



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

Bid Receiving/Réception des soumissions

Procurement Hub | Centre
d'approvisionnement
Fisheries and Oceans Canada | Pêches et
Océans Canada
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**REQUEST FOR PROPOSAL
DEMANDE DE PROPOSITION**

Proposal to: Fisheries and Oceans 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, referred to herein or attached hereto, the goods and services listed herein and on any attached sheets at the price(s) set out therefor.

Proposition à : Pêches et Océans Canada

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

Title / Titre Evaluation and statistical performance review		Date July 4, 2023
Solicitation No. / N° de l'invitation 30002646C		RFP AMD 001
Client Reference No. / No. de référence du client(e) 30002646		
Solicitation Closes / L'invitation prend fin At / à : 2.00 PM EDT (Eastern Daylight Time) / HAE (Heure Avancée de l'Est) On / le : July 20, 2023		
F.O.B. / F.A.B. Destination	Taxes See herein — Voir ci-inclus	Duty / Droits See herein — Voir ci-inclus
Destination of Goods and Services / Destinations des biens et services See herein — Voir ci-inclus		
Instructions See herein — Voir ci-inclus		
Address Inquiries to : / Adresser toute demande de renseignements à : Tammy O'Toole, Contracting Specialist Email / Courriel: DFOtenders-soumissionsMPO@dfo-mpo.gc.ca and/et Tammy.Otoole@dfo-mpo.gc.ca		
Delivery Required / Livraison exigée See herein — Voir en ceci	Delivery Offered / Livraison proposée	
Vendor Name, Address and Representative / Nom du vendeur, adresse et représentant du fournisseur/de l'entrepreneur		
Telephone No. / No. de téléphone	Facsimile No. / No. de télécopieur	
Name and title of person authorized to sign on behalf of Vendor (type or print) / Nom et titre de la personne autorisée à signer au nom du fournisseur (taper ou écrire en caractères d'imprimerie)		
Signature	Date	



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PART 1. - GENERAL INFORMATION

This bid solicitation cancels and supersedes previous bid solicitation number 30002646B dated April 24, 2023 with a closing of May 26, 2023 at 2:00 pm (Eastern Standard Time). A debriefing or feedback session will be provided upon request to bidders/offerors/suppliers who bid on the previous solicitation. This solicitation is open tender and not under the ProServices supply arrangement.

1.1. Introduction

The bid solicitation is divided into six 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 Resulting Contract Clauses: includes the clauses and conditions that will apply to any resulting contract.

1.2. Summary

Fisheries and Oceans Canada (DFO) requires the services of one or more senior fisheries science analysts to provide an evaluation and statistical performance review of the technical elements of Fisheries and Oceans Canada's ("DFO") "A Fishery Decision-Making Framework Incorporating the Precautionary Approach" ("PA Policy", DFO 2009a), and technical analyses of potential revisions, additions or clarifications to the PA Policy, taking into account:

- the need to implement the PA Policy across diverse species life histories and data availabilities,
- a broad range of assessment paradigms from traditional stock assessment to full management strategy evaluation, and
- international best practices in the sustainable management of fisheries under the precautionary approach.

1.2.1. Security Requirements

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

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 or by telephone.



PART 2. - BIDDER INSTRUCTIONS

2.1. Standard Instructions, Clauses and Conditions

As this solicitation is issued by Fisheries and Oceans Canada (DFO), any reference to Public Works and Government Services Canada or PWGSC or its Minister contained in any term, condition or clause of this solicitation, including any individual Standard Acquisition Clauses and Conditions manual (SACC) clauses incorporated by reference, will be interpreted as reference to DFO or its Minister.

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

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

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

Subsection 5.4 of [2003](#), Standard Instructions - Goods or Services - Competitive Requirements, is amended as follows:

Delete: 60 days
Insert: 120 days

2.2. Submission of Bids

Bids must be submitted by the date, time and place indicated on page 1 of the bid solicitation.

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

2.3. Enquiries- Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than five (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**.

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 Bid Challenge and Recourse Mechanisms

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



PART 3. - BID PREPERATION INSTRUCTIONS

3.1. Bid Preparation Instructions

Canada requests that the Bidder submit **all** its **email** bid in separately saved sections as follows and **prior to the bid closing date, time and location**:

Section I: Technical Bid (one soft copy in PDF format)

Section II: Financial Bid (one soft copy in PDF format)

Section III: Certifications (one soft copy in PDF format)

Important Note:

The maximum size per email (including attachments) is limited to 10MB. If the limit is exceeded, your email might not be received by DFO. It is suggested that you compress the email size to ensure delivery. Bidders are responsible to send their proposal and to allow enough time for DFO to receive the proposal by the closing period indicated in the RFP. Emails with links to bid documents will not be accepted.

