

**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 indique(s).

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: WORKPLACE ASSESSMENT AND ADVISORY SERVICES	
Solicitation No. – N° de l’invitation 01B68-23-0048	Date of Solicitation – Date de l’invitation December 19, 2023.
Solicitation Closes – L’invitation prend fin At – à : 14 :00 On-le : February 1, 2024.	Time Zone - Fuseau Horaire EST
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:	

TABLE OF CONTENTS

<u>PART 1 - GENERAL INFORMATION</u>	4
1.1 <u>INTRODUCTION</u>	4
1.2 <u>SUMMARY</u>	4
1.3 <u>DEBRIEFINGS</u>	5
<u>PART 2 - BIDDER INSTRUCTIONS</u>	5
2.1 <u>STANDARD INSTRUCTIONS, CLAUSES AND CONDITIONS</u>	5
2.2 <u>SUBMISSION OF BIDS</u>	6
2.3 <u>FORMER PUBLIC SERVANT</u>	6
2.4 <u>ENQUIRIES - BID SOLICITATION</u>	8
2.5 <u>APPLICABLE LAWS</u>	8
2.6 <u>IMPROVEMENT OF REQUIREMENT DURING SOLICITATION PERIOD</u>	8
2.7 <u>BID CHALLENGE AND RECOURSE MECHANISMS</u>	9
2.8 <u>BASIS FOR CANADA'S OWNERSHIP OF INTELLECTUAL PROPERTY</u>	9
<u>PART 3 - BID PREPARATION INSTRUCTIONS</u>	10
3.1 <u>BID PREPARATION INSTRUCTIONS</u>	10
<u>PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION</u>	12
4.1 <u>EVALUATION PROCEDURES</u>	12
4.2 <u>TECHNICAL EVALUATION</u>	12
4.3 <u>FINANCIAL EVALUATION</u>	13
4.4 <u>BASIS OF SELECTION</u>	14
<u>PART 5 - CERTIFICATIONS AND ADDITIONAL INFORMATION</u>	16
5.1 <u>CERTIFICATIONS REQUIRED WITH THE BID</u>	16
5.2 <u>CERTIFICATIONS PRECEDENT TO CONTRACT AWARD AND ADDITIONAL INFORMATION</u>	16
<u>PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS</u>	ERROR! BOOKMARK NOT DEFINED.
6.1 <u>SECURITY REQUIREMENTS</u>	24
<u>PART 7 - RESULTING CONTRACT CLAUSES</u>	25
7.1 <u>STATEMENT OF WORK</u>	25
7.2 <u>STANDARD CLAUSES AND CONDITIONS</u>	25
7.3 <u>SECURITY REQUIREMENTS</u>	26
7.4 <u>TERM OF CONTRACT</u>	26
7.5 <u>AUTHORITIES</u>	27
7.6 <u>PROACTIVE DISCLOSURE OF CONTRACTS WITH FORMER PUBLIC SERVANTS</u>	28
7.7 <u>PAYMENT</u>	28
7.8 <u>INVOICING INSTRUCTIONS</u>	29
7.9 <u>CERTIFICATIONS AND ADDITIONAL INFORMATION</u>	29
7.10 <u>APPLICABLE LAWS</u>	30
7.11 <u>PRIORITY OF DOCUMENTS</u>	30
7.12 <u>FOREIGN NATIONALS (CANADIAN CONTRACTOR OR FOREIGN CONTRACTOR)</u>	30
7.13 <u>INSURANCE OR INSURANCE REQUIREMENTS</u>	30
7.14 <u>DISPUTE RESOLUTION</u>	30

<u>ANNEX “A”</u>	31
<u>STATEMENT OF WORK</u>	31
<u>ANNEX “B”</u>	39
<u>BASIS OF PAYMENT</u>	39
<u>ANNEX “C”</u>	41
<u>EVALUATION PROCEDURES & CRITERIA TECHNICAL PROPOSAL</u>	41
<u>ANNEX “D”</u>	48
<u>TASK AUTHORIZATION TEMPLATE</u>	48
<u>ANNEX “E”</u>	49
<u>LIST OF LOCATIONS</u>	49
<u>ANNEX “F”</u>	50
<u>SECURITY REQUIREMENTS CHECKLIST</u>	50

PART 1 – GENERAL INFORMATION

1.1 INTRODUCTION

This document states terms and conditions that apply to bid solicitation # 01B68-23-0048 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 annexes include the Statement of Work, the Basis of Payment, the Bid Evaluation Criteria, and any other annexes.

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 (1) contract from contract award to March 31, 2025 with two (2), one (1) year option periods.
- 1.2.2 The Department has over 5,000 employees at 55 work locations (subject to change) across Canada. Locations include research centers, farms and regional offices. Persons are employed in a variety of different fields such as Business / Commerce, Communications, Human Resources, Information Technology, Internal Services and Science and Technology.
- 1.2.3 As COVID-19 measures and safety precautions are coming to an end, the majority of AAFC employees are working a hybrid work schedule with 40% to 60% of hours worked to be completed on-site, in the workplace. Some employees continue to work virtually from home, depending on their job requirements and personal or medical needs.
- 1.2.4 Pursuant to the Treasury Board Secretariat's Directive on the Duty to Accommodate, AAFC has an obligation to develop an inclusive, barrier-free workplace. The goal is to provide a work environment that allows all candidates for employment and persons employed to work to the best of their abilities, without barriers or discrimination.

1.2.5 The AAFC Integrated Disability Management team supports and brings together employees, managers, union representatives (if applicable) and specialists to identify appropriate solutions to address limitations, restrictions or work-related needs.

1.2.6 AAFC must also meet the legal obligations established by:

[Canadian Human Rights Act](#)

[Employment Equity Act](#)

[Privacy Act](#)

[Canada Labour Code](#)

[Accessible Canada Act](#)

In order to implement the Treasury Board Policy on the Duty to Accommodate Persons with Disabilities in the Federal Public Service and AAFC's Workplace Accommodation Guidelines, the Department requires the assistance of external experts in accommodation and disability management, specifically the provision of workplace assessment and advisory services, including independent medical examinations (IMEs), but excluding the provision of ergonomic assessments.

Specifically, AAFC is looking for the provision of:

1. Workplace assessment and advisory services:

Services related to consultation, disability management, workplace assessment, case management and solutions to support and to assist the department in ensuring an appropriate environment for employees or potential employees who require an accommodation within the context of Duty to Accommodate.

Ergonomic assessments are not included in the scope of these services.

2. Independent medical examinations:

Services to evaluate the medical fitness for work of current or future employees, including those employees who may be on leave and/or returning to work, including assessment of accommodation needs, fitness to perform expected work, fitness to remain at work, fitness to return to work after absence, and identification of medical limitations or restrictions that require accommodation in the workplace and to consult on more complex requirements within the scope of this document.

3. Occupational Therapy/Rehabilitation Support:

Services by a certified professional to support and provide additional guidance, assessment, support and recommendations, on accommodations / return to work success / on-going struggles in the workplace and in the day to day duties of the job.

1.2.3 There is a 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 via email 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.

2.8 Basis for Canada's Ownership of Intellectual Property

Agriculture and Agri-Food Canada has determined that any intellectual property rights arising from the performance of the Work under the resulting contract will belong to Canada, for the following reasons, as set out in the [Policy on Title to Intellectual Property Arising Under Crown Procurement Contracts](#):

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. 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 Annex C Technical Evaluation Criteria.

- i. A Technical Proposal Score (out of 110 points), will be computed for each technically responsive Bidder using the following formula:

Actual Score	x 70 =	Final Score
Maximum Score Attainable		<i>70% of Bidders Calculated Score</i>

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

85	x 70 =	Final Score
100		59.500 out of 70

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.
- B. **Number of Resources Evaluated:** Only a single resource per Resource Category will be evaluated as part of this bid solicitation as identified in **Appendix C**. Other resources may be assessed after contract award once specific tasks are requested of the Contractor. After contract award, the Task Authorization process will be in accordance with Part 7 - Resulting Contract Clauses, the Article titled "Task Authorization". When a Task Authorization Form (TA Form) is issued, the Contractor will be requested to propose a resource to satisfy the specific requirement based on the TA Form's Statement of Work. **The proposed resource, if not already evaluated, will then be assessed against the applicable criteria identified in the Contract's Statement of Work in accordance with Appendix C of this RFP.**

4.3 Financial Evaluation

a. Mandatory Financial Criteria

- i. **Formulae in Pricing Tables:** If the pricing tables provided to Bidders include any formulae, Canada may re-input the prices provided by Bidders into a fresh table, if Canada believes that the formulae may no longer be functioning properly in the version submitted by a Bidder.

b. Financial Proposal Score

- i. The Bidder must provide fixed, all inclusive per diem rates for the initial contract period and option period(s) for each Resource Category identified in Appendix A, Statement of Work.
- ii. The Financial evaluation will be conducted only on proposals that are technically responsive by using these rates to calculate the Total Financial Score.

- iii. Per diem rates proposed for Option Period(s) must not be lower than the rates proposed for the Initial Contract Period. Failure to abide with these conditions will result in a proposal being considered non-responsive.

A. Financial Evaluation – Method:

The following financial evaluation method will be used for all bids that are determined to be technically responsive:

- 1) Points will be allocated to the Bidder, for each period and each Category, using the following calculation which will be rounded to no more than three (3) decimal places:

$$\frac{\text{Lowest proposed per diem rate}}{\text{Bidder's proposed per diem rate}} \times (10 \text{ points})$$

- iv. **Total Financial Score Calculation:** Bidders' financial score points, as calculated for each Resource Category and Contract Year will be summed, to arrive at a score for each technically responsive Bidder out of 180 points.

