



Request for Proposal: 100021893

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Attention:  
Ekaterina Suvorova

<b>Title: Better Understanding Canadians to Improve the Client Experience - SaaS</b>	
<b>Solicitation No.:</b> 100021893	<b>Date:</b> June 22, 2023
<b>File No. – N° de dossier:</b>	
<b><u>Solicitation Closes</u></b>  At 02 :00 PM / 14 h On July 18, 2023	<b>Time Zone</b> Eastern Standard Time (EST)
<b>Address Inquiries to :</b> Ekaterina Suvorova at <a href="mailto:nc-solicitations-gd@hrsdcc.gc.ca">nc-solicitations-gd@hrsdcc.gc.ca</a>	
<b>Destination:</b> See Herein	

**REQUEST FOR PROPOSAL**

**Proposal To: Employment and Social Development Canada**

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

**Instructions : See Herein**

**Vendor/Firm Name and address**

<b>Vendor/firm Name and address :</b>	
<b>Facsimile No. :</b> <b>Telephone No. :</b>	
<b>Name and title of person authorized to sign on behalf of Vendor/firm (type or print):</b>	
<b>Name:</b>	
<b>Title:</b>	
<b>Signature:</b>	<b>Date:</b>



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## **PART 1 - GENERAL INFORMATION**

### **1.1 Introduction**

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

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

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

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

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

Part 5 Certifications and Additional Information: includes the certifications and additional information 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 General Conditions, Statement of Work, the Basis of Payment, the Electronic Payment Instruments, the Task Authorization Form, the Service Level Agreement.

The Attachments include: Attachment 1 to Part 3 "Pricing Schedule" and Attachment 1 to Part 4 "Bid Evaluation Criteria".

### **1.2 Summary**

1.2.1 This bid solicitation is being issued to satisfy the requirement of the Client Insights and Business Intelligence (CIBI) Division of the Employment and Social Development Canada (the "Client") for a subscription to a Software as a Service Solution (SaaS) including comprehensive and up-to-date set of data variables comprising Canadian social, demographic, behavioral and psychographic attributes, and support, training, and data analytics services. Under the resulting contract, the contractor will also need to provide professional services on-and-when requested basis for additional support and data analytics.

1.2.2 It is intended to result in the award of one contract. The period of the Contract is for one year. The start date of the services will be once the security assessment has been completed and the services accepted. The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to three additional one one-year periods under the same conditions.

1.2.3 The requirement is subject to the provisions of the Canadian Free Trade Agreement (CFTA), Canada–Chile Free Trade Agreement, Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP), Canada–Colombia Free Trade Agreement, Canada–European Union Comprehensive Economic and Trade Agreement (CETA), Canada–Honduras Free Trade Agreement, Canada–Korea Free Trade Agreement, Canada–Panama Free Trade Agreement, Canada–Peru Free Trade Agreement,



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Canada-UK Trade Continuity Agreement (Canada-UK TCA),  
Canada-Ukraine Free Trade Agreement,  
World Trade Organization-Agreement on Government Procurement (WTO-GPA) if it is in force.

- 1.2.4 There are security requirements associated with this requirement. For additional information, consult Part 6 - Security Requirements, and Part 7 - Resulting Contract Clauses.

### **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

#### 2.1.1 Integrity provisions—bid

1. The *Ineligibility and Suspension Policy* (the “Policy”) in effect on the date the bid solicitation is issued, and all related Directives in effect on that date, are incorporated by reference into, and form a binding part of the bid solicitation. The Bidder 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 bid solicitation, the Bidder 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, 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 in response to this bid solicitation, the Bidder 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 Bidder or a third party for purposes of making a determination of ineligibility or suspension;
  - d. it has provided with its bid 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 Bidder is unable to provide any of the certifications required by subsection 4, it must submit with its bid a completed Integrity Declaration Form, which can be found at [\*Declaration form for procurement\*](#).
6. Canada will declare non-responsive any bid 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 Bidder provided a false or misleading certification or declaration, Canada may terminate the Contract for default. Pursuant to the Policy, Canada may also determine the Bidder to be ineligible for award of a contract for providing a false or misleading certification or declaration.



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### 2.1.2 Standard instructions, clauses and conditions

Pursuant to the *Department of Public Works and Government Services Act* ( S.C. 1996, c.16), the instructions, clauses and conditions identified in the bid solicitation and resulting contract by number, date, and title are incorporated by reference into and form part of the bid solicitation and resulting contract as though expressly set out in the bid solicitation and resulting contract.

### 2.1.3 Definition of Bidder

"Bidder" means the person or entity (or, in the case of a joint venture, the persons or entities) submitting a bid to perform a contract for goods, services or both. It does not include the parent, subsidiaries or other affiliates of the Bidder, or its subcontractors.

### 2.1.4 Submission of bids

1. Bids must be submitted only to Employment and Social Development Canada (ESDC) by the date, time and place or email address indicated on page 1 of the bid solicitation.
2. Bidders must ensure e-mails do not exceed 13MB to avoid problems with transmission. For security reasons, any information submitted on a USB key will not be evaluated.
3. Canada requires that each bid, at solicitation closing date and time or upon request from the Contracting Authority, be signed by the Bidder or by an authorized representative of the Bidder. If a bid is submitted by a joint venture, it must be in accordance with section 2.1.15.
4. It is the Bidder's responsibility to:
  - a. obtain clarification of the requirements contained in the bid solicitation, if necessary, before submitting a bid;
  - b. prepare its bid in accordance with the instructions contained in the bid solicitation;
  - c. submit by solicitation closing date and time a complete bid;
  - d. send its bid only to the e-mail address specified on Page 1;
  - e. ensure that the Bidder's name, return address, bid solicitation number, and solicitation closing date and time are clearly visible on the bid; and,
  - f. provide a comprehensible and sufficiently detailed bid, including all requested pricing details, that will permit a complete evaluation in accordance with the criteria set out in the bid solicitation.
5. Canada will make available Notices of Proposed Procurement (NPP), bid solicitations and related documents for download through the Government Electronic Tendering Service (GETS). Canada is not responsible and will not assume any liabilities whatsoever for the information found on websites of third parties. In the event an NPP, bid solicitation or related documentation would be amended, Canada will not be sending notifications. Canada will post all amendments, including significant enquiries received and their replies, using GETS. It is the sole responsibility of the Bidder to regularly consult GETS for the most up-to-date information. Canada will not be liable for any oversight on the Bidder's part nor for notification services offered by a third party.
6. Bids will remain open for acceptance for a period of not less than 90 days from the closing date of the bid solicitation, unless specified otherwise in the bid solicitation. Canada reserves the right to seek an extension of the bid validity period from all responsive bidders in writing, within a minimum of 3 days before the end of the bid validity period. If the extension is accepted by all responsive bidders, Canada will continue with the evaluation of the bids. If the extension is not accepted by all responsive bidders, Canada will, at its sole discretion, either continue with the evaluation of the bids of those who have accepted the extension or cancel the solicitation.
7. Bid documents and supporting information may be submitted in either English or French.



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8. Bids received on or before the stipulated bid solicitation closing date and time will become the property of Canada and will not be returned. All bids will be treated as confidential, subject to the provisions of the [Access to Information Act](#) ( R.S. 1985, c. A-1) and the [Privacy Act](#) ( R.S., 1985, c. P-21).
9. Unless specified otherwise in the bid solicitation, Canada will evaluate only the documentation provided with a bidder's bid. Canada will not evaluate information such as references to Web site addresses where additional information can be found, or technical manuals or brochures not submitted with the bid.
10. A bid cannot be assigned or transferred in whole or in part.

#### **2.1.5 Late bids**

Canada will return or delete bids delivered after the stipulated solicitation closing date and time, unless they qualify as a delayed bid as described in section 2.1.6.

Late physical bids will be returned, and for bids submitted electronically, the late bids will be deleted.

#### **2.1.6 Legal capacity**

The Bidder must have the legal capacity to contract. If the Bidder is a sole proprietorship, a partnership or a corporate body, the Bidder must provide, if requested by the Contracting Authority, a statement and any requested supporting documentation indicating the laws under which it is registered or incorporated together with the registered or corporate name and place of business. This also applies to bidders submitting a bid as a joint venture.

#### **2.1.7 Rights of Canada**

Canada reserves the right to:

- a. reject any or all bids received in response to the bid solicitation;
- b. enter into negotiations with bidders on any or all aspects of their bids;
- c. accept any bid in whole or in part without negotiations;
- d. cancel the bid solicitation at any time;
- e. reissue the bid solicitation;
- f. if no responsive bids are received and the requirement is not substantially modified, reissue the bid solicitation by inviting only the bidders who bid to resubmit bids within a period designated by Canada; and,
- g. negotiate with the sole responsive Bidder to ensure best value to Canada.

#### **2.1.8 Rejection of bid**

1. Canada may reject a bid where any of the following circumstances is present:
  - a. the Bidder is subject to a Vendor Performance Corrective Measure, under the Vendor Performance Corrective Measure Policy, which renders the Bidder ineligible to bid on the requirement;
  - b. an employee, or subcontractor included as part of the bid, is subject to a Vendor Performance Corrective Measure, under the Vendor Performance Corrective Measure Policy, which would render that employee or subcontractor ineligible to bid on the requirement, or the portion of the requirement the employee or subcontractor is to perform;
  - c. the Bidder is bankrupt or where, for whatever reason, its activities are rendered inoperable for an extended period;
  - d. evidence, satisfactory to Canada, of fraud, bribery, fraudulent misrepresentation or failure to comply with any law protecting individuals against any manner of discrimination, has been received with respect to the Bidder, any of its employees or any subcontractor included as part of the bid;





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- e. evidence satisfactory to Canada that based on past conduct or behavior, the Bidder, a subcontractor or a person who is to perform the Work is unsuitable or has conducted himself/herself improperly;
  - f. with respect to current or prior transactions with the Government of Canada:
    - i. Canada has exercised its contractual remedies of suspension or termination for default with respect to a contract with the Bidder, any of its employees or any subcontractor included as part of the bid;
    - ii. Canada determines that the Bidder's performance on other contracts, including the efficiency and workmanship as well as the extent to which the Bidder performed the Work in accordance with contractual clauses and conditions, is sufficiently poor to jeopardize the successful completion of the requirement being bid on.
2. Where Canada intends to reject a bid pursuant to a provision of subsection 1. (f), the Contracting Authority will so inform the Bidder and provide the Bidder 10 days within which to make representations, before making a final decision on the bid rejection.
3. Canada reserves the right to apply additional scrutiny, in particular, when multiple bids are received in response to a bid solicitation from a single bidder or a joint venture. Canada reserves the right to:
- a. reject any or all of the bids submitted by a single bidder or joint venture if their inclusion in the evaluation has the effect of prejudicing the integrity and fairness of the process, or;
  - b. reject any or all of the bids submitted by a single bidder or joint venture if their inclusion in the procurement process would distort the solicitation evaluation, and would cause a result that would not reasonably have been expected under prevailing market conditions and/or would not provide good value to Canada.

#### **2.1.9 Communications—solicitation period**

To ensure the integrity of the competitive bid process, enquiries and other communications regarding the bid solicitation must be directed only to the Contracting Authority identified in the bid solicitation. Failure to comply with this requirement may result in the bid being declared non-responsive.

To ensure consistency and quality of information provided to bidders, significant enquiries received and their replies will be posted on the Government Electronic Tendering Service (GETS). For further information, consult subsection 3 of section 2.1.4.

#### **2.1.10 Price justification**

In the event that the Bidder's bid is the sole responsive bid received, the Bidder must provide, on Canada's request, one or more of the following price justification:

- a. a current published price list indicating the percentage discount available to Canada; or
- b. a copy of paid invoices for the like quality and quantity of the goods, services or both sold to other customers; or
- c. a price breakdown showing the cost of direct labour, direct materials, purchased items, engineering and plant overheads, general and administrative overhead, transportation, etc., and profit; or
- d. price or rate certifications; or
- e. any other supporting documentation as requested by Canada.

#### **2.1.11 Bid costs**



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No payment will be made for costs incurred in the preparation and submission of a bid in response to the bid solicitation. Costs associated with preparing and submitting a bid, as well as any costs incurred by the Bidder associated with the evaluation of the bid, are the sole responsibility of the Bidder.

#### **2.1.12 Conduct of evaluation**

1. In conducting its evaluation of the bids, Canada may, but will have no obligation to, do the following:
  - a. seek clarification or verification from bidders regarding any or all information provided by them with respect to the bid solicitation;
  - b. contact any or all references supplied by bidders to verify and validate any information submitted by them;
  - c. request, before award of any contract, specific information with respect to bidders' legal status;
  - d. conduct a survey of bidders' facilities and/or examine their technical, managerial, and financial capabilities to determine if they are adequate to meet the requirements of the bid solicitation;
  - e. correct any error in the extended pricing of bids by using unit pricing and any error in quantities in bids to reflect the quantities stated in the bid solicitation; in the case of error in the extension of prices, the unit price will govern.
  - f. verify any information provided by bidders through independent research, use of any government resources or by contacting third parties;
  - g. interview, at the sole costs of bidders, any bidder and/or any or all of the resources proposed by bidders to fulfill the requirement of the bid solicitation.
2. Bidders will have the number of days specified in the request by the Contracting Authority to comply with any request related to any of the above items. Failure to comply with the request may result in the bid being declared non-responsive.

#### **2.1.13 Joint venture**

1. A joint venture is an association of two or more parties who combine their money, property, knowledge, expertise or other resources in a single joint business enterprise, sometimes referred as a consortium, to bid together on a requirement. Bidders who bid as a joint venture must indicate clearly that it is a joint venture and provide the following information:
  - a. the name of each member of the joint venture;
  - b. the Procurement Business Number of each member of the joint venture;
  - c. the name of the representative of the joint venture, i.e. the member chosen by the other members to act on their behalf, if applicable;
  - d. the name of the joint venture, if applicable.
2. If the information is not clearly provided in the bid, the Bidder must provide the information on request from the Contracting Authority.
3. The bid and any resulting contract must be signed by all the members of the joint venture unless one member has been appointed to act on behalf of all members of the joint venture. The Contracting Authority may, at any time, require each member of the joint venture to confirm that the representative has been appointed with full authority to act as its representative for the purposes of the bid solicitation and any resulting contract. If a contract is awarded to a joint venture, all members of the joint venture will be jointly and severally or solitarily liable for the performance of any resulting contract.

