

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

Agriculture and Agri-Food Canada / Agriculture et Agroalimentaire Canada

Attn: Kyle Harrington

Email: kyle.harrington@agr.gc.ca

**REQUEST FOR PROPOSAL/
DEMANDE DE PROPOSITION**

Proposal To: Agriculture and Agri-Food Canada

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

Proposition à : Agriculture et Agroalimentaire Canada

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

Comments-Commentaires

Vendor/Firm Name and Address - Raison sociale et adresse du fournisseur/ de l'entrepreneur

Issuing Office- Bureau de distribution

Agriculture and Agri-Food Canada / Agriculture et Agroalimentaire Canada

Corporate Materiel Management Centre/ Centre de gestion intégrée du matériel

Title/Titre: EXPLORATION OF SECTORS FEASIBILITY FOR WHOLE FARM REVENUE AND MARGIN INSURANCE	
Solicitation No. – N° de l'invitation 01B68-22-0082	Date of Solicitation – Date de l'invitation September 13th 2022.
Solicitation Closes – L'invitation prend fin At – à : 12 :00 On-le : October 24th 2022.	Time Zone - Fuseau Horaire EDT
Address Enquiries to: Adresser toutes questions à :	
Name : Kyle Harrington Email : kyle.harrington@agr.gc.ca	
Telephone No. – N° de téléphone N/A	FAX No. – N° de fax N/A
Destination- of Goods, Services, and Construction : Destination-des biens, services et construction :	
Instructions: Municipal taxes are not applicable. Unless otherwise specified herein all prices quoted must include all applicable Canadian customs duties, GST/HST, excise taxes and are to be delivered Delivery Duty Paid including all delivery charges to destination(s) as indicated. The amount of the Goods and Services Tax/Harmonized Sales Tax is to be shown as a separate item. Instructions: Les taxes municipales ne s'appliquent pas. Sauf indication contraire, les prix indiqués doivent comprendre les droits de douane canadiens, la TPS/TVH et la taxe d'accise. Les biens doivent être livrés « rendu droits acquittés », tous frais de livraison compris, à la ou aux destinations indiquées. Le montant de la taxe sur les produits et services/taxe de vente harmonisée doit être indiqué séparément.	
Delivery required - Livraison exigée	Delivery offered - Livraison proposée
Vendor/Firm Name and Address - Raison sociale et adresse du fournisseur/ de l'entrepreneur	
Name and title of person authorized to sign on behalf of Vendor/firm - Nom et titre de la personne autorisée à signer au nom du fournisseur/ de l'entrepreneur	
(type or print) - (taper or écrire en caractère d'imprimerie)	
Signature:	
Date:	

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PART 1 – GENERAL INFORMATION

1.1 INTRODUCTION

This document states terms and conditions that apply to bid solicitation # 01B68-22-0082 it is divided into seven parts plus annexes and, attachments as follows :

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

Part 2 Bidder Instructions provides the instructions, clauses and conditions applicable to the bid solicitation and states that the Bidder agrees to be bound by the clauses and conditions contained in all parts of the bid solicitation;

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

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

Part 5 Certifications: includes the certifications to be provided;

Part 6 Security, Financial and Other Requirements: includes specific requirements that must be addressed by bidders; and

Part 7 Resulting Contract Clauses: includes the clauses and conditions that will apply to any resulting contract.

The appendices include the Statement of Work, the Basis of Payment, the Bid Evaluation Criteria, and the Task Authorization Form.

1.2 SUMMARY

1.2.1 This bid solicitation is being issued to satisfy the requirement of Agriculture and Agri-Food Canada. It is intended to result in the award of one contract from contract award to September 30 2023 with three (3) one year option periods.

1.2.2 AAFC is requesting proposals to fulfill the primary intent of the Task Authorizations (TA's) Contract under this procurement, the Department of Agriculture and Agri-Food Canada (AAFC) is seeking the services of a multi-disciplinary firm experienced in agriculture, insurance, accounting and actuarial services, in order to explore the concept of a new approach in agricultural insurance programming.

The intent is to have a consultant undertake a complete analysis of how whole farm revenue insurance and margin insurance could work for the fruits and vegetables sector and the potato sector in Canada. This work will build off the basic framework outlined in the department's previous third-party review of whole farm revenue insurance for the grains and cattle sectors while also adapting and customizing the conceptual and models to account for the unique specific characteristics of the production and market risks and data availability in all of these new sectors.

The mandate for this work was set out by FPT Ministers of Agriculture at their meeting in July 2019 where they tasked officials to review the potential for alternative insurance-based approaches to BRM programming (i.e., revenue and margin insurance). The outcomes of this work has the potential to make profound and significant policy and administrative improvements to Canada's suite of risk management tools for agriculture.

1.2.3 There is no Security component associated with this requirement.

1.3 Debriefings

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

PART 2 - BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

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

Bidders who submit a bid agree to be bound by the instructions, clauses and conditions of the bid solicitation and accept the clauses and conditions of the resulting contract.

The [2003 \(2022-03-29\)](#) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

Subsection 5.4 of 2003, Standard Instructions - Goods or Services - Competitive Requirements, is amended as follows:

Delete: 60 days

Insert: 120 days

In the complete text content (except Subsection 1.0, Subsection 3.0, and Subsection 20): Delete "Public Works and Government Services Canada" and Insert "Agriculture and Agri-Food Canada". Delete "PWGSC" and Insert "AAFC".

Subsection 5.2 of Standard Instructions - Goods or Services - Competitive Requirements 2003 is amended as follows:

Delete: (d) send its bid only to the specified Bid Receiving Unit of Public Works and Government Services Canada (PWGSC) specified in the bid solicitation or, to the address specified in the bid solicitation, as applicable;

Insert: (d) send its bid only to the specified Bid Receiving Unit of Agriculture and Agri-Food Canada (AAFC) specified in the bid solicitation or, to the address specified in the bid solicitation, as applicable;

2.2 Submission of Bids

Unless specified otherwise in the RFP, bids must be received by the Contract Authority at the location identified by the date, time and place indicated on page 1 of the solicitation.

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

2.3 Former Public Servant

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

Definitions

For the purposes of this clause, "former public servant" is any former member of a department as defined in the [Financial Administration Act](#), R.S., 1985, c. F-11, a former member of the Canadian

Armed Forces or a former member of the Royal Canadian Mounted Police. A former public servant may be:

- a. an individual;
- b. an individual who has incorporated;
- c. a partnership made of former public servants; or
- d. a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.

"lump sum payment period" means the period measured in weeks of salary, for which payment has been made to facilitate the transition to retirement or to other employment as a result of the implementation of various programs to reduce the size of the Public Service. The lump sum payment period does not include the period of severance pay, which is measured in a like manner.

"pension" means a pension or annual allowance paid under the [Public Service Superannuation Act](#) (PSSA), R.S., 1985, c. P-36, and any increases paid pursuant to the [Supplementary Retirement Benefits Act](#), R.S., 1985, c. S-24 as it affects the PSSA. It does not include pensions payable pursuant to the [Canadian Forces Superannuation Act](#), R.S., 1985, c. C-17, the [Defence Services Pension Continuation Act](#), 1970, c. D-3, the [Royal Canadian Mounted Police Pension Continuation Act](#), 1970, c. R-10, and the [Royal Canadian Mounted Police Superannuation Act](#), R.S., 1985, c. R-11, the [Members of Parliament Retiring Allowances Act](#), R.S. 1985, c. M-5, and that portion of pension payable to the [Canada Pension Plan Act](#), R.S., 1985, c. C-8.

Former Public Servant in Receipt of a Pension

As per the above definitions, is the Bidder a FPS in receipt of a pension? **Yes () No ()**

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

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

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

Work Force Adjustment Directive

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

If so, the Bidder must provide the following information:

- a. name of former public servant;
- b. conditions of the lump sum payment incentive;
- c. date of termination of employment;
- d. amount of lump sum payment;
- e. rate of pay on which lump sum payment is based;

- f. period of lump sum payment including start date, end date and number of weeks;
- g. number and amount (professional fees) of other contracts subject to the restrictions of a work force adjustment program.

2.4 Enquiries - Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than **ten (10)** calendar days before the bid closing date. Enquiries received after that time may not be answered.

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

2.5 Applicable Laws

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

Bidders may, at their discretion, substitute the applicable laws of a Canadian province or territory of their choice without affecting the validity of their bid, by deleting the name of the Canadian province or territory specified and inserting the name of the Canadian province or territory of their choice. If no change is made, it acknowledges that the applicable laws specified are acceptable to the Bidders.

2.6 Improvement of Requirement During Solicitation Period

Should bidders consider that the specifications or Statement of Work contained in the bid solicitation could be improved technically or technologically, bidders are invited to make suggestions, in writing, to the Contracting Authority named in the bid solicitation. Bidders must clearly outline the suggested improvement as well as the reason for the suggestion. Suggestions that do not restrict the level of competition nor favour a particular bidder will be given consideration provided they are submitted to the Contracting Authority at least **ten (10)** days before the bid closing date. Canada will have the right to accept or reject any or all suggestions.

2.7 Bid Challenge and Recourse Mechanisms

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

PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

- a. **Copies of Bid:** Canada requests that bidders provide their bid in separately bound sections as follows:

- i. Section I: Technical Bid
- ii. Section II: Financial Bid
- iii. Section III: Certifications not included in the Technical Bid

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

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

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

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

- 1) Include all environmental certification(s) relevant to your organization (e.g. ISO 14001, Leadership in Energy and Environmental Design (LEED), Carbon Disclosure Project, etc.)
- 2) Include all environmental certification(s) or Environmental Product Declaration(s) (EPD) specific to your product/service (e.g. Forest Stewardship Council (FSC), ENERGYSTAR, etc.)
- 3) Unless otherwise noted, bidders are encouraged to submit bids electronically. If hard copies are required, bidders should:
 - a. use 8.5 x 11 inch (216 mm x 279 mm) paper containing fibre certified as originating from a sustainably-managed forest and containing minimum 30% recycled content; and
 - b. use an environmentally-preferable format including black and white printing instead of colour printing, printing double sided/duplex, using staples or clips instead of cerlox, duotangs or binders.