- A. Each Bidder's score out of 180 points will be pro-rated to arrive at a Total Financial Score for each Bidder out of 30 points [rounded to no more than three (3) decimal places] as follows:

$$\frac{\text{Bidders' Financial Score out of 180 points}}{180 \text{ points}} \times 30 \text{ points}$$

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. obtain the required minimum of 66 points overall for the technical evaluation criteria which are subject to point rating. The rating is performed on a scale of 110 points.
- 2. Bids not meeting (a) or (b) 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 70% for the technical merit and 30% 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 70%.

5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 30% .
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 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS

6.1 Security Requirements

1. At the date of bid closing, the following conditions must be met:
 - (a) the Bidder must hold a valid organization security clearance as indicated in Part 7 - Resulting Contract Clauses;
2. Before access to sensitive information is provided to the Bidder, the following conditions must be met:
 - (a) the Bidder's proposed individuals requiring access to sensitive information, assets or sensitive work sites must meet the security requirements as indicated in Part 7 - Resulting Contract Clauses;
 - (b) the Bidder's security capabilities must be met as indicated in Part 7 - Resulting Contract Clauses.
3. For additional information on security requirements, Bidders should refer to the [Contract Security Program](http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html) of Public Works and Government Services Canada (<http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>) website.

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 Annex "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 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](#) (2022-12-01), General Conditions - Higher Complexity - Services, apply to and form part of the Contract.

7.2.2 Supplemental General Conditions

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

[4008](#) (2008-12-12), Personal Information, apply to and form part of the Contract.

7.3 Security Requirements

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

Security requirement for Canadian supplier: Public Works and Government Services Canada (PWGSC) file # Common-professional services security requirement check list #6

1. The contractor/offeror must, at all times during the performance of the contract, hold a valid designated organization screening (DOS), issued by the Contract Security Program (CSP), Public Works and Government Services Canada (PWGSC)
2. The contractor/offeror personnel requiring access to **protected** information, assets or sensitive work site(s) must **each** hold a valid **reliability status**, granted or approved by the CSP, PWGSC
3. The contractor/offeror **must not** remove any **protected** information or assets from the identified work site(s), and the contractor/offeror must ensure that its personnel are made aware of and comply with this restriction
4. Subcontracts which contain security requirements are **not** to be awarded without the prior written permission of AAFC
5. The contractor/offeror must comply with the provisions of the:
 - a. Security Requirements Check List and security guide (if applicable), attached at Annex F
 - b. Contract Security Manual (latest edition)

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 March 31st, 2025; 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 two (2) 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 **\$70,000.00** . 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 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.
- 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; 01B68-23-0048
- (v) Financial codes, including GST or HST (as applicable) registration number;
- (vi) Description of the Work/by day/hours per day for each resource;
- (vii) Name 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.

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](#) (2022-12-01), General Conditions - Higher Complexity - Services;
- (c) Annex A, Statement of Work;
- (d) Annex B, Basis of Payment;
- (e) Annex F, Security Requirements Checklist;
- (f) the signed Task Authorizations (including all of its annexes, if any);
- (g) 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](#)".

ANNEX “A”
STATEMENT OF WORK

WORKPLACE ASSESSMENT AND ADVISORY SERVICES

1. Purpose

Under this procurement, the Department of Agriculture and Agri-Food Canada (AAFC) is seeking the services of a firm experienced in Workplace Assessment and Independent Medical Examination Advisory Services.

2. Background

Agriculture and Agri-Food Canada (AAFC) supports the Canadian agriculture and agri-food sector through initiatives that promote innovation and competitiveness.

The department has over 5,000 employees at 55 work locations (subject to change) across Canada. Locations include research centers, farms and regional offices. Persons are employed in a variety of different fields such as Business / Commerce, Communications, Human Resources, Information Technology, Internal Services and Science and Technology.

As COVID-19 measures and safety precautions are coming to an end, the majority of AAFC employees are working a hybrid work schedule with 40% to 60% of hours worked to be completed on-site, in the workplace. Some employees continue to work virtually from home, depending on their job requirements and personal or medical needs.

Pursuant to the Treasury Board Secretariat's Directive on the Duty to Accommodate, AAFC has an obligation to develop an inclusive, barrier-free workplace. The goal is to provide a work environment that allows all candidates for employment and persons employed to work to the best of their abilities, without barriers or discrimination.

The AAFC Integrated Disability Management team supports and brings together together employees, managers, union representatives (if applicable) and specialists to identify appropriate solutions to address limitations, restrictions or work-related needs.

AAFC must also meet the legal obligations established by:

- [Canadian Human Rights Act](#)
- [Employment Equity Act](#)
- [Privacy Act](#)
- [Accessible Canada Act](#)

In order to implement the *Treasury Board Policy on the Duty to Accommodate Persons with Disabilities in the Federal Public Service* and AAFC's *Workplace Accommodation Guidelines*, the Department requires the assistance of external experts in accommodation and disability management, specifically the provision of workplace assessment and advisory services, including independent medical examinations (IMEs), but excluding the provision of ergonomic assessments.

3. Objectives

The Contractor will provide services to identify limitations and restrictions, return to work plans,

accommodations, and other consultative services or supports to assess the ability to undertake the physical and psychological demands of a position for candidates for employment and persons employed.

The Contractor will provide advisory and analysis services to support the department in meeting the requirements of the Treasury Board Secretariat's Directive on the Duty to Accommodate.

Specifically, AAFC is looking for the provision of:

1. Workplace assessment and advisory services:

Services related to consultation, disability management, workplace assessment, case management and solutions to support and to assist the department in ensuring an appropriate environment for employees or potential employees who require an accommodation within the context of Duty to Accommodate.

Ergonomic assessments are not included in the scope of these services.

2. Independent medical examinations:

Services to evaluate the medical fitness for work of current or future employees, including those employees who may be on leave and/or returning to work, including assessment of accommodation needs, fitness to perform expected work, fitness to remain at work, fitness to return to work after absence, and identification of medical limitations or restrictions that require accommodation in the workplace and to consult on more complex requirements within the scope of this document.

3. Occupational Therapy/Rehabilitation Support:

Services by a certified professional to support and provide additional guidance, assessment, support and recommendations, on accommodations / return to work success / on-going struggles in the workplace and in the day to day duties of the job.

4. Scope of Work

The Contractor will designate and assign a Workplace Accommodation or Disability Management Specialist as a primary contact with AAFC. The Contractor will ensure the primary contact is qualified to conduct intake assessments and provide guidance to AAFC on recommended assessment.

The Contractor will provide the use of a toll-free number and email account for AAFC use only to facilitate communication and ensure accessibility to its services.

The Contractor will receive a "Task Authorization Form" (TA) from AAFC to initiate an assessment or evaluation. The Contractor shall ensure that they acknowledge receipt of the requests from AAFC within 48 Hours.

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 resource, as selected from those available under the Contract; 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 resource 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.

Following Task Authorization issuance, the Contractor will provide the qualifications of the specialist and the proposed plan of assessment or evaluation to the department for validation prior to the initiation of service.

Prior to completion of ANY assessment, the Contractor will provide a costed proposal (quote) to AAFC including the following information:

- TA number
- Date
- Employee name
- Manager name
- AAFC Disability Management Advisor name
- AAFC Branch/Directorate
- Geographic region/location
- Nature of work (Assessment, IME, Support or Advisory Services)
- Estimated hours
- Estimated cost (# hours x hourly rate)
- Completion date for the assessment/examination/report

The Contractor will email the proposal to AAFC at:
aafc.accommodatedutyto-adaptationmesures.aac@agr.gc.ca

Once received, the Project Authority will authorize the work / services to commence by return email to the email address as provided by the Contractor.

Following validation and approval of the costed proposal, the Contractor will move forward with the completion of the work for each employee as required. The Contractor will contact the employee and manager (if applicable) to discuss needs/concerns and determine the appropriate assessment methodology.

The Contractor will ensure that all specialists have the necessary educational requirements, certifications and experience in their area of specialization and are appropriately trained to provide

these work assessments, make appropriate recommendations and assist in the implementation of accommodation solutions for employees.

If it is determined that an occupational assessment is required, the Contractor will ensure arrangements are made to assess the employee. The assessment may involve meeting with both the employee and the supervisor/manager at the work-site, if required.

If it is determined that an independent medical examination is required, the Contractor will ensure that arrangements include a medical exam of the employee, discussions between medical professionals, as well as review of medical files, if required.

Report

The medical specialist will perform the assessment and submit a report to the Requesting Officer, providing details of the assessment, including limitations and restrictions, alternate recommendations in terms of *accommodations that must be made to ensure the employee and the manager fully comprehend how to maximize efficiency and success.*

This report should include, but not be limited to:

- Confirmation of a disabling condition or diagnosis (do not include any diagnoses);
- Providing detailed information on physical and/or cognitive limitations and/or restrictions in relation to the confirmed diagnoses;
- Provide additional guidance and/or recommendation on how to ensure employee success in the workplace;
- Provide guidance on other possible therapeutic supports the employer may be able to provide, such as Occupational Therapy support and recommendation of duration of support;
- Provide a prognosis, if possible;
- Provide guidance on follow up requirements, as needed; and
- Respond to any additional administrative questions posed by the employer.

If it is determined that additional supports are required, such as the support of an Occupational Therapist, the Contractor will ensure that arrangements are made with the employee and the manager for further discussion on the needs and the goal of the therapeutic support, including recommended frequency of sessions and follow ups, and a plan. This discussion should include an assessment of the current situation as well as current barriers and future expectations and organizational requirements. Further discussions between medical professionals, employees and Managers, additional follow-ups, as well as review of medical files are to be completed as required.

The Contractor will be required to complete an Assessment Report, in the official language of choice identified by the employee, for each case. Copies of the assessment report are to be sent to the AAFC Integrated Disability Management Advisor, manager and the employee with recommendations, if applicable. If information is forwarded via email, the sensitive information contained or attached must be encrypted to meet Government of Canada standards for Protected B.

The Contractor will ensure the written report at the end of support program will include:

- A summary of the assessment, identified limitations and/or restrictions, as well as any additional observations;
- An outline of the supports provided, including tools, resources, adaptive technologies etc.;
- Guidance on support measures to keep in place as well as guidance on any future supports that may be considered by the employee and employer, as needed; and
- Provide any follow up recommendations.