#### **2.1.14 Conflict of interest—unfair advantage**



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1. In order to protect the integrity of the procurement process, bidders are advised that Canada may reject a bid in the following circumstances:
  - a. if the Bidder, any of its subcontractors, any of their respective employees or former employees was involved in any manner in the preparation of the bid solicitation or in any situation of conflict of interest or appearance of conflict of interest;
  - b. if the Bidder, any of its subcontractors, any of their respective employees or former employees had access to information related to the bid solicitation that was not available to other bidders and that would, in Canada's opinion, give or appear to give the Bidder an unfair advantage.
2. The experience acquired by a bidder who is providing or has provided the goods and services described in the bid solicitation (or similar goods or services) will not, in itself, be considered by Canada as conferring an unfair advantage or creating a conflict of interest. This bidder remains however subject to the criteria established above.
3. Where Canada intends to reject a bid under this section, the Contracting Authority will inform the Bidder and provide the Bidder an opportunity to make representations before making a final decision. Bidders who are in doubt about a particular situation should contact the Contracting Authority before bid closing. By submitting a bid, the Bidder represents that it does not consider itself to be in conflict of interest nor to have an unfair advantage. The Bidder acknowledges that it is within Canada's sole discretion to determine whether a conflict of interest, unfair advantage or an appearance of conflict of interest or unfair advantage exists.

#### **2.1.15 Entire requirement**

The bid solicitation documents contain all the requirements relating to the bid solicitation. Any other information or documentation provided to or obtained by a bidder from any source are not relevant. Bidders should not assume that practices used under previous contracts will continue, unless they are described in the bid solicitation. Bidders should also not assume that their existing capabilities meet the requirements of the bid solicitation simply because they have met previous requirements.

#### **2.1.16 Further information**

For further information, bidders may contact the Contracting Authority identified in the bid solicitation.

#### **2.1.17 Code of Conduct for Procurement—bid**

The *Code of Conduct for Procurement* provides that Bidders must respond to bid solicitations in an honest, fair and comprehensive manner, accurately reflect their capacity to satisfy the requirements set out in the bid solicitation and resulting contract, submit bids and enter into contracts only if they will fulfill all obligations of the Contract. By submitting a bid, the Bidder is certifying that it is complying with the *Code of Conduct for Procurement*. Failure to comply with the *Code of Conduct for Procurement* may render the bid non-responsive.

#### **2.2 Former Public Servant**

Contracts awarded to former public servants (FPS) in receipt of a pension or of a lump sum payment must bear the closest public scrutiny, and reflect fairness in the spending of public funds. In order to comply with Treasury Board policies and directives on contracts awarded to FPS, 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:



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

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

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

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

#### **Former Public Servant in Receipt of a Pension**

As per the above definitions, is the 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.



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### 2.3 Enquiries - Bid Solicitation

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

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

### 2.4 Applicable Laws

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

*Note to Bidders: 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.*

### 2.5 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 five (5) days before the bid closing date. Canada will have the right to accept or reject any or all suggestions.

### 2.6 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.



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## **PART 3 - BID PREPARATION INSTRUCTIONS**

### **3.1 Bid Preparation Instructions**

Canada requests that Bidders provide their full company name and address, e-mail address, as well as contact name, and telephone number.

Canada requests that bidders provide their bid in separate files, as follows:

Section I: Technical Bid, 1 soft copy via e-mail;  
Section II: Financial Bid, 1 soft copy via e-mail;  
Section III: Certifications, 1 soft copy via e-mail.

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

Canada requests that Bidders use a numbering system that corresponds to the bid solicitation when preparing their bid.

#### **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 Pricing Schedule in Attachment 1 to part 3.

##### **3.1.1 Electronic Payment of Invoices – Bid**

If you are willing to accept payment of invoices by Electronic Payment Instruments, complete Annex “E” Electronic Payment Instruments, to identify which ones are accepted.

If Annex “E” Electronic Payment Instruments is not completed, it will be considered as if Electronic Payment Instruments are not being accepted for payment of invoices.

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

##### **3.1.2 Exchange Rate Fluctuation**

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

#### **Section III: Certifications**

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



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## **PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION**

### **4.1 Evaluation Procedures**

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

#### **4.1.1 Technical Evaluation**

Mandatory and point rated technical evaluation criteria are included in Attachment 1 to Part 4 "Bid Evaluation Criteria".

#### **4.1.2 Financial Evaluation**

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

#### **4.1.3 Demonstration**

Canada may, but will have no obligation, to require that the top-ranked Bidder (identified after the financial evaluation) demonstrate any features, functionality and capabilities described in this bid solicitation or in its bid, in order to verify compliance with the requirements of this bid solicitation. If required, the demonstration must be conducted, at no cost to Canada, virtually, as agreed to by the Contracting Authority. Canada will provide no fewer than 5 working days of notice before the scheduled date for the demonstration. The demonstration must be conducted during normal business hours, to be determined by the Contracting Authority. Despite the written bid, if Canada determines during a demonstration that the Bidder's proposed solution does not meet the mandatory requirements of this bid solicitation, the bid will be declared non-responsive. Canada may, as a result of a demonstration, reduce the score of the Bidder on any rated requirement, if the demonstration indicates that the score provided to the Bidder on the basis of its written bid is not validated by the demonstration. The Bidder's score will not be increased as a result of any demonstration. If the Bidder's score is reduced by the demonstration, Canada will reassess the ranking of all bidders.

### **4.2 Basis of Selection**

#### **4.2.1 Basis of Selection – Highest Combined Rating of Technical Merit and Price 70/30**

1. To be declared responsive, a bid must:
  - a. comply with all the requirements of the bid solicitation;
  - b. meet all mandatory criteria;
  - c. obtain the required minimum number of points specified in Attachment 1 to Part 4 "Bid Evaluation Criteria".
2. Bids not meeting (a) or (b) or (c) will be declared non-responsive.
3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 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.





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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.
8. If two or more responsive bids achieve an identical score (total number of points) and this score is determined to be the Highest Combined Rating of Technical Merit and Price, the bidder who achieved the highest technical merit score will be recommended for contract award.

The table below illustrates an example where all three bids are responsive and the selection of the contractor is determined by a 70/30 ratio of technical merit and price, respectively. The total available points equals 135 and the lowest evaluated price is \$45,000 (45).

**Basis of Selection - Highest Combined Rating Technical Merit (70%) and Price (30%)**

		<b>Bidder 1</b>	<b>Bidder 2</b>	<b>Bidder 3</b>
<b>Overall Technical Score</b>		115/135	89/135	92/135
<b>Bid Evaluated Price</b>		\$55,000.00	\$50,000.00	\$45,000.00
<b>Calculations</b>	<b>Technical Merit Score</b>	$115/135 \times 70 = 59.63$	$89/135 \times 70 = 46.15$	$92/135 \times 70 = 47.70$
	<b>Pricing Score</b>	$45/55 \times 30 = 24.55$	$45/50 \times 30 = 27.00$	$45/45 \times 30 = 30.00$
<b>Combined Rating</b>		84.18	73.15	77.7
<b>Overall Rating</b>		1st	3rd	2nd

9. Bidders should note that all contract awards are subject to Canada's internal approvals process, which includes a requirement to approve funding in the amount of any proposed contract. Despite the fact that the Bidder may have been recommended for contract award, a contract will only be awarded if internal approval is granted according to Canada's internal policies. If approval is not granted, no contract will be awarded.





## **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 Integrity Provisions – Required Documentation**

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



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## **PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS**

### **6.1 Security Requirements**

The Contractor must meet the security requirements as indicated in Part 7 - Resulting Contract Clauses.



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## **PART 7 - RESULTING CONTRACT CLAUSES**

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

### **7.1 Statement of Work**

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

#### **7.1.1 Task Authorization**

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 Annex "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(bases) and methods of payment as specified in the Contract.
3. The Contractor must provide the Project Authority, within 14 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 Task Authorization Limit**

Any task authorization to be issued must be authorized by the Project Authority and Contracting Authority before issuance.

##### **7.1.1.3 Periodic Usage Reports - Contracts with Task Authorizations**

The Contractor must compile and maintain records on its provision of services to the federal government under authorized Task Authorizations issued under the Contract.

The Contractor must provide this data in accordance with the reporting requirements detailed below. If some data is not available, the reason must be indicated. If services are not provided during a given period, the Contractor must still provide a "nil" report.

The data must be submitted on a monthly basis to the Contracting Authority.

The monthly periods are defined as the period between the first day and the last day of each month inclusively.

The data must be submitted to the Contracting Authority no later than seven (7) calendar days after the end of the reporting period.

### **Reporting Requirement- Details**



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A detailed and current record of all authorized tasks must be kept for each contract with a task authorization process. This record must contain:

**For each authorized task:**

- i. the authorized task number or task revision number(s);
- ii. a title or a brief description of each authorized task;
- iii. the total estimated cost specified in the authorized Task Authorization (TA) of each task, exclusive of Applicable Taxes;
- iv. the total amount, exclusive of Applicable Taxes, expended to date against each authorized task;
- v. the start and completion date for each authorized task; and
- vi. the active status of each authorized task, as applicable.

**For all authorized tasks:**

- i. the amount (exclusive of Applicable Taxes) specified in the contract (as last amended, as applicable) as Canada's total liability to the contractor for all authorized TAs; and
- ii. the total amount, exclusive of Applicable Taxes, expended to date against all authorized TAs.

**7.1.1.4 Canada's Obligation - Portion of the Work - Task Authorizations**

Canada's obligation with respect to the portion of the Work under the Contract that is performed through task authorizations is limited to the total amount of the actual tasks performed by the Contractor.

**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**

The General Conditions – ESDC (2022-04-07) at Annex "A", apply to and form part of the Contract.

**7.2.2 Supplemental General Conditions**

4006 (2010-08-16), [Contractor to Own Intellectual Property Rights in Foreground Information](#) apply to and form part of the Contract.

**7.3 Security Requirements**

Canada will conduct a security assessment with the cooperation from the Contractor to ensure that the Contractor's solution complies with the points identified in the section 5.0 Constraints of the Statement of Work. If the Contractor's solution doesn't comply, Canada may terminate the Contract or require that it be corrected at the Contractor's expense before accepting the service. No payments for the subscription to a solution are due under the Contract unless the Services are accepted.

**7.4 Term of Contract**

**7.4.1 Period of the Contract**

The period of the Contract is for one year. The start date of the services will be once the security assessment has been completed and the services accepted.

*Note: At the acceptance of services this article will be amended to modify the dates.*



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### 7.4.2 Option to Extend the Contract

The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to three additional one-year periods under the same conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions as set out in the Basis of Payment.

Canada may exercise this option at any time by sending a written notice to the Contractor at least fifteen calendar days before the expiry date of the Contract. The option may only be exercised by the Contracting Authority, and will be evidenced for administrative purposes only, through a contract amendment.

## 7.5 Authorities

### 7.5.1 Contracting Authority

The Contracting Authority for the Contract is: *(To be determined at contract award)*

Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Employment and Social Development Canada  
Directorate: \_\_\_\_\_  
Address: \_\_\_\_\_  
Telephone: \_\_\_\_-\_\_\_\_-\_\_\_\_\_  
E-mail address: \_\_\_\_\_

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

The Project Authority for the Contract is: *(To be determined at contract award)*

Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Employment and Social Development Canada  
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 determined at contract award)*

Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Company: \_\_\_\_\_  
Address: \_\_\_\_\_



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Telephone: \_\_\_\_-\_\_\_\_-\_\_\_\_

E-mail address: \_\_\_\_\_

## 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 – Annual Subscriptions

#### 7.7.1.1 Basis of Payment – Firm Unit Price for the Software as a Service (SaaS) Solution Annual Subscriptions

In consideration of the Contractor satisfactorily completing all of its obligations under the contract, the Contractor will be paid the firm unit price in accordance with the basis of payment, in Annex C, article 1. Software as a Service Solution – Annual Subscription. Customs duties are included and Applicable Taxes are extra.

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

#### 7.1.1.2 Method of Payment – Advance Payment – Annual Subscriptions

Canada will pay the Contractor in advance for the Work if:

- a. an accurate and complete invoice and any other documents required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- b. all such documents have been verified by Canada.

### 7.7.2 Basis of Payment – Task Authorization

#### 7.7.2.1 Basis of Payment – Professional Services

The Contractor will be paid for the Work specified in the authorized task authorization, in accordance with the Basis of payment at annex C, article 2. Professional Services.

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.

#### 7.7.2.2 Limitation of Expenditure – Cumulative Total of all Task Authorizations

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 \$\_\_\_\_\_ (Will be inserted at contract award) Customs duties are included and Applicable Taxes are extra.



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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.

#### **7.7.2.3 Method of Payment – Monthly Payment – Task Authorization**

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

- a. an accurate and complete invoice and any other documents required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- b. all such documents have been verified by Canada;
- c. the Work performed has been accepted by Canada.

#### **7.7.3 Electronic Payment of Invoices – Contract**

The Government of Canada is switching from cheques to direct deposit as primary payment method, an electronic transfer of funds deposited directly into your bank account. Direct deposit is faster, more convenient and more secure. Enroll for direct deposit or update the banking information you already have on file by sending your completed [Direct Deposit Enrollment Form](#) at the following email address: [nc-cfob-dgapf-fournis-vendors-gd@hrsdc-rhdcc.gc.ca](mailto:nc-cfob-dgapf-fournis-vendors-gd@hrsdc-rhdcc.gc.ca).

#### **7.8 Invoicing Instructions**

The Contractor must submit invoices in accordance with the section entitled "Invoice Submission" of the general conditions. Invoices cannot be submitted until all work identified in the invoice is completed.