Section I: Technical Bid

In their technical bid, Bidders should demonstrate their understanding of the requirements contained in the bid solicitation and explain how they will meet these requirements. Bidders should demonstrate their capability and describe their approach in a thorough, concise and clear manner for carrying out the work.

The technical bid should address clearly and in sufficient depth the points that are subject to the evaluation criteria against which the bid will be evaluated. Simply repeating the statement contained in the bid solicitation is not sufficient. In order to facilitate the evaluation of the bid, Canada requests that Bidders address and present topics in the order of the evaluation criteria under the same headings. To avoid duplication, Bidders may refer to different sections of their bids by identifying the specific paragraph and page number where the subject topic has already been addressed.

Section II: Financial Bid

Bidders must submit their financial bid in accordance with the Basis of Payment provided in Annex "B" of this bid solicitation. The total amount of Applicable Taxes must be shown separately, if applicable.

Section III: Certifications

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

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

- a. Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria. There are several steps in the evaluation process, which are described below. Even though the evaluation and selection will be conducted in steps, the fact that Canada has proceeded to a later step does not mean that Canada has conclusively determined that the Bidder has successfully passed all the previous steps. Canada may conduct steps of the evaluation in parallel.
- b. An evaluation team composed of representatives of the Identified User(s) will evaluate the bids on behalf of Canada. Canada may hire any independent consultant, or use any Government resources, to evaluate any bid. Not all members of the evaluation team will necessarily participate in all aspects of the evaluation.
- c. In addition to any other time periods established in the bid solicitation:
 - i. **Requests for Clarifications:** If Canada seeks clarification or verification from the Bidder about its bid, the Bidder will have 2 working days (or a longer period if specified in writing by the Contracting Authority) to provide the necessary information to Canada. Failure to meet this deadline will result in the bid being declared non-responsive.
 - ii. **Requests for Interviews:** If Canada wishes to interview the Bidder and/or any or all of the resources proposed by the Bidder to fulfill the requirements of the bid solicitation, the Bidder will have 2 working days following notice by the Contracting Authority to make any necessary arrangements (at the Bidder's sole cost) for the interview to take place at a location specified by Canada.
 - iii. **Requests for Further Information:** If Canada requires additional information to do any of the following pursuant to the Section entitled "Conduct of Evaluation" in 2003, Standard Instructions - Goods or Services - Competitive Requirements:
 - A. Verify any or all information provided by the Bidder in its bid; or
 - B. Contact any or all references supplied by the Bidder (e.g., references named in the grids of individual resources) to verify and validate any information submitted by the Bidder.The Bidder must provide the information requested by Canada within two (2) working days of a request by the Contracting Authority.
 - iv. **Extension of Time:** If additional time is required by the Bidder, the Contracting Authority may grant an extension in his or her sole discretion.

4.2 Technical Evaluation

a. Mandatory Technical Criteria :

Each bid will be reviewed to determine whether it meets the mandatory requirements of the bid solicitation. Any element of the bid solicitation that is identified specifically with the words "must" or "shall" or "mandatory" is a mandatory requirement. Bids that do not comply with every mandatory requirement will be considered non-responsive and be disqualified. The Mandatory evaluation criteria are described in **Appendix "C" Technical Evaluation Criteria**.

b. Point-Rated Technical Criteria:

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

- i. A Technical Proposal Score (out of 80 points), will be computed for each technically responsive Bidder using the following formula:

Actual Technical Score	x 80 =	Final Score
Maximum Technical Score Attainable		<i>80% of Bidders Calculated Score</i>

Example: Given the Bidder has met the minimum threshold for the point-rated evaluation criteria

120	x 80 =	Final Score
135		71.111 out of 80

Note: Scores will be computed to a maximum of three decimal places.

Technically Responsive Proposal: A technically responsive proposal is a proposal that

- A. Meets the mandatory requirements and obtains the required minimum points specified in the bid solicitation for the criteria that are subject to point rating.

4.3 Financial Evaluation

The price of the bid will be evaluated in Canadian dollars, Applicable Taxes excluded, FOB destination, Canadian customs duties and excise taxes included.

In the Financial Proposal, the Bidder shall provide a firm all-inclusive price to provide the services requested in accordance with Deliverables as identified in **Appendix B**.

The requirements of the Financial Proposal are detailed in **Appendix C, Evaluations Procedures and Criteria**.

Prices shall not appear in any area of the proposal except in the Financial Proposal.

All bids must be in Canadian dollars. Financial evaluations are calculated on the total cost of the project, excluding GST or HST (if applicable). Only the Canadian currency value for the bid will be used in evaluating a proposal. The Canadian currency value for a bid is fixed at the time of the proposal, irrespective of future changes in currency rate.

The failure by a company to bid in Canadian dollars (a mandatory requirement of the solicitation) is sufficient to make its proposal non-compliant. AAFC will reject a company's bid made in any other currency than Canadian.

4.4 Basis of Selection

1. To be declared responsive, a bid must:
 - a. comply with all the requirements of the bid solicitation; and
 - b. meet all mandatory criteria; and
 - c. obtain the required minimum of 60% for each category technical evaluation criteria which are subject to point rating.
2. Bids not meeting (a) or (b) or (c) will be declared non-responsive.

3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 80% for the technical merit and 20% for the price.
4. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of 80%.
5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 20% .
6. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
7. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.

PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

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

The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Unless specified otherwise, Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.

The Contracting Authority will have the right to ask for additional information to verify the Bidder's certifications. Failure to comply and to cooperate with any request or requirement imposed by the Contracting Authority will render the bid non-responsive or constitute a default under the Contract.

5.1 Certifications Required with the Bid

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

5.1.1 Integrity Provisions - Declaration of Convicted Offences

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

5.2 Certifications Precedent to Contract Award and Additional Information

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

5.2.1 Legal Entity And Corporate Name

Please certify that the Bidder is a legal entity that can be bound by the contract and sued in court and indicate **i)** whether the Bidder is a corporation, partnership or sole proprietorship, **ii)** the laws under which the Bidder was registered or formed, **iii)** together with the registered or corporate name. Also identify **iv)** the country where the controlling interest/ownership (name if applicable) of the Bidder is located.

- i) _____
- ii) _____
- iii) _____
- iv) _____

Any resulting Contract may be executed under the following **i)** corporate full legal name and **ii)** at the following place of business (complete address) **iii)** telephone and fax number and email:

- i) _____
- ii) _____
- iii) _____

Name

Signature

Date

5.2.2 Education/Experience Certification

We certify that all statements made with regard to the education and the experience of individuals proposed for completing the subject Work are accurate and factual, and we are aware that the Minister reserves the right to verify any information provided in this regard and that untrue statements may result in the proposal being declared **non-responsive** or in other action which the Minister may consider appropriate.

Name

Signature

Date

5.2.3 Price/Rate Certification

"We hereby certify that the price quoted have been computed in accordance with generally accepted accounting principles applicable to all like services rendered and sold by us, that such prices are not in excess of the lowest prices charged anyone else, including our most favoured customer for like quality and quantity so the services, does not include an element of profit on the sale in excess of that normally obtained by us on the sale of services of like quality and quantity, and does not include any provision for discounts or commissions to selling agents".

Name

Signature

Date

5.2.4 Validity Of Proposal

It is requested that proposals submitted in response to this Request for Proposal be:

- valid in all aspects, including price, for not less than one hundred and twenty (120) days from the closing date of this RFP; and,
- signed by an authorized representative of the Bidder in the space provided on the RFP; and,
- provide the name and telephone number of a representative who may be contacted for clarification or

other matters relating to the Bidder's proposal.

Name

Signature

Date

5.2.5 Availability And Status Of Personnel

The Bidder certifies that, should it be authorized to provide services under any contract resulting from this RFP, the employees proposed in its proposal will be available to commence performance of the work within a reasonable time from contract award, or within the time specified herein.

If the Bidder has proposed any person in fulfilment of this requirement who is not an employee of the Bidder, the Bidder hereby certifies that it has written permission from such person to propose the services of such person in relation to the work to be performed in fulfilment of this requirement and to submit such person's résumé to the Contracting Authority.

During the proposal evaluation, the Bidder MUST upon the request of the Contracting Authority provide a copy of such written permission, in relation to any or all non-employees proposed. The Bidder agrees that failure to comply with such a request may lead to disqualification of the Bidder's proposal from further consideration.

Name

Signature

Date

5.2.6 FORMER PUBLIC SERVANT – STATUS AND DISLCOSURE

Contracts with 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 with FPS, bidders must provide the information required below.

Definitions

For the purposes of this clause, "former public servant" is any former member of a department as defined in the [Financial Administration Act](#), R.S., 1985, c. F-11, a former member of the Canadian Armed Forces or a former member of the Royal Canadian Mounted Police. A former public servant may be:

- a. an individual;
- b. an individual who has incorporated;
- c. a partnership made of former public servants; or
- d. a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.

"lump sum payment period" means the period measured in weeks of salary, for which payment has been made to facilitate the transition to retirement or to other employment as a result of the implementation of various programs to reduce the size of the Public Service. The lump sum payment period does not include

the period of severance pay, which is measured in a like manner.