The Contractor will consult with at least three (3) suppliers (when possible, with the exception of products or services that are subject to patent/copyright laws) where equipment, technical aids, workstation modifications or other products or services are needed to accommodate an individual with a disability or an ill/injured employee returning to work. The information obtained from suppliers will be used to provide options that satisfy the assessed requirements, facilitate the appropriate accommodation solution, and ensure best value. These options will be included in the written assessment report.

The Contractor will participate in quarterly meetings with the Team Leader, Disability Management or their representative, to examine the quality, timeliness and cost-effectiveness of the service according to criteria mutually agreed to by the parties. Information garnered from these meetings will be used by AAFC to inform departmental accommodation strategies and potential initiatives.

The Contractor will be available to provide training and information sessions to AAFC employees on the TBS *Directive on the Duty to Accommodate*, its application, procedures and guidelines.

5. Schedule and Deliverables

The services described herein are to be delivered on an “as and when” required basis. Timelines and deliverables will be identified on individual Task Authorization forms.

It is the responsibility of the Contractor to facilitate and maintain regular communication with the AAFC Project Authority. In addition, the Contractor must immediately notify the Project Authority of any issues, problems, or areas of concern in relation to any work completed as they arise.

Deliverables include but are not limited to:

- The Contractor will ensure they acknowledge receipt of the TA from AAFC no later than the end of the 2nd business day;
- The Contractor will ensure initial contact with the employee no later than end of the 4th business day following receipt of the TA;
- The Contractor will ensure initial contact with the specialist to initiate discussion of assessment no later than the end of the 2nd business day following discussion with employee or manager;
- The Contractor will confirm the date of assessment with the employee no later than the end of the 2nd business day following discussion with the specialist;

- The Contractor will provide a written assessment report no later than the end of the 20th business day following the request for assessment (exception can be considered for Independent Medical Evaluations); and.
- The Contractor will remain available for a follow-up within 30 days to discuss assessment report;

The Contractor may be tasked with other follow-up activities, supports, programs, reports as required, at the request of and / or at potential additional cost to AAFC.

Required Formats

Preferred delivery format is PDF (Adobe) password protected, but other formats (also password protected) may be accepted at the request of AAFC or upon mutual agreement between AAFC and the contractor. All reports must additionally meet accessibility standards, as per the Accessible Canada Act.

Reporting Deliverables

The Contractor will provide AAFC with monthly statistical reports and a year-end report on cases referred to them, as well as the resolution of these cases. These reports should be submitted to AAFC, no more than 2 weeks following the last day of the month and 2 weeks following the last day of the fiscal year (March 31, 202X) for the annual report.

The statistical report, whose content is subject to change by mutual agreement, will contain the following information:

- a) The number of requests by geographic location;
- b) The number of cases opened and closed;
- c) Date cases are opened and closed;
- d) The number of enquiries by type (e.g., information, advisory services, accommodation planning);
- e) Cases by branch, type and accommodation measures
- f) Number of follow-ups per case (contacts with managers and employees);
- g) Time involved in management of each case;
- h) Number of cases by type of disability, as determined jointly by the Contractor and the Project Authority;
- i) Number of cases escalated to the Project Authority and reason(s); and
- j) Analysis/summary of the information provided in the report.

6. AAFC Support to the Contractor

AAFC will:

- Ensure that the Contractor has access to its facilities, as required and when needed;
- Ensure that its employees are provided with sufficient time to attend scheduled appointments when required;

- Make available AAFC subject matter experts, as required (e.g. representatives from Contracting, Occupational Health and Safety, Employee Assistance Program, other);
- Provide any applicable AAFC policies, guidelines, and other reference documents;
- Be available within two (2) working days to meet with the Contractor to resolve any emerging problems or issues; and
- Provide employees' job descriptions, where appropriate, to provide context in terms of the employees' essential duties, standards and functions.

7. Resources and Level of Effort

The Contractor and its specialists who provide workplace assessments or recommendations, arrange for independent medical examinations or assist with the implementation of these assessments, recommendations or examinations, are expected to be fully trained and qualified and must:

- Have experience in Disability Management or Workplace Reintegration (Return-to-Work) issues or in Workplace Accommodation measures;
- Possess sound knowledge of workplace assessment requirements, dynamics, constraints, tools and techniques;
- Possess sound understanding of the legislation and jurisprudence attached to the TBS *Policy on the Duty to Accommodate Persons with Disabilities in the Federal Public Service*.

The Contractor must ensure that all health practitioners and specialists are in good standing with the applicable provincial and federal associations or licensing bodies. The Contractor is responsible for conducting credential verifications on all health practitioners. In delivering the services under the Contract, the Contractor may be required to provide the services of the following health practitioners and specialists:

Physicians: Physicians must hold a current and valid Canadian license to practice medicine in the province or territory in which they are engaged.

Registered Nurses and Nurse Practitioners: Registered Nurses (RNs) must be licensed to practice in their province or territory of employment. Nurse Practitioners (NPs) must be registered and licensed with the particular provincial or territorial regulatory and/or licensing body within Canada.

Physiotherapists: Physiotherapists must be licensed in their province or territory of employment.

Occupational Therapists: Occupational therapists must have a university degree in occupational therapy, including supervised fieldwork, or, where considered acceptable by the applicable provincial regulatory body, graduation from an occupational therapy program approved by the World Federation of Occupational Therapists (WFOT). Occupational therapists must also be licensed by the applicable provincial or territorial regulatory body.

Clinical Psychologists: Clinical psychologists must be graduates of an accredited university with either a masters or a doctoral degree in clinical psychology and have a registration for autonomous practice in clinical psychology with the appropriate provincial licensing body.

Certified Kinesiologists: Kinesiologists must have an undergraduate degree in Kinesiology, Human Kinetics, or Kinanthropology, and be certified by the applicable provincial or territorial certification body or the Canadian Kinesiology Alliance.

8. Location of Work and Travel

8.1 Hours of Work

AAFC presently operates in a combination of physical and virtual office environments.

AAFC's Office Hours are from 07:00 – 17:00 local time.

The Contractor's resources must be available to provide services, within AAFC's Office Hours across the country based on time zones.

For urgent work requests there may be a requirement, from time to time, to work outside of AAFC's regular Office Hours in order to meet short deliverable deadlines. The Contractor's resources must be available to provide these services upon request by AAFC. However, the Project Authority will make all reasonable efforts to provide the Contractor with sufficient turnaround time for requested work.

8.2 Location of Work

The Contractor must be able to provide virtual and / or in-person services where the AAFC employee is located.

Where in-person services are recommended or required the Contractor will ensure that all health and safety requirements, protocols and processes as determined by the department, in accordance with AAFC Occupational Health and Safety Advisors and local health authority guidance, are strictly adhered to.

8.3 Work-related Travel

There is anticipated requirement for travel to AAFC locations.

Canada will not reimburse the Contractor for any expenses associated with travel. The **firm all-inclusive per diem** proposed should take into account all expenses associated with the provision of the services as there will not be any travel expense budget allocated under this contract.

8. Language of Work

The Contractor will provide all services and activities in both of Canada's official languages (English or French). All services and activities shall be provided in the official language chosen by the requestor.

ANNEX “B”
BASIS OF PAYMENT

Contractual Limitation of Expenditure

The contract has a limitation of expenditure of **\$210,000.00 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 March 31, 2025	\$70,000.00
Option 1	April 1, 2025 to March 31, 2026	\$70,000.00
Option 2	April 1, 2026 to March 31, 2027	\$70,000.00
	subtotal I	\$210,000.00
	HST calculated on the TOTAL	\$27,300.00

Fee Schedules

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid no more than the Per Diem rate(s) for the applicable Resource Category(ies) required by AAFC in CAD, as provided within the Contractor’s Proposal and as stipulated below. The identified Firm Per Diem rates apply to all services delivered within the time period identified in the table below. Any changes in Firm Per Diem rates come into effect only upon the commencement of the subsequent period as indicated in the table below:

Resource Category Resource Name(s)			
	Initial Contract Period	Option Period #1	Option Period #2
	Award to March 31, 2025	April 1, 2025 to March 31, 2026	April 1, 2026 to March 31, 2027
	(\$CAD)	(\$CAD)	(\$CAD)
Physicians			
Registered Nurses and Nurse Practitioners			
Physiotherapists			
Occupational Therapists			
Clinical Psychologists			
Certified Kinesiologists			

Definition of Per Diem Rates

All Per Diem rates are in CAD for professional fees plus applicable taxes. The Per Diem Rate(s) are 'all inclusive'. Charges for expenses that are normally incurred in the provision of services, such as, labour for providing estimates and conducting contract negotiations, resolving contract disputes, tracking time sheets, monthly invoicing, facsimile, office supplies, computer hardware and software charges, courier, long-distance telephone charges, travel costs from a personal residence to the work site, local travel costs, and the like are included in the firm per diem rates and will not be permitted as an additional charge under the contract. Prices of deliverables, if any, are included in the Per Diem Rates(s) and all deliverables are FOB Destination, Canadian Customs Duty included if applicable.

Calculation of Per Diem Rates

For the purposes of defining the Per Diem Rate(s), a day is defined as 7.5 hours exclusive of meal breaks. Payment shall be for days actually worked with no provision for annual leave, statutory holidays and sick leave.

Time worked which is more or less than a day shall be prorated to reflect the actual time worked in accordance with the following formula:

$$(\text{Hours worked} / 7.5) \times \text{Per Diem Rate}$$

No premium will be paid for overtime hours. Payments will be made monthly on weekly time sheets submitted to the Project Authority.

