

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

SOUMISSIONBID@SAC-ISC.GC.CA

**BID SOLICITATION
DEMANDE DE SOUMISSIONS**

The Bidder offers to provide to Canada the goods, services or both listed in the bid solicitation in accordance with the conditions set out in the bid solicitation and at the prices set out in the bid.

This bid solicitation is issued in accordance with the conditions of Supply Arrangement No. ne s'applique pas . Only suppliers who are pre-qualified and have been issued a supply arrangement at the time this bid solicitation is issued are eligible to bid.

Le soumissionnaire offre de fournir au Canada les biens, services ou les deux énumérés dans la demande de soumissions aux conditions prévues dans la demande de soumissions et aux prix indiqués dans la soumission.

Cette demande de soumissions est émise conformément aux conditions de l'arrangement en matière d'approvisionnement numéro ne s'applique pas . Seuls les fournisseurs qui sont pré-qualifiés et auxquels un arrangement en matière d'approvisionnement a été émis au moment où cette demande de soumissions est émise peuvent présenter une soumission.

Solicitation No. - N° de la demande 1000228530	Amendment No. - N° de modification
Solicitation closes - La demande prend fin at - à 2:00 p.m. EDT on - le 2022-08-16	File No. - N° de dossier 1000228530

Date of Solicitation - Date de la demande 2022-07-08	
Address inquiries to - Adresser toute demande de renseignements à : Bruno.Paradis2@sac-isc.gc.ca	
Area code and Telephone No. Code régional et N° de téléphone	Facsimile No. N° de télécopieur
Destination National Capital Region (NCR)	

Instructions:
Municipal taxes are not applicable.

Unless otherwise specified in the bid solicitation, all prices quoted must be net prices in Canadian funds including Canadian customs duties, excise taxes, and must be FOB, including all delivery charges to destination(s) as indicated. The amount for Applicable Taxes is to be shown as a separate item.

Instructions:
Les taxes municipales ne s'appliquent pas.

Sauf indication contraire dans la demande de soumissions, tous les prix indiqués doivent être des prix nets, en dollars canadiens, comprenant les droits de douane canadiens, la taxe d'accise et doivent être FAB, y compris tous frais de livraison à la (aux) destination(s) indiquée(s). Le montant des taxes applicables doit apparaître séparément.

Delivery required - Livraison exigée	Delivery offered - Livraison proposée
Supplier Name and Address - Nom et adresse du fournisseur	
Telephone No. - N° de téléphone	
Facsimile No. - N° de télécopieur	
Name and title of person authorized to sign on behalf of supplier (type or print) Nom et titre de la personne autorisée à signer au nom du fournisseur (caractère d'impression)	
Signature	Date

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PART 1 - GENERAL INFORMATION

1.1 Introduction

The Request for Standing Offers (RFSO) is divided into seven parts plus attachments and annexes, as follows:

- Part 1 General Information: provides a general description of the requirement;
- Part 2 Offeror Instructions: provides the instructions applicable to the clauses and conditions of the RFSO;
- Part 3 Offer Preparation Instructions: provides offerors with instructions on how to prepare their offer to address the evaluation criteria specified;
- Part 4 Evaluation Procedures and Basis of Selection: indicates how the evaluation will be conducted, the evaluation criteria which must be addressed in the offer, and the basis of selection;
- Part 5 Certifications and Additional Information: includes the certifications and additional information to be provided;
- Part 6 Security, Financial and Insurance Requirements: includes specific requirements that must be addressed by offerors; and
- Part 7 7A, Standing Offer, and 7B, Resulting Contract Clauses:
 - 7A, includes the Standing Offer containing the offer from the Offeror and the applicable clauses and conditions;
 - 7B, includes the clauses and conditions which will apply to any contract resulting from a call-up made pursuant to the Standing Offer.

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

1.2 Summary

1.2.1 Indigenous Services Canada (ISC) works collaboratively with partners to improve access to high quality services for First Nations, Inuit and Métis. Our vision is to support and empower Indigenous peoples to independently deliver services and address the socio-economic conditions in their communities. To support this mandate, ISC requires timely access to high-calibre resources able to provide research, analysis and related services corresponding to all Indigenous peoples in Canada as well as to specific populations including Registered Indian, Non-Status First Nations, Inuit, and Métis, including those who live in urban areas across Canada.

The mandate of the Strategic Research and Data Innovation Branch (SRDI) is to support ISC and the federal government's policy-making in Indigenous and northern matters by providing authoritative data and analytical advice and evidence-based knowledge, through a program of survey development, policy research, statistical analysis, and knowledge transfer.

1.3 Security Requirements

1. Pursuant to the Policy on Government Security, the nature of the services to be provided under this contract requires a valid Government of Canada (GoC) personnel Security Screening at the level of

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- Reliability Status** for the Contractor, authorized resources and any sub-contractors to be assigned to conduct the work.
2. Prior to the commencement of the work, the Contractor and each authorized resources involved in the performance of the work under this contract must each hold a valid Security Screening at the level of **Reliability Status** during the lifetime of the contract.
 3. The Contractor and its personnel requiring access to PROTECTED information, assets or sensitive work site(s) must EACH hold a valid Security Screening at the level of **Reliability Status**.
 4. The Contractor MUST NOT possess or safeguard **PROTECTED** information/assets at their organization's premises until written permission from the security in contracting team of Indigenous Services Canada (ISC). After permission has been granted, these tasks may be performed up to the level of **Protected B**.
 5. The Contractor MUST NOT remove any **Sensitive** information from the identified work site(s), and the Contractor must ensure that its personnel are made aware of and comply with this restrictions.
 6. The Contractor MUST NOT utilize its Information Technology (IT) systems to electronically process, produce or store any sensitive information until written permission from the security in contracting team of ISC. After permission has been granted, these tasks may be performed up to the level of **Protected B including an I.T. link up to the level of protected B**.
 7. Subcontracts are not to be awarded without the prior written permission from the security in contracting team of ISC.
 8. Any substitute or alternate resource proposed for this contract:
 - a) must be approved by the Security and Emergency Services Divisions of Indigenous Services Canada; and,
 - b) must hold a valid GoC Security Screening at the level of **Reliability Status**, before gaining access to designated information or assets.
 9. Under this contract, if a Contractor submits a resource who is subsequently found to not meet the Security requirements, the Department may immediately terminate the contract with no obligation to replace the resource with a resource from the same Contractor or to pay any invoice for work undertaken by this resource.
 10. This contract only has force or effect for as long as the Security Screening at the level of **Reliability Status** is valid. During the lifetime of this contract, if the Security Screening issued prior to the commencement of the work, be suspended or revoked the contract shall be terminated immediately and the Contractor shall have no claim against Her Majesty or the Minister as a result of the termination. The Contractor shall be paid for satisfactory work performed up to the time of termination pursuant to the terms of the Contract.
 11. The Contractor must comply with the provisions of the:
 - a) Security Requirements Agreement, attached as Annex C; and
 - b) Policy on Government Security <https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=16578>

1.4 Debriefings

Offerors may request a debriefing on the results of the request for standing offers process. Offerors should make the request to the Standing Offer Authority within 15 working days of receipt of the results of the request for standing offers process. The debriefing may be in writing, by telephone or in person

PART 2 - OFFEROR INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

All instructions, clauses and conditions identified in the Request for Standing Offers (RFSO) by number, date and title are set out in the [Standard Acquisition Clauses and Conditions Manual \(https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual\)](https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) issued by Public Works and Government Services Canada.

Offerors who submit an offer agree to be bound by the instructions, clauses and conditions of the RFSO and accept the clauses and conditions of the Standing Offer and resulting contract(s).

The [2006](#) (2018-05-22) Standard Instructions - Request for Standing Offers - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the RFSO.

Subsection 5.44 of [2006](#), Standard Instructions - Request for Standing Offers - Goods or Services, Competitive Requirements, is amended as follows:

Delete: 60 days
Insert: 180 days

2.2 Submission of Offers

2.2.1 Offers (and any amendments thereto) must be submitted in soft copy format in PDF or Word (Email) to the Department of Indigenous Services Canada (ISC) Bid Receiving Address by the date, time and place indicated on page 1 of the RFSO document. ISC will not assume responsibility for offers (and any amendments thereto) directed to any other locations. Offers submitted by any other means will not be accepted.

2.2.2 Tender Submissions

Offerors must clearly identify in their submission containing their offer, the following:

- **RFSO Number: 1000228530**
- **Contracting Authority: Bruno Paradis**
- **Closing Date: August 16, 2022 at 2:00 p.m. EST**
- **Offeror's Name and Address**

2.3 Former Public Servant

Contracts awarded to former public servants (FPS) in receipt of a pension or of a lump sum payment must bear the closest public scrutiny, and reflect fairness in the spending of public funds. In order to comply with Treasury Board policies and directives on contracts awarded to FPS, offerors must provide the information required below before the issuance of a standing offer. If the answer to the questions and, as applicable the information required have not been received by the time the evaluation of offers is completed, Canada will inform the Offeror 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 offer non-responsive.

Definitions

For the purposes of this clause,

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"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 Offeror a FPS in receipt of a pension? **YES** () **NO** ()

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

Work Force Adjustment Directive

Is the Offeror a FPS who received a lump sum payment pursuant to the terms of the Work Force Adjustment Directive? **YES** () **NO** ()

If so, the Offeror must provide the following information:

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- 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.

Former Public Servant in Receipt of a Pension

As per the above definitions, is the Offeror a FPS in receipt of a pension? **YES** () **NO** ()

If so, the Offeror 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, Offerors agree that the successful Offeror'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 Offeror a FPS who received a lump sum payment pursuant to the terms of the Work Force Adjustment Directive? **YES** () **NO** ()

If so, the Offeror must provide the following information:

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

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

2.4 Enquiries - Request for Standing Offers

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All enquiries must be submitted in writing to the Standing Offer Authority no later than seven (7) calendar days before the Request for Standing Offers (RFSO) closing date. Enquiries received after that time may not be answered.

Offerors should reference as accurately as possible the numbered item of the RFSO to which the enquiry relates. Care should be taken by offerors 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 offerors do so, so that the proprietary nature of the question(s) is eliminated, and the enquiry can be answered to all offerors. Enquiries not submitted in a form that can be distributed to all offerors may not be answered by Canada.

2.5 Applicable Laws

The Standing Offer and any contract resulting from the Standing Offer must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario.

Offerors may, at their discretion, substitute the applicable laws of a Canadian province or territory of their choice without affecting the validity of their offer, 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 offerors.

2.6 Bid Challenge and Recourse Mechanisms

- (a) Several mechanisms are available to potential offerors to challenge aspects of the procurement process up to and including contract award.
- (b) Canada encourages offerors 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) Offerors should note that there are **strict deadlines** for filing complaints, and the time periods vary depending on the complaint body in question. Offerors should therefore act quickly when they want to challenge any aspect of the procurement process.

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PART 3 - OFFER PREPARATION INSTRUCTIONS

3.1 Offer Preparation Instructions

Canada requests that Offerors provide their offer in separately bound sections as follows:

Section I: Technical Offer One (1) soft copy in PDF or Word format.

Section II: Financial One (1) soft copy in PDF or Word format.

Section III: Certifications One (1) soft copy in PDF or Word format.

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

Canada requests that Offerors follow the format instructions described below in the preparation of their offer:

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

Section I: Technical Offer

In their technical offer, offerors should explain and demonstrate how they propose to meet the requirements and how they will carry out the Work.

Section II: Financial Offer

Offerors must submit their financial offer in accordance with the Annex B, Basis of Payment. The total amount of Applicable Taxes must be shown separately.

3.2 Exchange Rate Fluctuation

[C3011T \(2013-11-06\) Exchange Rate Fluctuation](#)

Section III: Certifications

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

Section IV: Additional Information

3.3 Offeror's Proposed Sites or Premises Requiring Safeguarding Measures

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

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

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3.3.2 The Company Security Officer must ensure through the **Contract Security Program** that the Offeror and proposed individual(s) hold a valid security clearance at the required level, as indicated in Part 6 - Security, Financial and Other Requirements.

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PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

4.1.1 Each Proposal will be evaluated in the following manner:

- 1. Evaluation against the Mandatory Criteria.** Technical Proposals that fail to meet any of the Mandatory Criteria, will be deemed non-compliant and no further consideration will be given.
- 2. Evaluation against the Point-Rated Criteria.** Technical Proposals that meet all of the Mandatory Criteria will be point-rated against further criteria, below.
- 3. Evaluation of Financial Proposals.** Bidders meeting all the Mandatory Criteria will be evaluated using the methodology set out in the Financial Evaluation of these Selection and Evaluation Criteria. The score as calculated in this stage will constitute the Bidder's Financial Score.
4.1.2 The Bidder must ensure that its Proposal provides sufficient evidence for the Evaluation Committee to assess the compliance of the Proposal with the criteria listed in this RFSO. It is the sole responsibility of the Bidder to provide the applicable information within its Proposal to enable the Evaluation Committee to complete its evaluation.
- 4.1.3** An evaluation team composed of representatives of ISC will evaluate the proposals.
- 4.1.4** The Bidder must include, in its proposal, any reference material it wishes to be considered for evaluation. Any material or documents outside the Proposal will not be considered (for example, should the Bidder wish to provide screen shots of its website or product, etc. for evaluation, copies or printouts of website or product material must be included within the Proposal). URL links to the Bidder's website will not be considered by the Evaluation Committee. The Evaluation Committee will not take into account any prior knowledge of experience with the Bidder.
- 4.1.5** A weighting has been established by ISC wherein the Bidder's **Technical Score** as derived from the Point-Rated Criteria will be valued at **70%** of the Bidder's Total Score, and the Bidder's **Financial Score** will be valued at **30%** of the total score.

4.1.6 Definitions

The following definitions apply to the Criteria, below:

"Must" refers to a requirement. Failure on the part of the Bidder to provide the information or demonstrate it meets a requirement expressed by **"must"** within its Proposal will result in the Proposal being deemed non-compliant and no further consideration given.

"Should" refers to a desired element. Failure on the part of the Bidder to provide the information requested by **"should"** within its Proposal or to demonstrate that it meets the element expressed by **"should"** may result in the Bidder receiving less than full points on any Point-Rated Criteria. Bidders are encouraged to address all elements expressed by **"should"**.

4.1.7 Bidders **MUST** propose in One (1) of the five (5) Service Areas for Stream one (1) to five (5). Streams are defined as follow:

Stream 1:

Qualitative / Mixed-Methods / Historical Research and Analysis;

Stream 2:

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Quantitative Research and Analysis – Multivariate Data Analysis and Simulation;

Stream 3:

Data Visualization

Stream 4:

Data Development

Stream 5:

Policy Research and Analysis

4.1.8 Bidders must propose for the following Region:

- National Capital Region (NCR)

4.1.9 Submission of Only One Bid from a Bidding Group:

- i. The submission of more than one bid from members of the same bidding group per Region is not permitted in response to this bid solicitation. If members of a bidding group participate in more than one bid per Region, including as part of a joint venture, Canada will set aside all bids received from members of that bidding group.
- ii. For the purposes of this article, **“bidding group”** means all entities (whether those entities include one or more natural persons, corporations, partnerships, limited liability partnerships, etc.) that are related to one another. Regardless of the jurisdiction where any of the entities concerned is incorporated or otherwise formed as a matter of law, entities are considered **“related”** for the purposes of this bid solicitation if:
 - A. they are the same legal entity (i.e., the same natural person, corporation, partnership, limited liability partnership, etc.);
 - B. they are “related persons” or “affiliated persons” according to the *Canada Income Tax Act*;
 - C. the entities have now or in the two years before bid closing had a fiduciary relationship with one another (either as a result of an agency arrangement or any other form of fiduciary relationship); or
 - D. the entities otherwise do not deal with one another at arm’s length, or each of them does not deal at arm’s length with the same third party.