"pension" means, a pension or annual allowance paid under the [Public Service Superannuation Act](#) (PSSA), R.S., 1985, c.P-36, and any increases paid pursuant to the [Supplementary Retirement Benefits Act](#), R.S., 1985, c.S-24 as it affects the PSSA. It does not include pensions payable pursuant to the [Canadian Forces Superannuation Act](#), R.S., 1985, c.C-17, the [Defence Services Pension Continuation Act](#), 1970, c.D-3, the [Royal Canadian Mounted Police Pension Continuation Act](#) , 1970, c.R-10, and the [Royal Canadian Mounted Police Superannuation Act](#), R.S., 1985, c.R-11, the [Members of Parliament Retiring Allowances Act](#) , R.S., 1985, c.M-5, and that portion of pension payable to the [Canada Pension Plan Act](#), R.S., 1985, c.C-8.

Former Public Servant in Receipt of a Pension

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

Yes () No ()

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

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

By providing this information, Bidders agree that the successful Bidder's status, with respect to being a former public servant in receipt of a pension, will be reported on departmental websites as part of the published proactive disclosure report.

Work Force Reduction Program

Is the Bidder a FPS who received a lump sum payment pursuant to the terms of a work force reduction program? Yes () No ()

If so, the Bidder must provide the following information:

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

Name

Signature

Date

5.2.7 JOINT VENTURES

In the event of a proposal submitted by a contractual joint venture, the proposal shall be signed by either all members of the joint venture or a statement shall be provided to the effect that the signatory represents all parties of the joint venture. The following will be completed if applicable:

1. The Bidder represents that the bidding entity is/is not (delete as applicable) a joint venture in accordance with the definition in paragraph 3.

2. A Bidder that is a joint venture represents the following additional information:

(a) Type of joint venture (mark applicable choice):

- Incorporated joint venture
- Limited partnership joint venture
- Partnership joint venture
- Contractual joint venture
- Other

(b) Composition (names and addresses of all members of the joint venture)

3. Definition of joint venture

A joint venture is an association of two or more parties who combine their money, property, knowledge, skills, time or other resources in a joint business enterprise agreeing to share the profits and the losses and each having some degree of control over the enterprise. Joint ventures may be carried on in a variety of legal forms divided into three categories:

- (a) The incorporated joint venture;
- (b) The partnership venture;
- (c) The contractual joint venture where the parties combine their resources in the furtherance of a single business enterprise without actual partnership or corporate designation.

4. The joint venture team arrangement is to be distinguished from other types of Contractor arrangements, such as:

(a) Prime Contractor, in which, for example, the purchasing agency contracts directly with a Contractor (prime) who acts as the system assembler and integrator, with major components, assemblies and subsystems normally subcontracted;

(b) Associated Contractor, in which for example, the purchasing agency contracts directly with each of the major component suppliers and performs the integration tasks or awards a separate contract for this purpose.

5. If the Contract is awarded to an unincorporated joint venture, all members of the joint venture shall be jointly and severally responsible for the performance of the Contract.

Name

Signature

Date

5.2.8 INTEGRITY PROVISIONS

1. Ineligibility and Suspension Policy (the "Policy"), and all related Directives (2016-04-04), are incorporated by reference into, and form a binding part of the procurement process. The Supplier must comply with the Policy and Directives, which can be found at [Ineligibility and Suspension Policy](#).
2. Under the Policy, charges and convictions of certain offences against a Supplier, its affiliates or first tier subcontractors, and other circumstances, will or may result in a determination by Public Works and Government Services Canada (PWGSC) that the Supplier is ineligible to enter, or is suspended from entering into a contract with Canada. The list of ineligible and suspended Suppliers is contained in PWGSC's Integrity Database. The Policy describes how enquiries can be made regarding the ineligibility or suspension of Suppliers.
3. In addition to all other information required in the procurement process, the Supplier must provide the following:
 - a. by the time stated in the Policy, all information required by the Policy described under the heading "Information to be Provided when Bidding, Contracting or Entering into a Real Property Agreement"; and
 - b. with its bid / quote / proposal, a complete list of all foreign criminal charges and convictions pertaining to itself, its affiliates and its proposed first tier subcontractors that, to the best of its knowledge and belief, may be similar to one of the listed offences in the Policy. The list of foreign criminal charges and convictions must be submitted using an Integrity Declaration Form, which can be found at [Declaration form for procurement](#).
4. Subject to subsection 5, by submitting a bid / quote / proposal in response a request by AAFC, the Supplier certifies that:
 - a. it has read and understands the [Ineligibility and Suspension Policy](#);
 - b. it understands that certain domestic and foreign criminal charges and convictions, and other circumstances, as described in the Policy, will or may result in a determination of ineligibility or suspension under the Policy;
 - c. it is aware that Canada may request additional information, certifications, and validations from the Supplier or a third party for purposes of making a determination of ineligibility or suspension;
 - d. it has provided with its bid / quote / proposal a complete list of all foreign criminal charges and convictions pertaining to itself, its affiliates and its proposed first tier subcontractors that, to the best of its knowledge and belief, may be similar to one of the listed offences in the Policy;

- e. none of the domestic criminal offences, and other circumstances, described in the Policy that will or may result in a determination of ineligibility or suspension, apply to it, its affiliates and its proposed first tier subcontractors; and
 - f. it is not aware of a determination of ineligibility or suspension issued by PWGSC that applies to it.
5. Where a Supplier is unable to provide any of the certifications required by subsection 4, it must submit with its bid/ quote / proposal a completed Integrity Declaration Form, which can be found at [Declaration form for procurement](#).
6. Canada will declare non-responsive any bid / quote / proposal in respect of which the information requested is incomplete or inaccurate, or in respect of which the information contained in a certification or declaration is found by Canada to be false or misleading in any respect. If Canada establishes after award of the Contract that the Supplier provided a false or misleading certification or declaration, Canada may terminate the Contract for default. Pursuant to the Policy, Canada may also determine the Supplier to be ineligible for award of a contract for providing a false or misleading certification or declaration.

Certification:

I _____ (Suppliers name) understand that any information I submit in order for the department to confirm my eligibility to receive a contract may be shared and used by AAFC and /or PSPC as part of the validation process, and the results of verification may be publicly disseminated. Moreover, I am aware that any erroneous or missing information could result in the cancellation of my bid as well as a determination of ineligibility/suspension.

Name

Signature

Date

PART 7 - RESULTING CONTRACT CLAUSES

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

7.1 Statement of Work

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

7.1.1 Task Authorization

The Work or a portion of the Work to be performed under the Contract will be on an "as and when requested basis" using a Task Authorization (TA). The Work described in the TA must be in accordance with the scope of the Contract.

7.1.1.1 Task Authorization Process

1. The Project Authority will provide the Contractor with a description of the task using the "Task Authorization Form specified in Appendix D .
2. The Task Authorization (TA) will contain the details of the activities to be performed, a description of the deliverables, and a schedule indicating completion dates for the major activities or submission dates for the deliverables. The TA will also include the applicable basis and methods of payment as specified in the Contract.
3. The Contractor must provide the Project Authority, within 2 calendar days of its receipt, the proposed total estimated cost for performing the task and a breakdown of that cost, established in accordance with the Basis of Payment specified in the Contract.
4. The Contractor must not commence work until a TA authorized by the Contracting and Project Authority has been received by the Contractor. The Contractor acknowledges that any work performed before a TA has been received will be done at the Contractor's own risk.

7.1.1.2 Minimum Work Guarantee - All the Work - Task Authorizations

1. **Maximum Contract Value** means the amount specified in the "Limitation of Expenditure" clause set out in the Contract; and **Minimum Contract Value** means 5%.
2. Canada's obligation under the Contract is to request Work in the amount of the Minimum Contract Value or, at Canada's option, to pay the Contractor at the end of the Contract in accordance with paragraph 3. In consideration of such obligation, the Contractor agrees to stand in readiness throughout the Contract period to perform the Work described in the Contract. Canada's maximum liability for work performed under the Contract must not exceed the Maximum Contract Value, unless an increase is authorized in writing by the Contracting Authority.
3. In the event that Canada does not request work in the amount of the Minimum Contract Value during the period of the Contract, Canada must pay the Contractor the difference between the Minimum Contract Value and the total cost of the Work requested.
4. Canada will have no obligation to the Contractor under this clause if Canada terminates the Contract in whole or in part for default.

7.2 Standard Clauses and Conditions

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

7.2.1 General Conditions

[2035](#) (2022-05-12), General Conditions - Higher Complexity - Services, apply to and form part of the Contract.

7.3 Security Requirements

7.3.1 There is no security requirement applicable to the Contract.

7.4 Term of Contract

- a. **Contract Period** : The "**Contract Period**" is the entire period of time during which the Contractor is obliged to perform the Work, which includes :
- i. The "**Initial Contract Period**", which begins on the date the Contract is awarded and ends September 30th, 2023; and
 - ii. The period, during which the Contract is extended, if Canada chooses to exercise any options set out in the Contract.
- b. **Option to Extend the Contract** :
- i. The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to three (3) additional one-year periods under the same terms and conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions set out in the Basis of Payment.
 - ii. Canada may exercise this option at any time by sending a written notice to the Contractor before the expiry date of the Contract. The option may only be exercised by the Contracting Authority, and will be evidenced, for administrative purposes only, through a formal contract amendment.

c. **Termination on Thirty Days Notice**

Canada reserves the right to terminate the Contract at any time in whole or in part by giving thirty (30) calendar days written notice to the Contractor.

In the event of such termination, Canada will only pay for costs incurred for services rendered and accepted by Canada up to the date of the termination. Despite any other provision of the Contract, there will be no other costs that will be paid to the Contractor as a result of the termination.

7.5 AUTHORITIES

7.5.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: Kyle Harrington
Title: Senior Contracting Specialist
Organization: Professional Services Contracting Unit, Agriculture and Agri-Food Canada
E-mail address: kyle.harrington@agr.gc.ca

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

7.5.2 Project Authority

[To be provided at time of Contract award]

The Project Authority for the Contract is:

Name : [_____]
Title : [_____]
Organization : [_____]
Address : [_____]

Telephone : [_____]
E-mail address : [_____]

The Project Authority is the representative of the department or agency for whom the Work is being carried out under the Contract and is responsible for all matters concerning the technical content of the Work under the Contract. Technical matters may be discussed with the Project Authority; however, the Project Authority has no authority to authorize changes to the scope of the Work. Changes to the scope of the Work can only be made through a contract amendment issued by the Contracting Authority.