ANNEX “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 most qualified contractor to provide services as stipulated in the Statement of Work (Annex A).
- 1.2 This section comprises the detailed Proposal requirements that will be used to evaluate Bidders’ responses to the Request for Proposal (RFP).
- 1.3 The selection of the responsive Proposal will be made on the basis of the **HIGHEST OVERALL SCORE** for both the technical and financial proposals. Highest overall score will be determined by adding the technical and financial points obtained.

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

Technical Proposal = 70%

Financial Proposal = 30%

Overall Proposal = 100%

1.5 To be considered Responsive, a Proposal must:

1- Achieve the **minimum passing score of 60% (66/110) identified in the point rated criteria.**

Proposals which do not meet the minimum point requirements shall not be given further consideration.

The responsive Proposal which receives the highest score of the combined points for the **Technical Proposal** rated requirements (**70%**) and the **Financial Proposal** rated requirements (**30%**) will be selected as the successful Proposal.

$$\frac{\text{Technical Score} \times \text{Ratio (70)}}{\text{Max Points}} + \frac{\text{Lowest Price} \times \text{Ratio (30)}}{\text{Bidder's Price}} = \text{Combined Score}$$

- 1.6 The cost 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 Proponents 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).**
- 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 (Annex A).
- 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.

2.0 POINT RATED REQUIREMENTS

- 2.1 The Bidder must address the rated requirements 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 Bidder for clarifications.

The Bidder is requested to use the tables provided to identify where the information can be found in the proposal (i.e.: Identify the file/ page / project number, etc.).

The rated requirements have been selected to provide evaluators the ability to assess bidder's capacity and ability to conduct the work for which a proposal has been submitted. The marking scheme reflects a balance between complexities of the criteria evaluated weighted towards the criteria deemed critical to the success of the project (Each criteria will be marked according to completeness, clarity, and rationales provided).

- 2.2 Cutting and pasting wording from the RFP into the proposal does not constitute demonstrating the requirement. Experience **must** be demonstrated by citing specific examples of work performed that relates to the specific evaluation criteria. If the Bidder's response does not fully and clearly demonstrate that the requirement is met by the information cited, then information provided will not be considered.

- 2.3 The technical bid must substantiate the compliance with the specific articles of Annex “C”, which is the requested format for providing the substantiation. The substantiation must not simply be a repetition of the requirement(s), but must explain and demonstrate how the Bidder will meet the requirements and carry out the required Work. Simply stating that the Bidder or its proposed solution or product complies is not sufficient. Where Canada determines that the substantiation is not complete, the Bidder will be considered non-responsive and disqualified.
- 2.4 For Point Rated Requirements partial points will be awarded based upon each rated criteria.

3.0 MANDATORY REQUIREMENTS

Failure to comply with 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 the compliance.

Criteria	Mandatory Evaluation Criteria	Page No.	Pass/Fail
	Language Requirements		
M.1	The Bidder must be able to offer all services described in the Statement of Work, in both official languages and in alternative formats (such as large print, braille etc.)		
	Delivery of Services		
M.2	The Bidder must demonstrate that it can offer services at all AAFC locations in Canada, as defined in Annex E List of Locations.		
	Resources		
M.3	The Bidder must be able to offer the services of each resource as per the Resource Categories in the Statement of Work.		

4.0 POINT-RATED EVALUATION CRITERIA

Point Rated Technical Criteria

Only those proposals which first meet the Mandatory Requirements will be considered in the second stage of the evaluation, the Point Rated Technical Evaluation.

To be considered compliant, bidders must obtain a minimum passing mark of 60% overall for the point rated criteria of the Technical Evaluation. Proposals scoring less than 60% overall for the point rated criteria of the Technical Evaluation will not be given further consideration.

The Bidder should 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 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 Bidder for clarifications.

Point-Rated Criteria

Demonstration of experience using Project descriptions:

A **Project** is defined in this context as an undertaking carried out by a proposed resource, or firm, that addresses a client's need and seeks to achieve a particular goal or outcome for that client.

For any Point Rated Criteria that require experience in the form of a "**Project**", the provided summary (i.e. description of this work) requires the following minimum information in order to be considered against the applicable criterion:

- provide the name of the Client organization, external to the Bidder's own organization, to whom the services were provided;
- provide the **start date** and **end date** (mm/yyyy to mm/yyyy) of the engagement on the project to demonstrate that the work was undertaken within the stipulated timeframe (i.e. within the past 5 years);
- provide a description of the services provided that are applicable to the evaluation criterion and relevant to the scope of work; and
- include a Contact person for the client organization, who is external to the Bidder's organization and capable of verifying the work performed by the proposed resource during the Project, if contacted by AAFC for the purposes of project verification, including:
 - Client Contact person's name, and (optionally) title;
 - Client Contact person's contact information, either telephone number or e-mail address.

Criteria	RATED REQUIREMENTS	Allocation of Points
R.1A	Relevant Work Experience	Max Points 30
	<p>The Bidder <u>should</u> demonstrate experience in the provision of independent medical examinations (excluding the provision of ergonomic assessments), including services to evaluate all of the following:</p> <ul style="list-style-type: none"> - medical fitness for work; - assessment of accommodation needs; - assessment of fitness to perform expected work, fitness to remain at work; - fitness to return to work after absence; - identification of medical limitations or restrictions that require workplace accommodation; - and consult on complex requirements. 	<p>Criteria not met and/or information not provided or not relevant. 0 points</p> <p>Description(s) demonstrate limited experience. Experience provided to organizations of 1,000 or less and/or without national coverage and / or not in both official languages. 10 points</p> <p>Description(s) demonstrate some experience to organizations up to of 5,000 and / or at some work locations nationally and/or limited official languages. 20 points</p>

Criteria	RATED REQUIREMENTS	Allocation of Points
	<p>The Bidder <u>should</u> provide the required experience through descriptions of up to two (2) previous projects completed in the previous five (5) years to:</p> <ul style="list-style-type: none"> • Private or public sector organizations having a minimum of 1,000 employees; • Multiple national work locations distributed nationally; and • Clients in both official languages (English and French). <p>The Bidder should provide the current contact information for the two references provided to validate that the work occurred.</p> <p>No previous AAFC references will be accepted.</p>	<p>Description(s) demonstrate significant experience to organizations of 5,000 or more, at multiple work locations nationally, in both official languages. 30 points</p>
	<p>Total Points - Relevant Work Experience</p>	
<p>R.1B</p>	<p>Relevant Work Experience</p>	<p>Max Points 30</p>
	<p>The Bidder <u>should</u> demonstrate experience in the provision of occupational therapy and rehabilitation support to provide additional guidance, assessment, support and recommendations related to:</p> <ul style="list-style-type: none"> - Workplace accommodations; - Return to work; - On-going workplace challenges; and - Day-to-day duties of the job. <p>The Bidder <u>should</u> provide the required experience through descriptions of up to two (2) previous projects completed in the previous five (5) years to:</p> <ul style="list-style-type: none"> • Private or public sector organizations having a minimum of 1,000 employees; • Multiple national work locations distributed nationally; and • Clients in both official languages (English and French). <p>The Bidder should provide the current contact information for the two references provided to validate that the work occurred.</p> <p>No previous AAFC references will be accepted.</p>	<p>Criteria not met and/or information not provided or not relevant. 0 points</p> <p>Description(s) demonstrate limited experience. Experience provided to organizations of 1,000 or less and/or without national coverage and / or not in both official languages. 10 points</p> <p>Description(s) demonstrate some experience to organizations up to of 5,000 and / or at some work locations nationally and/or limited official languages. 20 points</p> <p>Description(s) demonstrate significant experience to organizations of 5,000 or more, at multiple work locations nationally, in both official languages. 30 points</p>

Criteria	RATED REQUIREMENTS	Allocation of Points
R.2	Project Lead	Max Points 20
	<p>The Bidder <u>should</u> identify a workplace accommodation or disability management specialist as primary contact with AAFC. Qualified by education and experience, to conduct intake assessments, provide recommendations, and assist in the implementation of solutions.</p> <p>The Bidder <u>should</u> describe:</p> <ul style="list-style-type: none"> • How it determines and assigns primary contact specialists; • How it ensures that specialists have the necessary educational requirements, certifications and experience in their area of specialization and are appropriately trained to conduct intake assessments, make recommendations, and assist in the implementation of solutions; • How it ensures it has access to specialists who understand workstation, office, laboratory and at-home work environments • How it ensures that specialists have sound understanding of legislation and jurisprudence pursuant to the Treasury Board Secretariat Policy on the Duty to Accommodate Persons with Disabilities in the federal public service 	<p>Criteria not met and/or information not provided or not relevant. 0 points</p> <p>Description provided but does not address any or most of the 4 elements, above. 5 points</p> <p>Description provided and addresses some but not all of the 4 elements, above. 15 points</p> <p>Description provided and addresses all of the 4 elements, above. 20 points</p>
	Total Points – Project Lead	
R.3	Proposed Methodology and Detailed Work Plan	Max Points 15
	<p>The Bidder <u>should</u> describe its capability to provide workplace assessment and advisory services in person and/or virtually to the locations where AAFC employees are located, as listed in <i>Annex (E) List of Locations</i> and described in the Statement of Work.</p>	<p>Description not provided or not relevant. 0 points</p> <p>Description is incomplete and/or indicates case management services will be provided to some AAFC locations. 5 points</p> <p>Description is partially complete and/or indicates case management services will be provided to most AAFC locations. 10 points</p> <p>Description is complete and indicates how case management services will be provided to all AAFC locations. 15 points</p>

Criteria	RATED REQUIREMENTS	Allocation of Points
	Total Points - Proposed Methodology and Detailed Work Plan	
R.4	Reporting Deliverables	Max Points 15
	The Bidder <u>should</u> describe how, and how frequently, it will provide statistical reports to AAFC on cases referred to them as well as the resolution of these cases, including what these reports include.	<p>Description not provided or not relevant. 0 Points</p> <p>Description provided but does not include statistical information. 5 Points</p> <p>Description provided and includes some statistical information. 10 Points</p> <p>Description provided and includes detailed statistical information. 15 Points</p>
	Total Points - Reporting Deliverables	
	TOTAL AVAILABLE POINTS – RATED REQUIREMENTS – 110 Minimum Points Required to Pass – 66 (60%)	