#### **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;



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- (b) the supplemental general conditions 4006 (2010-08-16) Contractor to Own Intellectual Property Rights in Foreground Information;
- (c) Annex A, ESDC - General Conditions (2022-12-01);
- (d) Annex B, Statement of Work;
- (e) Annex C, Basis of Payment;
- (f) Annex D, the signed Task Authorizations (including all of its annexes, if any);
- (g) Annex E, Electronic Payment Instruments;
- (h) Annex F, Service Level Agreements (SLA);
- (i) the Contractor's bid dated \_\_\_\_\_.

#### **7.12 Foreign Nationals (Canadian Contractor **OR** Foreign Contractor) (To be determined at contract award)**

The Contractor must comply with Canadian immigration requirements applicable to foreign nationals entering Canada to work temporarily in fulfillment of the Contract. If the Contractor wishes to hire a foreign national to work in Canada to fulfill the Contract, the Contractor should immediately contact the nearest Service Canada regional office to enquire about Citizenship and Immigration Canada's requirements to issue a temporary work permit to a foreign national. The Contractor is responsible for all costs incurred as a result of non-compliance with immigration requirements.

**OR**

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

#### **7.13 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 Environmental Considerations**

As part of the Greening Government Strategy (GGS), the Government of Canada is committed to aid the transition to a net-zero, circular economy through green procurement that includes life-cycle assessment principles and the adoption of clean technologies and green products and services. To align with departmental efforts to reduce Canada's carbon footprint, when applicable, the Contractor should undertake the following measures to improve environmental performance and support the transition to a low-carbon economy:

- a. Provide and transmit draft reports, final reports, other documents and bids in electronic format. Should printed material be required, double-sided printing in black and white format is the default.
- b. Provide printed material on a minimum recycled content of 30% and/or certified as originating from a sustainably managed forest.
- c. Recycle unneeded printed documents (in accordance with Security Requirements).
- d. Use video and/or teleconferencing where possible to cut down unnecessary travel.
- e. Use of public/green transit where feasible.
- f. Use of Properties with Environmental Ratings, including accommodations while travelling.





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- g. Take actions to reduce the amount of fuel consumed by its vehicles. This can include such provisions as promoting good driving behaviour (eg - anti-idling, speed, car-sharing initiatives, green driving habits, etc) and purchasing fuel efficient and hybrid vehicles.
- h. Select and operate IT and office equipment in a manner that reduces energy consumption and material usage.
- i. Use and/or provide consumables that minimize environmental impacts through reduce, recycle, reuse and elimination of packaging.

#### **7.15 Dispute Resolution**

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



## ANNEX "A"

### ESDC - GENERAL CONDITIONS (2022-12-01)

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## 01 Interpretation

In the Contract, unless the context otherwise requires:

**"Applicable Taxes"** means the Goods and Services Tax (GST), the Harmonized Sales Tax (HST), and any provincial tax, by law, payable by Canada such as, the Quebec Sales Tax (QST) as of April 1, 2013;

**"Articles of Agreement"** means the clauses and conditions incorporated in full text or incorporated by reference from the *Standard Acquisition Clauses and Conditions Manual* to form the body of the Contract; it does not include these general conditions, any supplemental general conditions, annexes, the Contractor's bid or any other document;

**"Canada", "Crown", "His Majesty" or "the Government"** means His Majesty the King in right of Canada as represented by the Minister of Employment and Social Development Canada (ESDC) and any other person duly authorized to act on behalf of that minister;

**"Contract"** means the Articles of Agreement, these general conditions, any supplemental general conditions, annexes and any other document specified or referred to as forming part of the Contract, all as amended by agreement of the Parties from time to time;

**"Contracting Authority"** means the person designated by that title in the Contract, or by notice to the Contractor, to act as Canada's representative to manage the Contract;

**"Contractor"** means the person, entity or entities named in the Contract to supply goods, services or both to Canada;

**"Contract Price"** means the amount stated in the Contract to be payable to the Contractor for the Work, exclusive of Applicable Taxes;

**"Cost"** means cost determined according to Contract Cost Principles 1031-2 as revised to the date of the bid solicitation or, if there was no bid solicitation, the date of the Contract;

**"Government Property"** means anything supplied to the Contractor by or on behalf of Canada for the purposes of performing the Contract and anything acquired by the Contractor in any manner in connection with the Work, the cost of which is paid by Canada under the Contract;

**"Party"** means Canada, the Contractor, or any other signatory to the Contract and "Parties" means all of them;

**"Specifications"** means the description of the essential, functional or technical requirements of the Work in the Contract, including the procedures for determining whether the requirements have been met;

**"Total Estimated Cost", "Revised Estimated Cost", "Increase (Decrease)"** on page 1 of the Contract or Contract Amendment means an amount used for internal administrative purposes only that comprises the Contract Price, or the revised Contract Price, or the amount that would increase or decrease the Contract Price and the Applicable Taxes as evaluated by the Contracting Authority, and does not constitute tax advice on the part of Canada;

**"Work"** means all the activities, services, goods, equipment, matters and things required to be done, delivered or performed by the Contractor under the Contract.



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## 02 Standard clauses and conditions

Pursuant to the [Department of Public Works and Government Services Act](#), S.C. 1996, c. 16, the clauses and conditions identified by number, date and title in the Contract are incorporated by reference and form part of the Contract as though expressly set out in the Contract.

## 03 Powers of Canada

All rights, remedies, powers and discretions granted or acquired by Canada under the Contract or by law are cumulative, not exclusive.

## 04 Status of the Contractor

The Contractor is an independent contractor engaged by Canada to perform the Work. Nothing in the Contract is intended to create a partnership, a joint venture or an agency between Canada and the other Party or Parties. The Contractor must not represent itself as an agent or representative of Canada to anyone. Neither the Contractor nor any of its personnel is engaged as an employee or agent of Canada. The Contractor is responsible for all deductions and remittances required by law in relation to its employees.

## 05 Conduct of the Work

1. The Contractor represents and warrants that:
  - a. it is competent to perform the Work;
  - b. it has everything necessary to perform the Work, including the resources, facilities, labour, technology, equipment, and materials; and
  - c. it has the necessary qualifications, including knowledge, skill, know-how and experience, and the ability to use them effectively to perform the Work.
2. The Contractor must:
  - a. perform the Work diligently and efficiently;
  - b. except for Government Property, supply everything necessary to perform the Work;
  - c. use, as a minimum, quality assurance procedures, inspections and controls generally used and recognized by the industry to ensure the degree of quality required by the Contract;
  - d. select and employ a sufficient number of qualified people;
  - e. perform the Work in accordance with standards of quality acceptable to Canada and in full conformity with the Specifications and all the requirements of the Contract;
  - f. provide effective and efficient supervision to ensure that the quality of workmanship meets the requirements of the Contract.
3. The Work must not be performed by any person who, in the opinion of Canada, is incompetent, unsuitable or has conducted himself/herself improperly.
4. All services rendered under the Contract must, at the time of acceptance, be free from defects in workmanship and conform to the requirements of the Contract. If the Contractor is required to correct or replace the Work or any part of the Work, it will be at no cost to Canada.
5. Canada's facilities, equipment and personnel are not available to the Contractor to perform the Work unless the Contract specifically provides for it. The Contractor is responsible for advising the Contracting Authority in advance if it requires access to Canada's facilities, equipment or personnel to perform the Work. The Contractor must comply and ensure that its employees and subcontractors comply with all security measures, standing orders, policies or other rules in force at the site where the Work is performed.



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6. Unless the Contracting Authority orders the Contractor to suspend the Work or part of the Work pursuant to section 28, the Contractor must not stop or suspend the Work or part of the Work pending the settlement of any dispute between the Parties about the Contract.
7. The Contractor must provide all reports that are required by the Contract and any other information that Canada may reasonably require from time to time.
8. The Contractor is fully responsible for performing the Work. Canada will not be responsible for any negative consequences or extra costs if the Contractor follows any advice given by Canada unless the Contracting Authority provides the advice to the Contractor in writing and includes a statement specifically relieving the Contractor of any responsibility for negative consequences or extra costs that might result from following the advice.

## **06 Subcontracts**

1. Except as provided in subsection 2, the Contractor must obtain the Contracting Authority's written consent before subcontracting or permitting the subcontracting of any part of the Work. A subcontract includes a contract entered into by any subcontractor at any tier to perform any part of the Work.
2. The Contractor is not required to obtain consent for subcontracts specifically authorized in the Contract. The Contractor may also without the consent of the Contracting Authority:
  - a. purchase "off-the-shelf" items and any standard articles and materials that are ordinarily produced by manufacturers in the normal course of business;
  - b. subcontract any portion of the Work as is customary in the carrying out of similar contracts; and
  - c. permit its subcontractors at any tier to make purchases or subcontract as permitted in paragraphs (a) and (b).
3. In any subcontract other than a subcontract referred to in paragraph 2.(a), the Contractor must, unless the Contracting Authority agrees in writing, ensure that the subcontractor is bound by conditions compatible with and, in the opinion of the Contracting Authority, not less favourable to Canada than the conditions of the Contract, with the exception of requirements under the Federal Contractors Program for employment equity which only apply to the Contractor.
4. Even if Canada consents to a subcontract, the Contractor is responsible for performing the Contract and Canada is not responsible to any subcontractor. The Contractor is responsible for any matters or things done or provided by any subcontractor under the Contract and for paying any subcontractors for any part of the Work they perform.

## **07 Specifications**

1. All Specifications provided by Canada or on behalf of Canada to the Contractor in connection with the Contract belong to Canada and must be used by the Contractor only for the purpose of performing the Work.
2. If the Contract provides that Specifications furnished by the Contractor must be approved by Canada, that approval will not relieve the Contractor of its responsibility to meet all requirements of the Contract.

## **08 Replacement of specific individuals**

1. If specific individuals are identified in the Contract to perform the Work, the Contractor must provide the services of those individuals unless the Contractor is unable to do so for reasons beyond its control.
2. If the Contractor is unable to provide the services of any specific individual identified in the Contract, it must provide a replacement with similar qualifications and experience. The replacement must meet the criteria used in the selection of the Contractor and be acceptable to Canada. The Contractor must, as soon as possible, give notice to the Contracting Authority of the reason for replacing the individual and provide:



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- a. the name, qualifications and experience of the proposed replacement; and
  - b. proof that the proposed replacement has the required security clearance granted by Canada, if applicable.
3. The Contractor must not, in any event, allow performance of the Work by unauthorized replacement persons. The Contracting Authority may order that a replacement stop performing the Work. In such a case, the Contractor must immediately comply with the order and secure a further replacement in accordance with subsection 2. The fact that the Contracting Authority does not order that a replacement stop performing the Work does not relieve the Contractor from its responsibility to meet the requirements of the Contract.

## 09 Time of the essence

It is essential that the Work be performed within or at the time stated in the Contract.

## 10 Excusable delay

1. A delay in the performance by the Contractor of any obligation under the Contract that is caused by an event that
  - a. is beyond the reasonable control of the Contractor,
  - b. could not reasonably have been foreseen,
  - c. could not reasonably have been prevented by means reasonably available to the Contractor, and
  - d. occurred without the fault or neglect of the Contractor,

will be considered an "Excusable Delay" if the Contractor advises the Contracting Authority of the occurrence of the delay or of the likelihood of the delay as soon as the Contractor becomes aware of it. The Contractor must also advise the Contracting Authority, within 15 working days, of all the circumstances relating to the delay and provide to the Contracting Authority for approval a clear work around plan explaining in detail the steps that the Contractor proposes to take in order to minimize the impact of the event causing the delay.

2. Any delivery date or other date that is directly affected by an Excusable Delay will be postponed for a reasonable time that will not exceed the duration of the Excusable Delay.
3. However, if an Excusable Delay has continued for 30 days or more, the Contracting Authority may, by giving notice in writing to the Contractor, terminate the Contract. In such a case, the Parties agree that neither will make any claim against the other for damages, costs, expected profits or any other loss arising out of the termination or the event that contributed to the Excusable Delay. The Contractor agrees to repay immediately to Canada the portion of any advance payment that is unliquidated at the date of the termination.
4. Unless Canada has caused the delay by failing to meet an obligation under the Contract, Canada will not be responsible for any costs incurred by the Contractor or any of its subcontractors or agents as a result of an Excusable Delay.
5. If the Contract is terminated under this section, the Contracting Authority may require the Contractor to deliver to Canada, in the manner and to the extent directed by the Contracting Authority, any completed parts of the Work not delivered and accepted before the termination and anything that the Contractor has acquired or produced specifically to perform the Contract. Canada will pay the Contractor:
  - a. the value, of all completed parts of the Work delivered to and accepted by Canada, based on the Contract Price, including the proportionate part of the Contractor's profit or fee included in the Contract Price; and
  - b. the Cost to the Contractor that Canada considers reasonable in respect of anything else delivered to and accepted by Canada.



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The total amount paid by Canada under the Contract to the date of termination and any amounts payable under this subsection must not exceed the Contract Price.

#### **11 Inspection and acceptance of the Work**

1. All the Work is subject to inspection and acceptance by Canada. Inspection and acceptance of the Work by Canada do not relieve the Contractor of its responsibility for defects or other failures to meet the requirements of the Contract. Canada will have the right to reject any Work that is not in accordance with the requirements of the Contract and require its correction or replacement at the Contractor's expense.
2. The Contractor must provide representatives of Canada access to all locations where any part of the Work is being performed at any time during working hours. Representatives of Canada may make examinations and such tests of the Work as they may think fit. The Contractor must provide all assistance and facilities, test pieces, samples and documentation that the representatives of Canada may reasonably require for the carrying out of the inspection. The Contractor must forward such test pieces and samples to such person or location as Canada specifies.
3. The Contractor must inspect and approve any part of the Work before submitting it for acceptance or delivering it to Canada. The Contractor must keep accurate and complete inspection records that must be made available to Canada on request. Representatives of Canada may make copies and take extracts of the records during the performance of the Contract and for up to three years after the end of the Contract.