7.5.3 Contractor's Representative

[To be provided at time of Contract award]

Name : [_____]
Title : [_____]
Organization : [_____]
Address : [_____]
Telephone : [_____]
E-mail address : [_____]

Note to Bidders: The Contractor's Representative, Contracting Authority, Technical Authority and contact information will be identified at the time of contract 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: 2019-01](#) of the Treasury Board Secretariat of Canada.

7.7 Payment

7.7.1 Basis of Payment - Limitation of Expenditures

The Contractor will be paid for the Work specified in the authorized task authorization, in accordance with the Basis of Payment at Appendix B.

Canada's liability to the Contractor under the authorized task authorization must not exceed the limitation of expenditure specified in the authorized task authorization. Custom duties are included and Applicable Taxes are extra.

No increase in the liability of Canada or in the price of the Work specified in the authorized task authorization 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 authorized, in writing, by the Contracting Authority before their incorporation into the Work.

1. Canada's total liability to the Contractor under the Contract for all authorized Task Authorizations (TAs), inclusive of any revisions, must not exceed the sum of **\$450,000.00** . Customs duties are included and Applicable Taxes are extra.
2. No increase in the total liability of Canada will be authorized or paid to the Contractor unless an increase has been approved, in writing, by the Contracting Authority.
3. 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 sum is inadequate for the completion of the Work required in all authorized TAs, inclusive of any revisions, whichever comes first.
4. 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.

7.7.2 Method of Payment

Milestone Payments

Payments will be made according to the following deliverables/payment schedule for the work completed as described in the Statement of Work in Annex "A" and in accordance with the terms herein this agreement and acceptance by the Departmental Representative.

Milestones/Deliverables	Estimated % Value of Contract
PHASE 1: Environmental scan of sector and risks as well as programs and known issues related to insurability.	30% of contract value (\$)
PHASE 2: Assessment of available data in Canada to undertake whole farm revenue insurance program, identify gaps and potential solutions to bridge these gaps.	
PHASE 3: Developing a blueprint for whole farm revenue insurance for each sector.	
PHASE 4: Basis risk assessment.	
PHASE 5: (OPTION #1) Actuarial analysis, including an estimate of administrative and premium costs and an estimate of expected program liability.	25% of contract value (\$)
PROJECT #2 (OPTION #2) Same deliverables as PHASE 1 TO 4 above but for additional sector/province	30% of contract value (\$)
PROJECT #2 (OPTION #3) Same deliverables as PHASE 5: (OPTION #1) above but for additional sector/province	15% of contract value (\$)

The Contractor's work will be determined to be acceptable by the Project Authorities provided the following criteria are met:

- The deliverables, as detailed above, are completed;
- the project follows and is completed according to the timeframe outlined in the "Deliverables and Schedule" section as described in Annex A, Statement of Work.

7.7.3 Electronic Payment of Invoices – Contract

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

- a. Direct Deposit (Domestic and International);
- b. Wire Transfer (International Only);

7.7.3 Time Verification

Time charged and the accuracy of the Contractor's time recording system are subject to verification by Canada, before or after payment is made to the Contractor. If verification is done after payment, the Contract must repay any overpayment, at Canada's request.

7.8 Invoicing Instructions

- a. The Contractor must submit invoices in accordance with the information required in the General Conditions.
- b. The Contractor's invoice must include a separate line item for each subparagraph in the Basis of Payment provision, and must show all applicable Task Authorization numbers.
- c. By submitting invoices the Contractor is certifying that the goods and services have been delivered and that all charges are in accordance with the Basis of Payment provision of the Contract, including any charges for work performed by subcontractors.
- d. The Contractor must provide the original of each invoice to the Project Authority. On request, the Contractor must provide a copy of any invoices requested by the Contracting Authority.

The Contractor will submit invoices on its own form, which will include:

- (i) The date;
- (ii) The Contractor name and address;
- (iii) The Destination (name and address of the client department);
- (iv) Contract serial number; 01B68-22-0082
- (v) Financial codes, including GST or HST (as applicable) registration number;
- (vi) Description of the Work/by day/hours per day;
- (vii) Category(ies) of Personnel and number of days worked;
- (viii) Firm Per Diem Rate on which the total dollar amount of the invoice is based;
- (ix) The amount invoiced (exclusive of the Goods and Services Tax (GST) or Harmonized Sales Tax (HST) as appropriate) and the amount of GST or HST, as appropriate, shown separately;

7.9 Certifications and Additional Information

7.9.1 Compliance

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

7.10 Applicable Laws

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

7.11 Priority of Documents

If there is a discrepancy between the wording of any documents that appear on the list, the wording of the document that first appears on the list has priority over the wording of any document that subsequently appears on the list.

- (a) the Articles of Agreement;
- (b) the general conditions [2035](#) (2022-05-12), General Conditions - Higher Complexity - Services;
- (c) Appendix A, Statement of Work;
- (d) Appendix B, Basis of Payment ;
- (e) the signed Task Authorizations (including all of its annexes, if any);
- (f) the Contractor's bid dated _____ *(to be inserted at the time of contract award)*

7.12 Foreign Nationals*(the applicable clause will be inserted at the time of contract award)*

SACC Manual clause [A2000C](#) (___-__-__) Foreign Nationals (Foreign Contractor)

SACC Manual clause [A2001C](#) (___-__-__) Foreign Nationals (Canadian Contractor)

7.13 Insurance Requirements

SACC Manual clause [G1005C](#) (2016-01-28), Insurance

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

7.14 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](#)".

APPENDIX “A” **STATEMENT OF WORK**

1.0 TITLE

Continued exploration of the whole farm revenue insurance as an alternative approach to BRM programming in Canada.

2.0 BACKGROUND

The federal-provincial-territorial (FPT) suite of Business Risk Management (BRM) programs provide Canadian farmers with protection against severe income declines. These programs are governed through five year policy frameworks, with the next slated for implementation in 2023. In advance of this, FPT governments have tasked officials with developing options to make the suite more effective, agile, timely, and equitable for producers.

Under this procurement, the Department of Agriculture and Agri-Food Canada (AAFC) is seeking the services of a multi-disciplinary firm experienced in agriculture, insurance, accounting and actuarial services, in order to explore the concept of a new approach in agricultural insurance programming.

The intent is to have a consultant undertake a complete analysis of how whole farm revenue insurance and margin insurance could work for the fruits and vegetables sector and the potato sector in Canada. This work will build off the basic framework outlined in the department’s previous third-party review of whole farm revenue insurance for the grains and cattle sectors while also adapting and customizing the conceptual and models to account for the unique specific characteristics of the production and market risks and data availability in all of these new sectors.

The mandate for this work was set out by FPT Ministers of Agriculture at their meeting in July 2019 where they tasked officials to review the potential for alternative insurance-based approaches to BRM programming (i.e., revenue and margin insurance). The outcomes of this work has the potential to make profound and significant policy and administrative improvements to Canada’s suite of risk management tools for agriculture.

3.0 OBJECTIVE

The project objectives will be divided into three distinct phases to achieve desired outcomes. Phase 1 will require an environmental scan including 1a) an overview of the unique production and marketing practices and characteristics and the significant risks that can affect farm revenue for each sector and sub-sector; b) an outline of the existing public and private insurance-based products already available in Canada or the United States (i.e., revenue, margin, cost of production and production insurance); and, 1c) a summary of the existing barriers to insurability including actuarial challenges (i.e., data availability/credibility, price and yield variability and discovery) and industry characteristics (business and marketing structures, risk tolerances, desire for insurance-based solutions.)

Building off the lessons learned the first phase, Phase 2 is designed to “bridge the gaps” for building a credible whole farm revenue insurance program for each sector. This phase will include: 2a) a comprehensive assessment of the public and private data availability that exists currently, 2b) identifying existing gaps and then 2c) determining the resources, infrastructure and data collection processes needed to bridge those gaps in the future.

The third phase of the project will require the development of a blue print of a whole farm revenue insurance program based on the cost-sharing framework and concept developed by AAFC. This will include how the program would work for different types of production and details of the basic design, coverage options and unique adjustments or necessary coverage riders needed to offer a credible revenue insurance program acceptable to producers.

Phase four of the project will require an analysis of basis risk of the refined blue print concepts for both the Fruit and Vegetable insurance product in Ontario and the Potato insurance product in Prince Edward Island.

Depending on the results of Phases 1 through 4, this procurement includes an option to undertake an actuarial assessment and estimate the costs of the whole farm revenue insurance and/or margin insurance program. Phase 5 (optional) will include a financial cost assessment of the insurance products, including an assessment of the administrative and premium costs as well as an estimate of total liability.

This procurement also includes two additional options. One for Phase 1 through 4 on one additional sector (likely hogs) in one additional province. As well as Phase 5 (optional) for this additional sector/province combo.

Definitions

Revenue insurance means insurance program that covers the expected revenue (multiplication of the expected production by the expected price for a given commodity) from a revenue decline triggered by either a production shortfall or a price decline.

Margin insurance means insurance program that covers the expected margin (expected revenue minus expected input cost) from a margin decline triggered by either a production shortfall, a price decline or an increase of input cost.

For the purpose of this project, the word program, in the context of Phase 1a) and Phase 1b), means any tools, insurance plans or programs. The terminology might differ whether it is in a public or a private setting.

4.0 SCOPE OF WORK

4.1 Summary of Work

In addition to the sectors and provinces mentioned below, this procurement also includes options for one sector in one additional province to be undertaken following the first five phases. All five additional phases would be followed and would be broken down as Phase 1 to 4 being an option, and Phase 5, another option period.