ANNEX "D"
TASK AUTHORIZATION TEMPLATE
(see below)

ANNEX "E"
LIST OF LOCATIONS
(see attached)

ANNEX "F" – SECURITY REQUIREMENTS CHECKLIST
(see attached)

TASK AUTHORIZATION FORM

Workplace Accommodation Service Request Form

For AAFC Use Only File No.: _____

SECTION 1: EMPLOYEE'S CONTACT INFORMATION

Employee First and Last Name		Job Title	
Geographic Region	Branch	Directorate	
Work Location (including floor number)		City	Province
Work Phone (Home phone if not at work) - - ext.		Work Email Address (Home email if not at work)	

The employee would like to receive all correspondence in: English French
 Can the employee receive external emails? No Yes

SECTION 2: EMPLOYEE'S BACKGROUND INFORMATION (to be completed by employee and manager)

1. Briefly describe the reason for this accommodation request:

Employee Barriers and Difficulties	How it Affects the Employee's Job (e.g., specific work tasks, access to the workplace)

2. Please provide relevant employment history/current job information:

Years of service: _____ years
 Years in current role: _____ years
 Status:
 Full-time
 Part-time

Scheduled Hours of Work:

- Monday, hours from _____ to _____
- Tuesday, hours from _____ to _____
- Wednesday, hours from _____ to _____
- Thursday, hours from _____ to _____
- Friday, hours from _____ to _____
- Saturday, hours from _____ to _____
- Sunday, hours from _____ to _____

Current Hours of Work:
 Same as Scheduled or:

- Monday, hours from _____ to _____
- Tuesday, hours from _____ to _____
- Wednesday, hours from _____ to _____
- Thursday, hours from _____ to _____
- Friday, hours from _____ to _____
- Saturday, hours from _____ to _____
- Sunday, hours from _____ to _____

3. Describe job duties and/or attach job description:

4. Please describe any accommodation solutions proposed:

Anticipated Duration of Request or Proposed Solution:

- Temporary: _____
- Permanent: _____

Is there an alternate work plan in place:

- Yes No

If yes, describe (or provide as attachment):

Has the employee requested accommodation for related or similar barriers or difficulties in the past?

- Yes No

If yes, please describe:

The above information is complete and accurate to the best of my knowledge and I consent to the collection, use, and disclosure of the information I have provided on this Form for the purposes of responding to my workplace accommodation request and for any other related or reasonably ancillary purpose.

Employee's Signature

Date

SECTION 3: CONSENT TO RELEASE INFORMATION (to be completed by employee)

I, (employee first and last name) _____, **DO HEREBY CONSENT** to have a Workplace Accommodation Assessment conducted by *(INSERT AT CONTRACT AWARD)*

The **purpose of the evaluation** is to **DETERMINE THE BARRIERS AND DIFFICULTIES** that I experience in performing my work tasks, and to have the evaluator make recommendations to alleviate these difficulties.

On the understanding that **NO CONFIDENTIAL MEDICAL INFORMATION WILL BE RELEASED WITHOUT MY WRITTEN CONSENT**, I agree to *(INSERT AT CONTRACT AWARD)* providing an interpretation of this evaluation to Human Resources and to _____, my manager/supervisor, who is ultimately responsible for implementing the recommendations.

I understand that **information collected by *(INSERT AT CONTRACT AWARD)* will not be retained in my personnel file**, but may be referenced in future workplace accommodation assessments.

I declare that my consent specified above **has been given voluntarily**. I understand that I may withdraw my consent **in writing** at any time.

Employee's Signature

Date

SECTION 4: LABOUR RELATIONS ADVISOR INFORMATION

Labour Relations Advisor First and Last Name

Work Phone

Labour Relations Advisor Email Address

The Manager has already consulted with the LR Advisor? Yes No

SECTION 5: MANAGER'S INFORMATION AND APPROVAL (to be completed by manager)

Manager's First and Last Name

Manager's Title

Manager's Work Phone

 - - ext.

Manager's Email Address

I have reviewed this request and I approve that a workplace assessment be conducted for this employee. I understand that I will receive recommendations for consideration and will be responsible for the implementation of a reasonable accommodation plan to address this request.

Manager's Signature

Date

Please send completed and signed form to: [Accommodate duty to / Adaptation mesures \(AAFC/AAC\)](#)



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

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

PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE

1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine Agriculture and Agri-Food Canada	2. Branch or Directorate / Direction générale ou Direction Human Resources
--	--

3. a) Subcontract Number / Numéro du contrat de sous-traitance	3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant
--	---

4. Brief Description of Work / Brève description du travail
To provide workplace assessment and advisory services, including Independent Medical Examinations, in order to implement the Treasury Board Policy on the Duty to Accommodate Persons with Disabilities in the Federal Public Service and AAFC's Workplace Accommodation Guidelines.

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

5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? / Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques? No / Non Yes / Oui

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

6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? / Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? (Specify the level of access using the chart in Question 7. c) / Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c) No / Non Yes / Oui

6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. / Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé. No / Non Yes / Oui

6. c) Is this a commercial courier or delivery requirement with **no** overnight storage? / S'agit-il d'un contrat de messagerie ou de livraison commerciale **sans** entreposage de nuit? No / Non Yes / Oui

7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès

Canada <input checked="" type="checkbox"/>	NATO / OTAN <input type="checkbox"/>	Foreign / Étranger <input type="checkbox"/>
--	--------------------------------------	---

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

No release restrictions / Aucune restriction relative à la diffusion <input checked="" type="checkbox"/>	All NATO countries / Tous les pays de l'OTAN <input type="checkbox"/>	No release restrictions / Aucune restriction relative à la diffusion <input type="checkbox"/>
Not releasable / À ne pas diffuser <input type="checkbox"/>		
Restricted to: / Limité à: <input type="checkbox"/>	Restricted to: / Limité à: <input type="checkbox"/>	Restricted to: / Limité à: <input type="checkbox"/>
Specify country(ies): / Préciser le(s) pays:	Specify country(ies): / Préciser le(s) pays:	Specify country(ies): / Préciser le(s) pays:

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

PROTECTED A / PROTÉGÉ A <input checked="" type="checkbox"/>	NATO UNCLASSIFIED / NATO NON CLASSIFIÉ <input type="checkbox"/>	PROTECTED A / PROTÉGÉ A <input type="checkbox"/>
PROTECTED B / PROTÉGÉ B <input checked="" type="checkbox"/>	NATO RESTRICTED / NATO DIFFUSION RESTREINTE <input type="checkbox"/>	PROTECTED B / PROTÉGÉ B <input type="checkbox"/>
PROTECTED C / PROTÉGÉ C <input type="checkbox"/>	NATO CONFIDENTIAL / NATO CONFIDENTIEL <input type="checkbox"/>	PROTECTED C / PROTÉGÉ C <input type="checkbox"/>
CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>	NATO SECRET / NATO SECRET <input type="checkbox"/>	CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>
SECRET <input type="checkbox"/>	COSMIC TOP SECRET / COSMIC TRÈS SECRET <input type="checkbox"/>	SECRET <input type="checkbox"/>
TOP SECRET / TRÈS SECRET <input type="checkbox"/>		TOP SECRET / TRÈS SECRET <input type="checkbox"/>
TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>		TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>

Security Classification / Classification de sécurité
--



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

PART A (continued) / PARTIE A (suite)

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

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

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

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

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

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

Special comments:
 Commentaires spéciaux : _____

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

10. b) May unscreened personnel be used for portions of the work?
 Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail? No / Non Yes / Oui
 If Yes, will unscreened personnel be escorted?
 Dans l'affirmative, le personnel en question sera-t-il escorté? No / Non Yes / Oui

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

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

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

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

PRODUCTION

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

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

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

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

Security Classification / Classification de sécurité
--



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

PART C - (continued) / PARTIE C - (suite)

For users completing the form **manually** use the summary chart below to indicate the category(ies) and level(s) of safeguarding required at the supplier's site(s) or premises.

Les utilisateurs qui remplissent le formulaire **manuellement** doivent utiliser le tableau récapitulatif ci-dessous pour indiquer, pour chaque catégorie, les niveaux de sauvegarde requis aux installations du fournisseur.

For users completing the form **online** (via the Internet), the summary chart is automatically populated by your responses to previous questions.

Dans le cas des utilisateurs qui remplissent le formulaire **en ligne** (par Internet), les réponses aux questions précédentes sont automatiquement saisies dans le tableau récapitulatif.

SUMMARY CHART / TABLEAU RÉCAPITULATIF

Category Catégorie	PROTECTED PROTÉGÉ			CLASSIFIED CLASSIFIÉ			NATO				COMSEC					
	A	B	C	CONFIDENTIAL CONFIDENTIEL	SECRET	TOP SECRET TRÈS SECRET	NATO RESTRICTED NATO DIFFUSION RESTREINTE	NATO CONFIDENTIAL NATO CONFIDENTIEL	NATO SECRET	COSMIC TOP SECRET COSMIC TRÈS SECRET	PROTECTED PROTÉGÉ			CONFIDENTIAL CONFIDENTIEL	SECRET	TOP SECRET TRÈS SECRET
											A	B	C			
Information / Assets Renseignements / Biens Production																
IT Media / Support TI																
IT Link / Lien électronique																

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

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

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

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



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

PART D - AUTHORIZATION / PARTIE D - AUTORISATION

13. Organization Project Authority / Chargé de projet de l'organisme			
Name (print) - Nom (en lettres moulées)		Title - Titre	Signature
Susan Gasiorowski		A/Manager, IDM	Gasiorowski, Susan
<small>Digitally signed by Gasiorowski, Susan DN: C=CA, O=GC, OU=AGR, CN="Gasiorowski, Susan" Reason: I am the author of this document Location: Date: 2023.05.09 10:08:59-04'00' Foxit PDF Editor Version: 12.1.2</small>			
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date
343-552-0865		susan.gasiorowski@agr.gc.ca	
14. Organization Security Authority / Responsable de la sécurité de l'organisme			
Name (print) - Nom (en lettres moulées)		Title - Titre	Signature
Lise Levesque-Masson		SRCL Coordinator	Lise Levesque-Masson
<small>Digitally signed by Lise Levesque-Masson Date: 2023.12.15 13:45:37 -05'00'</small>			
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date
		Lise.levesque-Masson@AGR.GC.CA	
15. Are there additional instructions (e.g. Security Guide, Security Classification Guide) attached? Des instructions supplémentaires (p. ex. Guide de sécurité, Guide de classification de la sécurité) sont-elles jointes?			<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
16. Procurement Officer / Agent d'approvisionnement			
Name (print) - Nom (en lettres moulées)		Title - Titre	Signature
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date
17. Contracting Security Authority / Autorité contractante en matière de sécurité			
Name (print) - Nom (en lettres moulées)		Title - Titre	Signature
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date

Security Classification / Classification de sécurité
--

Instructions for completion of a Security Requirements Check List (SRCL)

The instruction sheet should remain attached until Block #17 has been completed.