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4.2 Technical Evaluation

4.2.1 Mandatory Technical Criteria

The Mandatory Criteria listed below will be evaluated on a simple Pass/Fail (i.e. responsive/non-responsive or compliant/non-compliant) basis. Proposals which fail to meet one of the Mandatory Criteria will be deemed non-responsive and given no further consideration.

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

Bidders **MUST** clearly indicate in their proposal the page number and paragraph number where the reference material can be found.

WORK STREAM 1 - MANDATORY CRITERIA #1	MET	NOT MET
<p><u>M1 Qualifications of Resources</u></p> <p>The Bidder must propose at least one (1) resource. For the resource named, a detailed curriculum vitae (CV) must be provided.</p> <p>CVs must demonstrate that proposed resources have met ALL of the following minimum requirements:</p> <p>1) Graduation with a degree from a recognized university with acceptable specialization in the Social Sciences or Humanities (including Native/Indigenous/Aboriginal Studies, Canadian Studies, history, geography, anthropology, economics, demography, psychology, women’s studies, international studies, cultural studies, linguistics, political science, sociology, education, law), or a related field (a justification must be provided in order to show how the education attainment enables resource to contribute to Indigenous research).</p> <p>*Proof of education, a photocopy of degree(s), must be provided with the bid.</p> <p>2) Experience undertaking at least two (2) projects* within the last sixty (60) months in which the resource was responsible for at least one (1) of the following types of activities:</p> <ul style="list-style-type: none"> • Conducting a meta-analysis/systematic review • Applying culturally appropriate research methodologies in Indigenous contexts and Indigenous ways of knowing • Applying appropriate qualitative / mixed-methods / historical research methodologies • Conducting a structured literature review 		

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<p>3) Published at least one (1) peer-reviewed book or article or a research monograph; or two (2) conference presentations. Publications and/or presentations must have been completed within the past sixty (60) months.</p> <p>Relevant work experience should be listed chronologically, with brief descriptions of the nature of the work that indicate the depth of the resource's knowledge and experience.</p> <p>CVs should also include information about training, professional attainments, research grants, awards, publications, and any other information deemed relevant by the Bidder. All formal training should be listed chronologically; the title of the course or program and duration in days, months or years should be included.</p> <p>CVs will be used to evaluate resources against Mandatory M1 AND Point Rated Criteria R1.</p> <p>*Projects conducted as part of a degree program will not be considered.</p>		
<p>WORK STREAM 1 - MANDATORY CRITERIA #2</p>	<p align="center">MET</p>	<p align="center">NOT MET</p>
<p><u>M2 Resource Project Summaries & References</u></p> <p>1) For each of the two (2) projects* listed in the proposed resource's CV, the Bidder must provide written project summaries. The project summaries must describe in detail the proposed resources' experience in successfully providing qualitative / mixed-methods / historical research and analysis as described in Appendix D, Statement of Work, within the past sixty (60) months (dates calculated based on the closing date of the RFP).</p> <p>Within each project summary provided, the Bidder MUST indicate (a-g):</p> <ol style="list-style-type: none"> a) the name and a brief description of the client organization; b) the dates/duration (in years/months) of the project; c) the total resource level of effort (in days) for the duration of the project; d) a description of the services provided by the resource during the project, including his/her role and responsibilities in relation to the project; e) a brief description of the scope and complexity of the project, purpose, objectives, methodological approaches and/or theoretical frameworks utilized, needs, and issues which necessitated the contribution of the proposed resource; f) the extent to which the project finished on time, on budget and in accordance with the established project goals; and g) the name, title, e-mail address and telephone number of the client project authority**. <p>The Bidder MUST use Table M1.1 – Resource Project Summary Form (See attachment 1 to Part 4 for form) – for each Project Summary submitted. The Bidder is encouraged to provide detailed responses for each of the</p>		

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<p>requirements set out in the Table. The Bidder should copy Table M1.1 as required.</p> <p>2) The Bidder must include within its Proposal, a signed reference letter for each of the project summaries (using template, Table M2.1 included at Attachment 2 to Part 4).</p> <p>The reference** must be able to confirm the Resource's competencies in conducting research. The reference letter/template must be from an individual or a firm outside of the Bidder's organization and not from immediate relatives.</p> <p>Summaries and references will be used to evaluate resources against Mandatory Criteria M2 AND Point Rated Criteria R2.</p> <p>*Projects conducted as part of a degree program will not be considered.</p> <p>** References may be contacted, to validate information, at ISC's discretion.</p>		
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WORK STREAM 2 - MANDATORY CRITERIA #1	MET	NOT MET
<p><u>M1 Qualifications of Resources</u></p> <p>The Bidder must propose at least one (1) resource. For the resource named, a detailed curriculum vitae (CV) must be provided.</p> <p>CVs must demonstrate that proposed resources have met ALL of the following minimum requirements:</p> <ol style="list-style-type: none"> 1) Graduation with a degree from a recognized university with acceptable specialization in Economics, Social Sciences or Statistics, Psychology, Epidemiology, or Biostatistics or a related field (a justification must be provided in order to show how the education attainment enables resource to undertake quantitative analysis) with at least three (3) accredited courses in multivariate data analysis or simulation at the Bachelor's level or above. A graduate thesis wherein these methods were applied counts as an accredited course. Proof of education, a photocopy of degree(s), must be provided. 2) Experience undertaking at least two (2) projects* using quantitative analysis techniques within the past sixty (60) months, in which the resource was responsible for at least one of the following types of activities: <ul style="list-style-type: none"> • Applying univariate, bivariate and/or multivariate data analysis on demographic and/or economic and or social data • Simulating/forecasting demographic and/or economic and/or social, and/or health outcomes, and the impacts of these outcomes on Indigenous program utilization. 		

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<ul style="list-style-type: none"> • Reporting on multivariate data and/or detailed, disaggregated simulation/forecasting results • Producing interactive data visualizations • Demographic estimation techniques <p>3) Published at least one (1) peer-reviewed book or article or a research monograph; or an interactive database or map depicting multiple demographic, economic, social or socioeconomic indicators of interest to Indigenous peoples and communities; or two (2) conference presentations. Publications and/or presentations must have been completed within the past sixty (60) months.</p> <p>Relevant work experience should be listed chronologically, with brief descriptions of the nature of the work that indicate the depth of the resource's knowledge and experience.</p> <p>CVs should also include information about training, professional attainments, research grants, awards, publications, and any other information deemed relevant by the Bidder. All formal training should be listed chronologically; the title of the course or program and duration in days, months or years should be included.</p> <p>CVs will be used to evaluate resources against Mandatory M1 AND Point Rated Criteria R1.</p> <p>*Projects conducted as part of a degree program will not be considered.</p>		
<p>WORK STREAM 2 - MANDATORY CRITERIA #2</p> <p>M2 Bidder Project Summaries & References</p> <p>2.1 For each of the two (2) projects* listed in the proposed resource's CV, the Bidder must provide written project summaries. The project summaries must describe in detail the proposed resources' experience in successfully providing demographic and/or socio-economic research and analysis as described in Appendix A, Statement of Work, during the past sixty (60) months (dates calculated based on the closing date of the RFP).</p> <p>Within each project summary provided, the Bidder MUST indicate (a-g):</p> <ol style="list-style-type: none"> a) the name and a brief description of the client organization; b) the dates/duration (in months) of the project; c) the total resource level of effort (in days) for the duration of the project; d) a description of the services provided by the resource during the project, including his/her role and responsibilities in relation to the project; e) a brief description of the scope and complexity of the project, purpose, objectives, methodological approaches and/or theoretical frameworks utilized, needs, and issues which necessitated the contribution of the proposed resource; f) the extent to which the project finished on time, on budget and in accordance with the established project goals; and g) the name, title, e-mail address and telephone number of the client project authority**. 	MET	NOT MET

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<p>The Bidder MUST use Table M1.2 – Resource Project Summary Form (Attachment 1 to Part 4) – for each Project Summary submitted. The Bidder is encouraged to provide detailed responses for each of the requirements set out in the Table. The Bidder should copy Table M1.2 as required.</p> <p>2.2 The Bidder must include within its Proposal, a signed reference letter for each of the project summaries (using template, Table M2.2 at Attachment 2 to Part 4 below).</p> <p>The reference** must be able to confirm the Resource’s competencies in undertaking quantitative research. The reference letter/template must be from an individual or a firm outside of the Bidder’s organization and not from immediate relatives.</p> <p>Summaries and references will be used to evaluate resources against Mandatory Criteria M2 AND Point Rated Criteria R2.</p> <p>*Projects conducted as part of a degree program will not be considered. ** References may be contacted, to validate information, at ISC’s discretion.</p>	
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	MET	NOT MET
<p>WORK STREAM 3 - MANDATORY CRITERIA #1</p> <p>M1 Qualifications of Resources</p> <p>The Bidder must propose at least one (1) resource. For the resource named, a detailed curriculum vitae (CV) must be provided.</p> <p>CVs must demonstrate that proposed resources have met ALL of the following minimum requirements:</p> <ol style="list-style-type: none"> 1) Graduation with a degree from a recognized university with acceptable specialization in Economics, Social Sciences or Statistics, Computer Science, Computer Engineering or a related field with at least two (2) accredited courses related to data science or analytics. A graduate thesis involving data science or analytics counts as an accredited course. Proof of education, a photocopy of degree(s), must be provided. 2) Experience undertaking at least two (2) projects* within the past sixty (60) months, in which the resource was responsible for undertaking at least one of the following types of activities: <ul style="list-style-type: none"> • Conducting data analytics using a variety of tools and techniques from statistics and/or computer science to leverage data of various kinds and/or various sources with a focus on visualizing and/or otherwise exploring issues related to Indigenous peoples. • Conducting complex manipulation and/or management of at least three (3) substantively different data sets while applying data governance principles and/or tools 		

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<ul style="list-style-type: none"> • Compiling and manipulating data, defined in terms of preparing data for analysis and/or linking disparate data sources to create hybrid data sets • Producing interactive data visualizations <p>Relevant work experience should be listed chronologically, with brief descriptions of the nature of the work that indicate the depth of the resource's knowledge and experience.</p> <p>CVs should also include information about training, professional attainments, research grants, awards, publications, and any other information deemed relevant by the Bidder. All formal training should be listed chronologically; the title of the course or program and duration in days, months or years should be included.</p> <p>CVs will be used to evaluate resources against Mandatory M1 AND Point Rated Criteria R1.</p> <p>*Projects conducted as part of a degree program will not be considered.</p>	<p>MET</p>	<p>MET</p>	
<p>WORK STREAM 3 - MANDATORY CRITERIA #2</p>		<p>NOT MET</p>	
<p>M2 Resource Project Summaries & References</p> <p>For each of the two (2) projects* listed in the proposed resource's CV, the Bidder must provide written project summaries. The project summaries must describe in detail the proposed resources' experience as described in Annex A, Statement of Work, within the last eighty four (84) months (dates calculated based on the closing date of the RFP).</p> <p>Within each project summary provided, the Bidder MUST indicate (a-g):</p> <ol style="list-style-type: none"> a) the name and a brief description of the client organization; b) the dates/duration (in months) of the project; c) the total resource level of effort (in days) for the duration of the project; d) a description of the services provided by the resource during the project, including his/her role and responsibilities in relation to the project; e) a brief description of the scope and complexity of the project, purpose, objectives, methodological approaches and/or theoretical frameworks utilized, needs, and issues which necessitated the contribution of the proposed resource; f) the extent to which the project finished on time, on budget and in accordance with the established project goals; and g) the name, title, e-mail address and telephone number of the client project authority**. <p>The Bidder MUST use Table M1.3 – Resource Project Summary Form (Attachment 1 to Part 4) – for each Project Summary submitted. The Bidder is encouraged to provide detailed responses for each of the requirements set out in the Table. The Bidder should copy Table M1.3 as required.</p> <p>2.2 The Bidder must include within its Proposal, a signed reference letter for each of the project summaries (using template, Table M2.3).</p>	<p>MET</p>		

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<p>The reference** must be able to confirm the Resource's competencies in the field of data visualization. The reference letter/template must be from an individual or a firm outside of the Bidder's organization and not from immediate relatives.</p> <p>Summaries and references will be used to evaluate resources against Mandatory Criteria M2 AND Point Rated Criteria R2</p> <p>*Projects conducted as part of a degree program will not be considered. ** References may be contacted, to validate information, at ISC's discretion.</p>		
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WORK STREAM 4 - MANDATORY CRITERIA #1	MET	NOT MET
<p>M1 Qualifications of Resources</p> <p>The Bidder must propose at least one (1) resource. For the resource named, a detailed curriculum vitae (CV) must be provided.</p> <p>CVs must demonstrate that proposed resources have met ALL of the following minimum requirements:</p> <ol style="list-style-type: none"> 1) Graduation with a degree from a recognized university with acceptable specialization in Economics, Social Sciences or Statistics, Computer Science, Computer Engineering or a related field with at least two (2) accredited courses related to data science or analytics. A graduate thesis involving data science or analytics counts as an accredited course. Proof of education, a photocopy of degree(s), must be provided. 2) Experience undertaking at least two (2) projects* within the last sixty (60) months, in which the resource was responsible for undertaking at least one of the following types of activities: <ul style="list-style-type: none"> • Providing advisory services in the area of data development, covering a range of issues including but not limited to: • Data governance • Data management • Data sharing • Data linkages • Data collections and acquisitions • Conducting complex manipulation and/or management of at least three (3) substantively different data sets while applying data governance principles and/or tools • Developing data, defined in terms of designing/implementing surveys and/or scraping data and/or developing simulation environments, and/or linking disparate data sources to create hybrid data sets 		

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<p>Relevant work experience should be listed chronologically, with brief descriptions of the nature of the work that indicate the depth of the resource's knowledge and experience.</p> <p>CVs should also include information about training, professional attainments, research grants, awards, publications, and any other information deemed relevant by the Bidder. All formal training should be listed chronologically, the title of the course or program and duration in days, months or years should be included.</p> <p>CVs will be used to evaluate resources against Mandatory M1 AND Point Rated Criteria R1.</p> <p>*Projects conducted as part of a degree program will not be considered.</p>		
<p>WORK STREAM 4 - MANDATORY CRITERIA #2</p> <p>M2 Resource Project Summaries & References</p> <p>2.1 For each of the two (2) projects* listed in the proposed resource's CV, the Bidder must provide written project summaries. The project summaries must describe in detail the proposed resources' experience as described in Annex A, Statement of Work, within the last sixty (60) months (dates calculated based on the closing date of the RFP).</p> <p>Within each project summary provided, the Bidder MUST indicate (a-g):</p> <ol style="list-style-type: none"> a) the name and a brief description of the client organization; b) the dates/duration (in years/months) of the project; c) the total resource level of effort (in days) for the duration of the project; d) a description of the services provided by the resource during the project, including his/her role and responsibilities in relation to the project; e) a brief description of the scope and complexity of the project, purpose, objectives, methodological approaches and/or theoretical frameworks utilized, needs, and issues which necessitated the contribution of the proposed resource; f) the extent to which the project finished on time, on budget and in accordance with the established project goals; and g) the name, title, e-mail address and telephone number of the client project authority**. <p>The Bidder MUST use Table M1.4 – Resource Project Summary Form (Attachment 1 to Part 4) – for each Project Summary submitted. The Bidder is encouraged to provide detailed responses for each of the requirements set out in the Table. The Bidder should copy Table M1.4 as required.</p> <p>2.2 The Bidder must include within its Proposal, a signed reference letter for each of the project summaries (using template, Table M2.4 in attachment 2 to Part 4).</p> <p>The reference** must be able to confirm the Resource's competencies in the field of data visualization. The reference letter/template must be from an individual or a firm outside of the Bidder's organization and not from immediate relatives.</p> <p>Summaries and references will be used to evaluate resources against Mandatory Criteria M2 AND Point Rated Criteria R2</p>	<p align="center">MET</p>	<p align="center">NOT MET</p>