#### **12 Invoice submission**

1. Invoices must be submitted, in the Contractor's name, to the Project or Technical Authority identified in the contract. The Contractor must submit invoices for each delivery or shipment; invoices must only apply to the Contract. Each invoice must indicate whether it covers partial or final delivery.
2. Invoices must show:
  - a. the date, the name and address of the client, item or reference numbers, deliverable/description of the Work, contract number and financial code(s);
  - b. details of expenditures (such as item, quantity, unit of issue, unit price, fixed time labour rates and level of effort, subcontracts, as applicable) in accordance with the Basis of Payment, exclusive of Applicable Taxes;
  - c. deduction for holdback, if applicable;
  - d. the extension of the totals, if applicable; and
  - e. if applicable, the method of shipment together with date, case numbers and part or reference numbers, shipment charges and any other additional charges.
3. Applicable Taxes must be specified on all invoices as a separate item along with corresponding registration numbers from the tax authorities. All items that are zero-rated, exempt or to which Applicable Taxes do not apply, must be identified as such on all invoices.
4. By submitting an invoice, the Contractor certifies that the invoice is consistent with the Work delivered and is in accordance with the Contract.

#### **13 Taxes**

1. Federal government departments and agencies are required to pay Applicable Taxes.
2. Applicable Taxes will be paid by Canada as provided in the Invoice Submission section. It is the sole responsibility of the Contractor to charge Applicable Taxes at the correct rate in accordance with applicable legislation. The Contractor agrees to remit to appropriate tax authorities any amounts of Applicable Taxes paid or due.





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3. The Contractor is not entitled to use Canada's exemptions from any tax, such as provincial sales taxes, unless otherwise specified by law. The Contractor must pay applicable provincial sales tax, ancillary taxes, and any commodity tax, on taxable goods or services used or consumed in the performance of the Contract (in accordance with applicable legislation), including for material incorporated into real property.
4. In those cases where Applicable Taxes, customs duties, and excise taxes are included in the Contract Price, the Contract Price will be adjusted to reflect any increase, or decrease, of Applicable Taxes, customs duties, and excise taxes that will have occurred between bid submission and contract award. However, there will be no adjustment for any change to increase the Contract Price if public notice of the change was given before bid submission date in sufficient detail to have permitted the Contractor to calculate the effect of the change.
5. Tax Withholding of 15 Percent – Canada Revenue Agency  
Pursuant to the [Income Tax Act](#), 1985, c. 1 (5th Supp.) and the [Income Tax Regulations](#), Canada must withhold 15 percent of the amount to be paid to the Contractor in respect of services provided in Canada if the Contractor is not a resident of Canada, unless the Contractor obtains a valid waiver from the [Canada Revenue Agency](#). The amount withheld will be held on account for the Contractor in respect to any tax liability which may be owed to Canada.

#### 14 Transportation costs

If transportation costs are payable by Canada under the Contract and the Contractor makes the transportation arrangements, shipments must be made by the most direct and economical means consistent with normal shipping practice. The costs must be shown as a separate item on the invoice.

#### 15 Transportation carriers' liability

The federal government's policy of underwriting its own risks precludes payment of insurance or valuation charges for transportation beyond the point at which ownership of goods passes to the federal government (determined by the FOB point or Incoterms). Where increased carrier liability is available without charge, the Contractor must obtain the increased liability for shipment.

#### 16 Payment period

1. Canada's standard payment period is 30 days. The payment period is measured from the date an invoice in acceptable form and content is received in accordance with the Contract or the date the Work is delivered in acceptable condition as required in the Contract, whichever is later. A payment is considered overdue on the 31st day following that date and interest will be paid automatically in accordance with the section 17.
2. If the content of the invoice and its substantiating documentation are not in accordance with the Contract or the Work is not in acceptable condition, Canada will notify the Contractor within 15 days of receipt. The 30-day payment period begins upon receipt of the revised invoice or the replacement or corrected Work. Failure by Canada to notify the Contractor within 15 days will only result in the date specified in subsection 1 to apply for the sole purpose of calculating interest on overdue accounts.

#### 17 Interest on overdue accounts

1. For the purpose of this section:

**"Average Rate"** means the simple arithmetic mean of the Bank Rates in effect at 4:00 p.m. Eastern Time each day during the calendar month immediately before the calendar month in which payment is made;

**"Bank Rate"** means the rate of interest established from time to time by the Bank of Canada as the minimum rate at which the Bank of Canada makes short term advances to members of the Canadian Payments Association;





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**"date of payment"** means the date of the negotiable instrument drawn by the Receiver General for Canada to pay any amount under the Contract;

an amount becomes **"overdue"** when it is unpaid on the first day following the day on which it is due and payable according to the Contract.

2. Canada will pay to the Contractor simple interest at the Average Rate plus 3 percent per year on any amount that is overdue, from the date that amount becomes overdue until the day before the date of payment, inclusive. The Contractor is not required to provide notice to Canada for interest to be payable.
3. Canada will pay interest in accordance with this section only if Canada is responsible for the delay in paying the Contractor. Canada will not pay interest on overdue advance payments.

## 18 Compliance with applicable laws

1. The Contractor must comply with all laws applicable to the performance of the Contract. The Contractor must provide evidence of compliance with such laws to Canada at such times as Canada may reasonably request.
2. The Contractor must obtain and maintain at its own cost all permits, licenses, regulatory approvals and certificates required to perform the Work. If requested by the Contracting Authority, the Contractor must provide a copy of any required permit, license, regulatory approvals or certificate to Canada.

## 19 Ownership

1. Unless provided otherwise in the Contract, the Work or any part of the Work belongs to Canada after delivery and acceptance by or on behalf of Canada.
2. However if any payment is made to the Contractor for or on account of any Work, either by way of progress or milestone payments, that work paid for by Canada belongs to Canada upon such payment being made. This transfer of ownership does not constitute acceptance by Canada of the Work or any part of the Work and does not relieve the Contractor of its obligation to perform the Work in accordance with the Contract.
3. Despite any transfer of ownership, the Contractor is responsible for any loss or damage to the Work or any part of the Work until it is delivered to Canada in accordance with the Contract. Even after delivery, the Contractor remains responsible for any loss or damage to any part of the Work caused by the Contractor or any subcontractor.
4. Upon transfer of ownership to the Work or any part of the Work to Canada, the Contractor must, if requested by Canada, establish to Canada's satisfaction that the title is free and clear of all claims, liens, attachments, charges or encumbrances. The Contractor must execute any conveyances and other instruments necessary to perfect the title that Canada may require.

## 20 Copyright

In this section, **"Material"** means anything that is created by the Contractor as part of the Work under the Contract, that is required by the Contract to be delivered to Canada and in which copyright subsists. "Material" does not include anything created by the Contractor before the date of the Contract.

Copyright in the Material belongs to Canada and the Contractor must include the copyright symbol and either of the following notice on the Material: © His Majesty the King in right of Canada (year) or © Sa Majesté le Roi du chef du Canada (année).

The Contractor must not use, copy, divulge or publish any Material except as is necessary to perform the Contract. The Contractor must execute any conveyance and other documents relating to copyright in the Material as Canada may require.



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The Contractor must provide at the request of Canada a written permanent waiver of moral rights, in a form acceptable to Canada, from every author that contributed to the Material. If the Contractor is the author of the Material, the Contractor permanently waives its moral rights in the Material.

## 21 Translation of documentation

The Contractor agrees that Canada may translate in the other official language any documentation delivered to Canada by the Contractor that does not belong to Canada under section 20. The Contractor acknowledges that Canada owns the translation and that it is under no obligation to provide any translation to the Contractor. Canada agrees that any translation must include any copyright notice and any proprietary right notice that was part of the original. Canada acknowledges that the Contractor is not responsible for any technical errors or other problems that may arise as a result of the translation.

## 22 Confidentiality

1. The Contractor must keep confidential all information provided to the Contractor by or on behalf of Canada in connection with the Work, including any information that is confidential or proprietary to third parties, and all information conceived, developed or produced by the Contractor as part of the Work when copyright or any other intellectual property rights in such information belongs to Canada under the Contract. The Contractor must not disclose any such information without the written permission of Canada. The Contractor may disclose to a subcontractor any information necessary to perform the subcontract as long as the subcontractor agrees to keep the information confidential and that it will be used only to perform the subcontract.
2. The Contractor agrees to use any information provided to the Contractor by or on behalf of Canada only for the purpose of the Contract. The Contractor acknowledges that all this information remains the property of Canada or the third party, as the case may be. Unless provided otherwise in the Contract, the Contractor must deliver to Canada all such information, together with every copy, draft, working paper and note that contains such information, upon completion or termination of the Contract or at such earlier time as Canada may require.
3. Subject to the [Access to Information Act](#), R.S., 1985, c. A-1, and to any right of Canada under the Contract to release or disclose, Canada must not release or disclose outside the Government of Canada any information delivered to Canada under the Contract that is proprietary to the Contractor or a subcontractor.
4. The obligations of the Parties set out in this section do not apply to any information if the information:
  - a. is publicly available from a source other than the other Party; or
  - b. is or becomes known to a Party from a source other than the other Party, except any source that is known to be under an obligation to the other Party not to disclose the information; or
  - c. is developed by a Party without use of the information of the other Party.
5. Wherever possible, the Contractor must mark or identify any proprietary information delivered to Canada under the Contract as "Property of (Contractor's name), permitted Government uses defined under Employment and Social Development Canada (ESDC) Contract No. (fill in Contract Number)". Canada will not be liable for any unauthorized use or disclosure of information that could have been so marked or identified and was not.
6. If the Contract, the Work, or any information referred to in subsection 1 is identified as TOP SECRET, SECRET, CONFIDENTIAL, PROTECTED, COSMIC TOP SECRET, NATO SECRET, NATO CONFIDENTIAL, or NATO RESTRICTED by Canada, the Contractor must at all times take all measures reasonably necessary for the safeguarding of the material so identified, including those set out in the *PWGSC Contract Security Manual* and its supplements and any other instructions issued by Canada.
7. If the Contract, the Work, or any information referred to in subsection 1 is identified as TOP SECRET, SECRET, CONFIDENTIAL, PROTECTED, COSMIC TOP SECRET, NATO SECRET, NATO



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CONFIDENTIAL, or NATO RESTRICTED by Canada, representatives of Canada are entitled to inspect the Contractor's premises and the premises of a subcontractor at any tier for security purposes at any time during the term of the Contract. The Contractor must comply with, and ensure that any subcontractor complies with, all written instructions issued by Canada dealing with the material so identified, including any requirement that employees of the Contractor or of any subcontractor execute and deliver declarations relating to reliability screenings, security clearances and other procedures.

### 23 Government Property

1. All Government Property must be used by the Contractor solely for the purpose of the Contract and remains the property of Canada. The Contractor must maintain adequate accounting records of all Government Property and, whenever feasible, mark it as being the property of Canada.
2. The Contractor must take reasonable and proper care of all Government Property while it is in its possession or subject to its control. The Contractor is responsible for any loss or damage resulting from its failure to do so other than loss or damage caused by ordinary wear and tear.
3. All Government Property, unless it is installed or incorporated in the Work, must be returned to Canada on demand. All scrap and all waste materials, articles or things that are Government Property must, unless provided otherwise in the Contract, remain the property of Canada and must be disposed of only as directed by Canada.
4. At the time of completion of the Contract, and if requested by the Contracting Authority, the Contractor must provide to Canada an inventory of all Government Property relating to the Contract.

### 24 Liability

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

### 25 Intellectual property infringement and royalties

1. The Contractor represents and warrants that, to the best of its knowledge, neither it nor Canada will infringe any third party's intellectual property rights in performing or using the Work, and that Canada will have no obligation to pay royalties of any kind to anyone in connection with the Work.
2. If anyone makes a claim against Canada or the Contractor concerning intellectual property infringement or royalties related to the Work, that Party agrees to notify the other Party in writing immediately. If anyone brings a claim against Canada, according to [Department of Justice Act](#), R.S., 1985, c. J-2, the Attorney General of Canada must have the regulation and conduct of all litigation for or against Canada, but the Attorney General may request that the Contractor defend Canada against the claim. In either case, the Contractor agrees to participate fully in the defence and any settlement negotiations and to pay all costs, damages and legal costs incurred or payable as a result of the claim, including the amount of any settlement. Both Parties agree not to settle any claim unless the other Party first approves the settlement in writing.
3. The Contractor has no obligation regarding claims that were only made because:
  - a. Canada modified the Work or part of the Work without the Contractor's consent or used the Work or part of the Work without following a requirement of the Contract; or
  - b. Canada used the Work or part of the Work with a product that the Contractor did not supply under the Contract (unless that use is described in the Contract or the manufacturer's specifications or other documentation); or



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- c. the Contractor used equipment, drawings, specifications or other information supplied to the Contractor by Canada (or by someone authorized by Canada); or
  - d. the Contractor used a specific item of equipment or software that it obtained because of specific instructions from the Contracting Authority; however, this exception only applies if the Contractor has included the following language in its own contract with the supplier of that equipment or software: "[Supplier name] acknowledges that the purchased items will be used by the Government of Canada. If a third party claims that equipment or software supplied under this contract infringes any intellectual property right, [supplier name], if requested to do so by either [Contractor name] or Canada, will defend both [Contractor name] and Canada against that claim at its own expense and will pay all costs, damages and legal fees payable as a result of that infringement." Obtaining this protection from the supplier is the Contractor's responsibility and, if the Contractor does not do so, it will be responsible to Canada for the claim.
4. If anyone claims that, as a result of the Work, the Contractor or Canada is infringing its intellectual property rights, the Contractor must immediately do one of the following:
    - a. take whatever steps are necessary to allow Canada to continue to use the allegedly infringing part of the Work; or
    - b. modify or replace the Work to avoid intellectual property infringement, while ensuring that the Work continues to meet all the requirements of the Contract; or
    - c. take back the Work and refund any part of the Contract Price that Canada has already paid.

If the Contractor determines that none of these alternatives can reasonably be achieved, or if the Contractor fails to take any of these steps within a reasonable amount of time, Canada may choose either to require the Contractor to do (c), or to take whatever steps are necessary to acquire the rights to use the allegedly infringing part(s) of the Work itself, in which case the Contractor must reimburse Canada for all the costs it incurs to do so.