GENERAL - PROCESSING THIS FORM

The project authority shall arrange to complete this form.

The organization security officer shall review and approve the security requirements identified in the form, in cooperation with the project authority.

The contracting security authority is the organization responsible for ensuring that the suppliers are compliant with the security requirements identified in the SRCL.

All requisitions and subsequent tender / contractual documents including subcontracts that contain PROTECTED and/or CLASSIFIED requirements must be accompanied by a completed SRCL.

It is important to identify the level of PROTECTED information or assets as Level "A," "B" or "C," when applicable; however, certain types of information may only be identified as "PROTECTED". No information pertaining to a PROTECTED and/or CLASSIFIED government contract may be released by suppliers, without prior written approval of the individual identified in Block 17 of this form.

The classification assigned to a particular stage in the contractual process does not mean that everything applicable to that stage is to be given the same classification. Every item shall be PROTECTED and/or CLASSIFIED according to its own content. If a supplier is in doubt as to the actual level to be assigned, they should consult with the individual identified in Block 17 of this form.

PART A - CONTRACT INFORMATION

Contract Number (top of the form)

This number must be the same as that found on the requisition and should be the one used when issuing an RFP or contract. This is a unique number (i.e. no two requirements will have the same number). A new SRCL must be used for each new requirement or requisition (e.g. new contract number, new SRCL, new signatures).

1. Originating Government Department or Organization

Enter the department or client organization name or the prime contractor name for which the work is being performed.

2. Directorate / Branch

This block is used to further identify the area within the department or organization for which the work will be conducted.

3. a) Subcontract Number

If applicable, this number corresponds to the number generated by the Prime Contractor to manage the work with its subcontractor.

b) Name and Address of Subcontractor

Indicate the full name and address of the Subcontractor if applicable.

4. Brief Description of Work

Provide a brief explanation of the nature of the requirement or work to be performed.

5. a) Will the supplier require access to Controlled Goods?

*The Defence Production Act (DPA) defines "Controlled Goods" as certain goods listed in the Export Control List, a regulation made pursuant to the *Export and Import Permits Act* (EIPA). Suppliers who examine, possess, or transfer Controlled Goods within Canada must register in the Controlled Goods Directorate or be exempt from registration. More information may be found at www.cgd.gc.ca.*

b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations?

The prime contractor and any subcontractors must be certified under the U.S./Canada Joint Certification Program if the work involves access to unclassified military data subject to the provisions of the Technical Data Control Regulations. More information may be found at www.dlis.dla.mil/jcp.

6. Indicate the type of access required

Identify the nature of the work to be performed for this requirement. The user is to select one of the following types:

a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets?

The supplier would select this option if they require access to PROTECTED and/or CLASSIFIED information or assets to perform the duties of the requirement.

b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted.

The supplier would select this option if they require regular access to government premises or a secure work site only. The supplier will not have access to PROTECTED and/or CLASSIFIED information or assets under this option.

c) Is this a commercial courier or delivery requirement with no overnight storage?

The supplier would select this option if there is a commercial courier or delivery requirement. The supplier will not be allowed to keep a package overnight. The package must be returned if it cannot be delivered.

7. Type of information / Release restrictions / Level of information

Identify the type(s) of information that the supplier may require access to, list any possible release restrictions, and if applicable, provide the level(s) of the information. The user can make multiple selections based on the nature of the work to be performed.

Departments must process SRCLs through PWGSC where:

- contracts that afford access to PROTECTED and/or CLASSIFIED foreign government information and assets;
- contracts that afford foreign contractors access to PROTECTED and/or CLASSIFIED Canadian government information and assets; or
- contracts that afford foreign or Canadian contractors access to PROTECTED and/or CLASSIFIED information and assets as defined in the documents entitled Identifying INFOSEC and INFOSEC Release.

a) Indicate the type of information that the supplier will be required to access

Canadian government information and/or assets

If Canadian information and/or assets are identified, the supplier will have access to PROTECTED and/or CLASSIFIED information and/or assets that are owned by the Canadian government.

NATO information and/or assets

If NATO information and/or assets are identified, this indicates that as part of this requirement, the supplier will have access to PROTECTED and/or CLASSIFIED information and/or assets that are owned by NATO governments. NATO information and/or assets are developed and/or owned by NATO countries and are not to be divulged to any country that is not a NATO member nation. Persons dealing with NATO information and/or assets must hold a NATO security clearance and have the required need-to-know.

Requirements involving CLASSIFIED NATO information must be awarded by PWGSC. PWGSC / CIISD is the Designated Security Authority for industrial security matters in Canada.

Foreign government information and/or assets

If foreign information and/or assets are identified, this requirement will allow access to information and/or assets owned by a country other than Canada.

b) Release restrictions

If **Not Releasable** is selected, this indicates that the information and/or assets are for **Canadian Eyes Only (CEO)**. Only Canadian suppliers based in Canada can bid on this type of requirement. NOTE: If Canadian information and/or assets coexists with CEO information and/or assets, the CEO information and/or assets must be stamped **Canadian Eyes Only (CEO)**.

If **No Release Restrictions** is selected, this indicates that access to the information and/or assets are not subject to any restrictions.

If **ALL NATO countries** is selected, bidders for this requirement must be from NATO member countries only.

NOTE: There may be multiple release restrictions associated with a requirement depending on the nature of the work to be performed. In these instances, a security guide should be added to the SRCL clarifying these restrictions. The security guide is normally generated by the organization's project authority and/or security authority.

c) Level of information

Using the following chart, indicate the appropriate level of access to information/assets the supplier must have to perform the duties of the requirement.

PROTECTED	CLASSIFIED	NATO
PROTECTED A	CONFIDENTIAL	NATO UNCLASSIFIED
PROTECTED B	SECRET	NATO RESTRICTED
PROTECTED C	TOP SECRET	NATO CONFIDENTIAL
	TOP SECRET (SIGINT)	NATO SECRET
		COSMIC TOP SECRET

8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets?

If Yes, the supplier personnel requiring access to COMSEC information or assets must receive a COMSEC briefing. The briefing will be given to the "holder" of the COMSEC information or assets. In the case of a "personnel assigned" type of contract, the customer department will give the briefing. When the supplier is required to receive and store COMSEC information or assets on the supplier's premises, the supplier's COMSEC Custodian will give the COMSEC briefings to the employees requiring access to COMSEC information or assets. If Yes, the Level of sensitivity must be indicated.

9. Will the supplier require access to extremely sensitive INFOSEC information or assets?

If Yes, the supplier must provide the Short Title of the material and the Document Number. Access to extremely sensitive INFOSEC information or assets will require that the supplier undergo a Foreign Ownership Control or Influence (FOCI) evaluation by CIISD.

PART B - PERSONNEL (SUPPLIER)

10. a) Personnel security screening level required

Identify the screening level required for access to the information/assets or client facility. More than one level may be identified depending on the nature of the work. Please note that Site Access screenings are granted for access to specific sites under prior arrangement with the Treasury Board of Canada Secretariat. A Site Access screening only applies to individuals, and it is not linked to any other screening level that may be granted to individuals or organizations.

RELIABILITY STATUS	CONFIDENTIAL	SECRET
TOP SECRET	TOP SECRET (SIGINT)	NATO CONFIDENTIAL
NATO SECRET	COSMIC TOP SECRET	SITE ACCESS

If multiple levels of screening are identified, a Security Classification Guide must be provided.

b) May unscreened personnel be used for portions of the work?

Indicating Yes means that portions of the work are not PROTECTED and/or CLASSIFIED and may be performed outside a secure environment by unscreened personnel. The following question must be answered if unscreened personnel will be used:

Will unscreened personnel be escorted?

If No, unscreened personnel may not be allowed access to sensitive work sites and must not have access to PROTECTED and/or CLASSIFIED information and/or assets.

If Yes, unscreened personnel must be escorted by an individual who is cleared to the required level of security in order to ensure there will be no access to PROTECTED and/or CLASSIFIED information and/or assets at the work site.

PART C - SAFEGUARDS (SUPPLIER)

11. INFORMATION / ASSETS

a) Will the supplier be required to receive and store PROTECTED and/or CLASSIFIED information and/or assets on its site or premises?

If Yes, specify the security level of the documents and/or equipment that the supplier will be required to safeguard at their own site or premises using the summary chart.

b) Will the supplier be required to safeguard COMSEC information or assets?

If Yes, specify the security level of COMSEC information or assets that the supplier will be required to safeguard at their own site or premises using the summary chart.

PRODUCTION

c) Will the production (manufacture, repair and/or modification) of PROTECTED and/or CLASSIFIED material and/or equipment occur at the supplier's site or premises?