PROJECT SPECIFICATIONS – PHASE 1

PHASE 1: Environmental scan: overview production and market processes and risks in the sector, outline of insurance products currently available in Canada and the US and a summary of the existing challenges and barriers to insurance.

Under Phase 1, AAFC requires the services of a consulting firm to draft an environmental scan report, covering all of the items identified in steps 1a) to 1c).

In order to confirm expectations, the consultant will be expected to meet with AAFC prior to starting the work for Phase 1.

PHASE 1A) OVERVIEW OF UNIQUE PRODUCTION AND MARKET CHARACTERISTICS AND RISKS OF EACH SECTOR (OR SUB-SECTOR)

This module will provide an overview the unique production practices and marketing characteristics and the significant risks that can affect farm revenue for each sector or major sub-sector.

For fruit and vegetables, there are over 120 horticulture crops grown in Canada with significant variation in production and marketing practices. The scope of Phase 1A will not be to provide a detailed overview of each crop but rather a general overview of the different production types and risks categorized into specific groupings (tree fruits, root vegetables, fruit vegetables, greenhouses) and marketing

characteristics (fresh market direct to consumer or processing) as well as any other significant or distinguishable features or risks that would impact a revenue insurance program (e.g., productive assets such as trees vs. marketable commodities like fruit).

For potatoes, the report should provide an overview of the different types of production and marketing risks for each type of production and revenue class (seed, chip stock, processing, and creamer) as well as unique challenges of a perishable commodity where losses can occur in storage, well after harvest.

PHASE 1B) OUTLINE OF INSURANCE PRODUCTS CURRENTLY AVAILABLE IN CANADA AND THE UNITED STATES

The aim of this module is to provide a general overview of the insurance products and tools currently available in Canada and the United States for the identified sectors. This includes any available revenue insurance, margin insurance, and cost of production insurance or production insurance programs.

PHASE 1C) SUMMARY OF EXISTING BARRIERS TO INSURABILITY

The purpose of this module is to highlight the existing barriers to insurability including actuarial challenges (i.e., data availability/credibility, price and yield variability and discovery) and industry characteristics (business and marketing structures, risk tolerances, desire for insurance-based solutions.)

DELIVERABLE 1: *Preliminary report with all details pertaining to Phase 1.*

PHASE 2: Data availability, identifying existing gaps, recommending how to bridge those gaps.

Under Phase 2, AAFC requires the services of a consulting firm to draft a report covering all of the items identified in steps 2a) to 2c).

In order to confirm expectations, the consultant will be expected to meet with AAFC prior to starting the work for Phase 1.

PHASE 2A) DATA AVAILABILITY IN CANADA

For the fruit and vegetables sector and the potato sector in Canada, the consultant will provide a detailed analysis of data requirements and availability, including data fields and data sources in order to undertake a premium pricing analysis of this concept (to be undertaken in Phase 3b).

The data requirement and availability is required before assessing the program feasibility and estimate costing through actuarial analysis (in Phase 3b).

The consultant will be expected to establish a list of all data fields needed to offer a whole farm revenue insurance program.

This section will then analyze the availability of the data and its sources. The consultant will likely have to perform outreach to various stakeholders in order to assess the existence of data in Canada and then to preliminarily validate their willingness to share data with potential program administrators to establish whole farm revenue insurance coverage to then assess potential premiums and indemnities. It is important to highlight that consultation with industry for any reasons other than access to data is proscribed and should not be entertained under this contract.

The consultant will be expected to perform the following task to assess the availability of data for establishing whole farm revenue insurance in Canada:

- a. Establish the list of data fields needed;
- b. Identify the existence of data;
- c. Identify how many years of data is required and available;
- d. Identify the publicly available data fields;
- e. Identify the data available by partnership with other stakeholders;
- f. Identify the non-publicly available but required to develop the concept;
- g. Identify the stakeholders to consult for non-publicly available data;
- h. Determine the costs of accessing the data, if any.

PHASE 2B) IDENTIFYING ANY GAPS IN DATA REQUIRED TO BUILD CREDIBLE INSURANCE PROGRAM (IF NECESSARY)

In Phase 2b, the consultant will report on and summarize any identified gaps in the available data that would be essential to the development of a whole farm revenue insurance program. Phase 2b is not necessary if no gaps in available data sources are recognized.

PHASE 2C) DETERMINATION OF RESOURCES, INFRASTRUCTURE OR DATA GATHERING PROCESSES NECESSARY

In phase 2c, the consultant will recommend the various resources, economic infrastructure and/or data gathering processes that would be necessary to launch a whole farm revenue insurance program. Phase 2c is not necessary if no gaps in available data sources are recognized.

DELIVERABLE 2: Preliminary report with all expected details of Phase 2.

PHASE 3 DEVELOPING THE BLUEPRINT FOR A WHOLE FARM REVENUE INSURANCE PROGRAM

The consulting firm will provide recommendations on a proposed whole farm revenue program design and provide an opinion on its feasibility in Canada. Using the whole farm concept and cost-sharing framework developed by AAFC, the consultant will provide a basic blue print of the revenue insurance model, including how the program would work for different types of production and details on the basic design, coverage options or unique adjustments or necessary coverage riders needed to offer a credible program that is acceptable to producers.

Description of the proposed model:

The proposed model is a program that insures the entire farm enterprise for a revenue decline (i.e., revenue insurance).

The proposed model is based on expected revenue and margin per production unit (e.g. acre, cwt, etc.) to facilitate the establishment of the whole farm coverage, including mixed farming operations (e.g., vegetables and grains, or potatoes and livestock, etc.). The farm revenue guaranteed by the program would be proportionate to the level of revenue depending on the coverage level (deductible) selected.

All agricultural commodities forming the farm enterprises that represent a set percentage of the total farm revenue (e.g. 10% minimum) could be accounted for under this whole farm concept. With this example, any agricultural commodity not accounting for 10% or more could be “excluded” from the coverage setting for administration simplicity.

Specific variables considered for revenue insurance:

Coverage:

Expected individual production per production unit
 Expected benchmark market dollar value per production unit

Indemnity payment:

Actual individual production per production unit
 Actual benchmark market dollar value per production unit

Consequently, to establish coverage under this insurance product, the individual expected production per production unit along with benchmark expected market dollar value per production unit would be used. In order to determine whether a producer would be eligible for an indemnity payment (based on the chosen coverage level or deductible), the actual individual production and actual benchmark market dollar value per production unit would then be used.

In terms of cost-sharing, the basic framework is that governments would fully fund catastrophic risks (e.g., 1 in 15 year events), while medium risks such as 1 in 5 year losses could be cos-shared between producers and governments and finally normal risks would be fully funded by producers. The frequency and severity of disasters can differ by sector and so the definition of disaster vs medium vs normal risk is not yet defined and will be determined once the full scope of the costs of these programs for all sectors can be determined. In the meantime, this basic premise is the shell of how the cost-sharing would work.

Additional specific variables considered for revenue insurance:

Where it is established that a particular input cost item is extremely volatile and coverage is necessary for the development of a credible revenue insurance product, consideration should be given to additional design options or riders/features. This could be accomplished by offering a “disaster rider” that accounts for these losses in the basic revenue insurance program or by designing a specific rider/feature to cover these essential input costs.

For example, in the cow/calf sector, feed costs make up approximately 80% total costs and are subject to significant production volatility. Therefore it is essential to offer a program design or coverage options for a cow/calf product that also accounts for feed costs/production and its impact on total farm revenue.

Where input cost coverage is essential and feasible, consideration could be given to offering basic margin insurance:

Coverage:

Expected benchmark input costs per production unit

Indemnity payment:

Actual benchmark input costs per production unit

The expected revenue per production unit under revenue insurance would be used to set margin coverage when deducted from the expected benchmark input costs. To establish a potential indemnity payment (based on the chosen deductible), the actual input costs per production unit would be used.

Producers would receive their payments (should the program triggers) when the policy expires at the end of the production cycle or at the end of the year depending on the sector, regardless of whether producers decide to sell their commodities.

Under this margin insurance component, the area (or region) where the producer is located will be used to determine the expected input costs (Benchmark) as well as the actual input costs (Benchmark). The area would be determined by the administration based on specific requirements: for example, area set by: risk area (application de fungicide), use of specific indices to determine rise in input costs (regional or provincial). The individualized component in the margin insurance will come from the production (that will not be approximated or based on benchmark). The expected input cost in the formula will be regional or provincial (based on specific input costs volatility).

In Annex 1 you will find supplementary information that will provide additional details on the concept and might help to understand the intricacy of what is proposed.

Refinement of the concept

The objective of this section is to obtain the consultant's opinion on the concept as presented. The consultant is expected to recommend improvements to refine the proposed design based on their experience and findings of Phase 1 and 2 and address, at a minimum, the following elements and questions.

Initial Assessment of potential issues

- a) Identify and evaluate any potential issues with the proposed concept.

Benefits coordination

- b) Recommendation of how the refined concept could be coordinated with AgrilInsurance (and the Risk Management program in Ontario) to avoid duplication of benefits.

Input costs analysis

- c) Identify any essential input costs per sector.
- d) Determine whether the input costs can be benchmarked.
- e) Determine whether the usage of the input costs can be benchmarked.
- f) Recommend a list of inputs per sector:
 - a. Are the "benchmarkable" input costs of sufficient magnitude (importance) to represent a significant portion of total farm expenses?
 - b. What proportion of all input costs can be benchmarked?
- g) Would "benchmarkable" input costs be volatile enough to trigger under such a program?
 - c. Should margin volatility be too minimal to trigger, should only revenue insurance be designed, given that the coverage level covers, at a minimum, the input costs?

Data availability

- h) Comment on the data availability and the measures to implement in order to access data (or to proxy).