## 26 Amendment and waivers

1. To be effective, any amendment to the Contract must be done in writing by the Contracting Authority and the authorized representative of the Contractor.
2. While the Contractor may discuss any proposed modifications to the Work with other representatives of Canada, Canada will not be responsible for the cost of any modification unless it has been incorporated into the Contract in accordance with subsection 1.
3. A waiver will only be valid, binding or affect the rights of the Parties if it is made in writing by, in the case of a waiver by Canada, the Contracting Authority and, in the case of a waiver by the Contractor, the authorized representative of the Contractor.
4. The waiver by a Party of a breach of any condition of the Contract will not be treated or interpreted as a waiver of any subsequent breach and therefore will not prevent that Party from enforcing of that term or condition in the case of a subsequent breach.

## 27 Assignment

1. The Contractor must not assign the Contract without first obtaining the written consent of the Contracting Authority. Any assignment made without that consent is void and will have no effect. The assignment will be effective upon execution of an assignment agreement signed by the Parties and the assignee.
2. Assignment of the Contract does not relieve the Contractor from any obligation under the Contract and it does not impose any liability upon Canada.



## **28 Suspension of the Work**

1. The Contracting Authority may at any time, by written notice, order the Contractor to suspend or stop the Work or part of the Work under the Contract for a period of up to 180 days. The Contractor must immediately comply with any such order in a way that minimizes the cost of doing so. While such an order is in effect, the Contractor must not remove any part of the Work from any premises without first obtaining the written consent of the Contracting Authority. Within these 180 days, the Contracting Authority must either cancel the order or terminate the Contract, in whole or in part, under section 29 or section 30.
2. When an order is made under subsection 1, unless the Contracting Authority terminates the Contract by reason of default by the Contractor or the Contractor abandons the Contract, the Contractor will be entitled to be paid its additional costs incurred as a result of the suspension plus a fair and reasonable profit.
3. When an order made under subsection 1 is cancelled, the Contractor must resume work in accordance with the Contract as soon as practicable. If the suspension has affected the Contractor's ability to meet any delivery date under the Contract, the date for performing the part of the Work affected by the suspension will be extended for a period equal to the period of suspension plus a period, if any, that in the opinion of the Contracting Authority, following consultation with the Contractor, is necessary for the Contractor to resume the Work. Any equitable adjustments will be made as necessary to any affected conditions of the Contract.

## **29 Default by the Contractor**

1. If the Contractor is in default in carrying out any of its obligations under the Contract, the Contracting Authority may, by giving written notice to the Contractor, terminate for default the Contract or part of the Contract. The termination will take effect immediately or at the expiration of a cure period specified in the notice, if the Contractor has not cured the default to the satisfaction of the Contracting Authority within that cure period.
2. If the Contractor becomes bankrupt or insolvent, makes an assignment for the benefit of creditors, or takes the benefit of any statute relating to bankrupt or insolvent debtors, or if a receiver is appointed under a debt instrument or a receiving order is made against the Contractor, or an order is made or a resolution passed for the winding-up of the Contractor, the Contracting Authority may, to the extent permitted by the laws of Canada, by giving written notice to the Contractor, immediately terminate for default the Contract or part of the Contract.
3. If Canada gives notice under subsection 1 or 2, the Contractor will have no claim for further payment except as provided in this section. The Contractor will be liable to Canada for all losses and damages suffered by Canada because of the default or occurrence upon which the notice was based, including any increase in the cost incurred by Canada in procuring the Work from another source. The Contractor agrees to repay immediately to Canada the portion of any advance payment that is unliquidated at the date of the termination.
4. Upon termination of the Contract under this section, the Contracting Authority may require the Contractor to deliver to Canada, in the manner and to the extent directed by the Contracting Authority, any completed parts of the Work, not delivered and accepted before the termination and anything the Contractor has acquired or produced specifically to perform the Contract. In such a case, subject to the deduction of any claim that Canada may have against the Contractor arising under the Contract or out of the termination, Canada will pay or credit to the Contractor:
  - a. the value, of all completed parts of the Work delivered to and accepted by Canada, based on the Contract Price, including the proportionate part of the Contractor's profit or fee included in the Contract Price; and
  - b. the cost to the Contractor that Canada considers reasonable in respect of anything else delivered to and accepted by Canada.



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The total amount paid by Canada under the Contract to the date of the termination and any amount payable under this subsection must not exceed the Contract Price.

5. Title to everything for which payment is made to the Contractor will, once payment is made, pass to Canada unless it already belongs to Canada under any other provision of the Contract.
6. If the Contract is terminated for default under subsection 1, but it is later determined that grounds did not exist for a termination for default, the notice will be considered a notice of termination for convenience issued under subsection 1 of section 30.

### 30 Termination for convenience

1. At any time before the completion of the Work, the Contracting Authority may, by giving notice in writing to the Contractor, terminate for convenience the Contract or part of the Contract. Once such a notice of termination for convenience is given, the Contractor must comply with the requirements of the termination notice. If the Contract is terminated in part only, the Contractor must proceed to complete any part of the Work that is not affected by the termination notice. The termination will take effect immediately or, as the case may be, at the time specified in the termination notice.
2. If a termination notice is given pursuant to subsection 1, the Contractor will be entitled to be paid, for costs that have been reasonably and properly incurred to perform the Contract to the extent that the Contractor has not already been paid or reimbursed by Canada. The Contractor agrees that it will only be paid the following amounts:
  - a. on the basis of the Contract Price, for any part of the Work completed that is inspected and accepted in accordance with the Contract, whether completed before, or after the termination in accordance with the instructions contained in the termination notice;
  - b. the Cost incurred by the Contractor plus a fair and reasonable profit thereon as determined by Canada in accordance with the profit provisions found in PWGSC Supply Manual section [10.65 Calculation of profit on negotiated contracts](#), for any part of the Work commenced, but not completed, prior to the date of the termination notice. The Contractor agrees that it is not entitled to any anticipated profit on any part of the Contract terminated; and
  - c. all costs incidental to the termination of the Work incurred by the Contractor but not including the cost of severance payments or damages to employees whose services are no longer required, except wages that the Contractor is obligated by statute to pay.
3. Canada may reduce the payment in respect of any part of the Work, if upon inspection, it does not meet the requirements of the Contract.
4. The total of the amounts, to which the Contractor is entitled to be paid under this section, together with any amounts paid, due or becoming due to the Contractor must not exceed the Contract Price. The Contractor will have no claim for damages, compensation, loss of profit, interest, allowance arising out of any termination notice given by Canada under this section except to the extent that this section expressly provides. The Contractor agrees to repay immediately to Canada the portion of any advance payment that is unliquidated at the date of the termination.

### 31 Audit

1. To enable Canada to determine whether the Work has been performed and the price charged for the Work is in accordance with the Contract terms and whether best value has been achieved for Canada, the Contractor must maintain complete and accurate records of the estimated and actual cost of the Work.
2. Such records include all tender calls, quotations, contracts, correspondence, source documents for accounting entries such as Excel or other spread sheets in numeric and machine readable form (not PDF copies), books and ledgers of initial accounting entries, work sheets, spreadsheets and other documentation supporting cost allocations, computations, reconciliations and assumptions made by the





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Contractor in relation to the Contract. Copies are generally not acceptable and can only be used where originals are unavailable due to unusual circumstances, such as fire, flood or theft.

3. The Contractor must establish and maintain an accounting system that enables Canada to readily identify these records.
4. These records must be made available on request, for examination by Canada, or by persons designated to act on behalf of Canada during normal business hours at the contractor's office or place of business. In the event that no such location is available, then the financial records, together with the supporting or underlying documents and records, must be made available for examination at a time and location that is convenient for Canada.
5. The Contractor must maintain such records at all times during the term of this Contract and for a period of seven years after it receives the final payment under the Contract, or until the settlement of all outstanding claims and disputes, whichever is later.
6. Canada and its authorized representatives have the right to examine, and to make copies of, or extract from, all such records in whatever form they may be kept, relating to or pertaining to this Contract kept by or under the control of the Contractor, including but not limited to those kept by the Contractor, its employees, agents, successors, and subcontractors.
7. The Contractor must cause all subcontractors at any tier and all other persons directly or indirectly controlled by, or affiliated with the Contractor, to comply with the requirements of this clause as if they were the Contractor.

### **32 Right of set-off**

Without restricting any right of set-off given by law, Canada may set-off against any amount payable to the Contractor under the Contract, any amount payable to Canada by the Contractor under the Contract or under any other current contract. Canada may, when making a payment pursuant to the Contract, deduct from the amount payable to the Contractor any such amount payable to Canada by the Contractor which, by virtue of the right of set-off, may be retained by Canada.

### **33 Notice**

Any notice under the Contract must be in writing and may be delivered by hand, courier, mail, facsimile or other electronic method that provides a paper record of the text of the notice. It must be sent to the Party for whom it is intended at the address stated in the Contract. Any notice will be effective on the day it is received at that address. Any notice to Canada must be delivered to the Contracting Authority.

### **34 Conflict of interest and Values and Ethics Codes for the Public Service**

The Contractor acknowledges that individuals who are subject to the provisions of the [Conflict of Interest Act](#), 2006, c. 9, s. 2, the *Conflict of Interest Code for Members of the House of Commons*, the *Values and Ethics Code for the Public Service* or all other codes of values and ethics applicable within specific organizations cannot derive any direct benefit resulting from the Contract.

### **35 No bribe or conflict**

1. The Contractor declares that no bribe, gift, benefit, or other inducement has been or will be paid, given, promised or offered directly or indirectly to any official or employee of Canada or to a member of the family of such a person, with a view to influencing the entry into the Contract or the administration of the Contract.
2. The Contractor must not influence, seek to influence or otherwise take part in a decision of Canada knowing that the decision might further its private interest. The Contractor must have no financial interest in the business of a third party that causes or would appear to cause a conflict of interest in connection with the performance of its obligations under the Contract. If such a financial interest is acquired during the period of the Contract, the Contractor must immediately declare it to the Contracting Authority.



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3. The Contractor warrants that, to the best of its knowledge after making diligent inquiry, no conflict exists or is likely to arise in the performance of the Contract. In the event the Contractor becomes aware of any matter that causes or is likely to cause a conflict in relation to the Contractor's performance under the Contract, the Contractor must immediately disclose such matter to the Contracting Authority in writing.
4. If the Contracting Authority is of the opinion that a conflict exists as a result of the Contractor's disclosure or as a result of any other information brought to the Contracting Authority's attention, the Contracting Authority may require the Contractor to take steps to resolve or otherwise deal with the conflict or, at its entire discretion, terminate the Contract for default. Conflict means any matter, circumstance, interest, or activity affecting the Contractor, its personnel or subcontractors, which may or may appear to impair the ability of the Contractor to perform the Work diligently and independently.

### **36 Survival**

All the Parties' obligations of confidentiality, representations and warranties set out in the Contract as well as the provisions, which by the nature of the rights or obligations might reasonably be expected to survive, will survive the expiry or termination of the Contract.

### **37 Severability**

If any provision of the Contract is declared by a court of competent jurisdiction to be invalid, illegal or unenforceable, that provision will be removed from the Contract without affecting any other provision of the Contract.

### **38 Successors and assigns**

The Contract is to the benefit of and binds the successors and permitted assignees of Canada and of the Contractor.

### **39 Contingency fees**

The Contractor certifies that it has not directly or indirectly, paid or agreed to pay and agrees that it will not, directly or indirectly, pay a contingency fee for the solicitation, negotiation or obtaining of the Contract to any person, other than an employee of the Contractor acting in the normal course of the employee's duties. In this section, "contingency fee" means any payment or other compensation that depends or is calculated based on a degree of success in soliciting, negotiating or obtaining the Contract and "person" includes any individual who is required to file a return with the registrar pursuant to section 5 of the [Lobbying Act](#), 1985, c. 44 (4th Supplement).

### **40 International sanctions**

1. Persons in Canada, and Canadians outside of Canada, are bound by economic sanctions imposed by Canada. As a result, the Government of Canada cannot accept delivery of goods or services that originate, either directly or indirectly, from the countries or persons subject to [economic sanctions](#).
2. The Contractor must not supply to the Government of Canada any goods or services which are subject to economic sanctions.
3. The Contractor must comply with changes to the regulations imposed during the period of the Contract. The Contractor must immediately advise Canada if it is unable to perform the Work as a result of the imposition of economic sanctions against a country or person or the addition of a good or service to the list of sanctioned goods or services. If the Parties cannot agree on a work around plan, the Contract will be terminated for the convenience of Canada in accordance with section 30.

### **41 Integrity provisions—contract**

The *Ineligibility and Suspension Policy* (the "Policy") and all related Directives incorporated by reference into the bid solicitation on its closing date are incorporated into, and form a binding part of the Contract. The Contractor must comply with the provisions of the Policy and Directives, which can be found on Public Works and Government Services Canada's website at [Ineligibility and Suspension Policy](#).





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#### **42 Harassment in the workplace**

1. The Contractor acknowledges the responsibility of Canada to ensure, for its employees, a healthy work environment, free of harassment. A copy of the [Directive on the Prevention and Resolution of Workplace Harassment and Violence](#), which is also applicable to the Contractor, is available on the Treasury Board Web site.
2. The Contractor must not, either as an individual, or as a corporate or unincorporated entity, through its employees or subcontractors, harass, abuse, threaten, discriminate against or intimidate any employee, contractor or other individual employed by, or under contract with Canada. The Contractor will be advised in writing of any complaint and will have the right to respond in writing. Upon receipt of the Contractor's response, the Contracting Authority will, at its entire discretion, determine if the complaint is founded and decide on any action to be taken.

#### **43 Entire agreement**

The Contract constitutes the entire and only agreement between the Parties and supersedes all previous negotiations, communications and other agreements, whether written or oral, unless they are incorporated by reference in the Contract. There are no terms, covenants, representations, statements or conditions binding on the Parties other than those contained in the Contract.