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<p>*Projects conducted as part of a degree program will not be considered. ** References may be contacted, to validate information, at ISC's discretion.</p>		
<p>WORK STREAM 5 - MANDATORY CRITERIA #1</p>		
<p>M1 Qualifications of Resources</p> <p>The Bidder must propose at least one (1) resource. For each resource named, a detailed curriculum vitae (CV) must be provided.</p> <p>CVs must demonstrate that proposed resources have met ALL of the following minimum requirements:</p> <ol style="list-style-type: none"> 1) Graduation with a degree from a recognized university with acceptable specialization in Economics, Social Sciences or Statistics, or a related field (a justification must be provided in order to show how the education attainment enables resource to contribute to Indigenous issues in Canada and policy development) or specialization over a period of a hundred twenty (120) consecutive months in policy or program initiatives obtained through an acceptable combination of education, training, and/or experience. Proof of education, a photocopy of degree(s), must be provided. 2) Experience undertaking at least two (2) projects* within the past sixty (60) months, in which the resource was responsible for undertaking at least one of the following types of activities: <ul style="list-style-type: none"> • Managing policy research • Leading policy analysis • Facilitating stakeholder engagement • Formulating policy recommendations • Leading policy development • Conducting structured literature reviews and environmental scans <p>Relevant work experience should be listed chronologically, with brief descriptions of the nature of the work that indicate the depth of the resource's knowledge and experience.</p> <p>CVs should also include information about training, professional attainments, research grants, awards, publications, and any other information deemed relevant by the Bidder. All formal training should be listed chronologically; the title of the course or program and duration in days, months or years should be included.</p> <p>CVs will be used to evaluate resources against Mandatory M1 AND Point Rated Criteria R1.</p> <p>*Projects conducted as part of a degree program will not be considered.</p>	<p align="center">MET</p>	<p align="center">NOT MET</p>

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WORK STREAM 5 - MANDATORY CRITERIA #2	MET	NOT MET
<p>M2 Resource Project Summaries & References</p> <p>2.1 For each of the two (2) projects* listed in the proposed resource's C.V, the Bidder must provide written project summaries. The project summaries must describe in detail the proposed resources' experience in relations management and/or policy development as described in Annex A, Statement of Work, within the last sixty (60) months (dates calculated based on the closing date of the RFP).</p> <p>Within each project summary provided, the Bidder MUST indicate (a-g):</p> <ul style="list-style-type: none"> a) the name and a brief description of the client organization; b) the dates/duration (in months) of the project; c) the total resource level of effort (in days) for the duration of the project; d) a description of the services provided by the resource during the project, including his/her role and responsibilities in relation to the project; e) a brief description of the scope and complexity of the project, purpose, objectives, methodological approaches and/or theoretical frameworks utilized, needs, and issues which necessitated the contribution of the proposed resource; f) The extent to which the project finished on time, on budget and in accordance with the established project goals; and g) the name, title, e-mail address and telephone number of the client project authority**. <p>The Bidder MUST use Table M1.5 – Resource Project Summary Form (Attachment 1 to Part 4) – for each Project Summary submitted. The Bidder is encouraged to provide detailed responses for each of the requirements set out in the Table. The Bidder should copy Table M1.5 as required.</p> <p>2.2 The Bidder must include within its Proposal, a signed reference letter for each of the project summaries (using template, Table M2.5 at Attachment 2 to part 4)).</p> <p>The reference** must be able to confirm the Resource's competencies in managing relationships and leading policy development. The reference letter/template must be from an individual or a firm outside of the Bidder's organization and not from immediate relatives.</p> <p>*Projects conducted as part of a degree program will not be considered.</p> <p>** References may be contacted, to validate information, at ISC's discretion.</p> <p><i>Summaries and references will be used to evaluate resources against Mandatory Criteria M2 AND Point Rated Criteria R2</i></p>		

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4.2.1 Point Rated Technical Criteria

Proposals meeting all mandatory technical criteria will be evaluated and point rated against the following point rated technical criteria, using the evaluation factors and weighting indicators specified for each criterion.

Point Rated Criteria – Work Stream 1: Qualitative / Mixed-Methods / Historical Research and Analysis

R1 - Resource Qualifications		
Criteria	Weight	Evaluation Factors
R1.1 Education attainment	/7	3 points for a master’s degree. 4 additional points for a PhD. Either degree must be from a recognized university with acceptable specialization in the Social Sciences or Humanities (including Native/Indigenous/Aboriginal Studies, Canadian Studies, history, geography, anthropology, economics, demography, psychology, women’s studies, international studies, cultural studies, linguistics, political science, sociology, education, law), or a related field (a justification must be provided in order to show how the education attainment enables resource to contribute to Indigenous research).
R1.2 Publications	/10	1 point per book on non-Indigenous issues or 3 points per book on Indigenous issues; 1 point per article on non-Indigenous issues or 3 points per article on Indigenous issues; 1 point per conference presentation on non-Indigenous issues or 3 points per conference presentation on Indigenous issues. Up to a total of 10 points.
Sub-Total		/17
R2 Resource Experience		

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<p>The evidence within the Project summaries for the Bidder’s proposed Resource submitted in response to the Mandatory Requirement M2, will be evaluated on the breadth and quality of the individual’s experience regarding the conduct of qualitative / mixed-methods / historical research and analysis, as defined in the Statement of Work. The two (2) examples of work experience will be rated as a whole.</p>		
Criteria	Weight	Evaluation Factors
2.1 Experience in carrying out qualitative / mixed-methods / historical research and analysis activities in Canada.	/20	<p>Four (4) points will be allocated per type of activity undertaken in the two (2) submitted examples of work experience. Specific activity types include:</p> <ul style="list-style-type: none"> • conducting meta-analyses/systematic reviews; • applying culturally appropriate research methodologies and Indigenous ways of knowing; • applying appropriate qualitative / mixed-methods / historical research methodologies; • conducting structured literature reviews.
2.2 Experience in carrying out qualitative / mixed-methods / historical research and analysis activities in Canada.	/15	<p>Three (3) points will be allocated per theme addressed in the two (2) examples of work experience, up to a total of 15 points. The specific themes are:</p> <ul style="list-style-type: none"> • lived experiences of Indigenous peoples • social determinants of health; • economic development; • women; • children and youth; • LGBTQ+; and/or urban.
2.3 Experience in carrying out gender-based analysis as defined by Women and Gender Equality Canada within the conduct of qualitative / mixed-methods / historical research and analysis activities in Canada.	/12	<p>Three (3) points per project (including the 2 projects identified in M1) up to 12 points.</p>
Sub-Total		/47
R3 Resource References		

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<p>The evidence within the reference template for the Bidder’s proposed Resource submitted in response to the Mandatory Requirement M2.2, will be evaluated on the quality of the individual’s reference.</p>		
R3.1 Reference #1	/15	<p>Three (3) points will be allocated if the resource was managing the project and one (1) point if the resource was responsible for completing the project (under a project manager) in section 1 of the resource reference template.</p> <p>One (1) point will be allocated for each “Yes” answer for section 2 and 3 and four (4) points for an answer “Yes” for section 4 of the resource reference template.</p>
R3.2 Reference #2	/15	<p>Three (3) points will be allocated if the resource was managing the project and one (1) point if the resource was responsible for completing the project (under a project manager) in section 1 of the resource reference template.</p> <p>One (1) point will be allocated for each “Yes” answer for section 2 and 3 and four (4) points for an answer “Yes” for section 4 of the resource reference template.</p>
R3.3 Reference #3	/15	<p>Three (3) points will be allocated if the resource was managing the project and one (1) point if the resource was responsible for completing the project (under a project manager) in section 1 of the resource reference template.</p> <p>One (1) point will be allocated for each “Yes” answers for section 2 and 3 and four (4) points for an answer “Yes” for section 4 of the resource reference template.</p>
Sub-Total		/45
Total	/109	Minimum Pass Mark: 70%

Point Rated Criteria – Work Stream 2: Quantitative Research and Analysis – Multivariate Data Analysis and Simulation

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<p>R1 Resource Qualifications The evidence within the CV for the Bidder's proposed Resource, submitted in response to Mandatory Requirement M1 will be evaluated on the breadth of the individual's experience regarding the provision of quantitative research and analysis as defined in the Statement of Work.</p>		
Criteria	Weight	Evaluation Factors
R1.1 Education attainment	/7	Graduation with a degree from a recognized university with acceptable specialization in Economics, Social Sciences or Statistics, Psychology, Epidemiology, or Biostatistics or a related field (a justification must be provided in order to show how the education attainment enables resource to undertake quantitative analysis) with at least 3 accredited courses in multivariate data analysis or simulation at the Bachelor's level or above. A graduate thesis wherein these methods were applied counts as an accredited course. Proof of education (a photocopy of the degree) must be provided.
R1.4 Publications	/10	1 points per book on non-Indigenous issues or 3 points per book on Indigenous issues; 1 point per article on non-Indigenous issues or 3 points per article on Indigenous issues; 1 point per conference presentation on non-Indigenous issues or 3 points per conference presentation on Indigenous issues. Up to a maximum of 10 points.
Sub-Total		/17
<p>R2 Resource Experience The evidence within the Project summaries for the Bidder's proposed Resource submitted in response to the Mandatory Requirement M2.1, will be evaluated on the breadth and quality of the individual's experience regarding the provision of quantitative research and analysis as defined in the Statement of Work. The two (2) examples of work experience will be rated as a whole.</p>		
Criteria	Weight	Evaluation Factors
2.1 Experience in carrying out quantitative analysis activities.	/20	4 points will be allocated per type of activity undertaken in the 2 submitted examples of work experience, as per the section 6.1.2 in the statement of work, up to a maximum of 20 points. Specific experience categories include data analysis products in the following areas: <ul style="list-style-type: none"> • applying multivariate data analysis techniques to analyze structured data on demographic and/or economic and or social data

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		<ul style="list-style-type: none"> • using simulation techniques to predict/project detailed, disaggregated demographic and/or economic and or social outcomes • reporting on multivariate data and/or simulation results • conducting structured literature reviews • applying demographic techniques
2.2 Experience in carrying out quantitative analysis activities.	/15	<p>3 points will be allocated per theme addressed in the three examples of work experience, as per the section 6.1.2 in the statement of work, up to a maximum of 15 points. Specific themes include:</p> <ul style="list-style-type: none"> • Indigenous-specific research; • social determinants of health; • economic development; • women; • children and youth; • LGBTQ+; and/or • urban.
2.3 Experience in carrying out gender-based analysis as defined by Status of Women Canada within the conduct of quantitative research and analysis activities.	/12	3 points per project (including the 2 projects identified in M1), up to a maximum of 12 points.
Sub-Total		/47
<p>R3 Resource Reference The evidence within the reference template for the Bidder’s proposed Resource submitted in response to the Mandatory Requirement M2.2, will be evaluated on the quality of the individual’s reference in regards to the provision of quantitative research and analysis as defined in the Statement of Work.</p>		
R3.1 Reference #1	/15	3 points will be allocated if the resource was managing the project and 1 point if the resource was responsible for completing the project (under a project manager) in section 1 of the resource reference template.

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		1 point will be allocated for each "Yes" answer for section 2 and 3; and 4 points for an answer "Yes" for section 4 of the resource reference template, up to a maximum of 15 points.
R3.2 Reference #2	/15	3 points will be allocated if the resource was managing the project and 1 point if the resource was responsible for completing the project (under a project manager) in section 1 of the resource reference template. One (1) point will be allocated for each "Yes" answer for section 2 and 3; and 4 points for an answer "Yes" for section 4 of the resource reference template, up to a maximum of 15 points.
R3.3 Reference #3	/15	3 points will be allocated if the resource was managing the project and 1 point if the resource was responsible for completing the project (under a project manager) in section 1 of the resource reference template. 1 point will be allocated for each "Yes" answers for section 2 and 3; and 4 points for an answer "Yes" for section 4 of the resource reference template.
Sub-Total		/45
Total	/109	Minimum Pass Mark: 70%

Pass-mark

In order to be judged acceptable, proposals must meet all the mandatory requirements. Only resources that achieve a pass-mark of 70% overall on point-rated criteria **R1-R3** will be considered for selection on the basis of their financial proposal.

Point Rated Criteria – Work Stream 3: Data Visualization

R1 Resource Qualifications		
The evidence within the CV for the Bidder's proposed Resource, submitted in response to Mandatory Requirement M1 will be evaluated on the breadth of the individual's experience in conducting data visualization, as defined in the Statement of Work.		
Criteria	Weight	Evaluation Factors

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R1.1 Education attainment	/7	3 points for a master's degree. Either degree must be from a recognized university with acceptable specialization in Economics, Social Sciences or Statistics, Computer Science, Computer Engineering or a related field with at least 2 accredited courses related to data science or analytics. A graduate thesis involving data science or analytics counts as an accredited course. 2 points per accredited course
R1.2 Work experience	/8	2 points per past work experience (in excess of the 3 projects identified in M1), up to a maximum of 8 points.
Sub-Total		/15
R2 Resource Experience		
The evidence within the Project summaries for the Bidder's proposed Resource submitted in response to the Mandatory Requirement M2.1 , will be evaluated on the breadth and quality of the individual's experience as defined in the Statement of Work. The two examples of work experience will be rated as a whole.		
Criteria	Weight	Evaluation Factors
2.1 Experience in programming.	/20	2 points will be allocated per past project that utilized programming languages, up to a maximum of 20 points, including but not limited to the following: <ul style="list-style-type: none"> • Java • Python • Scala • R • C# • C++ • C • SAS • SPSS
2.2 Experience with interactive maps	/8	2 points per past experience involving the development of an interactive map, up to a maximum of 8 points.
Sub-Total		/28
R3 Resource Reference		
The evidence within the reference template for the Bidder's proposed Resource submitted in response to the Mandatory Requirement M2.2 , will be evaluated on the quality of the individual's reference in conducting data visualization, as defined in the Statement of Work.		

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R3.1 Reference #1	/15	<p>3 points will be allocated if the resource was managing the project 1 point if the resource was responsible for completing the project (under a project manager) in section 1 of the resource reference template.</p> <p>1 point will be allocated for each "Yes" answer for section 2 and 3; and 4 points for an answer "Yes" for section 4 of the resource reference template, up to a maximum of 15 points.</p>
R3.2 Reference #2	/15	<p>3 points will be allocated if the resource was managing the project and 1 point if the resource was responsible for completing the project (under a project manager) in section 1 of the resource reference template.</p> <p>1 point will be allocated for each "Yes" answer for section 2 and 3; and 4 points for an answer "Yes" for section 4 of the resource reference template, up to a maximum of 15 points.</p>
R3.3 Reference #3	/15	<p>3 points will be allocated if the resource was managing the project and 1 point if the resource was responsible for completing the project (under a project manager) in section 1 of the resource reference template.</p> <p>1 point will be allocated for each "Yes" answers for section 2 and 3; and 4 points for an answer "Yes" for section 4 of the resource reference template, up to a maximum of 15 points.</p>
Sub-Total		/45
Total	/88	Minimum Pass Mark: 70%

Pass-mark

In order to be judged acceptable, proposals must meet all the mandatory requirements. Only resources that achieve a pass-mark of 70% overall on point-rated criteria **R1-R3** will be considered for selection on the basis of their financial proposal.