Opinion on revenue insurance

- i) With all the information gathered and study undertaken, does revenue insurance seem feasible?

Additional recommendation on specific situation

- j) How would the refined concept work for a mixed operation (vegetables and grains, cattle and potatoes, etc.)?
- k) Suggestions for the treatment of quality loss in whole farm revenue and margin insurance concept.

Refinements proposed

- l) The consultant is expected to propose specific refinements to the presented concept of whole farm revenue and margin insurance.
- m) The consultant is expected to suggest when (month) the policy should be sold and potential indemnity be processed.

DELIVERABLE 3: Preliminary report with all expected details of Phase 3

PHASE 4 RISK ASSESSMENT OF THE BLUEPRINT MODEL FOR FRUITS AND VEGETABLES AND POTATOES

Under this section, the consultant will be expected to supply a risk assessment for the refined blueprint concept refined in Phase 3. When benchmarks are used, one of the underlying insurance risk is basis risk. Analysis of the basis risk present in the whole farm revenue insurance and/or margin insurance concept for Fruits & Vegetables and Potatoes will help inform policy direction.

The objective of this section is to better understand the risks facing this concept as well as have an in-depth understanding of the basis risk to determine their potential effects on the future program development.

Risk identification and mitigation

- a) Identify all risks facing this concept (including, but not limited to, basis risks)
- b) Identify their likelihood of the risk happening,
- c) Identify their potential effect on the project, and;
- d) Propose mitigation measures.

Basis risk in-depth analysis

1. For each of the followings, please confirm the existence of farm level basis risk in the concept and describe its anticipated effect on producers' decision to participate:

- Revenue insurance basis risk when the indemnities are settled: it is the difference between the actual market value (using benchmark market prices) and the actual value the producer received for his commodity.
- Margin insurance basis risk in addition to the revenue basis risk (if applicable):
 - Margin insurance basis risk when the indemnities are settled: it is the difference between the actual input cost (using benchmark actual input cost) and the actual input cost the producer spent for his commodity.

2. Basis risk per commodity should then be rolled up at the farm level to see whether over estimating a commodity price is cancelled out by underestimating the price of another commodity, and vice versa, assuming typical commodity mix.

3. Consultant will present the basis risk results for the last 5 years (with an annual result per

regions) in Ontario (Fruits and Vegetables) and Prince Edward Island (Potatoes).

4. Present different basis risk measurements
 - Variability indices, standard deviation, percentiles of the farm level revenue basis risk.
 - Assessed twice (when coverage is set and when indemnities are settled)
 - Variability indices, standard deviation, percentiles of the farm level margin basis risk.
 - Assessed twice (when coverage is set and when indemnities are settled)
5. Comment on the adverse selection the basis risk could create.

Forward contract prices from processors and wholesalers could be used to establish prices for the Fruits and Vegetables sector and expected prices established for AgrilInsurance could be used for Potatoes.

DELIVERABLE 4: *Final report with all details pertaining to Phase 4.*

Note: In addition to the final report, the consultant will provide a presentation and present the results of Phase 1 to the AAFC project Management team.

PHASE 5 ACTUARIAL ANALYSIS

After receiving and analyzing the findings and results of the reports from Phases 1, 2, 3 and 4, AAFC Management will decide if this phase 5 (**option**) will be exercised. The consultant will then be expected to estimate the cost of premiums and administration costs as well as approximately quantify the increased provincial liability with revenue and margin insurance approaches compared to the current programing.

At the end of this phase, AAFC hopes to have gathered sufficient information should it decide to approach stakeholders, in the future, with a proposed program design.

NOTE: In order to estimate the premium of the “refined blueprint concept”, the consultant will be expected to meet virtually with AAFC prior to starting the work for this Phase.

The program design as presented in the previous phase could be modified based on the refinement and other findings of the previous reports delivered by the consultant. However, the main conceptual elements will remain (i.e. whole farm, revenue and/or margin insurance based on benchmark as well as individual producer’s production component).

The “refined blueprint concept” design is the one taken into account in the approximation of premiums, administration costs and liability development hereafter.

PHASE 5A) PREMIUM PRICING MODEL

The objective of Phase 5 is for the consultant to develop a premium estimation model to estimate premium rate per unit of production along with associated loads to build a sufficient reserve for whole farm revenue and margin insurance for the Fruits & Vegetable sector in Ontario and Potato sector in Prince Edward Island. The premium estimation model would eventually be used as a starting point to build a more robust model to actuarially certify premium rates for all commodities and provinces.

1. Data based on the sectors in the two provinces: Ontario and Prince Edward Island will be required for this actuarial analysis. For the Fruits and Vegetable sector, price and

production data should be made available based on the findings from Phase 2. Additionally, the province of Ontario through Agricorp, the provincial crown insurance agency and will be providing actual production data and cost of production data.

2. Regarding Potato data, price and production data will be provided by the province of Prince Edward Island, through the Prince Edward Island Agricultural Insurance Corporation, their provincial crown insurance agency.
3. The input costs data to be used in this model are the relevant input costs defined in Phase 3. During the meeting to be set at the beginning of Phase 5, the consultant will have the final list to be included in this model.
4. The premium estimates are expected to be calculated for different coverage level (30%, 40%, 50%, 60%, 70%, and 80%).
5. To deepen the analysis, the consultant is also expected to estimate the reaction of the concept (in retrospect) for various historic years of difficult production (specific events) in agriculture to assess how the whole farm revenue and margin insurance would have covered losses in specific historical events (i.e. potato wart in 2001 and 2021, drought, excess moisture, frost and COVID-19 in 2020) as well as a normal year.

NOTE: The premium estimation model developed will be a deliverable under this phase. There will be an understanding that it could be reused by AAFC in the future. AAFC maintains property of the model developed and has the option to modify it shall it be needed in the future.

PHASE 5B) ADMINISTRATION COSTS ASSESSMENT

For Phase 5b), the objective is to roughly estimate the administration cost of the refined concept. In order to estimate these costs, the consultant will base their analysis on other similar programs (from Phase 1 and Phase 4 results).

Two different costs will be estimated:

1. Initial aggregate set up costs
2. Ongoing aggregate costs as percentage of premiums or insured value

The report will also include suggestions to manage the delivery of revenue and margin insurance programs in smaller jurisdictions.

The hypothesis and assumptions used to forecast the estimated administration costs should be detailed in this section.

PHASE 5C) PROGRAM LIABILITY

Under this section, the consultant will be expected to roughly estimate the program liability based on different participation scenario under a whole farm revenue and/or margin insurance concept for Ontario (fruit and vegetables) and Prince Edward Island (potatoes). Then, propose options to reduce the impact on the provinces' balance sheets.

1. Use Statistics Canada value of production data to estimate the insured value.
2. Propose various scenarios to estimate participation rate.
3. Use coverage levels of 50%, 60%, 70% and 80%.
4. Quantify the liability for the two provinces and comment on the re-insurability of the

program.

1. Value of the commodity multiplied by the coverage level multiplied by the participation rate.
5. Include an analysis to compare to the “current” liability of the AgriStability program of the Business Risk Management suite in both provinces, provided by AAFC, with the estimated liability of this section.

DELIVERABLE 5: Pricing model and report on the results of Phase 5.

Note: The consultant will submit a report, prepare a presentation and present the results the AAFC project Management team under Phase 2.

4.3 Task Authorizations

The work will be conducted under one (1) or more issued Task Authorizations (TAs).

Prior to authorizing a TA, AAFC will identify in the form of a written request for services, the specific project phase, as selected from those available under the Contract (see listing in section below); together with any additional experience, or skillsets required (such as specific experience or skillsets required) and language capability (if applicable to the TA) that the Contractor's Resource(s) must meet.

The scope of the work, including required activities and deliverables and any specific timelines for deliverable completion, will be specified within the issued TA. Services may be required to supplement AAFC teams as well as to support delivery upon defined projects and programs of work.

The Contractor must provide the services of the in order to meet AAFC's requirements, as specified in the written TA request for services.

Subject to AAFC's authorization, services under a TA may be provided up to the maximum Contract value and/or Contract period.

5.0 DELIVERABLES AND SCHEDULE

Specific Deliverables and delivery timeframes will be specified by AAFC in the TA. As specified in each TA, the Contractor must establish a work plan to complete the TA activities and deliverables in a manner that meets AAFC's requirements, including delivery timelines and outcomes.

Under this procurement, there are a total of ten deliverables (including a total of three option period) and draft reports which are expected at the dates noted below.

<u>Deliverables</u>	<u>Deliverable Content</u>
Report of Phase 1	Environmental scan of sector and risks as well as programs and known issues related to insurability.
Report of Phase 2	Assessment of available data in Canada to undertake whole farm revenue insurance program, identify gaps and potential solutions to bridge these gaps.

Report of Phase 3	Developing a blueprint for whole farm revenue insurance for each sector
Report of Phase 4	Basis risk assessment
PHASE 5: (Option #1)	Actuarial analysis, including an estimate of administrative and premium costs and an estimate of expected program liability.
PROJECT #2 (OPTION #2)	Same deliverables as Report of Phase 1 to 4 above but for additional sector/province
PROJECT #2 (OPTION #3)	Same deliverables as Phase 5 (optional) above but for additional sector/province

Meetings:

One meeting prior to starting Phase 1 with project authorities to provide verbal details on the proposed concept and answer specific questions the successful contractor may have.

Bi-weekly meetings to update project authority on the project development (as required).

6.0 LANGUAGE OF WORK

All the deliverables under this contract will be delivered in English.

7.0 LOCATION OF WORK AND TRAVEL

The work for this project will be conducted at the Contractor's location. Any travel expense incurred as a result of this project will be the sole responsibility of the Contractor. AAFC will not assume any travel expense resulting from this contract.