#### **44 Access to information**

Records created by the Contractor, and under the control of Canada, are subject to the [Access to Information Act](#). The Contractor acknowledges the responsibilities of Canada under the [Access to Information Act](#) and must, to the extent possible, assist Canada in discharging these responsibilities. Furthermore, the Contractor acknowledges that section 67.1 of the [Access to Information Act](#) provides that any person, who destroys, alters, falsifies or conceals a record, or directs anyone to do so, with the intent of obstructing the right of access that is provided by the [Access to Information Act](#) is guilty of an offence and is liable to imprisonment or a fine, or both.

#### **45 Code of Conduct for Procurement—Contract**

The Contractor agrees to comply with the [Code of Conduct for Procurement](#) and to be bound by its terms for the period of the Contract.



## ANNEX "B"

### STATEMENT OF WORK

#### **1.0 Title**

Better understanding Canadians to improve the client experience

#### **2.0 Objectives**

The Client Insights and Business Intelligence (CIBI) Division of Employment and Social Development Canada (ESDC) plans to undertake data analyses of the Canadian population to understand various demographic profiles and their lifestyles. Completing these analyses will allow for a better understanding of the behaviours and preferences of these groups and will inform service and program design, service delivery and outreach strategies.

#### **3.0 Background statement**

CIBI's primary source for insights on service expectations and client experience of ESDC's clients is the annual Client Experience Survey of individuals using the Department's services or benefits.

CIBI seeks to improve its understanding of the diverse Canadian demographic to generate insights that can better inform ESDC's policy, program, and service design. Given ESDC's broad mandate to serve all Canadians, CIBI will undertake analyses of different segments of the Canadian population such as seniors, youth, minorities, people with disabilities, Indigenous peoples, etc. to understand their social, economic and geo-demographic characteristics, and the factors influencing them. CIBI, therefore, requires access to a comprehensive and up-to-date set of data variables (segmented by postal code) comprising Canadian social, demographic, behavioural and psychographic attributes.

At the completion of this contract, CIBI will have compiled insights specific to various client profiles/groups that will help ESDC make evidence-based decisions to improve the client experience. These insights could also help inform communications with Canadians and client outreach strategies to reach client groups who are eligible for



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government benefits but may not be accessing them. Population modelling and statistical projections could help inform the future network footprint of Service Canada centres.

#### **4.0 Scope**

ESDC requires that the Contractor provide multiple integrated datasets sourced from large-sample national surveys and other sources representative of the Canadian population. These datasets will be analyzed to present a thorough understanding of the Canadian population, including various behavioural, psychographic and geo-demographic features. The CIBI project team, consisting of approximately six (6) analysts/users, must also be able to use ESDC client data variables to enable analysis comparing the Canadian population with client groups and identifying geographic areas not currently in receipt of benefits. The CIBI project team will leverage the Contractor's datasets, Contractor's analytics expertise, in-depth knowledge of the analytics platform and support services to focus on important and time-sensitive projects on behalf of ESDC.

**Software as a Service.** The Contractor will provide the Solution through a Software as a Service ("SaaS") delivery model, allowing Canada to access and use the Solution which is hosted by the Contractor.

**Commercially-Available Solution.** ESDC acknowledges that the SaaS Solution is a commercially-available solution provided to other customers. As part of the subscription to use the Solution, the Contractor agrees to make available to ESDC all the features and functionalities included in the commercially available version of the Solution, and be responsible for the incidental and required information technology infrastructure services required to deliver the Solution, all of which is included in the subscription price.

#### **Improvements to and Evolution of the Solution: Features or Functionalities.**

ESDC acknowledges that the SaaS solution, underlying software application or associated infrastructure may evolve during the course of the Contract Period. The Contractor agrees to continue to provide the Services as the commercially available Solution, with functionality or features with terms that are materially no less favorable than as at the time of Contract award.

The parties acknowledge that technology and business models evolve quickly and that any SaaS solution provided at the beginning of the Contract Period inevitably will be different from the Solution provided at the end of the Contract Period and the method(s) by which the SaaS solution and any potential peripheral systems are provided to ESDC are likely to change or evolve, and that, at the time of entering into this Contract, the parties cannot possibly contemplate all the goods or services that may be delivered under this Contract, other than they will be connected to delivering to Users. With that in mind, the parties agree that:

- a) The Contractor must maintain and continuously improve the SaaS solution and infrastructure throughout the Contract Period on a commercially reasonable basis and must provide those improvements and enhancements to ESDC as part of ESDC's subscription, with no price adjustment if those improvements and enhancements are also offered to other customers at no additional cost.
  
- b) If the Contractor removes any functions from the commercial offering to the SaaS solution and offers those functions in any new or other services or products, the Contractor must continue to provide those functions to ESDC as part of ESDC's subscription to the Services, under the existing terms and conditions of the Contract regardless of whether those other services or products also contain new or additional functions. The Contractor has no obligation to comply with this paragraph if the SaaS solution acquired by ESDC is still offered by Contractor in parallel with the new services offered to other customers.

**ESDC requires:**



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**1) Subscription service that includes the following:**

a. Data:

- i. Access to multiple up-to-date, large-scale data sets representative of the Canadian population that can be reviewed at various geographic levels (national and down to postal code) and include:
  - Demographics (e.g. population size, occupation types, annual income, level of education, family status, number and age of children, sex, age, location, type of property owned, etc.);
  - Psychographics (e.g. the outlooks and values that inform decision making of Canadians and identify the underlying motivators of behaviour);
  - Behavioural including media and news consumption (e.g. insight into the different social media platforms used by Canadians to obtain information and/or inform their decision making, traditional media, preference by type of programming) and how Canadians gather/seek out government information, etc.;
  - Lifestyle attribute data (buying habits, channel preferences and interests, brand association and attitudes) at the neighbourhood level to distinguish amongst the Canadian population; and
  - Financial data\* such as the wealth of Canadians, financial attitudes, behaviours (including savings, investments, debt, data literacy, etc.) as well as data reflecting newcomers (where they are locating, language spoken, education, values, etc.).
- ii. The data points must integrate the latest Census, General Social Survey and leading syndicated studies on media consumption behaviours and lifestyle and include variables that can drill down on media behaviour based on household composition (e.g. female heads of household). Data provided at contract award and throughout the contract must be the most up-to-date data available. Where source data is updated in periods longer than one year (e.g. Census), the Contractor uses statistically sound modelling techniques to project current and near-term future estimates.

b. Analytics platform that provides ESDC users:

- i. The ability to perform analytics and create reports with the datasets provided using a browser-agnostic, operating system-agnostic, secure and intuitive platform and via flat file;
- ii. The ability to both query the Contractor's datasets independently and integrate with ESDC's client data within the Contractor's platform to derive insights on the Canadian population;
- iii. An ESDC data analytics results page where ESDC users can compile/save analyses and reports sourced through the Contractor's platform and create password-protected folders to enable ESDC non-users to view the maps and reports created (dynamic read-only reports);
- iv. Technical support and uninterrupted access to the data and all platform features; and
- v. Advance notification of any scheduled maintenance or data updates.
- vi. *Contractor* must submit published service level agreements (SLA) that outline the service level agreements as per Annex – Service Level Agreements (SLA).

c. Support and training that includes:



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- i. Introductory virtual classroom-styled training sessions that focus on the Platform as well as on querying methodology and report creation ;
- ii. Existing self-serve tutorials, videos, tools and other training material to maximize user ability to generate desired population insights;
- iii. Customized training for ESDC users (minimum twice per contract year) that focuses on leveraging vendor's data specific to ESDC use cases;
- iv. A block of at least 40 support hours per ESDC user that could be used to ask questions about the platform and data, and talk to analysts who can verify their insights and conclusions, to interpret ESDC needs and questions, turn them into queries and to create reports; and
- v. Resources available to provide support include Account manager, Project manager and Data and insights analyst.

The resources' tasks could include but are not limited to:

**Account manager:**

- a) *Liaising between ESDC and Contractor.*
- b) *Coordinating meetings between ESDC and Contractor's project team.*
- c) *Understanding ESDC's business requirements and translate the same into technical requirements*
- d) *Understanding ESDC's business processes and priorities.*
- e) *Addressing all issues raised by ESDC by co-ordinating with relevant teams within the Contractor's organization.*
- f) *Acting as ESDC's single point of contact including for initiating new research project requests, change requests and for coordinating between Contractor's and ESDC's project teams.*
- g) *Reporting progress of the project to ESDC on an ongoing basis and at scheduled points in the life cycle.*
- h) *Ensuring ESDC management staff is provided with timely and accurate project information and status updates.*

**Project manager:**

- a) *Planning and coordinating project activities.*
- b) *Giving briefings on progress and concerns of project.*
- c) *Developing, planning, analyzing, evaluating and prioritizing deliverables and requirements.*
- d) *Planning, directing and controlling the activities of a project team within scheduled time and cost parameters.*
- e) *Reporting progress of the project on an ongoing basis and at scheduled points in the life cycle.*
- f) *Preparing plans, charts, tables and diagrams to assist in analyzing or displaying problems.*
- g) *Formulating and managing project plans by defining deliverables, identifying key milestones and reviewing project progress.*
- h) *Monitoring the design, implementation and operations start up of the project against established goals, objectives and milestones.*
- i) *Ensuring management staff is provided with timely and accurate project information and status updates.*

**Data and insights analysts:**



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- a) *Reporting results of statistical analyses, including information in the form of graphs, charts and tables.*
- b) *Processing large amounts of data for statistical modeling and graphic analysis using computers.*
- c) *Identifying relationships and trends in data, as well as any factors that could affect the results of research.*
- d) *Analyzing and interpreting statistical data in order to identify significant differences in relationships among sources of information.*
- e) *Preparing estimates and forecasts using statistical techniques.*
- f) *Preparing data for processing by organizing information, checking for any inaccuracies and adjusting and weighting the raw data.*
- g) *Evaluating the statistical methods and procedures used to obtain data in order to ensure validity, applicability, efficiency and accuracy.*
- h) *Evaluating sources of information in order to determine any limitations in terms of reliability or usability.*

**2) When requested, the Contractor will be required to provide a variety of support services that could include, but are not limited to, the following:**

- a) The ability to leverage the Contractor’s analytics expertise, in-depth knowledge of the analytics platform and consultative services, to provide ESDC with analysis and actionable client insights;
- b) Specialists as defined in Part A(Item c. v.), who could assist ESDC users; and
- c) Written reports in Excel or PowerPoint and PDF.

The actual requirements, including details of the services required, will be included in the Task Authorization.

**4.1 Tasks**

The Contractor shall undertake the following tasks and activities to the satisfaction of the Project Authority:

<b>Tasks and activities</b>	<b>Time schedule</b>	<b>Included in</b>
a. The Contractor must meet with the Project Authority.	Within one week of contract award	Subscription Service
b. The Contractor must provide a training plan and a data variable dictionary.	Within one week of contract award	Subscription Service
c. The Contractor must schedule training of identified users on its data analytics platform.	Within one week of identifying users	Subscription Service
d. The Contractor must grant access to their data analytics platform and train users as per the agreed-upon training schedule.	Within one week of identifying users	Subscription Service
e. The Contractor must provide dedicated resources to provide technical support for its data analytics platform and analytical expertise to maximize insights drawn from the data on an ongoing basis.	As soon as users are granted access	Subscription Service



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f. The Contractor must establish the ESDC data analytics results page.	Prior to training of ESDC users	Subscription Service
g. In instances that ESDC wishes to leverage the Contractor's expertise to conduct analyses of the datasets (Item 2.a of Section 4.0), the Contractor must provide a project proposal including objectives, milestones and deliverables, including timelines for each ESDC request to leverage the Contractor's analytical expertise.	Within two weeks of the request	Subscription Service and Professional services (if hours in Subscription are all used)
h. The Contractor must, for each approved project request (per task 'g.' above), execute the analysis and provide ESDC a project report in agreed format (e.g. PowerPoint, Word, PDF, etc.) with readable and actionable insights that are relevant to the project's purpose, scope and objectives.	Within the agreed upon timelines in project proposal.	Subscription Service and Professional services (if hours in Subscription are all used)
i. The Contractor must attend all meetings organized by ESDC.	When scheduled	Subscription Service and Professional Service

**5.0 Constraints**

The Contractor must:

- 1) Ensure that the datasets are compliant with all Government of Canada legislative requirements pertaining to data collection, retention, usage and disclosure on Canadians, including the Privacy Act and the Personal Information Protection and Electronic Documents Act.
- 2) The Contractor must protect ESDC data from unauthorized access, modification or exfiltration. This includes implementing and maintaining appropriate technical and organizational security measures including information security policies, procedures and security controls to preserve the confidentiality, integrity and availability of ESDC's data.
- 3) Be able to conduct analysis as required on behalf of ESDC including integrating ESDC unclassified data with Contractor's data, while ensuring full compliance with Canadian privacy laws.
- 4) Maintain confidentiality on all documents and information provided by ESDC. The Contractor must also return all materials or data belonging to ESDC, should ESDC provide any data to the Contractor. The Contractor must be willing to provide certification of deletion upon termination of the contract.
- 5) Certify that it has personnel who are capable of providing the required services in both official languages to the participants, ESDC personnel and any others as required.
- 6) Provide the ability for ESDC to establish secure connections to cloud services, including providing data-in-transit protection between ESDC and the cloud service using TLS 1.2, or subsequent versions.

**6.0 Meetings**

In order to ensure that all contract deliverables are completed successfully, the Contractor will attend weekly, fortnightly or monthly meetings as agreed upon as well as any ad-hoc meetings called by ESDC. These meetings will include discussions on methodologies, scope, data changes, consultant support timelines and progress. In addition, the Contractor will organize meetings with ESDC to provide demonstration of their platform, to present





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data summary reports and to have additional discussions focused on refining each project deliverable in this contract as required to ensure that the right quality reports are generated to ESDC's satisfaction.

**7.0 Travel**

No travel is required.