Using the summary chart, specify the security level of material and/or equipment that the supplier manufactured, repaired and/or modified and will be required to safeguard at their own site or premises.

INFORMATION TECHNOLOGY (IT)

d) Will the supplier be required to use its IT systems to electronically process and/or produce or store PROTECTED and/or CLASSIFIED information and/or data?

If Yes, specify the security level in the summary chart. This block details the information and/or data that will be electronically processed or produced and stored on a computer system. The client department and/or organization will be required to specify the IT security requirements for this procurement in a separate technical document. The supplier must also direct their attention to the following document: Treasury Board of Canada Secretariat - Operational Security Standard: Management of Information Technology Security (MITS).

e) Will there be an electronic link between the supplier’s IT systems and the government department or agency?

If Yes, the supplier must have their IT system(s) approved. The Client Department must also provide the Connectivity Criteria detailing the conditions and the level of access for the electronic link (usually not higher than PROTECTED B level).

SUMMARY CHART

For users completing the form **manually** use the summary chart below to indicate the category(ies) and level(s) of safeguarding required at the supplier’s site(s) or premises.

For users completing the form **online** (via the Internet), the Summary Chart is automatically populated by your responses to previous questions.

PROTECTED	CLASSIFIED	NATO	COMSEC
PROTECTED A	CONFIDENTIAL	NATO RESTRICTED	PROTECTED A
PROTECTED B	SECRET	NATO CONFIDENTIAL	PROTECTED B
PROTECTED C	TOP SECRET	NATO SECRET	PROTECTED C
	TOP SECRET (SIGINT)	COSMIC TOP SECRET	CONFIDENTIAL
			SECRET
			TOP SECRET

12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED?

If Yes, classify this form by annotating the top and bottom in the area entitled “Security Classification”.

b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED?

If Yes, classify this form by annotating the top and bottom in the area entitled “Security Classification” and indicate with attachments (e.g. SECRET with Attachments).

PART D - AUTHORIZATION

13. Organization Project Authority

This block is to be completed and signed by the appropriate project authority within the client department or organization (e.g. the person responsible for this project or the person who has knowledge of the requirement at the client department or organization). This person may on occasion be contacted to clarify information on the form.

14. Organization Security Authority

This block is to be signed by the Departmental Security Officer (DSO) (or delegate) of the department identified in Block 1, or the security official of the prime contractor.

15. Are there additional instructions (e.g. Security Guide, Security Classification Guide) attached?

A Security Guide or Security Classification Guide is used in conjunction with the SRCL to identify additional security requirements which do not appear in the SRCL, and/or to offer clarification to specific areas of the SRCL.

16. Procurement Officer

This block is to be signed by the procurement officer acting as the contract or subcontract manager.

17. Contracting Security Authority

This block is to be signed by the Contract Security Official. Where PWGSC is the Contract Security Authority, Canadian and International Industrial Security Directorate (CIISD) will complete this block.

Instructions pour établir la Liste de vérification des exigences relatives à la sécurité (LVERS)

La feuille d'instructions devrait rester jointe au formulaire jusqu'à ce que la case 17 ait été remplie.

GÉNÉRALITÉS - TRAITEMENT DU PRÉSENT FORMULAIRE

Le responsable du projet doit faire remplir ce formulaire.

L'agent de sécurité de l'organisation doit revoir et approuver les exigences de sécurité qui figurent dans le formulaire, en collaboration avec le responsable du projet.

Le responsable de la sécurité des marchés est le responsable chargé de voir à ce que les fournisseurs se conforment aux exigences de sécurité mentionnées dans la LVERS.

Toutes les demandes d'achat ainsi que tous les appels d'offres et les documents contractuels subséquents, y compris les contrats de sous-traitance, qui comprennent des exigences relatives à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS doivent être accompagnés d'une LVERS dûment remplie.

Il importe d'indiquer si les renseignements ou les biens PROTÉGÉS sont de niveau A, B ou C, le cas échéant; cependant, certains types de renseignements peuvent être indiqués par la mention « PROTÉGÉ » seulement. Aucun renseignement relatif à un contrat gouvernemental PROTÉGÉ ou CLASSIFIÉ ne peut être divulgué par les fournisseurs sans l'approbation écrite préalable de la personne dont le nom figure à la case 17 de ce formulaire.

La classification assignée à un stade particulier du processus contractuel ne signifie pas que tout ce qui se rapporte à ce stade doit recevoir la même classification. Chaque article doit être PROTÉGÉ et/ou CLASSIFIÉ selon sa propre nature. Si un fournisseur ne sait pas quel niveau de classification assigner, il doit consulter la personne dont le nom figure à la case 17 de ce formulaire.

PARTIE A - INFORMATION CONTRACTUELLE

Numéro du contrat (au haut du formulaire)

Ce numéro doit être le même que celui utilisé sur la demande d'achat et services et devrait être celui utilisé dans la DDP ou dans le contrat. Il s'agit d'un numéro unique (c.-à-d. que le même numéro ne sera pas attribué à deux besoins distincts). Une nouvelle LVERS doit être utilisée pour chaque nouveau besoin ou demande (p. ex. un nouveau numéro de contrat, une nouvelle LVERS, de nouvelles signatures).

1. Ministère ou organisme gouvernemental d'origine

Inscrire le nom du ministère ou de l'organisme client ou le nom de l'entrepreneur principal pour qui les travaux sont effectués.

2. Direction générale ou Direction

Cette case peut servir à fournir plus de détails quant à la section du ministère ou de l'organisme pour qui les travaux sont effectués.

3. a) Numéro du contrat de sous-traitance

S'il y a lieu, ce numéro correspond au numéro généré par l'entrepreneur principal pour gérer le travail avec son sous-traitant.

b) Nom et adresse du sous-traitant

Indiquer le nom et l'adresse au complet du sous-traitant, s'il y a lieu.

4. Brève description du travail

Donner un bref aperçu du besoin ou du travail à exécuter.

5. a) Le fournisseur aura-t-il accès à des marchandises contrôlées?

La *Loi sur la production de défense* (LPD) définit « marchandises contrôlées » comme désignant certains biens énumérés dans la Liste des marchandises d'exportation contrôlée, un règlement établi en vertu de la *Loi sur les licences d'exportation et d'importation* (LLEI). Les fournisseurs qui examinent, possèdent ou transfèrent des marchandises contrôlées à l'intérieur du Canada doivent s'inscrire à la Direction des marchandises contrôlées ou être exemptés de l'inscription. On trouvera plus d'information à l'adresse www.cgp.gc.ca.

b) Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques?

L'entrepreneur et tout sous-traitant doivent être accrédités en vertu du Programme mixte d'agrément Etats-Unis / Canada si le travail comporte l'accès à des données militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques. On trouvera plus d'information à l'adresse www.dlis.dla.mil/jcp/.

6. Indiquer le type d'accès requis

Indiquer la nature du travail à exécuter pour répondre à ce besoin. L'utilisateur doit choisir un des types suivants :

a) Le fournisseur et ses employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS?

Le fournisseur choisit cette option s'il doit avoir accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS pour accomplir le travail requis.

b) Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé.

Le fournisseur choisit cette option seulement s'il doit avoir accès régulièrement aux locaux du gouvernement ou à un lieu de travail protégé. Le fournisseur n'aura pas accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS en vertu de cette option.

c) S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit?

Le fournisseur choisit cette option s'il y a nécessité de recourir à un service de messagerie ou de livraison commerciale. Le fournisseur ne sera pas autorisé à garder un colis pendant la nuit. Le colis doit être retourné s'il ne peut pas être livré.

7. Type d'information / Restrictions relatives à la diffusion / Niveau d'information

Indiquer le ou les types d'information auxquels le fournisseur peut devoir avoir accès, énumérer toutes les restrictions possibles relatives à la diffusion, et, s'il y a lieu, indiquer le ou les niveaux d'information. L'utilisateur peut faire plusieurs choix selon la nature du travail à exécuter.

Les ministères doivent soumettre la LVERS à TPSGC lorsque:

- les marchés prévoient l'accès aux renseignements et aux biens de nature PROTÉGÉS et/ou CLASSIFIÉS étrangers ;
- les marchés prévoient aux entrepreneurs étrangers l'accès aux renseignements et aux biens de nature PROTÉGÉS et/ou CLASSIFIÉS canadiens; ou
- les marchés prévoient aux entrepreneurs étrangers ou canadiens l'accès aux renseignements et aux biens de nature PROTÉGÉS et/ou CLASSIFIÉS tels que définis dans les documents intitulés Moyens INFOSEC détermination et Divulgateion de INFOSEC.

a) Indiquer le type d'information auquel le fournisseur devra avoir accès

Renseignements et/ou biens du gouvernement canadien

Si des renseignements et/ou des biens canadiens sont indiqués, le fournisseur aura accès à des renseignements et/ou à des biens PROTÉGÉS et/ou CLASSIFIÉS appartenant au gouvernement canadien.

Renseignements et/ou biens de l'OTAN

Si des renseignements et/ou des biens de l'OTAN sont indiqués, cela signifie que, dans le cadre de ce besoin, le fournisseur aura accès à des renseignements et/ou à des biens PROTÉGÉS et/ou CLASSIFIÉS appartenant à des gouvernements membres de l'OTAN. Les renseignements et/ou les biens de l'OTAN sont élaborés par des pays de l'OTAN ou leur appartiennent et ne doivent être divulgués à aucun pays qui n'est pas un pays membre de l'OTAN. Les personnes qui manient des renseignements et/ou des biens de l'OTAN doivent détenir une autorisation de sécurité de l'OTAN et avoir besoin de savoir.

Les contrats comportant des renseignements CLASSIFIÉS de l'OTAN doivent être attribués par TPSGC. La DSICI de TPSGC est le responsable de la sécurité désigné relativement aux questions de sécurité industrielle au Canada.