APPENDIX “B”
BASIS OF PAYMENT

The contract has a limitation of expenditure of **\$450,000.00 plus HST.**

For evaluation purposes, AAFC is estimating the following amounts. However, this is for evaluation purposes only and will not necessarily reflect actual amounts spent by fiscal year.

Funds will be re-profiled as required.

Period of the Contract	Dates	Limitation of Expenditure
Initial Period	Contract award to September 30, 2023	\$135,000.00
Option 1	October 1, 2023 to March 31, 2024	\$115,000.00
Option 2	April 1, 2024 to December 31, 2024	\$135,000.00
Option 3	January 1, 2025 to June 30, 2025	\$65,000.00
	subtotal 	\$450,000.00
	HST calculated on the TOTAL	\$58,500.00

1.0 General

Payment shall be in accordance with **article 7.7.2 of Part 7, Method of Payment and 7.8 Invoicing Instructions.**

2.0 Pricing Basis

The Contractor shall be paid in accordance with the following for work performed under the Contract.

For the Work described in Annex A, Statement of Work, the Contractor will be paid a Firm all-inclusive price per Milestone.

Milestone Payments:

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

Payment shall be made based on the deliverables described in Appendix A Statement of Work, and identified in Appendix D Task Authorization and the acceptance and satisfaction of the deliverables by the Project Authority. The Contractor will be paid a Firm all-inclusive price per Milestone identified in the Task Authorization.

Bidder shall provide cost detail for each specific deliverable set out in this RFP including the following components where applicable:

Milestones/Deliverables	Estimated % Value of Contract
<p>PHASE 1: Environmental scan of sector and risks as well as programs and known issues related to insurability.</p>	<p>30% of contract value (\$)</p>
<p>PHASE 2: Assessment of available data in Canada to undertake whole farm revenue insurance program, identify gaps and potential solutions to bridge these gaps.</p>	
<p>PHASE 3: Developing a blueprint for whole farm revenue insurance for each sector.</p>	
<p>PHASE 4: Basis risk assessment.</p>	
<p>PHASE 5: (Option #1) Actuarial analysis, including an estimate of administrative and premium costs and an estimate of expected program liability.</p>	<p>25% of contract value (\$)</p>
<p>PROJECT #2 (OPTION #2) Same deliverables as <i>PHASE 1 TO 4</i> above but for additional sector/province</p>	<p>30% of contract value (\$)</p>
<p>PROJECT #2 (OPTION #3) Same deliverables as <i>PHASE 5: (OPTION #1)</i> above but for additional sector/province</p>	<p>15% of contract value (\$)</p>

APPENDIX "C"

EVALUATION PROCEDURES & CRITERIA

TECHNICAL PROPOSAL

It is essential that the elements contained in the Proposal be stated in a clear manner and in sufficient depth to allow for evaluation by the evaluation team.

1.0 METHOD OF SELECTION – HIGHEST COMBINED SCORE OF TECHNICAL MERIT AND PRICE

1.1 The evaluation process is designed to identify the qualified contractors to provide services as stipulated in the Statement of Work (Appendix B).

Bidder's who are deemed compliant will be ranked in order based on the overall combined score (technical score + financial score) they attain. Of these compliant bidders, the bidder with the highest score will be ranked first and be recommended for Contract award.

1.2 This section comprises the detailed Proposal requirements that will be used to evaluate Bidder's responses to the Request for Proposal (RFP).

1.3 The mandatory requirements under section 2.0 will be evaluated on a compliant/non-compliant basis. The Proposals must include the necessary documentation to demonstrate this compliance.

Bidder's must indicate whether they comply with the mandatory requirements below (section 2.0) and indicate the location (page, paragraph number, etc.) of the information provided in the Technical Proposal to support the requirements.

1.4 The selection of the responsive Proposals will be made on the basis of the **HIGHEST OVERALL SCORE** for both the technical and financial proposals. Overall score will be determined by adding the technical and financial points obtained.

The Bidder's Technical and Financial proposals will be scored separately. An Overall Proposal Score will be determined by combining a Proposer's Technical Proposal Score and Financial Proposal Score in accordance with the following weights:

Technical Proposal = 80%

Financial Proposal = 20%

Overall Proposal = 100%

1.5 **To be considered Responsive/Compliant, a Proposal Must:**

1- Meet all the mandatory requirements as specified in section 2.0 below;

2- Achieve a **minimum of 60% in the overall rated criteria.**

Formula: Technical Score + Financial Score = Combined Score

1.6 The price of the Proposal will be evaluated in CANADIAN DOLLARS, Goods and Services Tax (GST)/Harmonized Sales Tax (HST) excluded, FOB destination for goods/services, Customs Duties and Excise Taxes included.

- 1.7 Failure of a Proposal to provide information in sufficient detail and depth to permit evaluation against the identified criteria may render a Proposal non-responsive. **All Bidders are advised that only listing experience without providing any supporting data to describe where and how such experience was obtained will not be considered to be “demonstrated” for the purpose of the evaluation. All professional experience must be fully demonstrated in the Proposal (i.e., dates, number of years and months of experience, value of projects referenced, etc.).**

The Bidders must address the rated requirements in the order in which they are listed and in sufficient detail so that an in-depth evaluation is possible. These criteria will be used by Agriculture and Agri-Food Canada to evaluate each Proposal. The assessment by AAFC will be based solely on the information contained in the Proposal. An item not addressed will be given zero (0) points under the point rated system. AAFC may, but is not obligated to, ask the Proposer for clarifications.

- 1.8 The Bidders acknowledge and agree that Canada is not responsible to search for, and therefore evaluate, information that is not properly referenced or is not otherwise provided in accordance with the Bid Preparation Instructions in Part 3.
- 1.9 Bidders shall not place any conditions or make any assumptions that attempt to limit or otherwise modify the scope of Work pursuant to the Statement of Work (Appendix B).
- 1.10 In the event two or more responsive proposals achieve the identical COMBINED SCORE, the proposal with the highest technical score will be considered the successful proposal.
- 1.11 Specific Bidder Instructions:
1. Cutting and pasting wording from the RFP into the project description template does not constitute demonstrating the requirement. This must be demonstrated by specific examples of work performed by the Bidder.
 2. AAFC reserves the right to verify any information provided by the Bidder in response to the mandatory and point-rated requirements. This will be done by contacting the reference contact, using the contact information provided by the Bidder, and providing the reference with a copy of the information submitted by the Bidder (applicable to that specific client only) for independent verification. If verification is required for a project for which AAFC does not have the contact information, the Bidder will be requested to provide this information.

2.0 MANDATORY REQUIREMENTS

Failure to comply with any of the mandatory requirements will render the Proposal non-compliant and the Proposal will receive no further consideration. The Proposer must include the necessary documentation to demonstrate this compliance.

Bidders must indicate the precise location (e.g. page, paragraph number, etc.) of the information provided in the Technical Proposal to support the mandatory requirements.

Criteria	Mandatory Evaluation Criteria	Page No.	Pass/Fail
	Team Composition and Experience		
M.1	The proposal must identify all project team members and provide curriculum vitae (CV) highlighting education and work-related experience in the last five years.		

3.0 POINT RATED REQUIREMENTS

The Bidder should address the rated requirements in the order in which they are listed and in sufficient detail within the format identified in Appendix C, so that an evaluation is possible.

These criteria will be used by Agriculture and Agri-Food Canada to evaluate each Proposal. The assessment by AAFC will be based solely on the information contained in the Proposal. An item not addressed will be given zero (0) points under the point rated system.

ALL PROJECT REFERENCES PROVIDED SUBSTANTIATING PREVIOUS WORK EXPERIENCE MUST CONTAIN CURRENT CONTACT INFORMATION OF THE INDIVIDUAL LISTED.

Criteria	RATED REQUIREMENTS	Page No.	Max Points
R.1.A	Relevant Work Experience		
	<p>The Bidder should provide two (2) projects demonstrating experience collecting and synthesizing technical data related to agriculture public sector programming or agriculture private insurance like products within the last five (5) years preceding the bid closing date.</p> <p>For each project Bidders should provide:</p> <ul style="list-style-type: none"> - The context of the project (Project Name, Timeline) - The type of client (industry, government, not-for-profit, etc.) - The current client contact information; - Project objectives; - The Project lead and relevant team members reporting relationships and tasks completed. <p>Scoring: The Bidder will receive up to 5 points for each project example. Full points will be awarded if all the requested information is provided. Point reductions are based on the amount of requested information that is not provided.</p>		10
R.1.B	Relevant Work Experience		
	<p>The Bidder should provide two (2) projects demonstrating experience managing or participating in a multidisciplinary project team of insurance and/or industry experts on the development or review of insurance programs related to the agricultural sector within the last five (5) years preceding the bid closing date.</p>		10

Criteria	RATED REQUIREMENTS	Page No.	Max Points
	<p>For each project Bidders should provide:</p> <ul style="list-style-type: none"> - The context of the project (Project Name, Timeline) - The type of client (industry, government, not-for-profit, etc.) - The current client contact information; - Project objectives; - The Project lead and relevant team members reporting relationships and tasks completed. <p>Scoring: The Bidder will receive up to 5 points for each project example. Full points will be awarded if all the requested information is provided. Point reductions are based on the amount of requested information that is not provided.</p>		
R.1.C	Relevant Work Experience		
	<p>The Bidder should provide two (2) projects demonstrating experience in the design, analysis or development and implementation of functional private or public sector agricultural insurance programs (crop, revenue and/or margin) in Canada or the United States within the last five (5) years preceding the bid closing date.</p> <p>For each project Bidders should provide:</p> <ul style="list-style-type: none"> - The context of the project (Project Name, Timeline) - The type of client (industry, government, not-for-profit, etc.) - The current client contact information; - Project objectives; - The Project lead and relevant team members reporting relationships and tasks completed. <p>Scoring: The Bidder will receive up to 10 points for each project example. Full points will be awarded if all the requested information is provided. Point reductions are based on the amount of requested information that is not provided.</p>		20
R.1.D	Relevant Work Experience		
	<p>The Bidder should provide two (2) projects demonstrating experience completing an in-depth risk assessment of an agricultural program or an agricultural policy within the last five (5) years preceding the bid closing date.</p>		10