Point Rated Criteria – Work Stream 4: Data Development

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R1 Resource Qualifications		
The evidence within the CV for the Bidder's proposed Resource, submitted in response to Mandatory Requirement M1 will be evaluated on the breadth of the individual's experience in conducting data development, as defined in the Statement of Work.		
Criteria	Weight	Evaluation Factors
R1.1 Education attainment	/7	3 points for a master's degree. Either degree must be from a recognized university with acceptable specialization in Economics, Social Sciences or Statistics, Computer Science, Computer Engineering or a related field with at least 2 accredited courses related to data science or analytics. 2 points per accredited course. A graduate thesis involving data science or analytics counts as an accredited course. Proof of education, a photocopy of degree(s), must be provided.
R1.2 Work experience	/8	2 points per past work experience (in excess of the 3 projects identified in M1), up to a maximum of 8 points.
Sub-Total		/15
R2 Resource Experience		
The evidence within the Project summaries for the Bidder's proposed Resource submitted in response to the Mandatory Requirement M2.1 , will be evaluated on the breadth and quality of the individual's experience as defined in the Statement of Work. The two examples of work experience will be rated as a whole.		
Criteria	Weight	Evaluation Factors
2.1 Experience in programming.	/20	2 points will be allocated per past project that utilized programming languages, up to a maximum of 20 points, including but not limited to the following: <ul style="list-style-type: none"> • Java • Python • Scala • R • C# • C++ • C • SAS • SPSS
2.2 Experience with interactive maps	/8	2 points per past experience involving the development of an interactive map, up to a maximum of 8 points

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Sub-Total	/28
<p>R3 Resource Reference The evidence within the reference template for the Bidder’s proposed Resource submitted in response to the Mandatory Requirement M2.2, will be evaluated on the quality of the individual’s reference in conducting data development, as defined in the Statement of Work.</p>	
R3.1 Reference #1	<p>/15 3 points will be allocated if the resource was managing the project and 1 point if the resource was responsible for completing the project (under a project manager) in section 1 of the resource reference template.</p> <p>1 point will be allocated for each “Yes” answer for section 2 and 3; and 4 points for an answer “Yes” for section 4 of the resource reference template, up to a maximum of 15 points.</p>
R3.2 Reference #2	<p>/15 3 points will be allocated if the resource was managing the project and 1 point if the resource was responsible for completing the project (under a project manager) in section 1 of the resource reference template.</p> <p>1 point will be allocated for each “Yes” answer for section 2 and 3; and 4 points for an answer “Yes” for section 4 of the resource reference template, up to a maximum of 15 points.</p>
R3.3 Reference #3	<p>/15 3 points will be allocated if the resource was managing the project and 1 point if the resource was responsible for completing the project (under a project manager) in section 1 of the resource reference template.</p> <p>1 point will be allocated for each “Yes” answers for section 2 and 3; and 4 points for an answer “Yes” for section 4 of the resource reference template, up to a maximum of 15 points.</p>
Sub-Total	/45
Total	/88
Pass-mark	
Minimum Pass Mark: 70%	

Pass-mark

In order to be judged acceptable, proposals must meet all the mandatory requirements. Only resources that achieve a pass-mark of 70% overall on point-rated criteria **R1-R3** will be considered for selection on the basis of their financial proposal.

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Point Rated Criteria – Work Stream 5: Policy Research and Analysis

<p>R1 Resource Qualifications The evidence within the CV for the Bidder’s proposed Resource, submitted in response to Mandatory Requirement M1 will be evaluated on the breadth of the individual’s experience regarding the provision of policy research and analysis, as defined in the Statement of Work.</p>		
Criteria	Weight	Evaluation Factors
R1.1 Education attainment	/7	3 points for a master’s degree. 4 points for a PhD, up to a maximum of 7 points. Either degree must be from a recognized university with acceptable specialization in Economics, Social Sciences or Statistics, or a related field (a justification must be provided in order to show how the education attainment enables resource to contribute to Indigenous issues in Canada and policy development) or specialization over a period of a hundred twenty (120) consecutive months in policy or program initiatives obtained through an acceptable combination of education, training, and/or experience. Proof of education, a photocopy of degree(s), must be provided.
Sub-Total		/ 7
<p>R2 Resource Experience The evidence within the Project summaries for the Bidder’s proposed Resource submitted in response to the Mandatory Requirement M2.1, will be evaluated on the breadth and quality of the individual’s experience regarding the provision of policy research and analysis, as defined in the Statement of Work. The three examples of work experience will be rated as a whole.</p>		
Criteria	Weight	Evaluation Factors
2.1 Experience in carrying out policy research and/or analysis activities specific to the Indigenous context in Canada.	/20	4 points will be allocated per type of activity undertaken in the 2 submitted examples of work experience, as per the section 6.1.3 of the statement of work, up to a maximum of 20 points. Specific experience categories include: <ul style="list-style-type: none"> • policy research, • policy analysis, • stakeholder engagement, • policy recommendations, • policy development, and/or • structured literature reviews/environmental scans.

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<p>2.2 Experience in addressing policy themes.</p>	<p>/15</p>	<p>3 points will be allocated per theme addressed in the 2 examples of work experience, up to a maximum of 15 points. Specific themes include:</p> <ul style="list-style-type: none"> • social determinants of health; • economic development; • women; • children and youth; • LGBTQ+; and/or • urban.
<p>2.3 Experience in carrying out gender-based analysis as defined by Women and Gender Equality Canada.</p>	<p>/12</p>	<p>3 points per project (including the 2 projects identified in M1), up to a maximum of 12 points.</p>
<p>Sub-Total</p>		<p>/47</p>
<p>R3 Resource Reference The evidence within the reference template for the Bidder's proposed Resource submitted in response to the Mandatory Requirement M2.2, will be evaluated on the quality of the individual's reference in regards to the provision of policy research and analysis, as defined in the Statement of Work.</p>		
<p>R3.1 Reference #1</p>	<p>/15</p>	<p>3 points will be allocated if the resource was managing the project and 1 point if the resource was responsible for completing the project (under a project manager) in section 1 of the resource reference template.</p> <p>1 point will be allocated for each "Yes" answer for section 2 and 3; and 4 points for an answer "Yes" for section 4 of the resource reference template, up to a maximum of 15 points.</p>
<p>R3.2 Reference #2</p>	<p>/15</p>	<p>3 points will be allocated if the resource was managing the project and 1 point if the resource was responsible for completing the project (under a project manager) in section 1 of the resource reference template.</p> <p>1 point will be allocated for each "Yes" answer for section 2 and 3; and 4 points for an answer "Yes" for section 4 of the resource reference template, up to a maximum of 15 points.</p>

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R3.3 Reference #3	/15	3 points will be allocated if the resource was managing the project and 1 point if the resource was responsible for completing the project (under a project manager) in section 1 of the resource reference template. 1 point will be allocated for each "Yes" answers for section 2 and 3; and 4 points for an answer "Yes" for section 4 of the resource reference template, up to a maximum of 15 points.
Sub-Total		/45
Total	/99	Minimum Pass Mark: 70%

Pass-mark

In order to be judged acceptable, proposals must meet all the mandatory requirements. Only resources that achieve a pass-mark of 70% overall on point-rated criteria R1-R3 will be considered for selection on the basis of their financial proposal.

Selection

4.3 Financial Evaluation

- 4.3.1** The Financial Evaluation will be carried out by an ISC Evaluation Committee responsible for rating the Technical Offer. Financial Offers will be evaluated based on the methodology detailed below.
- 4.3.2** All of the information required in this section **MUST** appear in the Bidder's Financial Offer ONLY. The Bidder's Financial Offer **MUST** be submitted in a separate attachment from the Bidder's Technical Offer. The Bidder's failure to comply with this condition will result in the Bidder's Offer being declared non-responsive and being given no further consideration.
- 4.3.3** Failure on the part of the Bidder to provide the information required within the Financial Offer table at 4.3.8 below will result in ISC deeming the Bidder's Offer to be non-responsive, with the Offer being given no further consideration by ISC.
- 4.3.4** For evaluation purposes, the proposed all-inclusive per diem rates as indicated in section 4.5.8 for the initial SOA period and the two option years will be averaged and weighted by work stream type to derive to an average per diem rate.
- 4.3.5** The Bidder's fixed, all-inclusive per diem rates **MUST** be inclusive of all payroll, overhead costs and profits required to complete the work. Fixed rates are not to be quoted as ranges. Fixed per diem rates should not include such things as travel expenses, living expenses, or transportation for any travel that may be authorized by and should not include GST/HST.
- 4.3.6** Using the Financial Offer table at 4.3.8 below, the Bidder **MUST** provide firm per diem rate (in CAD) for a 7.5 hour day and per Service Category.
- 4.3.7** The Bidder **MUST** indicate the applicable fixed all-inclusive per diem rate (CAD) for each of the first three (3) years of the SOA : 1) the initial SOA period, 2) option year 1; and 3) option year 2.

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Rates proposed for the option years must be equal or greater than rate proposed in the initial contract period.

SACC Manual Clause [M0220T \(2016-01-28\) Evaluation of Price - Offer](#)

4.3.8 Financial Offer Table

STREAM 1: (BIDDERS FOR STREAM 1 MUST FILL THIS TABLE)

Stream 1 Service Category	All-inclusive per diem Rate (CAD)			Level of Effort	For Evaluation purpose ONLY for use by the Contracting Authority Average and weighted Per Diem Rates (A+B+C X D/3)
	upon award until March 31, 2025 (Initial SOA period) A	April 1, 2025 to March 31, 2026 Option year 1 B	April 1, 2026 to March 31, 2027 Option year 2 C		
Qualitative / Mixed-Methods / Historical Research and Analysis	\$	\$	\$	100	\$
Bidder's Evaluation Assessment Value (sum total of averaged per diem rates)					\$

*ISC will calculate the Bidder's Financial Score.

STREAM 2: (BIDDER FOR STREAM 2 MUST FILL THIS TABLE)

Stream 2 Service Categories	All-inclusive per diem Rate (CAD)			Level of Effort	For Evaluation purpose ONLY for use by the Contracting Authority Average and weighted Per Diem Rates (A+B+C X D/3)
	upon award until March 31, 2025 (Initial SOA period) A	April 1, 2025 to March 31, 2026 Option year 1 B	April 1, 2026 to March 31, 2027 Option year 2 C		
Quantitative Research and Analysis - Multivariate Data	\$	\$	\$	100	\$

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Analysis and Simulation				
Bidder's Evaluation Assessment Value (sum total of averaged per diem rates)				\$

**ISC will calculate the Bidder's Financial Score.*

STREAM 3: (BIDDER FOR STREAM 3 MUST FILL THIS TABLE)

Stream 3	All-inclusive per diem Rate (CAD)		For Evaluation purpose ONLY for use by the Contracting Authority		
Service Categories	upon award until March 31, 2025 (Initial SOA period)	April 1, 2025 to March 31, 2026 Option year 1	April 1, 2026 to March 31, 2027 Option year 2	Level of Effort	Average and weighted Per Diem Rates (A+B+C X D/3)
	A	B	C	D	
Data Visualization	\$	\$	\$	100	\$
Bidder's Evaluation Assessment Value (sum total of averaged per diem rates)					\$

**ISC will calculate the Bidder's Financial Score.*

STREAM 4: (BIDDER FOR STREAM 4 MUST FILL THIS TABLE)

Stream 4	All-inclusive per diem Rate (CAD)		For Evaluation purpose ONLY for use by the Contracting Authority		
Service Categories	upon award until March 31, 2025 (Initial SOA period)	April 1, 2025 to March 31, 2026 Option year 1	April 1, 2026 to March 31, 2027 Option year 2	Level of Effort	Average and weighted Per Diem Rates (A+B+C X D/3)
	A	B	C	D	
Data Development	\$	\$	\$	100	\$
Bidder's Evaluation Assessment Value (sum total of averaged per diem rates)					\$

**ISC will calculate the Bidder's Financial Score.*

STREAM 5: (BIDDER FOR STREAM 5 MUST FILL THIS TABLE)

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Stream 5 Service Categories	All-inclusive per diem Rate (CAD)			For Evaluation purpose ONLY/for use by the Contracting Authority	
	upon award until March 31, 2025 (Initial SOA period)	April 1, 2025 to March 31, 2026	April 1, 2026 to March 31, 2027	Level of Effort	Average and weighted Per Diem Rates (A+B+C X D/3)
	A	B	C	D	
Policy Research and Analysis	\$	\$	\$	100	\$
Bidder's Evaluation Assessment Value (sum total of averaged per diem rates)					\$

**ISC will calculate the Bidder's Financial Score.*

- 4.4 Basis of Selection**
- 4.4.1 SACC Manual Clause (2012-07-16) A0027T - Highest Combined Rating of Technical Merit (70%) and Price (30%)**
Only Proposals that meet the all Mandatory Criteria will be considered. All Proposals will be rated on technical acceptability before price is considered.
- 4.4.2** Standing Offers will be awarded based on a determination of **Best Value** taking into account both the technical merit of the Proposals and the Financial Evaluation. Best Value is defined as the **Highest Total Score**.
- 4.4.4** The Bidder's Weighted **Technical Score (70)** will be added to the Bidder's **Financial Score (/30)** to arrive at the Bidder's **Total Score (/100)**
- 4.4.5** The Bidder's Weighted Technical Score will be calculated as follows:

$$\frac{\text{Bidder's Technical Score}}{\text{Total Overall Possible Score}} \times 70 = \text{Bidder's Weighted Technical Score (70)}$$
- 4.4.6** **Stream 1** Bidders will be ranked in order from highest to lowest Total Score. Up to ten (10) Standing Offer Awards will be offered.
Stream 2 Bidders will be ranked in order from highest to lowest Total Score. Up to ten (10) Standing Offer Awards will be offered.
Stream 3 Bidders will be ranked in order from highest to lowest Total Score. Up to ten (10) Standing Offer Awards will be offered.
Stream 4 Bidders will be ranked in order from highest to lowest Total Score. Up to ten (10) Standing Offer Awards will be offered.
Stream 5 Bidders will be ranked in order from highest to lowest Total Score. Up to ten (10) Standing Offer Awards will be offered.
- 4.4.8** In the event of more than one (1) Bidder has the same Total Score, the Bidder with the **Highest Technical Score** will be ranked higher.

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4.4.9 ISC reserves the right to refuse any and all Proposals received in response to this RFSO, without incurring any obligation to any Bidder having responded. ISC reserves the right to award a Standing Offer to the compliant Bidder that best meets the requirements, as described above, without incurring any obligation to any other Bidders having responded to this RFSO.