Renseignements et/ou biens de gouvernements étrangers

Si des renseignements et/ou des biens de gouvernements étrangers sont indiqués, ce besoin permettra l'accès à des renseignements et/ou à des biens appartenant à un pays autre que le Canada.

b) Restrictions relatives à la diffusion

Si **À ne pas diffuser** est choisi, cela indique que les renseignements et/ou les biens sont **réservés aux Canadiens**. Seuls des fournisseurs canadiens installés au Canada peuvent soumissionner ce genre de besoin. NOTA : Si des renseignements et/ou des biens du gouvernement canadien coexistent avec des renseignements et/ou des biens réservés aux Canadiens, ceux-ci doivent porter la mention **Réservé aux Canadiens**.

Si **Aucune restriction relative à la diffusion** est choisi, cela indique que l'accès aux renseignements et/ou aux biens n'est assujéti à aucune restriction.

Si **Tous les pays de l'OTAN** est choisi, les soumissionnaires doivent appartenir à un pays membre de l'OTAN.

NOTA : Il peut y avoir plus d'une restriction s'appliquant à une demande, selon la nature des travaux à exécuter. Pour ce genre de contrat, un guide de sécurité doit être joint à la LVERS afin de clarifier les restrictions. Ce guide est généralement préparé par le chargé de projet et/ou le responsable de la sécurité de l'organisme.

c) Niveau d'information

À l'aide du tableau ci-dessous, indiquer le niveau approprié d'accès aux renseignements et/ou aux biens que le fournisseur doit avoir pour accomplir les travaux requis.

PROTÉGÉ	CLASSIFIÉ	NATO
PROTÉGÉ A	CONFIDENTIEL	NATO NON CLASSIFIÉ
PROTÉGÉ B	SECRET	NATO DIFFUSION RESTREINTE
PROTÉGÉ C	TRÈS SECRET	NATO CONFIDENTIEL
	TRÈS SECRET (SIGINT)	NATO SECRET
		COSMIC TRÈS SECRET

8. Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS?

Si la réponse est Oui, les membres du personnel du fournisseur qui doivent avoir accès à des renseignements ou à des biens COMSEC doivent participer à une séance d'information COMSEC. Cette séance sera donnée au « détenteur autorisé » des renseignements ou des biens COMSEC. Dans le cas des contrats du type « personnel affecté », cette séance sera donnée par le ministère client. Lorsque le fournisseur doit recevoir et conserver, dans ses locaux, des renseignements ou des biens COMSEC, le responsable de la garde des renseignements ou des biens COMSEC de l'entreprise donnera la séance d'information COMSEC aux membres du personnel qui doivent avoir accès à des renseignements ou à des biens COMSEC.

9. Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate?

Si la réponse est Oui, le fournisseur doit indiquer le titre abrégé du document, le numéro du document et le niveau de sensibilité. L'accès à des renseignements ou à des biens extrêmement délicats INFOSEC exigera que le fournisseur fasse l'objet d'une vérification Participation, contrôle et influence étrangers (PCIE) effectuée par la DSICI.

PARTIE B - PERSONNEL (FOURNISSEUR)

10. a) Niveau de contrôle de la sécurité du personnel requis

Indiquer le niveau d'autorisation de sécurité que le personnel doit détenir pour avoir accès aux renseignements, aux biens ou au site du client. Selon la nature du travail, il peut y avoir plus d'un niveau de sécurité. Veuillez noter que des cotes de sécurité sont accordées pour l'accès à des sites particuliers, selon des dispositions antérieures prises auprès du Secrétariat du Conseil du Trésor du Canada. La cote de sécurité donnant accès à un site s'applique uniquement aux personnes et n'est liée à aucune autre autorisation de sécurité accordée à des personnes ou à des organismes.

COTE DE FIABILITÉ	CONFIDENTIEL	SECRET
TRÈS SECRET	TRÈS SECRET (SIGINT)	NATO CONFIDENTIEL
NATO SECRET	COSMIC TRÈS SECRET	ACCÈS AUX EMBLEMES

Si plusieurs niveaux d'autorisation de sécurité sont indiqués, un guide de classification de sécurité doit être fourni.

b) Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail?

Si la réponse est Oui, cela veut dire que certaines tâches ne sont pas PROTÉGÉES et/ou CLASSIFIÉES et peuvent être exécutées à l'extérieur d'un environnement sécurisé par du personnel n'ayant pas d'autorisation de sécurité. Il faut répondre à la question suivante si l'on a recours à du personnel n'ayant pas d'autorisation de sécurité :

Le personnel n'ayant pas d'autorisation de sécurité sera-t-il escorté?

Si la réponse est Non, le personnel n'ayant pas d'autorisation de sécurité ne pourra pas avoir accès à des lieux de travail dont l'accès est réglementé ni à des renseignements et/ou à des biens PROTÉGÉS et/ou CLASSIFIÉS.

Si la réponse est Oui, le personnel n'ayant pas d'autorisation de sécurité devra être escorté par une personne détenant la cote de sécurité requise, pour faire en sorte que le personnel en question n'ait pas accès à des renseignements et/ou à des biens PROTÉGÉS et/ou CLASSIFIÉS sur les lieux de travail.

PARTIE C - MESURES DE PROTECTION (FOURNISSEUR)

11. RENSEIGNEMENTS / BIENS :

a) Le fournisseur sera-t-il tenu de recevoir et d'entreposer sur place des renseignements ou des biens PROTÉGÉS et/ou CLASSIFIÉS?

Si la réponse est Oui, préciser, à l'aide du tableau récapitulatif, le niveau de sécurité des documents ou de l'équipement que le fournisseur devra protéger dans ses installations.

b) Le fournisseur sera-t-il tenu de protéger des renseignements ou des biens COMSEC?

Si la réponse est Oui, préciser, à l'aide du tableau récapitulatif, le niveau de sécurité des renseignements ou des biens COMSEC que le fournisseur devra protéger dans ses installations.

PRODUCTION

c) Les installations du fournisseur serviront-elles à la production (fabrication et/ou réparation et/ou modification) de matériel PROTÉGÉ et/ou CLASSIFIÉ?

Préciser, à l'aide du tableau récapitulatif, le niveau de sécurité du matériel que le fournisseur fabriquera, réparera et/ou modifiera et devra protéger dans ses installations.

TECHNOLOGIE DE L'INFORMATION (TI)

d) Le fournisseur sera-t-il tenu d'utiliser ses propres systèmes informatiques pour traiter, produire ou stocker électroniquement des renseignements ou des données PROTÉGÉS et/ou CLASSIFIÉS?

Si la réponse est Oui, préciser le niveau de sécurité à l'aide du tableau récapitulatif. Cette case porte sur les renseignements qui seront traités ou produits électroniquement et stockés dans un système informatique. Le ministère/organisme client devra préciser les exigences en matière de sécurité de la TI relativement à cet achat dans un document technique distinct. Le fournisseur devra également consulter le document suivant : Secrétariat du Conseil du Trésor du Canada – Norme opérationnelle de sécurité : Gestion de la sécurité des technologies de l'information (GSTI).

e) Y aura-t-il un lien électronique entre les systèmes informatiques du fournisseur et celui du ministère ou de l'agence gouvernementale?

Si la réponse est Oui, le fournisseur doit faire approuver ses systèmes informatiques. Le ministère client doit aussi fournir les critères de connectivité qui décrivent en détail les conditions et le niveau de sécurité relativement au lien électronique (habituellement pas plus haut que le niveau PROTÉGÉ B).

TABLEAU RÉCAPITULATIF

Les utilisateurs qui remplissent le formulaire **manuellement** doivent utiliser le tableau récapitulatif ci-dessous pour indiquer, pour chaque catégorie, les niveaux de sauvegarde requis aux installations du fournisseur.

Dans le cas des utilisateurs qui remplissent le formulaire **en ligne** (par Internet), les réponses aux questions précédentes sont automatiquement saisies dans le tableau récapitulatif.

PROTÉGÉ	CLASSIFIÉ	NATO	COMSEC
PROTÉGÉ A	CONFIDENTIEL	NATO DIFFUSION RESTREINTE	PROTÉGÉ A
PROTÉGÉ B	SECRET	NATO CONFIDENTIEL	PROTÉGÉ B
PROTÉGÉ C	TRÈS SECRET	NATO SECRET	PROTÉGÉ C
	TRÈS SECRET (SIGINT)	COSMIC TRÈS SECRET	CONFIDENTIEL
			SECRET
			TRÈS SECRET

12. a) La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE?

Si la réponse est Oui, classifier le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de

sécurité » au haut et au bas du formulaire.

b) La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE?

Si la réponse est Oui, classifier le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire et indiquer qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).

PARTIE D - AUTORISATION

13. Chargé de projet de l'organisme

Cette case doit être remplie et signée par le chargé de projet pertinent (c.-à-d. la personne qui est responsable de ce projet ou qui connaît le besoin au ministère ou à l'organisme client. On peut, à l'occasion, communiquer avec cette personne pour clarifier des renseignements figurant sur le formulaire.

14. Responsable de la sécurité de l'organisme

Cette case doit être signée par l'agent de la sécurité du ministère (ASM) du ministère indiqué à la case 1 ou par son remplaçant ou par le responsable de la sécurité du fournisseur.

15. Des instructions supplémentaires (p. ex. Guide de sécurité, Guide de classification de la sécurité) sont-elles jointes?

Un Guide de sécurité ou un Guide de classification de sécurité sont utilisés de concert avec la LVERS pour faire part d'exigences supplémentaires en matière de sécurité qui n'apparaissent pas dans la LVERS et/ou pour éclaircir certaines parties de la LVERS.

16. Agent d'approvisionnement

Cette case doit être signée par l'agent des achats qui fait fonction de gestionnaire du contrat ou du contrat de sous-traitance.

17. Autorité contractante en matière de sécurité

Cette case doit être signée par l'agent de la sécurité du marché. Lorsque TPSGC est le responsable de la sécurité du marché, la Direction de la sécurité industrielle canadienne et internationale (DSIC) doit remplir cette case.