**8.0 Client support and key stakeholders**

ESDC is responsible for:

- 1) Providing access to any relevant ESDC or Government of Canada documentation (e.g., reports, studies and publications) or knowledge resources (e.g., other government experts) as needed.
- 2) Providing access to a staff member who can respond to requests and co-ordinate activities between ESDC and the Contractor.
- 3) Providing comments or feedback within ten (10) working days of requests or deliverables shared by the Contractor.
- 4) Limiting access to the data analytics platform and its datasets to only certified users who have permission to use the platform, recognizing that access to the data is at enterprise level.
- 5) Destroying all Contractor-provided flat files at the termination of the contract, except for one copy, which shall be kept for archival or auditing purposes (but will not otherwise have permission to access).
- 6) Providing other assistance and support to the Contractor as needed.

**9.0 Resources and level of effort**

For resource and level of effort, see sections "4.1 Tasks" and "10. Deliverables, Milestones and Schedule."

**10.0 Deliverables, milestones and schedule**

The Contractor shall complete the following deliverables to the satisfaction of the Project Authority:

<b>Deliverables and milestones</b>	<b>Time schedule</b>	<b>Included in</b>
1) Initial meeting between Contractor and Project Authority, including a presentation that gives an overview of how the data-analytics platform works (with datasets).	Within one (1) week of signing of contract.	Subscription service
2) Initial meeting between Contractor and ESDC users of Contractor's data analytics platform, including a presentation that gives an overview of how the data analytics platform works (with datasets).	Within two (2) weeks of signing of contract.	Subscription Service
3) Granting all ESDC users access to the data analytics platform, including datasets (with all troubleshooting issues resolved by the Contractor).	Within ten (10) business days of signing the contract.	Subscription service





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Deliverables and milestones	Time schedule	Included in
4) Provide training to all identified users of Contractor’s data analytics platform at ESDC to enable users to conduct self-directed analyses and complete reports.	Within two (2) weeks of ESDC providing user names or within two (2) weeks of ESDC user change request.	Subscription service
5) Establish an ESDC data analytics results page to compile/save ESDC analyses and reports.	Prior to training of ESDC users	Subscription service
6) Provide customized training specific to ESDC needs to help ESDC better understand its clients.	Two sessions at minimum.	Subscription service
7) A finalized project plan and strategy to respond to ESDC data queries for each ESDC request for leveraging Contractor’s expertise.	Within two (2) weeks of ESDC’s request.	Subscription Service and Professional services (if hours in Subscription are all used)
8) The Contractor will provide a thorough and detailed analysis of its Canadian data, including client groups and profiles for each research project.	Within one (1) week of approved research project plan.	Subscription Service and Professional services (if hours in Subscription are all used)
9) Completion of a draft project report with the Contractor completing all analyses and presenting the report to the CIBI project team.		Subscription Service and Professional services (if hours in Subscription are all used)
10) Completion of project report, with the Contractor including any revisions to the draft project report (outlined in 8. above) and presenting the report to ESDC.	Within one (1) week following list of revisions provided by ESDC.	Subscription Service and Professional services (if hours in Subscription are all used)

**11.0 Work location**

Work should be performed at the Contractor’s place of business and delivered through online and cloud-based tools accessible to both ESDC and the Contractor.



**ANNEX “C” BASIS OF PAYMENT**

**1. Software as a Service Solution – Annual Subscription**

Customs duties are included, and Applicable Taxes are extra.

Period	Firm Annual Unit Price <i>*Annual Subscription fees</i>	
	For 6 users	Additional User
Initial Period		
Option Period – 1		
Option Period – 2		
Option Period – 3		

**2. Professional Services (as identified in Section 4 Scope of SoW)**

Customs duties are included, and Applicable Taxes are extra.

Period	Description	Firm Hourly Rate, \$
Initial Period	Account manager, Project manager, Data and Insights Analyst	
Option Period - 1	Account manager, Project manager, Data and Insights Analyst	
Option Period - 2	Account manager, Project manager, Data and Insights Analyst	
Option Period – 3	Account manager, Project manager, Data and Insights Analyst	



**ANNEX "D" TASK AUTHORIZATION FORM**

<b>TASK AUTHORIZATION (TA) FORM</b>				
<b>Contractor:</b>		<b>Contract No.</b>		
<b>Task Authorization No.:</b> 450000XXXX		<b>Date:</b>		
<b>Financial coding:</b>		<b>Amendment #:</b>		
<b>AMENDMENT INFORMATION</b> (if applicable) Amendment # has been issued to... Amendment # has been issued to... <p style="text-align: center;"><b>*All other terms and conditions remain the same*</b></p>				
<b>1. Statement of Work (Work Activities, Certifications and Deliverables)</b>				
<b>BACKGROUND</b>  <b>TASKS</b>  <b>DELIVERABLES</b>  <b>ESDC Contracting Authority:</b> Email:  The ESDC Contracting Authority (or delegated representative) is responsible for the management of this TA. Any changes to the TA must be authorized in writing by the ESDC Procurement Representative. The Contractor is not to perform work in excess of or outside the scope of this TA based on verbal or written requests or instructions from any government personnel other than the aforementioned officer.  <b><u>PLEASE SEND INVOICES TO:</u></b>  The Project Authority: Email:  The Project Authority (or delegated representative) is responsible for all matters concerning the technical content of the Work under this TA. Any proposed changes to the scope of the Work are to be discussed with the Project Authority, but any resulting change is only effective and enforceable if a written contract amendment is issued by the ESDC Procurement Representative or the PWGSC Contracting Authority.				
<b>2. Period of Services:</b>		<b>From:</b>		<b>To:</b>
<b>3. Work Location:</b>				
<b>4. Language Requirements:</b>				
<b>5. Level of Security Clearance required:</b>				
<b>6. Cost Breakdown</b>				
<b>Category</b>	<b>Name of Resource</b>	<b>Hourly Rate</b>	<b>Estimated # of Hours</b>	<b>Total Cost</b>
			<b>Estimated Cost</b>	
			<b>Applicable taxes</b>	
			<b>Total Estimated Cost</b>	
			<b>Total Travel &amp; Living Cost</b>	



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<b>Maximum Total of TA</b>		
<b>8 SIGNATURES</b>		
<b>Project Authority:</b>	<b>Signature:</b>	<b>Date:</b>
<b>Contract Authority:</b>	<b>Signature:</b>	<b>Date:</b>
<b>Check Either Option:</b>  <input type="checkbox"/> The Contractor hereby accepts this task authorization  <input type="checkbox"/> The Contractor does not accept this task authorization		
<b>Name of Contractor authorized to sign (type or print):</b>	<b>Title of Contractor authorized to sign (type or print):</b>	<b>Date:</b>
<b>Signature:</b>		



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### **ANNEX “E” ELECTRONIC PAYMENT INSTRUMENTS**

Canada requests that Bidders complete option 1 or 2 below:

1.  Electronic Payment Instruments will be accepted for payment of invoices.

The following Electronic Payment Instrument(s) are accepted:

- Direct Deposit (Domestic and International);

2.  Electronic Payment Instruments will not be accepted for payment of invoices.

The Bidder is not obligated to accept payment by Electronic Payment Instruments.

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



## **ANNEX “F” SERVICE LEVEL AGREEMENTS (SLA)**

Bidders must submit published service level agreements (SLA) that outline the service level agreements.

The service level commitments (detailed in the published service level agreements) must provide commercial clients support that includes, at the minimum, any published and commercially available support (i.e. warranty, maintenance and support services) typically provided to customers who provision the SaaS.

Service Level Agreements may consist of a single document which applies to all SaaS Solutions or may consist of multiple SaaS Solution specific documents. Should a Bidder submit multiple SaaS Solution specific SLA documents, the Bidder must clearly define the SaaS Solution and the corresponding Ceiling Prices, the SLA applies to. If SLA terms are already specified in the SaaS Usage Terms and Conditions, duplicate terms need not be provided. The following are examples of terms that may be addressed in the Bidder's Service Level Agreement:

- a) period during which the Bidder will support the SaaS users;
- b) contact and procedure information for accessing Support;
- c) procedures for resolution of problems;
- d) response times;
- e) procedures on how and when all telephone, fax or email communications will be responded to;
- f) support web site availability to Canada's users (e.g. 24 hours a day, 365 days a year, and 99.9% of the time); and
- g) Maintenance entitlements (e.g. patches, updates, major/minor releases, etc.)



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**ATTACHEMENT 1 TO PART 3 – PRICING SCHEDULE**

Bidders must submit their financial bid in accordance with the following Pricing Schedule.

The financial bid total price will be calculated as per the following equation:

**Financial Bid Total= (0.7 x A) + (0.3 x B)**

**1. Software as a Service Solution – Annual Subscription**

Customs duties are included, and Applicable Taxes are extra.

Period	Firm Annual Unit Price <i>*Annual Subscription fees</i>		
	For 6 users	Additional User	Subtotal
Initial Period	A1.1 \$ ____	A1.2 \$ ____	A1 \$ _____ (A1 = A1.1 + A1.2)
Option Period – 1	A2.1 \$ ____	A2.2 \$ ____	A2 \$ _____ (A2 = A2.1 + A2.2)
Option Period – 2	A3.1 \$ ____	A3.2 \$ ____	A3 \$ _____ (A3 = A3.1 + A3.2)
Option Period – 3	A4.1 \$ ____	A4.2 \$ ____	A4 \$ _____ (A4 = A4.1 + A4.2)
<b>(A) Total Software as a Service Annual Subscription (Sum of A1 to A4):</b>			<b>(A) \$ _____</b>

**2. Professional Services (as identified in Section 4 Scope of Statement of Work)**

Customs duties are included, and Applicable Taxes are extra.

In respect of the “Estimated Level of Effort” listed below, the estimated number of hours is for evaluation purposes only during the solicitation process and does not represent a commitment of the future usage.

Period	Estimated Level of Effort, Hours	Description	Firm Hourly Rate, \$
Initial Period	200	Account manager, Project manager, Data and Insights Analyst	B1 \$ _____
Option Period - 1	200	Account manager, Project manager, Data and Insights Analyst	B2 \$ _____
Option Period - 2	200	Account manager, Project manager, Data and Insights Analyst	B3 \$ _____
Option Period – 3	200	Account manager, Project manager, Data and Insights Analyst	B4 \$ _____
<b>(B) Total Professional Services (Sum of B1 to B4):</b>			<b>(B) \$ _____</b>



**ATTACHEMENT 1 TO PART 4 BID EVALUATION CRITERIA**

**1. Mandatory Technical Criteria**

The bid must meet the mandatory technical criteria specified in the table below. The Bidder must provide the necessary documentation to support compliance with this requirement. Bids that fail to meet the mandatory technical criteria below will be declared non-responsive. Each mandatory technical criterion must be addressed separately.

<b>Mandatory technical criteria (MT)</b>				
<b>Item number</b>	<b>Description</b>	<b>Page number /Paragraph number</b>	<b>Met</b>	<b>Not met</b>
<b>MT1</b>	<p><b>Comprehensive data on the Canadian population:</b></p> <p>a) The Bidder must offer integrable data sourced from large-sample, national surveys and other sources that are representative of the Canadian population and which support deriving insights about the Canadian population. Datasets must include demographics, psychographics, behavioural and social (including lifestyle) variables. Of particular interest are data variables representing media consumption habits, lifestyles, income, family structure, household size and type, occupation, ethnic diversity, labour-force participation, device usage and social values.</p> <p>b) The Bidder must offer Canadian segments or profiles that map to Canadian lifestyles.</p> <p>c) The data relating to a) and b) above must integrate the latest Census, General Social Survey and leading syndicated studies that are representative of the Canadian population with high levels of confidence (on behaviours and lifestyle) and include variables that can drill down on media behaviour based on household composition (e.g. female heads of household)</p> <p>d) The data must be exclusively Canadian, have pan-Canadian (national) coverage and be representative of the Canadian population.</p> <p>e) The data must contain historical values for variables to allow for demographic and population projections to be made for up to 10 years in the future.</p>			





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Mandatory technical criteria (MT)				
Item number	Description	Page number /Paragraph number	Met	Not met
	f) All data must have a geospatial identifier and be able to be connected or integrated in a privacy-compliant manner, via the use of a six-digit postal code.			
<b>MT2</b>	<p><b>Management, Governance, Privacy and Security of Data</b></p> <p>a) Datasets must be current and must be updated regularly (at least once annually)</p> <p>b) Bidder must demonstrate that the collection, storage, use and disclosure of datasets provided to ESDC is fully compliant with Canadian privacy laws and regulations including PIPEDA and the Privacy Act.</p> <p>c) Datasets must be integrated into the Bidder's analytics platform, and extractable in a format (e.g., a flat file) that can be imported into other business-intelligence (BI) tools including Power BI, MS Excel, SAS and Cognos.</p> <p>d) Bidder must demonstrate data governance policies supported by annual audits.</p> <p>e) Bidder must demonstrate policies in place to ensure safeguarding of ESDC's data, analyses and reports including for results storage page mentioned in MT4 below and as defined in section 5. Constraints (Sub-items 2 and 5) of Statement of Work.</p> <p>f) Bidder must demonstrate that business continuity and disaster recovery plans are in place.</p> <p>g) Bidder must demonstrate that their statistical modelling practices, including for sampling, imputing, analyzing correlation and association, establishing outliers and projecting for future, are based on well established statistical and scientific methods and that their rationale for any assumptions used are based on scientific reasoning and any prevailing industry standards.</p> <p>To demonstrate the compliance with this criterion, the Bidder must provide relevant documentation OR the name</p>			



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Mandatory technical criteria (MT)				
Item number	Description	Page number /Paragraph number	Met	Not met
	<p>and CV of the officer in-charge of overseeing the implementation of statistical modeling whose level of expertise is required to score a minimum of 75 points when evaluated as per the statistical oversight section of the flexible grid.</p> <p>h) Bidder must provide a data model for each data set as well as data dictionary explaining the variables within the dataset.</p> <p>i) Bidder must provide for each dataset an overview document summarizing the contents of the dataset including its source, size, grain, historical length, currency and type of statistical modelling used, if any.</p> <p>j) Bidder must provide ESDC with a calendar of scheduled updates to data provided to ESDC as well as of any regular maintenance activity that may impact ESDC's access to data.</p>			
<b>MT3</b>	<p><b>Data analytics platform:</b></p> <p>The Bidder must offer an analytics platform that:</p> <p>a) Has a user interface with drag-and-drop functions and an interactive dashboard.</p> <p>b) Is secure and cloud-based, as well as browser and operating system agnostic (the Bidder must disclose the company's security policies).</p> <p>c) Has an intuitive reporting tool that produces presentation-ready reports and does not require users to be data scientists.</p> <p>d) Allows for easy querying of geo-demographic segmentation of national population data down to six-digit postal codes.</p>			