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ATTACHMENT 1 TO PART 4

Table M1.1 to M1.5 – Resource Project Summary Forms:

Bidders may provide additional details as necessary; however projects submitted MUST contain at least the information required in the Mandatory Requirement M3

M1.1 - Work Stream #1: Qualitative / Mixed-Methods / Historical Research and Analysis	
Bidder Name:	Project Name:
Resource Name	
Client Organization [a]:	
Dates/Duration [b]: (in years/months)	Level of Effort (Days) [c]:
Services provided by the Resource during the project [d]	
Project objectives, scope, needs and issues [e]	
Extent and Role of the Resource's involvement in the Assignment, including project outcome and results [f]	
Client Project Authority Name, Title, E-mail address, Phone Number [g]	

M1.2 - Work Stream #2: Quantitative Research and Analysis – Multivariate Data Analysis and Simulation	
Bidder Name:	Project Name:
Resource Name	
Client Organization [a]:	
Dates/Duration [b]: (in years/months)	Level of Effort (Days) [c]:

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Services provided by the Resource during the project [d]
Project objectives, scope, needs and issues [e]
Extent and Role of the Resource's involvement in the Assignment, including project outcome and results [f]
Client Project Authority Name, Title, E-mail address, Phone Number [g]

M1.3 - Work Stream #3: Data Visualization		
Bidder Name:		Project Name:
Resource Name		
Client Organization [a]:		
Dates/Duration [b]: (in years/months)		Level of Effort (Days) [c]:
Services provided by the Resource during the project [d]		
Project objectives, scope, needs and issues [e]		
Extent and Role of the Resource's involvement in the Assignment, including project outcome and results [f]		

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Client Project Authority Name, Title, E-mail address, Phone Number [g]

M1.4 - Work Stream #4: Data Development			
Bidder Name:		Project Name:	
Resource Name			
Client Organization [a]:			
Dates/Duration [b]: (in years/months)		Level of Effort (Days) [c]:	
Services provided by the Resource during the project [d]			
Project objectives, scope, needs and issues [e]			
Extent and Role of the Resource's involvement in the Assignment, including project outcome and results [f]			
Client Project Authority Name, Title, E-mail address, Phone Number [g]			

M1.5 - Work Stream #5: Policy Research and Analysis			
Bidder Name:		Project Name:	
Resource Name			
Client Organization [a]:			
Dates/Duration [b]: (in years/months)		Level of Effort (Days) [c]:	
Services provided by the Resource during the project [d]			

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Project objectives, scope, needs and issues [e]
Extent and Role of the Resource's involvement in the Assignment, including project outcome and results [f]
Client Project Authority Name, Title, E-mail address, Phone Number [g]

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ATTACHMENT 2 TO PART 4

Form M2.1 to M2.5 – Resource Reference Forms

For each of the projects provided in compliance with **Mandatory Requirement M2 of each Streams**, the following letter should be filled in as appropriate by the Bidder and must be sent to the cited Client Authority for completion and confirmation.

M2.1 - Work Stream 1 – Qualitative / Mixed-Methods / Historical Research and Analysis			
Bidder name :			
Resource name :			
Reference name, title and organization :			
Reference contact information :	Email: _____ Telephone: () - _____		
Project Name and Scope of work accomplished for the reference :			
Services provided by the Resource during the project			
Reference Criteria		Yes	No
1. Was the Resource primarily responsible for the... ... management of the project	Yes () / No ()	Yes ()	No ()
2. Did the Resource meet the following critical factors:			
a) Complete the project on time.			
b) Stayed within budget.			
c) Met all the project objectives.			
d) Complied with the terms and conditions of the contract/project (ex. Statement of Work).			
3. Did the Resource possesses and demonstrated the following abilities:			
a) The ability to develop sound methodologies.			
b) The ability to coordinate multiple tasks.			
c) The ability to understand and analyze complex issues.			
d) The ability to provide quality and complete deliverables.			
4. Would you retain the services of this Resource again?			
5. As the "Referer" providing this reference, I have read the Project Scope provided above in this Reference form, and agree with the description of the work conducted by the Resource for the project.			
Signature :	_____		
Date:	_____		

M2.2 - Work Stream 2 – Quantitative Research and Analysis – Multivariate Data Analysis and Simulation	
Bidder name :	_____

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Resource name :			
Reference name, title and organization :			
Reference contact information : Email: _____ Telephone: () - _____			
Project Name and Scope of work accomplished for the reference :			
Services provided by the Resource during the project			
Reference Criteria			
1. Was the Resource primarily responsible for the...		Yes	No
... management of the project	Yes () / No ()	... completion of the project	Yes () / No ()
2. Did the Resource meet the following critical factors :			
a) Complete the project on time.			
b) Stayed within budget.			
c) Met all the project objectives.			
d) Complied with the terms and conditions of the contract/project (ex. Statement of Work).			
3. Did the Resource possessed and demonstrated the following abilities:			
a) The ability to develop sound methodologies.			
b) The ability to coordinate multiple tasks.			
c) The ability to understand and analyze complex socio-economic issues.			
d) The ability to provide quality and complete deliverables.			
4. Would you retain the services of this Resource again?			
5. As the "Referer" providing this reference, I have read the Project Scope provided above in this Reference form, and agree with the description of the work conducted by the Resource for the project.			
Signature : _____			
Date: _____			

M2.3 - Work Stream 3 – Data Visualization			
Bidder name :			
Resource name :			
Reference name, title and organization :			
Reference contact information : Email: _____ Telephone: () - _____			
Project Name and Scope of work accomplished for the reference :			
Services provided by the Resource during the project			

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Reference Criteria		Yes	No
1. Was the Resource primarily responsible for the...			
... management of the project	Yes () / No ()	... completion of the project	Yes () / No ()
2. Did the Resource meet the following critical factors :			
a) Complete the project on time.			
b) Stayed within budget.			
c) Met all the project objectives.			
d) Complied with the terms and conditions of the contract/project (ex. Statement of Work).			
3. Did the Resource possesses and demonstrated the following abilities:			
a) The ability to develop sound methodologies.			
b) The ability to coordinate multiple tasks.			
c) The ability to understand and analyze complex socio-economic issues.			
d) The ability to provide quality and complete deliverables.			
4. Would you retain the services of this Resource again ?			
5. As the "Referer" providing this reference, I have read the Project Scope provided above in this Reference form, and agree with the description of the work conducted by the Resource for the project.			
Signature : _____			
Date: _____			

M2.4 - Work Stream 4 – Data Development			
Bidder name :			
Resource name :			
Reference name, title and organization :			
Reference contact information : Email: _____ Telephone: () - _____			
Project Name and Scope of work accomplished for the reference :			
Services provided by the Resource during the project			
Reference Criteria			
1. Was the Resource primarily responsible for the...			
... management of the project	Yes () / No ()	... completion of the project	Yes () / No ()
2. Did the Resource meet the following critical factors :			
a) Complete the project on time.			
b) Stayed within budget.			

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c) Met all the project objectives.		
d) Complied with the terms and conditions of the contract/project (ex. Statement of Work).		
3. Did the Resource possessed and demonstrated the following abilities :		
a) The ability to develop sound methodologies.		
b) The ability to coordinate multiple tasks.		
c) The ability to understand and analyze complex socio-economic issues.		
d) The ability to provide quality and complete deliverables.		
4. Would you retain the services of this Resource again ?		
5. As the "Referer" providing this reference, I have read the Project Scope provided above in this Reference form, and agree with the description of the work conducted by the Resource for the project.		
Signature : _____		
Date: _____		

M2.5 - Work Stream 5 – Policy Research and Analysis			
Bidder name :			
Resource name :			
Reference name, title and organization :			
Reference contact information :	Email: _____ Telephone: () - _____		
Project Name and Scope of work accomplished for the reference :			
Services provided by the Resource during the project			
Reference Criteria			
1. Was the Resource primarily responsible for the...		Yes	No
... management of the project	Yes () / No ()	... completion of the project	Yes () / No ()
2. Did the Resource meet the following critical factors:			
a) Complete the project on time.			
b) Stayed within budget.			
c) Met all the project objectives.			
d) Complied with the terms and conditions of the contract/project (ex. Statement of Work).			
3. Did the Resource possesses and demonstrated the following abilities:			
a) The ability to develop sound methodologies.			
b) The ability to coordinate multiple tasks.			
c) The ability to understand and analyze complex socio-economic issues.			

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d) The ability to provide quality and complete deliverables.		
4. Would you retain the services of this Resource again ?		
5. As the "Referer" providing this reference, I have read the Project Scope provided above in this Reference form, and agree with the description of the work conducted by the Resource for the project.		
Signature : _____		
Date: _____		

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PART 5 - CERTIFICATIONS AND ADDITIONAL INFORMATION

Offerors must provide the required certifications and additional information to be issued a standing offer.

The certifications provided by offerors to Canada are subject to verification by Canada at all times. Unless specified otherwise, Canada will declare an offer non-responsive, will have the right to set-aside a standing offer, or will declare a contractor in default if any certification made by the Offeror is found to be untrue whether made knowingly or unknowingly during the offer evaluation period, during the Standing Offer period, or during the contract period.

The Standing Offer Authority will have the right to ask for additional information to verify the Offeror's certifications. Failure to comply and to cooperate with any request or requirement imposed by the Standing Offer Authority will render the offer non-responsive, result in the setting aside of the Standing Offer or constitute a default under the Contract.

5.1 Certifications Required with the Offer

Offerors must submit the following duly completed certifications as part of their offer.

5.1.1 Integrity Provisions - Declaration of Convicted Offences

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

5.2 Certifications Precedent to the Issuance of a Standing Offer and Additional Information

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

5.2.1 Integrity Provisions - Required Documentation

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

5.2.2 Additional Certifications Precedent to Issuance of a Standing Offer

5.2.2.1 SACC Manual Clause M3020T (2016-01-28) - Status of Availability of Resources

The Offeror certifies that, should it be issued a standing offer as a result of the Request for Standing Offer, every individual proposed in its offer will be available to perform the Work resulting from a call-up against the Standing Offer as required by Canada's representatives and at the time specified in a call-up or agreed to with Canada's representatives. If for reasons beyond its control, the Offeror is unable to provide the services of an individual named in its offer, the Offeror may propose a substitute with similar qualifications and experience. The Offeror must advise the Standing Offer 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 Offeror: death, sickness, maternity and parental leave, retirement, resignation, dismissal for cause or termination of an agreement for default.

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If the Offeror has proposed any individual who is not an employee of the Offeror, the Offeror 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 Offeror must, upon request from the Standing Offer Authority, provide a written confirmation, signed by the individual, of the permission given to the Offeror and of his/her availability. Failure to comply with the request may result in the offer being declared non-responsive.

5.2.2.2 SACC Manual Clause M3021T (2012-07-16), Education and Experience.

The Offeror certifies that all the information provided in the résumés and supporting material submitted with its offer, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Offeror to be true and accurate. Furthermore, the Offeror warrants that every individual offered by the Offeror for the requirement is capable of performing the Work resulting from a call-up against the Standing Offer.

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PART 6 - SECURITY, FINANCIAL AND INSURANCE REQUIREMENTS

6.1 Security Requirements

1. At the Request for Standing Offers closing date, the following conditions must be met:
 - (a) the Offeror must hold a valid organization security clearance as indicated in Part 7A - Standing Offer;
 - (b) the Offeror's proposed individuals requiring access to classified or protected information, assets or sensitive work sites must meet the security requirements as indicate **in Part 7A** - Standing Offer;
 - (c) the Offeror must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites;
 - (d) the Offeror's proposed location of work performance and document safeguarding must meet the security requirements as indicated in Part 7A - Standing Offer;
 - (e) the Offeror must provide the addresses of proposed sites or premises of work performance and document safeguarding as indicated in Part 3 - Section IV Additional Information.

2. For additional information on security requirements, offerors 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.

6.2 Insurance Requirements

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.

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PART 7 - STANDING OFFER AND RESULTING CONTRACT CLAUSES

A. STANDING OFFER

7.1 Offer

7.1.1 The Offeror offers to fulfill the requirement in accordance with the Statement of Work at Annex "A".

7.2 Security Requirements

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

SECURITY CLAUSES: 1000228530

1. Pursuant to the Policy on Government Security, the nature of the services to be provided under this contract requires a valid Government of Canada (GoC) personnel Security Screening at the level of **Reliability Status** for the Contractor, authorized resources and any sub-contractors to be assigned to conduct the work.
2. Prior to the commencement of the work, the Contractor and each authorized resources involved in the performance of the work under this contract must each hold a valid Security Screening at the level of **Reliability Status** during the lifetime of the contract.
3. The Contractor and its personnel requiring access to **PROTECTED** information, assets or sensitive work site(s) must EACH hold a valid Security Screening at the level of **Reliability Status**.
4. The Contractor **MUST NOT** possess or safeguard **PROTECTED** information/assets at their organization's premises until written permission from the security in contracting team of Indigenous Services Canada (ISC). After permission has been granted, these tasks may be performed up to the level of **Protected B**.
5. The Contractor **MUST NOT** remove any **Sensitive** information from the identified work site(s), and the Contractor must ensure that its personnel are made aware of and comply with this restrictions.
6. The Contractor **MUST NOT** utilize its Information Technology (IT) systems to electronically process, produce or store any sensitive information until written permission from the security in contracting team of ISC. After permission has been granted, these tasks may be performed up to the level of **Protected B including an I.T. link up to the level of protected B**.
7. Subcontracts are not to be awarded without the prior written permission from the security in contracting team of ISC.
8. Any substitute or alternate resource proposed for this contract:
 - a) must be approved by the Security and Emergency Services Divisions of Indigenous Services Canada; and,
 - b) must hold a valid GoC Security Screening at the level of **Reliability Status**, before gaining access to designated information or assets.
9. Under this contract, if a Contractor submits a resource who is subsequently found to not meet the Security requirements, the Department may immediately terminate the contract with no obligation to replace the resource with a resource from the same Contractor or to pay any invoice for work undertaken by this resource.

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10. This contract only has force or effect for as long as the Security Screening at the level of **Reliability Status** is valid. During the lifetime of this contract, if the Security Screening issued prior to the commencement of the work, be suspended or revoked the contract shall be terminated immediately and the Contractor shall have no claim against Her Majesty or the Minister as a result of the termination. The Contractor shall be paid for satisfactory work performed up to the time of termination pursuant to the terms of the Contract.

11. The Contractor must comply with the provisions of the:

- a) Security Requirements Agreement, attached as Annex C; and
- b) Policy on Government Security <https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=16578>

7.2.2 Offeror's Sites or Premises Requiring Safeguarding

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

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

The Company Security Officer must ensure through the Contract Security Program that the Offeror and individual(s) hold a valid security clearance at the required level.

7.3 Standard Clauses and Conditions

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

7.3.1 General Conditions

2005 (2017-06-21) General Conditions - Standing Offers - Goods or Services apply to and form part of the Standing Offer.

7.4 Term of Standing Offer

7.4.1 Period of the Standing Offer

The period for making call-ups against the Standing Offer is from date of award to March 31, 2025.

7.4.2 Extension of Standing Offer

If the Standing Offer is authorized for use beyond the initial period, the Offeror offers to extend its offer for an additional two (2) one (1) year option period under the same conditions and at the rates or prices specified in the Standing Offer, or at the rates or prices calculated in accordance with the formula specified in the Standing Offer.

The Offeror will be advised of the decision to authorize the use of the Standing Offer for an extended period by the Standing Offer Authority fifteen (15) days before the expiry date of the Standing Offer. A revision to the Standing Offer will be issued by the Standing Offer Authority.

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7.5 Authorities

7.5.1 Standing Offer Authority

The Standing Offer Authority is:

Bruno Paradis
Senior Contracting and Procurement Officer
Crown-Indigenous Relations and Northern Affairs Canada
Materiel and Assets Management Directorate
10 Wellington Street, 13th Floor
Gatineau, QC K1A 0H4

E-mail address: Bruno.Paradis2@sac-isc.gc.ca

The Standing Offer Authority is responsible for the establishment of the Standing Offer, its administration and its revision, if applicable. Upon the making of a call-up, as Contracting Authority, he is responsible for any contractual issues relating to individual call-ups made against the Standing Offer by any Identified User.

7.5.2 Project Authority (to be identified at SOA award)

The Project Authority for the Standing Offer is:

Name: _____
Title: _____
Organization: _____
Address: _____

Telephone: _____
Facsimile: _____
E-mail address: _____

The Project Authority is the representative of the department or agency for whom the Work will be carried out pursuant to a call-up against the Standing Offer and is responsible for all the technical content of the Work under the resulting Contract.

7.5.3 Offeror's Representative (to be identified at SOA award)

7.6 Proactive Disclosure of Contracts with Former Public Servants

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

7.7 Identified Users

The Identified User authorized to make call-ups against the Standing Offer are employees of the Department of Indigenous Services Canada (SAC).

