management of resources with respect to day-to-day activities and movement of assigned resources, risk identification and mitigation strategies, critical success factors, and accurate monitoring of billing;
- b) To facilitate the plenary sessions of all member organizations by setting up the agenda, providing detailed explanation of the annual benchmarking survey report contents at the meeting, recording issues discussed, and publishing any decisions made at the meeting, as well as a summary of the subject matter discussed as part of the meeting;
- c) To provide monthly progress reports on the completion of the benchmarking reports, from the time all data has been submitted by DND to the service provider, until the publication of the benchmarking report; and
- d) To manage mentor Board presentation of the benchmarking results at the convenience of DND after the final report is published.

8. QUALITY ASSURANCE

8.1 The Technical Authority will review and approve all work and deliverables for quality and completeness. The Technical Authority reserves the right to reject work if it fails to meet an acceptable standard. All work and deliverables are to be completed in accordance with a mutually accepted schedule set.



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- 8.2 The Contractor must provide documentation noting questionable data to which will be verified by the Technical Authority for accuracy against the data supplied for both narrative and financial spreadsheets portions of the report. Corrections or modifications to data supplied would then be incorporated into final report.
- 8.3 When the final report is received, the Technical Authority will verify the accuracy of data supplied for the narrative and financial spreadsheet portions of the report. The Contractor must do corrections or modifications to the final report as requested by the Technical Authority.

9. LANGUAGE REQUIREMENTS

- 9.1 Canada must abide by the Official Languages Act, to ensure Canadian citizens are granted service in the official language of their choice. Most of the work will be conducted in English; however, should Canada request communication in French for a portion of work, the Contractor must complete this portion of the work in French.

a) English Language:

The Contractor resources must be fluent in the English language. Fluent means that the individuals must be able to communicate orally and in writing without any assistance and with minimal errors; and

b) French language:

The Contractor resources must be fluent in the French language. Fluent means that the individuals must be able to communicate orally and in writing without any assistance and with minimal errors.

10. LOCATION OF WORK

- 10.1 The Contractor must work at their own place of business and attend meetings in the National Capital Region (NCR). A meeting boardroom at DND in Ottawa will be available for the purposes of data collections and presentation of results of the benchmarking exercise. The Contractor must bear any cost incurred for travel and living expenses in the performance of the work in the NCR.



ANNEX B – BASIS OF PAYMENT

- A. The firm rates specified below includes all expenses that may need to be incurred to satisfy the terms of the contract, including the total estimated cost of any travel and living expenses that may need to be incurred for the Work described in Annex A, Statement of Work.
- B. Canada will not accept travel and living expenses that may need to be incurred by the contractor for any relocation of resources required to satisfy its contractual obligations.

1. Milestone Payments

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

Milestone No.	Description or "Deliverable"	Sub-total	HST/GST	Total Firm Price (CAD)
	Contract Period: 1 April 2022 to 31 March 2023	[Value to be detailed in the resulting contract]		
1	Final Benchmarking Report for 2021/2022	\$	\$	\$
	Option Period 1: 1 April 2023 to 31 March 2024	[Value to be detailed in the resulting contract]		
2	Final Benchmarking Report for 2022/2023	\$	\$	\$
	Option Period 2: 1 April 2024 to 31 March 2025	[Value to be detailed in the resulting contract]		
3	Final Benchmarking Report for 2023/2024	\$	\$	\$
	Option Period 3: 1 April 2025 to 31 March 2026	[Value to be detailed in the resulting contract]		
4	Final Benchmarking Report for 2024/2025	\$	\$	\$



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ANNEX C – SECURITY REQUIREMENTS CHECK LIST



Government of Canada / Gouvernement du Canada

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

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PART A (continued) / PARTIE A (suite)

8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS? No / Non Yes / Oui

If Yes, indicate the level of sensitivity:
Dans l'affirmative, indiquer le niveau de sensibilité :

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

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

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

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

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

Special comments:
Commentaires spéciaux : _____

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

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

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

On DND premises, unscreened pers. may only access public/reception zones

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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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	SECRET	TOP SECRET	NATO RESTRICTED	NATO CONFIDENTIAL	NATO SECRET	COSMIC TOP SECRET	PROTECTED PROTÉGÉ			CONFIDENTIAL	SECRET	TOP SECRET
				CONFIDENTIEL		TRES SECRET	NATO DIFFUSION RESTRICTED	NATO CONFIDENTIEL		COSMIC TRES SECRET	A	B	C	CONFIDENTIEL		TRES SECRET
Information / Assets Renseignements / Biens Production																
IT Media / Support IT																
IT Link / Lien électronique																

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

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

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

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



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[Page 4 of the SRCL to be inserted in the resulting contract]



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ANNEX D – COVID-19 VACCINATION REQUIREMENT CERTIFICATION

COVID-19 Vaccination Requirement Certification

I, _____ (first and last name), as the representative of _____ (name of business) pursuant to _____ (insert solicitation number), warrant and certify that all personnel that _____ (name of business) will provide on the resulting Contract who access federal government workplaces where they may come into contact with public servants will be:

- a) fully vaccinated against COVID-19 with Health Canada-approved COVID-19 vaccine(s); or
- b) for personnel that are unable to be vaccinated due to a certified medical contraindication, religion or other prohibited grounds of discrimination under the Canadian Human Rights Act, subject to accommodation and mitigation measures that have been presented to and approved by Canada;

until such time that Canada indicates that the vaccination requirements of the COVID-19 Vaccination Policy for Supplier Personnel are no longer in effect.

I certify that all personnel provided by _____ (name of business) have been notified of the vaccination requirements of the Government of Canada’s COVID-19 Vaccination Policy for Supplier Personnel, and that the _____ (name of business) has certified to their compliance with this requirement.

I certify that the information provided is true as of the date indicated below and will continue to be true for the duration of the Contract. I understand that the certifications provided to Canada are subject to verification at all times. I also understand that Canada will declare a contractor in default, if a certification is found to be untrue, whether made knowingly or unknowingly, during the bid or contract period. Canada reserves the right to ask for additional information to verify 27 the certifications. Failure to comply with any request or requirement imposed by Canada will constitute a default under the Contract.

Signature: _____

Date: _____

Optional

For data purposes only, initial below if your business already has its own mandatory vaccination policy or requirements for employees in place. Initialing below is not a substitute for completing the mandatory certification above.

Initials: _____

Information you provide on this Certification Form and in accordance with the Government of Canada’s COVID-19 Vaccination Policy for Supplier Personnel will be protected, used, stored and disclosed in accordance with the Privacy Act. Please note that you have a right to access and correct any information on your file, and you have a right to file a complaint with the Office of the Privacy Commissioner regarding the handling of your personal information. These rights also apply to all individuals who are deemed to be personnel for the purpose for the Contract and who require access to federal government workplaces where they may come into contact with public servants.