Criteria	RATED REQUIREMENTS	Page No.	Max Points
	<p>For each project Bidders should provide:</p> <ul style="list-style-type: none"> - The context of the project (Project Name, Timeline) - The type of client (industry, government, not-for-profit, etc.) - The current client contact information; - Project objectives; - The Project lead and relevant team members reporting relationships and tasks completed. <p>Scoring: The Bidder will receive up to 5 points for each project example. Full points will be awarded if all the requested information is provided. Point reductions are based on the amount of requested information that is not provided.</p>		
R.1.E	Relevant Work Experience		
	<p>The Bidder should provide two (2) projects demonstrating experience performing an actuarial premium assessment of an agricultural insurance program (this can be demonstrated with experience “in-house” or from an alliance with an actuarial firm) within the last five (5) years preceding the bid closing date.</p> <p>For each project Bidders should provide:</p> <ul style="list-style-type: none"> - The context of the project (Project Name, Timeline) - The type of client (industry, government, not-for-profit, etc.) - The current client contact information; - Project objectives; - The Project lead and relevant team members reporting relationships and tasks completed. <p>Scoring: The Bidder will receive up to 5 points for each project example. Full points will be awarded if all the requested information is provided. Point reductions are based on the amount of requested information that is not provided.</p>		10
R.2	Familiarity with the Sector		
	<p>The Bidder should demonstrate the specific knowledge of the following topics and highlight the Bidder’s understanding of their relevance to the project:</p>		10

Criteria	RATED REQUIREMENTS	Page No.	Max Points
	<p>a) Programs, tools and policies from Canada and the United States in support of the agricultural sector, more specifically, agricultural commodity production, farm revenue and margin establishment. (maximum of 5 points)</p> <p>b) Risk management programs and policy in the context of the Canadian horticultural sector with particular emphasis or familiarity with fruits, vegetables and potato sectors. (maximum of 5 points)</p> <p><u>RATING SCALE:</u> 5 - Excellent – Meets requirement with <u>numerous</u> strengths in key areas 4 - Very Good – Meets requirement with <u>some</u> strengths in key areas 3 - Good – Meets <u>most</u> of the requirement with <u>some</u> strengths in key areas 2 - Moderate – Meets <u>some</u> of the requirement with <u>some</u> clear strengths 1 - Weak – Meets <u>little</u> of the requirement with <u>some</u> clear strengths 0 - Poor – Meets little to none of the requirement with few or no clear strengths</p>		
R.3.A	Proposed Methodology and Detailed Work Plan		
	<p>The Bidder <u>should</u> provide a work plan that describes, possibly in the form of a work breakdown structure, how the project would be undertaken as well as strategies to perform the project (including the specific steps, who will be responsible for completing each specific step, and timeframes proposed to achieve each section of the project objectives).</p> <ul style="list-style-type: none"> i. Environmental scan, including production and marketing risks and issues affecting insurability (maximum 5 points); ii. Assessment of data availability and recommending resources or data collection processes to acquire data in the future (maximum 5 points); iii. Developing a blue print of a credible whole farm revenue insurance program. (maximum 5 points); iv. Assessment of the basis risk of the refined concept. (maximum of 10 points); 		30

Criteria	RATED REQUIREMENTS	Page No.	Max Points
	<p data-bbox="418 348 1182 415">v. Cost estimate for premiums, administration costs and liability. (maximum 5 points);</p> <p data-bbox="349 457 1235 600">Scoring: The Bidder will receive up to 30 points. Full points will be awarded if all the requested information is provided. Point reductions are based on the amount of requested information that is not provided.</p> <p data-bbox="349 642 1235 785"><u>**Conducting online surveys or public opinion research (in-person or online) is not allowed under this contract; discussion with subject-matter experts is allowed. Direct contacts with administrators in other jurisdictions is expected.</u></p> <p data-bbox="349 835 1138 865"><u>RATING SCALE (for maximum of 5 points requirements):</u></p> <p data-bbox="349 869 1198 928">5 - Excellent – Meets requirement with <u>numerous</u> strengths in key areas</p> <p data-bbox="349 932 1243 961">4 - Very Good – Meets requirement with <u>some</u> strengths in key areas</p> <p data-bbox="349 966 1243 1024">3 - Good – Meets <u>most</u> of the requirement with <u>some</u> strengths in key areas</p> <p data-bbox="349 1029 1166 1087">2 - Moderate – Meets <u>some</u> of the requirement with <u>some</u> clear strengths</p> <p data-bbox="349 1092 1224 1121">1 - Weak – Meets <u>little</u> of the requirement with <u>some</u> clear strengths</p> <p data-bbox="349 1125 1235 1184">0 - Poor – Meets little to none of the requirement with few or no clear strengths</p> <p data-bbox="349 1234 1166 1264"><u>*RATING SCALE (for maximum of 10 points requirements):</u></p> <p data-bbox="349 1268 1224 1327">10 – Excellent – Element is well demonstrated and described with a high level of detail.</p> <p data-bbox="349 1331 1175 1390">7 – Very Good – Element is well demonstrated and described in detail.</p> <p data-bbox="349 1394 1211 1453">5 – Good – Element is demonstrated and described, but is missing some details.</p> <p data-bbox="349 1457 1185 1516">3 – Moderate – Element is partially demonstrated and described. Details are not fully provided.</p> <p data-bbox="349 1520 1172 1579">1 – Weak – Element is poorly demonstrated and described. Not many relevant details are provided, or are lacking.</p> <p data-bbox="349 1583 1117 1642">0 – Poor – Element is not or very weakly demonstrated and described. No pertinent details provided.</p>		

Criteria	RATED REQUIREMENTS	Page No.	Max Points
R.3.B	Proposed Methodology and Detailed Work Plan		
	<p>The Bidder <u>should</u> demonstrate the plans to identify and access data required to complete each phase of the project.</p> <p>Scoring: The Bidder will receive up to 10 points. Full points will be awarded if all the requested information is provided. Point reductions are based on the amount of requested information that is not provided.</p> <p><u>RATING SCALE:</u> 10 – Excellent – Element is well demonstrated and described with a high level of detail. 7 – Very Good – Element is well demonstrated and described in detail. 5 – Good – Element is demonstrated and described, but is missing some details. 3 – Moderate – Element is partially demonstrated and described. Details are not fully provided. 1 – Weak – Element is poorly demonstrated and described. Not many relevant details are provided, or are lacking. 0 – Poor – Element is not or very weakly demonstrated and described. No pertinent details provided.</p>		10
R.3.C	Proposed Methodology and Detailed Work Plan		
	<p>The Bidder <u>should</u> identify any potential challenges and/or constraints in carrying out the Statement of Work activities, and propose recommended solutions.</p> <p>Scoring: The Bidder will receive up to 5 points. Full points will be awarded if all the requested information is provided. Point reductions are based on the amount of requested information that is not provided.</p> <p><u>RATING SCALE (for maximum of 5 points requirements):</u> 5 - Excellent – Meets requirement with <u>numerous</u> strengths in key areas 4 - Very Good – Meets requirement with <u>some</u> strengths in key areas 3 - Good – Meets <u>most</u> of the requirement with <u>some</u> strengths in key areas</p>		5

Criteria	RATED REQUIREMENTS	Page No.	Max Points
	2 - Moderate – Meets <u>some</u> of the requirement with <u>some</u> clear strengths 1 - Weak – Meets <u>little</u> of the requirement with <u>some</u> clear strengths 0 - Poor – Meets little to none of the requirement with few or no clear strengths		
	TOTAL AVAILABLE POINTS – RATED REQUIREMENTS – 115 Minimum Points Required to Pass – 69 (60%)		

APPENDIX D – TASK AUTHORIZATION (TA) FORM

Task Authorization			
Contractor:		Contract Number:	
Task Number:		Date:	
TA Request			
<p>1. Description of Work to be Performed</p> <p align="center">Statement of Work</p> <p align="center">Description of any Deliverable(s) required (including the required format and media)</p>			
2. PERIOD OF SERVICES	From:		To:
3. Work Location			
4. Travel Requirements	<input type="checkbox"/> Yes <input type="checkbox"/> No Specify:		
5. Other Conditions /Restrains	<input type="checkbox"/> Yes <input type="checkbox"/> No Specify:		
6. Task Proposal (insert rows as required Check <input type="checkbox"/> :	Estimated Cost <input type="checkbox"/>	Fixed Price <input type="checkbox"/>	\$
7. LEVEL OF SECURITY CLEARANCE REQUIRED FOR THE CONTRACTOR’S PERSONNEL			
<input type="checkbox"/> Reliability Status	<input type="checkbox"/> Secret	<input type="checkbox"/> Top Secret	<input type="checkbox"/> Other
8. BILINGUALISM (if applicable)			
<input type="checkbox"/> Yes		<input type="checkbox"/> No	
TA Proposal			
9. Estimated Cost Contract (to be completed by Project Authority)			
Milestone Phase #	Total Cost		
Professional Services Estimated Contract Cost	Total		
	HST		
	Grand Total		

Task Authorization

TA Approval

10. Signing Authorities

Individual Authorized to Sign on Behalf of:	Name	Title	Signature
CONTRACTOR			
AAFC Project Authority			

9.0 Basis of Payment & Invoicing

In Accordance with the article entitled “Basis of Payment” in the Contract, payment will be made based on receipt of detailed monthly invoices for services rendered, subject to full acceptance by the Project Authority.

Total payment is not to exceed the grand total of the TA.

Original invoices are to be sent to: TBD at Contract Award

Invoices being processed by: (For Internal Use Only)