7.8 Number of Standing Offers

ISC seeks to award up to a total of fifty (50) Standing Offer Agreements (SOAs) to qualified Firms, as follows:

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- Stream 1** Bidders will be ranked in order from highest to lowest Total Score. Up to ten (10) Standing Offer Awards will be offered.
- Stream 2** Bidders will be ranked in order from highest to lowest Total Score. Up to ten (10) Standing Offer Awards will be offered.
- Stream 3** Bidders will be ranked in order from highest to lowest Total Score. Up to ten (10) Standing Offer Awards will be offered.
- Stream 4** Bidders will be ranked in order from highest to lowest Total Score. Up to ten (10) Standing Offer Awards will be offered.
- Stream 5** Bidders will be ranked in order from highest to lowest Total Score. Up to ten (10) Standing Offer Awards will be offered.
- 7.9 Call-up Allocation**
- 7.9.1** Call-ups for the delivery of the services will be awarded by ISC to the Contractors who, in ISC'S exclusive opinion, can best render the required services, based on the services to be rendered to a possible allocation of up to \$ (at SOA award) per SOA.
- 7.10 Call-up Procedures**
- 7.10.1** Contractors will be contacted directly as indicated above at 7.9.1.
- 7.10.2** The Project Authority will provide the Contractor with details of the Work activities to be performed within the scope of this Standing Offer including a description of the deliverables/reports to be submitted.
- 7.10.3** The Project Authority will determine whether a firm price, ceiling price, or limitation of expenditure will apply to the Call-up and will require the Contractor to accordingly submit either a firm price, ceiling price, or limitation of expenditure.
- Firm price definition:** The total amount payable is a fixed sum. Both parties agree prior to the award of the call-up as to the price payable thereunder.
- Ceiling price definition:** The maximum amount of monies that may be paid to a Contractor for costs reasonably and properly incurred in the performance of the Work described in the call-up. If the costs, as charged, reach or exceed the ceiling, the Contractor must complete the Work and will receive no monies beyond this ceiling.
- Limitation of expenditure definition:** The maximum amount of monies that may be paid to a Contractor for the costs reasonably and properly incurred in the performance of the Work described in the call-up. If the Contractor discovers that there are insufficient funds to complete the Work, the Contractor must inform the Project Authority. The Project Authority then has the option of providing additional funding or requesting the Contractor complete the Work to the extent that the current funding permits.
- 7.10.4** The Contractor will either submit a firm price, or a ceiling price, or a limitation of expenditure as required by the Project Authority, a schedule indicating completion dates for major Work activities and submission dates for deliverables/reports with supporting details to the Project Authority. The proposal must be submitted to the Project Authority within three (3) business days of receiving the request.
- 7.10.5** The firm price, ceiling price or limitation of expenditure will be established by utilizing the applicable rates as shows in the Basis of Payment, Annex "B".
- 7.10.6** Failure by the Contractor to submit a proposal in accordance with the time frame specified in 7.10.4 above will be interpreted as the Contractor being unable to perform the services and will result in the setting aside of the Offer. The Contractor will then be by-passed and the Project

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Authority will send the request to the next best-suited Contractor. This process will continue until the requirement can be fully addressed by a Contractor. Should no Contractor be able to provide the services requested, Canada reserves the right to procure the specified services by other contracting methods.

7.10.7 The Project Authority reserves the right to request references from the available Contractor to conduct a reference check to verify the accuracy of similar work previously performed. Should the reference(s) provide negative feedback in relation to the information provided, the Project Authority reserves the right to go to the next Contractor.

7.10.8 Upon agreement of the firm price, ceiling price or limitation of expenditure for the services, the Contractor will be authorized by the Contracting Authority to proceed with the Work through the issuance of a duly completed and signed Call-up against a Standing Offer.

7.10.9 The Contractor shall not commence Work until the Call-up against a Standing Offer has been signed by the Contracting Authority. The Contractor acknowledges that any and all Work performed in the absence of a Call-up Against a Standing Offer Agreement signed by the Contracting Authority will be undertaken at the Contractor's own risk, and Canada shall not be liable for payment therefor.

7.11 Call-up Instrument

The Work will be authorized or confirmed using a Call-up against a Standing Offer coming from ISC.

7.12 Limitation of Call-ups - Removed

7.13 Financial Limitation - Removed

7.14 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 call up against the Standing Offer, including any annexes;
- b) the articles of the Standing Offer;
- c) the general conditions 2005 (2017-06-21), General Conditions - Standing Offers - Goods or Services
- d) the Supplemental General Conditions 4007 (2010-08-16): Canada to Own Intellectual Property Rights in Foreground Information
- e) the General Conditions 2010B (2018-06-21) General Conditions - Professional Services (Medium Complexity)
- f) Annex A - Statement of Work;
- g) Annex B - Basis of Payment;
- h) Annex C - Security Requirements Check List (SRCL);
- i) Annex D - Security Requirements Agreement;
- j) Annex E – COVID-19 Vaccination Requirement Certification;
- k) the Offeror's offer dated (TBD at SOA award)

7.15 Certifications and Additional Information

7.15.1 Compliance

Unless specified otherwise, the continuous compliance with the certifications provided by the Offeror with its offer or precedent to issuance of the Standing Offer (SO), and the ongoing cooperation in providing additional information are conditions of issuance of the SO and failure to comply will constitute the Offeror

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in default. Certifications are subject to verification by Canada during the entire period of the SO and of any resulting contract that would continue beyond the period of the SO.

7.16 Applicable Laws

The Standing Offer and any contract resulting from the Standing Offer must be interpreted and governed, and the relations between the parties determined, by the laws in force in the province of Ontario. (Winning bidders can request the province to be changed at Standing Offer Agreement award).

7.17 SACC Manual Clauses

M3020C (2016-01-28) [Status of Availability of Resources - Standing Offer](#)

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B. - RESULTING CONTRACT CLAUSES

The following clauses and conditions apply to and form part of any contract resulting from a call-up against the Standing Offer.

7.1 Statement of Work

The Contractor must perform the Work described in the call-up against the Standing Offer.

7.2 Standard Clauses and Conditions

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

7.2.1 General Conditions

2010B (2018-06-21), General Conditions - Professional Services (Medium Complexity) apply to and form part of the Contract.

7.2.2 Supplemental General Conditions

4007 (2010-08-16) - Supplemental General Conditions, Canada to Own Intellectual Property Rights in Foreground Information apply to and form part of the Contract.

7.2.3 SACC Manual Clauses - Removed

7.3 Term of Contract

7.3.1 Period of the Contract

The Work must be completed in accordance with the call-up against the Standing Offer.

7.4 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.

7.5 Payment

The following Basis of Payment will form part of the resulting Call-up

7.5.1 Basis of Payment

The Contractor will be paid in accordance with the Basis of Payment at Annex "B".

7.5.2 Limitation of Expenditure - Professional Fees

For the work described in the Statement of Work in Annex A, the Contractor will be reimbursed for the costs reasonably and properly incurred in the performance of the work, as determined in accordance with

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the Basis of Payment in Annex B, to a limitation of expenditure of \$ _____ (at SOA award). Applicable taxes are extra.

7.5.3 Limitation of Expenditure - Travel and Living Expenses

The Contractor will be reimbursed its authorized travel and living expenses reasonably and properly incurred in the performance of the Work, at cost, without any allowance for profit and/or administrative overhead, in accordance with the meal, private vehicle 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 "travelers", rather than those referring to "employees" to a limitation of expenditure of \$ _____ (Applicable taxes included) (to be identified at SOA award).

All travel must have the prior authorization of the Project Authority.

All payments are subject to government audit.

Estimated Cost: \$ _____ (to be identified at SOA award)

7.5.6 Canada's Total Liability – Professional Fees and Travel and Living Expenses

1. Canada's total liability to the Contractor under the Contract including all call-ups must not exceed \$ _____ (to be identified at SOA award). Applicable Taxes are extra on professional fees only.
2. 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:
 - a. when it is 75 percent committed, or
 - b. four (4) months before the contract expiry date, or
 - c. as soon as the Contractor considers that the contract funds provided are inadequate for the completion of the Work, whichever comes first.
3. 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.

7.5.7 Method of Payment - Monthly Payment

Canada will pay the Contractor on a monthly basis for work performed during the month covered by the invoice in accordance with the payment provisions of the Contract if:

- a. an accurate and complete invoice and any other documents 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;
- c. the Work performed has been accepted by Canada.

7.5.8 Electronic Payment – Call-ups

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Method of invoice payment by **ISC** is by direct deposit to the Contractor's financial institution of choice.

If not registered for direct deposit payments, to enable payment, the Contractor must complete the Electronic Payment Request Form (https://www.aadnc-aandc.gc.ca/DAM/DAM-INTER-HQ/STAGING/texte-text/20-545_1362495227097_eng.pdf) and submit the form to the address provided.

7.6 Invoicing Instructions

One of the following invoicing instructions will form part of the resulting Contract:

1. The Contractor must submit invoices in accordance with the section entitled "Invoice Submission" of the general conditions and under subsection 7.2.1 c) and d) of this contract. Invoices cannot be submitted until all work identified in the invoice is completed.

Each invoice must be supported by:

- a. a copy of time sheets to support the time claimed;
- b. a copy of the release document and any other documents as specified in the Contract.

2. Invoices must be forwarded to the address shown on page 1 of the Contract for certification and payment

7.7 Insurance

SACC Manual clause [1005C](#) (2016-01-28) Insurance – No Specific Requirement

7.8 SACC Manual Clauses - Removed

7.9 Federal Contractors Program for Employment Equity - Default by the Contractor – Removed

7.10 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](#)".

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SW1 TITLE

Research and Policy Research on Indigenous and Northern issues specifically on issues related to the Registered Indian, Non-Status First Nations, Inuit, and Métis.

SW2 BACKGROUND

Indigenous Services Canada (ISC) works collaboratively with partners to improve access to high quality services for First Nations, Inuit and Métis. Our vision is to support and empower Indigenous peoples to independently deliver services and address the socio-economic conditions in their communities. To support this mandate, ISC requires timely access to high-calibre resources able to provide research, analysis and related services corresponding to all Indigenous peoples in Canada as well as to specific populations including Registered Indian, Non-Status First Nations, Inuit, and Métis, including those who live in urban areas across Canada.

SW3 OBJECTIVES

To acquire research, analysis and policy advice concerning:

- (1) Indigenous issues specifically on issues related to the Registered Indian, Non-Status First Nations, Inuit, and Métis; and/or
- (2) General issues that may contribute to a deeper understanding of issues related to the Indigenous peoples of Canada,

on an as and when required basis through Standing Offer Agreements (SOA).

SW4 DEFINITIONS

4.1 Definitions

The following list of definitions and/or acronyms is relevant to, and forms a part of, this Statement of Work (SOW). The list of definitions provided below is not exhaustive, but rather is intended to ensure clarity of understanding of critical terms used within this SOW.

<u>Term/Acronym</u>	<u>Definition</u>
Indigenous People	Includes First Nations, Inuit, Métis and Non-Status First Nation populations, including those who live in urban settings.
Call-up	Under a valid Standing Offer Agreement (SOA), a document prepared by the ISC Departmental Representative and issued by the ISC Contracting Authority to the Contractor, through which ISC will acquire the required services; and which will contain requirements for the provision of said services, which will be consistent with the Statement of Work, and may consist of any combination of the required services and deliverables. Upon acceptance of the Call-up by the contractor, the Call-up forms a binding agreement.

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<u>Term/Acronym</u>	<u>Definition</u>
Contracting Authority	The Contracting Authority shall be the sole authority on behalf of Canada for the administration and management of the SOA. Any changes to the SOA must be authorized in writing by the Contracting Authority. The Contractor is not to perform work in excess of or outside the scope of the SOA based on written requests from any government personnel other than the Contracting Authority.
Contractor	A qualified supplier selected pursuant to the present competitive selection process, who is a party to a Standing Offer Agreement.
Departmental Representative	A person, occupying a specific position within ISC or fulfilling a specific organizational function, who is responsible for monitoring the supplier's execution of the work under the SOA, as well as acting as a single point of contact on behalf of ISC.
ISC	Indigenous Services Canada
OFI	Former Office of the Federal Interlocutor for Métis and Non-Status Indians.
MNSFN	Métis and Non-Status First Nations.
NCR	National Capital Region.
SOW	Statement of Work.
Standing Offer Agreement (SOA)	An overarching agreement between ISC and a qualified supplier to provide services on an as-and-when-required basis. An SOA does not constitute a Contract. Individual service requirements will be initiated via a Call-up document duly-authorized by the ISC Contracting Authority.
KT	Knowledge Transfer.
TB	Treasury Board Secretariat of Canada.
SRDI	Strategic Research and Data Innovation Branch

SW5 BUSINESS ENVIRONMENT

- 5.1** ISC is based in Gatineau, Quebec, Canada. The Branch operates within a standard office environment, and maintains regular working hours (Monday to Friday, 08:00 to 17:00 EST, excluding statutory and government holidays).
- 5.2** The Contractor is expected to be capable of providing research, policy and analysis services within the hours as defined in section 5.1 above.

SW6 SCOPE OF WORK

Service is required in the following five (5) Work Streams:

1. Qualitative Research and Analysis
2. Quantitative Research and Analysis – Multivariate Data Analysis and Simulation
3. Data Visualization
4. Data Development
5. Policy Research and Analysis

The scope of work attached to each Call-up against the Standing Offer will identify the particular factual matters, issues, methodological design requirements, statistical analyses, relevant

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documents and materials and other areas of consideration that shall be researched, verified, documented, and reported upon using qualitative and quantitative methods of analysis, for research and policy research on Indigenous issues specifically on issues related to the Registered Indian, Non-Status First Nations, Inuit, and Métis. Under each Call-up, activities may consist of either/both policy and research services.

All work is to be done in conformity with the instructions issued by the Departmental Representative.

6.1 Work Stream 1: Qualitative / Mixed-Methods / Historical Research and Analysis

The Contractor shall, on an as and when required basis, carry out research and analysis activities of a general nature and/or related to Indigenous issues specifically on issues related to the Registered Indian, Non-Status First Nations, Inuit, and Métis as described below:

Conduct qualitative / mixed methods / historical research (including but not limited to structured and unstructured interviewing, historical research methods, archival research, oral history methodologies, field work, meta-analyses, and/or systematic literature reviews, utilising where applicable and/or appropriate such methodologies as storytelling; yarning; sharing and talking circles; arts-based methods; critical and auto-ethnography; hermeneutics; collective consensual data analytical procedure; and inclusion of wisdom keepers) and report on results as well as associated analysis, based on the identified needs of the organization.

6.2 Work Stream 2: Quantitative Research and Analysis – Multivariate Data Analysis and Simulation

The Contractor shall, on an as and when required basis, carry out research and analysis activities of a general nature and/or related to Indigenous issues specifically on issues related to the Registered Indian, Non-Status First Nations, Inuit, and Métis as described below:

Conduct quantitative research (including but not limited to applying multivariate data analysis techniques to analyze structured data related to demographic and/or economic and/or social, and potentially other characteristics; and/or using simulation techniques to predict/project demographic, and/or economic and/or social outcomes) and report on results as well as associated analysis, based on the identified needs of the organization.

6.3 Work Stream 3: Data Visualization

The Contractor shall, on an as and when required basis, carry out research and analysis activities of a general nature and/or related to Indigenous issues specifically on issues related to the Registered Indian, Non-Status First Nations, Inuit, and Métis as described below:

Conduct big data analytics using a variety of tools and techniques from statistics and/or computer science to leverage data of various kinds and/or from various sources with a focus on visualizing and/or otherwise exploring issues related to Indigenous peoples.. Must be able to use data visualization tools to enhance the story that the data tells in a meaningful way for a general audience.

6.4 Work Stream 4: Data Development

The Contractor shall, on an as and when required basis, carry out research and analysis activities of a general nature and/or related to Indigenous issues specifically on issues related to the Registered Indian, non-status First Nations, Inuit, and Métis as described below:

Provide advisory services in the area of data development, covering a range of data development issues including but not limited to data governance, data management, data sharing, data

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linkages, and data collection and acquisition.