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Mandatory technical criteria (MT)				
Item number	Description	Page number /Paragraph number	Met	Not met
	<ul style="list-style-type: none"> <li>e) Allows for the sharing of 1) analyses and reports with other users for collaboration, and 2) reports for presentation with non-users across the department.</li> <li>f) Allows for the integration of ESDC's unclassified administrative and client data with the Bidder's data in a way to compare between ESDC clients and the general population.</li> <li>g) Provides reporting features, such as comprehensive charting, geospatial maps, heatmaps and other data visualisations.</li> <li>h) Has built-in segmentation modelling tools.</li> <li>i) Provides statistical analyses of the relationships between variables.</li> </ul>			
MT4	<p><b>Results storage:</b></p> <p>The Bidder must provide ESDC data analytics results page used for compiling analyses and reports sourced through the Bidder's product including the ability for EDSC users to create password-protected folders enabling ESDC non-users to view the maps and reports created by the ESDC users (dynamic read-only reports with password protection).</p>			
MT5	<p><b>Support and training:</b></p> <ul style="list-style-type: none"> <li>a) The Bidder must demonstrate the ability to provide ESDC telephone and e-mail support that is available through business hours covering 8 a.m. to 8 p.m. ET for assistance in identifying and resolving technical issues.</li> <li>b) The Bidder must demonstrate their ability to provide the required training as described within section 4.0 Scope of the Statement of Work.</li> <li>c) Bidder must provide at least 40 hours of support services per user as identified in 4.0 Scope under part 1 subscription services of the Statement of Work.</li> </ul>			



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Mandatory technical criteria (MT)				
Item number	Description	Page number /Paragraph number	Met	Not met
MT6	<p><b>Proposal :</b> The Bidder must provide a proposal that demonstrates its intended approach to achieving the objectives outlined in section 2.0 of the Statement of Work in a manner that aligns with the scope articulated in section 4.0 and the tasks within section 5.0.</p> <p>The proposal will be evaluated for completeness, clarity and achievability as demonstrated by a structure mapped to the following sections described in the Statement of Work:            2.0 Objectives            4.0 Scope            5.0 Tasks            10.0 Deliverables, milestones and schedule.</p> <p>The required experience must be demonstrated through one or multiple referenced projects and each referenced project must have a minimum duration of three (3) months in order to be accepted. The bidder should provide the following information:</p> <ol style="list-style-type: none"> <li>1. Name and description of client organization</li> <li>2. Project title;</li> <li>3. Scope, objective, size in dollars and resources;</li> </ol> <p>Start and end date of the project (s) (if end date applies) including month and year.</p> <p>The Bidder MUST demonstrate experience providing data products and support services similar to this contract's requirements to the private, public and not-for-profit sector by listing where, when and to whom these services were provided in the last 5 years including at least four Government Department clients.</p>			
MT7	<p><b>Resource plan:</b></p> <ol style="list-style-type: none"> <li>1. The Bidder must submit a resource plan with the detailed curriculum vitae of each of the proposed resources, demonstrating that each resource meets the minimum mandatory requirements as outlined in the flexible grid below (educational, professional designations and work experience) for the following resource categories:</li> </ol> <p><b>Account manager:</b></p> <ol style="list-style-type: none"> <li>a) <i>Liaising between ESDC and Contractor.</i></li> </ol>			



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Mandatory technical criteria (MT)				
Item number	Description	Page number /Paragraph number	Met	Not met
	<p>b) <i>Coordinating meetings between ESDC and Contractor's project team.</i></p> <p>c) <i>Understanding ESDC's business requirements and translate the same into technical requirements</i></p> <p>d) <i>Understanding ESDC's business processes and priorities.</i></p> <p>e) <i>Addressing all issues raised by ESDC by co-ordinating with relevant teams within the Contractor's organization.</i></p> <p>f) <i>Acting as ESDC's single point of contact including for initiating new research project requests, change requests and for coordinating between Contractor's and ESDC's project teams.</i></p> <p>g) <i>Reporting progress of the project to ESDC on an ongoing basis and at scheduled points in the life cycle.</i></p> <p>h) <i>Ensuring ESDC management staff is provided with timely and accurate project information and status updates.</i></p> <p><b>Project manager:</b></p> <p>a) <i>Planning and coordinating project activities.</i></p> <p>b) <i>Giving briefings on progress and concerns of project.</i></p> <p>c) <i>Developing, planning, analyzing, evaluating and prioritizing deliverables and requirements.</i></p> <p>d) <i>Planning, directing and controlling the activities of a project team within scheduled time and cost parameters.</i></p> <p>e) <i>Reporting progress of the project on an ongoing basis and at scheduled points in the life cycle.</i></p> <p>f) <i>Preparing plans, charts, tables and diagrams to assist in analyzing or displaying problems.</i></p> <p>g) <i>Formulating and managing project plans by defining deliverables, identifying key milestones and reviewing project progress.</i></p> <p>h) <i>Monitoring the design, implementation and operations start up of the project against established goals, objectives and milestones.</i></p> <p>i) <i>Ensuring management staff is provided with timely and accurate project information and status updates.</i></p>			



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Mandatory technical criteria (MT)				
Item number	Description	Page number /Paragraph number	Met	Not met
	<p><b>Data and insights analysts:</b></p> <ul style="list-style-type: none"><li>a) Reporting results of statistical analyses, including information in the form of graphs, charts and tables.</li><li>b) Processing large amounts of data for statistical modeling and graphic analysis using computers.</li><li>c) Identifying relationships and trends in data, as well as any factors that could affect the results of research.</li><li>d) Analyzing and interpreting statistical data in order to identify significant differences in relationships among sources of information.</li><li>e) Preparing estimates and forecasts using statistical techniques.</li><li>f) Preparing data for processing by organizing information, checking for any inaccuracies and adjusting and weighting the raw data.</li><li>g) Evaluating the statistical methods and procedures used to obtain data in order to ensure validity, applicability, efficiency and accuracy.</li><li>h) Evaluating sources of information in order to determine any limitations in terms of reliability or usability.</li></ul>			



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**1.1 Flexible grid for resources**

Flexible grid for Resources		
Ressource Category	Description	Rating points
Account manager	<p><b>Levels of expertise:</b> Minimum points required: 80 pts</p> <p><b>Highest Education in the resource category</b></p> <ul style="list-style-type: none"> <li>• University (PhD, graduate or undergraduate degree): 35 pts</li> <li>• College or CEGEP diploma/certificate: 25 pts</li> </ul> <p><b>Professional certification</b></p> <ul style="list-style-type: none"> <li>• Relevant professional certification: 15 pts</li> </ul> <p><b>Relevant experience in resource category</b></p> <ul style="list-style-type: none"> <li>• ≥1 yrs and &lt;5 yrs: 12 to 59 months—30 pts</li> <li>• ≥5 yrs and &lt;10 yrs: 60 to 119 months— 45pts</li> <li>• ≥10 yrs: 120 + months—60 pts</li> </ul>	<p>Minimum Required 80 pts</p> <p>___/110</p>
Project manager	<p><b>Levels of expertise:</b> Minimum points required: 80 pts</p> <p><b>Education to the resource category</b></p> <ul style="list-style-type: none"> <li>• University (PhD, graduate or undergraduate degree): 35 pts</li> <li>• College or CEGEP diploma/certificate: 25 pts</li> </ul> <p><b>Professional certification</b></p> <ul style="list-style-type: none"> <li>• Relevant professional certification: 15 pts</li> </ul> <p><b>Relevant experience in resource category</b></p> <ul style="list-style-type: none"> <li>• ≥1 yrs and &lt;5 yrs: 12 to 59 months—30 pts</li> <li>• ≥5 yrs and &lt;10 yrs: 60 to 119 months— 45pts</li> <li>• ≥10 yrs: 120 + months—60 pts</li> </ul>	<p>Minimum Required 80 pts</p> <p>___/100</p>
Data and insights analysts	<p><b>Levels of expertise:</b> Minimum points required: 95 pts</p> <p><b>Education to the resource category</b></p> <ul style="list-style-type: none"> <li>• Graduate degree or higher: 35 pts</li> <li>• Undergraduate degree: 25 pts</li> </ul> <p><b>Professional certification</b> Relevant professional certification: 10 pts</p> <p><b>Relevant experience in resource category</b></p> <ul style="list-style-type: none"> <li>• ≥2 yrs and &lt;4 yrs: 24 to 47 months—30 pts</li> <li>• ≥4 yrs and &lt;6 yrs: 48 to 71 months—35 pts</li> <li>• ≥6 yrs and &lt;10 yrs: 72-119 months—45 pts</li> <li>• ≥10 yrs: 120 + months—60 pts</li> </ul>	<p>Minimum Required 95 pts</p> <p>___/105</p>



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Flexible grid for Resources		
Ressource Category	Description	Rating points
Statistical oversight	<p><b>Levels of expertise</b></p> <p><b>Minimum points required: 75 pts</b></p> <p><b>Education</b> (<i>Statistics, Demography, Social statistics, Behavioural statistics, Epidemiology, Actuarial statistics, Psephology, or similar fields with significant statistical analysis of population and their behaviours</i>):</p> <ul style="list-style-type: none"> <li>• PhD 45 pts</li> <li>• Graduate degree: 35 pts</li> </ul> <p><b>Relevant experience in the role of statistical oversight:</b></p> <ul style="list-style-type: none"> <li>• 10 to 19 years: 120 + months—30 pts (5 additional points for relevant experience in a government setting)</li> <li>• 20 to 29: 40 pts (5 additional points for relevant experience in a government setting)</li> <li>• Over 30 years :60 pts (5 additional points for relevant experience in a government setting)</li> </ul>	<p>Minimum Required 75 pts</p> <p>___/110</p>





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**2. Point-Rated Technical Criteria**

Bids which meet all the mandatory technical criteria will be evaluated and scored as specified in the tables below. Bids which fail to obtain the required minimum number of points specified will be declared non-responsive.

<b>Point-Rated Technical Criteria (RT)</b>			
For the purpose of the point-rated technical criteria specified below, the experience of the Bidder will be considered.			
<b>Item No.</b>	<b>Description (s)</b>	<b>Rating points</b>	<b>Page No. / Paragraph no.</b>
<b>R1</b>	<p><b>PROPOSAL</b> Will be evaluated on the following rated criteria: (Maximum 20 points)</p> <p>The proposal documentation submitted in response to <b>MT6</b> will be evaluated for completeness, clarity and achievability as demonstrated by a structure mapped to the following sections described in the Statement of Work:</p> <ul style="list-style-type: none"> <li>a. 2.0 Objectives</li> <li>b. 4.0 Scope</li> <li>c. 4.1 Tasks</li> <li>d. 5.0 Constraints</li> <li>e. 10.0 Deliverables, milestones and schedule</li> </ul>	/20	
<p><b>R1: Explanation of available points: PROPOSAL</b></p> <p><u>Not acceptable (0 points):</u> The information provided was unsuitable or insufficient.</p> <p><u>Limited (10 points):</u> Criterion addressed, but not enough information provided or technically not acceptable. Details provided regarding the Bidder's experience are insufficient:</p> <ul style="list-style-type: none"> <li>• With regards to MT1, Bidder's proposal identifies datasets but does not clearly identify information about attributes sought in the Scope section of the Statement of Work (SoW).</li> <li>• With regards to MT3 and MT4, Bidder's proposal identifies an analytics platform that meets some but NOT all the requirements mentioned in the Scope section of Statement of Work.</li> <li>• With regards to MT2, Bidder proposal identifies policies and practices to support data governance, security and privacy but are inadequate to meet ESDC's needs as identified in Scope and Constraints sections of SoW.</li> <li>• Tasks, deliverables and timelines are included in the proposal but are not clear or do not map to items listed in sections 4.1 and 10.0 of SoW.</li> </ul>			



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	<p><u>Good (15 points):</u> Proposal includes sufficient details and project documentation:</p> <ul style="list-style-type: none"> <li>• With regards to MT1, Bidder’s proposal clearly describes datasets and information about all attributes sought in the Scope section of the SoW.</li> <li>• With regards to MT3 and MT4, Bidder’s proposal identifies an analytics platform that meets all the requirements mentioned in the Scope section of the SoW.</li> <li>• With regards to MT2, Bidder proposal identifies policies and practices to support data governance, security and privacy that are adequate to meet ESDC’s needs as identified in Scope and Constraints sections of the SoW.</li> <li>• Tasks, deliverables and timelines are included, clear and map to items listed in sections 4.1 and 10.0 of the SoW</li> </ul> <p><u>Excellent (20 points):</u> Proposal includes complete details:</p> <ul style="list-style-type: none"> <li>• With regards to MT1, Bidder’s proposal clearly identifies datasets and information about all attributes sought in the Scope section of the SoW and offers flexibility for including additional datasets/attributes.</li> <li>• With regards to MT3 and MT4, Bidder’s proposal identifies an analytics platform that meets all the requirements mentioned in the Scope section of the SoW.</li> <li>• With regards to MT2, Bidder proposal identifies policies, practices and expertise to support data governance, security and privacy that are adequate to meet ESDC’s needs as identified in Scope and Constraints sections of the SoW. A clear incident resolution/risk management plan is identified.</li> <li>• Tasks, deliverables and timelines are described with clearly defined schedules and map to items listed in sections 4.1 and 10.0 of the SoW.</li> <li>• Bidder’s proposal demonstrates an adaptable approach for working with ESDC and examples are provided.</li> <li>• Proposal includes support that exceeds 40 hours per user as part of the subscription services.</li> </ul>	
	<b>R1: PROPOSAL</b>	<b>Total Points: 20</b> <b>Minimum points required: 10</b>