6.5 Work Stream 5: Policy Research and Analysis

The Contractor shall, on an as and when required basis, carry out research and analysis activities of a general nature and/or related to Indigenous issues specifically on issues related to the Registered Indian, Non-Status First Nations, Inuit, and Métis as described below:

Conduct critical policy and governance research and/or analysis using a variety of data sources including peer-reviewed literature, traditional and social media, and industry publications to frame policy issues and/or options (including but not limited to producing reports, management of relations with stakeholders, developing policy recommendations) and report on results as well as associated analysis, based on the identified needs of the organization.

SW7 DELIVERABLES

- 7.1** Deliverables will be as specified in each project/assignment Call-up. These shall include the provision of services as described in the above Scope of Work, as well as written progress/status reports and contract performance reports relating to the delivery of specific services and completion of assigned tasks;
- 7.2** Copies of deliverables will be in the electronic format specified in the call-up document; and
- 7.3** All deliverables and working papers will, at minimum, be provided in English or in French. Depending on the nature of the call-up, the Contractor may be required to undertake certain tasks in English, in French or in both languages (see also SW15.1-c)

SW8 CONTRACTOR RESPONSIBILITIES

- 8.1** Management by the Contractor of service delivery to ISC in relation to the Standing Offer Agreement (SOA) shall be undertaken in accordance with all applicable Acts, Codes, Departmental and/or federal government regulations, policies and procedures.
- 8.2** It is the responsibility of the Contractor to, at all times, conduct itself and to ensure the performance of its Resources in accordance with the terms and conditions of the SOA and any resultant Call-up, and in accordance with the Code of Conduct for Procurement (see <https://www.tpsgc-pwgsc.gc.ca/app-acq/cndt-cndct/index-eng.html>).
- 8.3** The Contractor shall ensure that all of its deployed personnel are properly trained and equipped to fulfil their responsibilities.
- 8.4** The Contractor shall supply all of its own tools, facilities, equipment, and software required for completion of the work, unless otherwise directed by the Departmental Representative.

SW9 CONTRACTOR RESOURCE REQUIREMENTS

- 9.1** Proposed Resources shall have the stated minimum qualifications and required work experience for the Resource Category for which they are proposed (see Selection and Evaluation Criteria at Part 4).

SW10 REPORTING REQUIREMENTS

- 10.1** The Contractor shall be responsible for facilitating and maintaining communication with the Departmental Representative regarding the progress of work completed under any Call-up(s) under the SOA.

ANNEX "A"
STATEMENT OF WORK

- 10.2** Upon request from the ISC Departmental Representative, the Contractor shall provide ad hoc written or oral status updates relating to any work in progress under any Call-up.
- 10.3** In addition, the Contractor shall immediately notify the Departmental Representative of any issues, problems, or areas of concern that could adversely affect the ability of the Contractor to complete the work specified under any Call-up within agreed upon deadlines.

SW11 DEPARTMENTAL SUPPORT

- 11.1 As required for the successful provision of research and policy research on Indigenous issues specifically on issues related to the Registered Indian, Non-Status First Nations, Inuit, and Métis, ISC will provide the Contractor any available relevant documents, research analysis, data, statistics, contact information on an as needed basis.

SW12 LOCATION OF WORK AND TRAVEL

- 12.1** Unless otherwise stated, the work will be conducted within the National Capital Region (NCR), but may be undertaken elsewhere in Canada. Contractors are responsible for all costs related to their own personal expenses within the NCR, including the cost of travel between their place of business, Statistics Canada Research Data Centres located in the NCR, and ISC headquarters.
- 12.2** There may be the occasional requirement for Contractor travel to other locations as specified in the Call-up documents. If required, any travel must be authorized in advance by the Departmental Representative and undertaken in accordance with the Treasury Board Secretariat (TB) Travel Directive. Contractors will be reimbursed for previously authorized travel, accommodation and living expenses associated, in accordance with TB Directives.
- 12.3** Except when on-site work at ISC premises is required, all Contractors shall provide their own premises, equipment, software, and tools necessary for the performance of the tasks outlined in the SOW.

SW13 GREEN PROCUREMENT AND SERVICES

- 13.1** The Contractor shall ensure, where possible, that all materials employed and work methods utilized by both the Contractor and its deployed personnel shall accord with ISC's commitment to ISC's and the Government of Canada's Green Procurement Strategy.

SW14 RESTRICTIVE COVENANTS

- 14.1** For the purposes of this Contract the suppliers designated shall avoid any situation of post-contract conflict of interest.
- 14.2** Upon expiration, termination or suspension of this Contract, including any extensions hereunder, the supplier shall not participate in the negotiations/claims/consultations/engagement activities etc. that are the subject of this Contract, any litigation related to the negotiations/consultations/engagement activities etc. that are the subject of this Contract, or any related matters, for a period of five (5) years:
- a) Without the express written consent of the Minister of Indigenous Services Canada or,
 - b) Unless directed to do so by a Court of Law.

The suppliers hereby acknowledge that the scope and duration of the restrictions in SW14 are reasonable given the nature of the Contract.

SW 15 CALL-UP ASSIGNMENT AND PROCEDURES

ANNEX "A"
STATEMENT OF WORK

- 15.1** Call-ups for the delivery of research and policy research services on Indigenous issues specifically on issues related to the Registered Indian, Non-Status First Nations, Inuit, and Métis will be awarded by ISC to the Contractor(s) who, in ISC's exclusive determination, can best render the requirements, based on the following factors:
- a) the availability of Contractor resources;
 - b) the need for specific types of services and subject matter expertise, taking into consideration any previous experience of the Contractor related to a particular issue;
 - c) the Official Language in which the required services shall be delivered;
 - d) the location where the required services shall be performed and (or) delivered within Canada without having to incur any travel expenses; and
 - e) the estimated cost to complete the work.

**ANNEX “B”
BASIS OF PAYMENT**

1. All of the information required in this section **MUST** appear in the Bidder’s Financial Offer **ONLY**. The Bidder’s Financial Offer **MUST** be submitted separate from the Bidder’s Technical Offer. The Bidder’s failure to comply with this condition will result in the Bidder’s Offer being declared non-compliant and being given no further consideration.
2. Failure on the part of the Bidder to provide the information required within the Financial Offer Table will result in ISC deeming the Bidder’s Offer to be non-compliant, with the Offer being given no further consideration by ISC.
3. All fixed, all-inclusive per diem rates and prices must include all payroll, overhead costs and profits to complete the work. The Contractor will be reimbursed in accordance with the quoted per diem rate for all work conducted, and will not be paid an overtime rate for any work under any resultant call-up(s). Rates should not include such things as travel and administrative expenses or GST/HST.
4. Only fixed all-inclusive rate may be provided for each category, failure to comply with this condition will result in the Bidder’s Offer being declared non-compliant and being given no further consideration.

STREAM 1:

Stream 1 Service Categories	For Evaluation purpose ONLY/for use by the Contracting Authority				Average and weighted Per Diem Rates (A+B+C+D X E/3)
	SOA award to March 31, 2025 (Initial SOA period) A	April 1, 2025 to March 31, 2026 Option year 1 B	April 1, 2026 to March 31, 2027 Option year 2 C	Level of Effort E	
Qualitative / Mixed- Methods / Historical Research and Analysis	\$	\$	\$	100	\$
					\$

***ISC will calculate the Bidder’s Financial Score.**

**ANNEX "B"
BASIS OF PAYMENT**

STREAM 2:

Stream 2 Service Categories	All-inclusive per diem Rate (CAD)			For Evaluation purpose ONLY/for use by the Contracting Authority	
	SOA award to March 31, 2025 (Initial SOA period)	April 1, 2025 to March 31, 2026 Option year 1	April 1, 2026 to March 31, 2027 Option year 2	Level of Effort	Average and weighted Per Diem Rates (A+B+C X D/3)
Quantitative Research and Analysis – Multivariate Data Analysis and Simulation	A	B	C	D	
	\$	\$		100	\$
Bidder's Evaluation Assessment Value (sum total of averaged per diem rates)					\$

**ISC will calculate the Bidder's Financial Score.*

STREAM 3:

Stream 3 Service Categories	All-inclusive per diem Rate (CAD)			For Evaluation purpose ONLY/for use by the Contracting Authority	
	SOA award until March 31, 2025 (Initial SOA period)	April 1, 2025 to March 31, 2026 Option year 1	April 1, 2026 to March 31, 2027 Option year 2	Level of Effort	Average and weighted Per Diem Rates (A+B+C X D/3)
	A	B	C	D	
Data Visualization	\$	\$	\$	100	\$
Bidder's Evaluation Assessment Value (sum total of averaged per diem rates)					\$

**ISC will calculate the Bidder's Financial Score.*

STREAM 4:

Stream 4	All-inclusive per diem Rate (CAD)	For Evaluation purpose ONLY/for use by the Contracting Authority

**ANNEX “B”
BASIS OF PAYMENT**

Service Categories	SOA award until March 31, 2025 (Initial SOA period) A	April 1, 2025 to March 31, 2026 Option year 1 B	April 1, 2026 to March 31, 2027 Option year 2 C	Level of Effort D	Average and weighted Per Diem Rates (A+B+C X D/3)
Data Development	\$	\$	\$	100	\$
Bidder's Evaluation Assessment Value (sum total of averaged per diem rates)					\$

**ISC will calculate the Bidder's Financial Score.*

STREAM 5:

Stream 5	All-inclusive per diem Rate (CAD)		For Evaluation purpose ONLY/for use by the Contracting Authority		
Service Categories	SOA award until March 31, 2025 (Initial SOA period) A	April 1, 2025 to March 31, 2026 Option year 1 B	April 1, 2026 to March 31, 2027 Option year 2 C	Level of Effort D	Average and weighted Per Diem Rates (A+B+C X D/3)
Policy Research and Analysis	\$	\$	\$	100	\$
Bidder's Evaluation Assessment Value (sum total of averaged per diem rates)					\$

**ISC will calculate the Bidder's Financial Score.*

5. The Contractor shall charge to ISC the rate for the Service Category of work conducted, regardless of the Resource that conducts the work, in accordance with the Statement of Work, 8.1 and 8.1.1.
6. Resource per diem rates are firm to **March 31st 2025**, thereafter (including for any optioned extension period), Resource per diem rates quoted in the first year of the SOA may be increased or decreased by an amount equal to the Consumer Price Index (CPI) for Canada (<http://www.statcan.gc.ca/bsolc/olc-cel/olc-cel?lang=eng&catno=62-001-XWE>). All-Items (Not Seasonally Adjusted), published in Statistics Canada Catalogue No. 62-001-XWE, Table 5, in accordance with the following formula, rounded to the nearest two decimals:
Escalation = ((A/B) – 1) x 100 Where:

$$A = \frac{\text{average of the monthly CPI for Canada, for the twelve (12) months ending three (3) months preceding the start date of the new Standing Offer year;}}{\text{average of the monthly CPI for Canada, for the twelve (12) months ending three (3) months preceding the start date of the new Standing Offer year;}}$$

ANNEX "B"
BASIS OF PAYMENT

B = average of the monthly CPI for Canada for the twelve (12) months ending fifteen (15) months preceding the start date of the new Standing Offer year.

The CPI adjustment will be made automatically to the Contractor's rates in April of each year.



Affaires autochtones et
Développement du Nord Canada

Aboriginal Affairs and
Northern Development Canada

ANNEX "C" SECURITY REQUIREMENT CHECK LIST (SRCL)

Contract Number / Numéro du contrat
1000228530 /

Security Classification / Classification de sécurité
Unclassified

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

PART A – CONTRACT INFORMATION / PARTIE A – INFORMATION CONTRACTUELLE

1. Branch / Sector / Direction / Région / Direction générale / Secteur / Direction / Région
Strategic Policy & Partnerships / Strategic Research and Data Innovation Branch
Research Consultants Standing Offer Agreements Renewal

2. Contract type / Type de contrat
Non-Competitive / Non-compétitif Competitive / Compétitif
Type :

3. Brief Description of Work / Brève description du travail
Research Consultants Standing Offer Agreements Renewal

4. Contract Amount / Montant du contrat \$10,000,000.00

5. Contract Start and End date / Date de début et de fin du contrat
SOA Award to / au March 31, 2027

7. Will the supplier require / Le fournisseur aura-t-il :

7.1 access to PROTECTED and/or CLASSIFIED information or assets? / accès à des renseignements ou à des biens désignés PROTÉGÉS et/ou CLASSIFIÉS? No / Non Yes / Oui

7.2 an access card to AANDC premises? / besoin d'une carte d'accès aux bureaux d'AANDC? No / Non Yes / Oui

7.3 access to the departmental computer network? / accès au réseau informatique du Ministère? No / Non Yes / Oui

If the answer is No to all three questions, go to Part D / Si la réponse est Non aux trois questions, allez à la Partie D)

PART B – SAFEGUARDS OFF-SITE (COMPANY) / PARTIE B – MESURES DE PROTECTION À L'EXTÉRIEUR (COMPAGNE)

PHYSICAL INFORMATION / ASSETS / RENSEIGNEMENTS MATÉRIELS / BIENS

8. Will the supplier be required to receive/proTECTED and/or CLASSIFIED information/assets on its site or premises? / Le fournisseur sera-t-il tenu de recevoir/renseignements PROTÉGÉS et/ou CLASSIFIÉS? No / Non Yes / Oui

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

9.1 Will the supplier be required to use its computers, portable media, or IT systems to electronically process/store sensitive information? / Le fournisseur sera-t-il tenu d'utiliser ses ordinateurs, médias portatifs ou systèmes TI pour traiter/stocker électroniquement des renseignements sensibles? No / Non Yes / Oui

9.2 Will the supplier be required to electronically transmit sensitive information to/from the Department or with other parties? / Le fournisseur sera-t-il requis de transmettre électroniquement de l'information sensible au/départ du Ministère ou avec d'autres parties? No / Non Yes / Oui

If yes, specify: / Si oui, spécifiez :

- a) Email transmission / Transmission par courriel électronique : No / Non Yes / Oui
- b) Other transmission (Secure FTP, Collaboration, etc) / Autre transmission (FTP sécurisé, collaboration, etc) : No / Non Yes / Oui
- c) Remote access required to AANDC network (VPN, Citrix) / Besoin de connexion à distance au réseau d'AANDC (VPN, Citrix) : No / Non Yes / Oui

9.3 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* ? Yes / Oui No / Non

* Handling equipment and measures for secure transmission and emission (cryptographic, secure fax/phone) / Manipulation de l'équipement et des mesures sécuritaires pour fin de transmission et émissions (cryptographie, téléphone/Microphone sécurisé)

10. SUMMARY CHART / TABLEAU RÉCAPITULATIF

Category / Catégorie	PROTECTED / PROTÉGÉ			CLASSIFIED / CLASSIFIÉ		
	A	B	C	CONFIDENTIAL / CONFIDENTIEL	SECRET	TOP SECRET / TRÈS SECRET
Information Assets / Renseignements/Biens	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Information Systems / Systèmes d'information (SIS) / Renseignements (SIS) / Renseignements (SIS)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Information Media (if any) / Renseignements/Médias (if any)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Information Technology / Support / Technologie de l'information / Support	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transmission - other / Transmission - autre	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transmission T - other / Transmission T - autre	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Control of access to assets / Contrôle de l'accès aux biens	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
COMSEC	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

PART C – PERSONNEL / PARTIE C – PERSONNEL

11.1 Personnel Security Screening Level Required: / Niveau d'enquête de la sécurité du personnel requis : N/A / Non requis Reliability / Fiabilité Confidential / Confidentiel Secret Top Secret / Très secret

11.2 May unscreened personnel be used for portions of work? / Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail? No / Non Yes / Oui N/A / Non requis

12. 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

ANNEX "C" SECURITY REQUIREMENT CHECK LIST (SRCL)



Gouvernement
du Canada

Contract Number / Numéro du contrat
1000228530 /

Security Classification / Classification de sécurité
Unclassified

PART D – AUTHORIZATION / PARTIE D – AUTORISATION			
13. Organization Project Authority / Chevalet de projet de l'organisme Name (print) – Nom (en lettres moullées) Éric Guimond		Signature guimond, eric Digitally signed by guimond, eric Date: 2022.05.11 12:58:37 -0400	
Title - Titre Chief Data Officer		Date 2022/05/11	
Telephone No. – N° de téléphone 813-614-8194	Facsimile No. - N° de télécopieur	Email address – Adresse courriel Eric.guimond@sac-isc.gc.ca	Date 2022/05/11
14. Organization Security Authority / Responsable de la sécurité de l'organisme			
Name (print) – Nom (en lettres moullées) Steven French		Signature french, steven Digitally signed by French, steven Date: 2022.05.11 12:58:37 -0400	
Title - Titre Supervisor, Contract Security		Date 2022/05/31	
Telephone No. – N° de téléphone 819-360-2958	Facsimile No. - N° de télécopieur	Email address – Adresse courriel steven.french@sac-isc.gc.ca	Date 2022/05/31
15. Are there additional instructions (e.g. Security Guide, Security Classification Guide) attached? Des instructions supplémentaires (p. ex. Guide de sécurité, Guide de classification de la sécurité) sont-elles jointes? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Out			
16. Procurement Officer / Agent d'approvisionnement			
Name (print) – Nom (en lettres moullées) Bruno Paradis		Signature paradis, bruno Digitally signed by Paradis, Bruno Date: 2022.05.11 12:58:37 -0400	
Title - Titre Senior Procurement and Contracting Officer		Date 2022/05/11	
Telephone No. – N° de téléphone 873-355-2459	Facsimile No. - N° de télécopieur	Email address – Adresse courriel bruno.paradis2@sac-isc.gc.ca	Date 2022/05/11
17. Contracting Security Authority / Autorité contractante en matière de sécurité			
Name (print) – Nom (en lettres moullées) Steven French		Signature french, steven Digitally signed by French, steven Date: 2022.05.11 12:58:37 -0400	
Title - Titre Supervisor, Contract Security		Date 2022/05/31	
Telephone No. – N° de téléphone 819-360-2958	Facsimile No. - N° de télécopieur	Email address – Adresse courriel steven.french@sac-isc.gc.ca	Date 2022/05/31

T85/SCT 300-103(200412)

Security Classification / Classification de sécurité
Unclassified



**ANNEX D
SECURITY REQUIREMENT AGREEMENT**

Company name: _____ At SOA Award) _____

Request for standing offer: 1000228530

Standing offer: _____ (TBD) _____

1. **Physical Security and Safeguard Requirements**

It is important to properly safeguard sensitive information. This will assist in reducing the risk of unauthorized access, disclosure or compromise of **Sensitive** information.

1.1 **Physical Safeguards:**

The Protected documents must be safeguarded in a locked security container with access restricted to the contractor only.

	Protected A	Protected B
Container	Key locked container	Dial lock container
Facility	Restricted access room within office/home	Restricted access room within office/home

Definitions:

Protected information: Information for which unauthorized disclosure, destruction, interruption, removal or modification could reasonably be expected to cause injury to an individual, organization or government which lies outside the national interest.

Protected A: Could cause injury. A few examples: Personal data such as names, birth dates, home address and telephone number, linguistic profiles, salary figures, Social Insurance Numbers.

Protected B: Could cause serious injury. A few examples: Several Protected A information compiled, business or client information such as: commercial financial, scientific, or technical information, loss of competitive advantage, legal opinion, medical record.

1.2 **Transportation**

1.2.1 **Transportation of Paper Records:**

- **Protected** documents must be securely packaged in folders carried in an approved locked briefcase.
- Sensitive information must be kept under the constant control of the contractor, including during meals and during travel.
- While on contractor premises, portable media devices containing sensitive information are equivalent to paper records and are to be physically stored within an appropriate security container such as those listed above.

1.2.2 **Prevention Tips While in Transit:**

- Prior to travel: Make an inventory of information.
- Public Areas: Sensitive information must never be read, displayed, discussed or used in public areas.
- Overnight Stopovers: Information is not to be left unattended.
- Travelling by Car: Locked in trunk while travelling. Never to be left unattended in vehicle.

ANNEX D SECURITY REQUIREMENT AGREEMENT

- Travelling by Air: Bring with you as a carry-on.
- Hotels/Conference Centers: Be careful about sensitive conversations in hotel conference rooms.
- Never use hotel reception staff or devices to fax, receive or copy sensitive information. Ensure all participants have the proper security clearance and the need-to-know.
- In the event a device or a document is lost or stolen, it must be reported immediately to the Department.

1.2.3 Discussion:

- Sensitive information must never be read, displayed, discussed or used in public areas.
- Be careful about sensitive conversations in hotel conference rooms. Ensure everyone in the conference room has the proper security screening level, the need-to-know and that the door is closed.
- Do not use a wireless device to discuss sensitive matters. Use a wired telephone to discuss **Sensitive** matters.

2. IT Security Requirements

Production and storage of **Protected** data outside of the departmental premises must be done as per the following to ensure that the data remains secure at all times.

2.1 Electronic Storage

- Store **Protected** electronic documents on encrypted removable media (USB key) that use approved Government of Canada standards (FIPS 140-2 or above (ex: FIPS 140-3) certified removable media device, encrypted with AES 128, 192 or 256 bit algorithm and not be copied to a device which does not meet these requirements.
<http://csrc.nist.gov/groups/STM/cmvp/documents/140-1/1401vend.htm>
- Select strong passwords for your encrypted USB keys. The level of protection provided by such devices is directly related to the strength of the password chosen.

2.2 Electronic Possession, Transportation and Processing

When there is a requirement for the contractor to transport, process or electronically store departmental information, the contractor must ensure that the data remains secure at all times no matter what level of confidentiality the information is by adhering to the following requirements:

- Computing devices used to process data are equipped with up to date anti-virus software which is configured to automatically receive and install product updates;
- Computing devices used to process data must be equipped with up to date software and Operating System versions, and configured to automatically receive and install updates;
- Computing devices are protected by a firewall which can be a network perimeter firewall appliance or host based firewall application installed on the computer (note: a standard router only device is not considered a substitute to a firewall);
- The contractor has the means to securely dispose of electronic data in accordance with CSEC standards (refer to <https://cyber.gc.ca/en/guidance/it-media-sanitization-itsp40006>)
Departmental data must be stored on a FIPS 140-2 or above certified removable media device that is encrypted with AES 128 bit algorithm or higher (refer to <http://csrc.nist.gov/groups/STM/cmvp/documents/140-1/1401vend.htm> for a list of certified devices); and
- Portable storage devices must be labeled to indicate the highest classification or designation level of information stored on the device.

**ANNEX D
SECURITY REQUIREMENT AGREEMENT**

2.3 Electronic Transmission of Departmental Data

Electronic transmission of Protected data between the Contractor and the Department of Indigenous Services Canada (ISC) must be done as per the following approved method based on the level of sensitivity of the information. The contractor may use a combination of these transmission methods in order to share information with ISC's personnel. The use of electronic transmission methods other than those listed below is prohibited.

Classification Level	ISC Approved Transmission Methods	Requirements
Protected A	Email	<p>The Contractor can transmit Protected A Data to ISC personnel via email as long as the following requirements are met:</p> <ul style="list-style-type: none"> • The e-mail account is not a publically accessible web-mail based service (ex: hotmail, yahoo mail, gmail etc); • Each user has their own corporate e-mail account which is protected with a username and password; and • Email server communication is protected with TLS encryption.
	Fax	<p>The Contractor can transmit Protected A Data to ISC via fax as long as the following requirements are met:</p> <ul style="list-style-type: none"> • The sending fax machine is located on the contractor's premises; • The sender contacts the recipient to confirm fax number and advise recipient of incoming fax; • Recipient is present at the fax machine ready to receive fax; and • Sender obtains confirmation from sender of receipt.
	Wireless Communications	<p>If a wireless access point is installed on the contractor's premises, and devices processing ISC data will be connected to this network, the wireless infrastructure must at a minimum include the following safeguards:</p> <ul style="list-style-type: none"> ▪ The administrator user name and password must be changed from their default values; ▪ The network name (SSID) has been changed from its default value; and ▪ WPA2 encryption with an AES algorithm enabled and the passphrase meets the following complexity requirements: <ul style="list-style-type: none"> • Must be 8 characters or longer; • Have at least one upper case character; • Have at least one lower case character; • Have at least one numeric character; and • Have at least one allowed special character

**ANNEX D
SECURITY REQUIREMENT AGREEMENT**

<p>Protected B</p>	<p>Encrypted and Digitally Signed eMail</p>	<p>The Contractor can transmit Protected B Data to ISC personnel via email as long as the messages and/or attachments are encrypted and the following requirements are met:</p> <ul style="list-style-type: none"> • The e-mail account is not a publically accessible web-mail based service (ex: hotmail, yahoo mail, gmail etc); • Each user has their own corporate e-mail account which is protected with a username and password; • The contractor has an approved Public Key Infrastructure (PKI) certificate that is compatible with the Government of Canada (GoC) PKI services; and • Entrust software is installed on the contractor's PC/laptop and utilized to encrypt the email using the following settings: <ul style="list-style-type: none"> • One of the following encryption algorithms is used: <ul style="list-style-type: none"> ▪ 3DES-168 Bit or higher ▪ AES-128 Bit or higher • Digitally signed with one of the following algorithms: <ul style="list-style-type: none"> ▪ RSA (Rivest, Shamir, Adleman) ▪ DSA (Digital Signature Algorithm) ▪ ECDSA (Elliptic Curve Digital Signature Algorithm) • One of the following Hash functions is used in the generation of digital signatures: <ul style="list-style-type: none"> • SHA-224 • SHA-256 • SHA-384 • SHA-512
	<p>Wireless Communications</p>	<p>If a wireless access point is installed on the contractor's premises, and devices processing ISC data will be connected to this network, the wireless infrastructure must at a minimum include the following safeguards:</p> <ul style="list-style-type: none"> ▪ The administrator user name and password must be changed from their default values; ▪ The network name (SSID) has been changed from its default value; and ▪ WPA2 encryption with an AES algorithm enabled WPA2 encryption with an AES algorithm enabled and the passphrase meets the following complexity requirements: <ul style="list-style-type: none"> • Must be 12 characters or longer; • Have at least one upper case character; • Have at least one lower case character; • Have at least one numeric character; and • Have at least one allowed special character

**ANNEX D
SECURITY REQUIREMENT AGREEMENT**

	ISC Secure File Exchange Service	<p>The Contractor can transmit Protected B Data via ISC's Secure File Exchange service as long as following requirements are met:</p> <ul style="list-style-type: none"> • A personally identifiable unique username and password is assigned to the user by ISC; and • The contractor has read and agrees to abide to the Secure File Exchange Acceptable Use Policy (See annex 1 of security requirement agreement)
	ISC Collaboration Service	<p>The Contractor can transmit Protected B Data via ISC's Collaboration service as long as following requirements are met:</p> <ul style="list-style-type: none"> • A personally identifiable unique username and password is assigned to each user by ISC.
	Fax	<p>The Contractor can transmit Protected B Data to ISC via fax as long as the following requirements are met:</p> <ul style="list-style-type: none"> • The sending fax machines is located on the contractor's premises; • The sender contacts the recipient to confirm fax number and advises recipient of incoming fax; • Recipient is present at the fax machine ready to receive fax; and • Sender obtains confirmation from sender of receipt.

2.4. Remote Connectivity to the Department's Network

The contractor requires remote access to the Department's network and IT Systems. Remote access is to be configured in the following manner:

- A unique identifier and password is assigned to each user and is used to authenticate the user to the network; and
- The Citrix Portal <https://pa-ap.aadnc-aandc.gc.ca> is used.

Note: The department has Certified and Accredited its remote connectivity services for access to and/or transmission of information up to Protected B. ISC accepts any residual risk for their use during the contract. Therefore, an IT inspection by ISC to verify remote access services is not required.

3. Inspection

An authorized representative of the Government shall have the right to inspect, at reasonable intervals, the Contractor's methods and facilities for compliance with the Policy on Government Security requirements and this Agreement. The Contractor shall cooperate with the authorized representative and provide such information as the authorized representative may require in regard to any such inspections. Should the Government determine that the Contractor is not in compliance, it shall submit a written report to the Contractor advising of the deficiencies and follow-up on the deficiencies until they are rectified to the satisfaction of the department.

4. Security Costs

**ANNEX D
SECURITY REQUIREMENT AGREEMENT**

The Department shall not be liable for any costs or claims of the Contractor arising out of this Agreement or instructions issued hereunder.

**ANNEX D
SECURITY REQUIREMENT AGREEMENT**

Annex 1

Indigenous Services Canada (ISC) Secure File Exchange Service

Acceptable Use Policy

You have been granted access to the Indigenous Services Canada (ISC) Secure File Exchange Service. The purpose of this system is to facilitate sharing of information between ISC and its business partners.

By using this system you acknowledge and agree to abide by the following terms and conditions:

- The service will **accommodate sensitive information up to, and including, Protected B**. Protected B information is defined as any information for which unauthorized release could cause serious injury to an individual, organization or government; prejudicial treatment; or loss of reputation or competitive edge.
- The system **will not** be used to share any information rated Protected C, Confidential, Secret or Top Secret.
- The ISC Secure File Exchange Service is for authorized business use only.
- The service may be accessed by authorized participants only.
- Participants will protect and not share their credentials (user ID, password, etc.) with others or allow records of their credentials to be viewed by unauthorized individuals.
- Participants will protect and manage information obtained from the ISC Secure File Exchange service to prevent disclosure to unauthorized individuals.
- Participants will access the service from personal or organizational workstations that are not intended for public use. This is intended to reduce the likelihood that user credentials or other sensitive information could be cached on the workstation and accessed by unauthorized individuals.
- Files shared via this service will remain available for a period of 48 hours only at which point the files will automatically be removed from the system.

ANNEX D
SECURITY REQUIREMENT AGREEMENT
SECURITY AGREEMENT

I, _____ (Contractor) and authorized resources will fulfill the duties as contractor working under standing offer _____ and upcoming call-ups against this standing offer, as set out below, to the best of our abilities.

1. Will abide by all of Indigenous Services Canada (ISC) security clauses and requirements included in this contract. Acknowledge receipt and understand these existing clauses and requirements, and promise to familiarize with any amendments to them, forthwith after receipt of such amendments.
2. Understand and agree that information received in the process of performing our duties in relation to this contract is subject to the Policy on Government Security and may be also subject to the Privacy Act, and will remain the property of ISC. Without the prior written authorization of ISC or of the person to whom the information relates, this information can only be viewed by myself and authorized resources and may only be used for the purposes of this contract on behalf of ISC.
3. Agree to notify ISC authorities of any unauthorized access, disclosure or misuse of the sensitive information of which we become aware and will provide full details of the incident immediately noting the corrective action taken to prevent a recurrence of the incident.
4. Understand and agree that any additional resources authorized to perform work under this contract will also abide by all of ISC security clauses and requirements included in this contract.

I, the undersigned, UNDERSTAND, AGREE AND CONSENT TO COMPLY WITH THE ABOVE:

Contractor:
PRINT NAME: _____

SIGNATURE: _____
DATE: _____

ISC Project Authority:
PRINT NAME: _____

SIGNATURE: _____
DATE: _____