For bids transmitted by email, DFO will not be responsible for any failure attributable to the transmission or receipt of the email bid. DFO will send a confirmation email to the Bidders when the submission is received.

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

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

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

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

- 1) use 8.5 x 11 inch (216 mm x 279 mm) paper containing fibre certified as originating from a sustainably-managed forest and containing minimum 30% recycled content; and
- 2) use an environmentally-preferable format including black and white printing instead of colour printing, printing double sided/duplex, using staples or clips instead of cerlox, duotangs or binders.

Section I: Technical Bid

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.

Part 4, Evaluation Procedures, contains additional instructions that bidders should consider when preparing their technical bid.



Section II: Financial Bid

- A. Bidders must submit their financial bid in Canadian funds and in accordance with the pricing schedule detailed in Attachment 1 to Part 3.
- B. Bidders must submit their price FOB destination; Canadian customs duties and excise taxes included, as applicable; and Applicable Taxes excluded.
- C. When preparing their financial bid, Bidders should review clause 4.1.2, Financial Evaluation, of Part 4 of the bid solicitation; and article 6.6, Payment, of Part 6 of the bid solicitation.

3.1.1. Exchange Rate Fluctuation

C3011T (2013-11-06), Exchange Rate Fluctuation

Section III: Certifications

In Section III of their bid, the Bidder must submit:

- i. A completed and signed cover page of this solicitation; and
- ii. the certifications and additional information required under Part 5 (including all attachments to Part 5).

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



ATTACHMENT 1 to PART 3, PRICING SCHEDULE

The Bidder must complete this pricing schedule and include it in its financial bid.

Project requirements may not be addressed in the sequence presented and the Contractor may be required to work on two or more project requirements concurrently at the discretion of the Project Authority.

The prices or rates specified below, when quoted by the Bidder are all inclusive prices which contain any expense that may need to be incurred to satisfy the terms of any contract that may result from its bid.

Milestone (Annex A – SOW)	Description	All-inclusive unit price (taxes excluded)
3.1.1	Identify and analyze relative performance (i.e., advantages and disadvantages) of candidate modifications to the reference points used in the PA Policy. This includes how the reference points are defined and explained, as well as any associated provisional default values to be used for the reference points, as they relate to the objectives of the PA Policy. The range of candidate modifications to be assessed will take into account diverse life histories and data availabilities, various assessment paradigms (i.e., from traditional stock assessment to full-scale management strategy evaluation), and international best practices regarding reference points and objectives they should represent. Reference points to be analyzed include (but are not limited to) the limit reference point (LRP), removal reference (RR), upper stock reference (USR) and target reference point (TRP) of the current PA Policy.	\$ _____
3.1.2	Identify and analyze relative performance (i.e., advantages and disadvantages) of candidate modifications to the PA Policy and associated guidance on the development, implementation and evaluation of harvest decision rules (HDRs) that are aimed to meet the objectives of the PA Policy, as well as risk-equivalent provisional default rules that may be adopted as HDRs. The range of candidate modifications to be assessed will take into account diverse life histories and data availabilities, varying assessment paradigms (i.e., from traditional stock assessment to full-scale management strategy evaluation), and international best practices, and will include evaluation of the relative performance of the provisional default HDRs of the current PA Policy.	\$ _____



Milestone (Annex A – SOW)	Description	All-inclusive unit price (taxes excluded)
3.1.3	Identify and analyze the relative performance (i.e., advantages and disadvantages) of candidate modifications to the PA Policy and associated guidance for choosing risk tolerance and taking into account risk and uncertainty, including provisional default risk tolerance categories that may be provided to guide choice of management measures. The range of candidate modifications to be assessed will take into account diverse life histories and data availabilities, varying assessment paradigms (i.e., from traditional stock assessment to full-scale management strategy evaluation), and international best practices, and will include evaluation of the provisional risk tolerance categories in the current PA Policy.	\$ _____
3.1.4	Identify and analyze the relative performance (i.e., advantages and disadvantages) of candidate modifications to the PA Policy and associated guidance for taking into account environmental conditions, including climate change, in precautionary approach elements such as reference points and HDRs, and will include evaluation of time-varying reference points. The range of candidate modifications to be assessed will take into account diverse life histories and data availabilities, varying assessment paradigms (i.e., from traditional stock assessment to full-scale management strategy evaluation), and international best practices.	\$ _____
3.1.5	Identify and analyze the relative performance (i.e., advantages and disadvantages) of candidate modifications to the PA Policy and associated guidance for the management of multi-species fisheries and forage fish fisheries. The candidate modifications to be assessed will address the development and implementation of precautionary approach elements such as reference points and HDRs for these cases, and will take into account diverse life histories and data availabilities, varying assessment paradigms (i.e., from traditional stock assessment to full-scale management strategy evaluation), and international best practices. In the case of forage fish, the review will also take into account differences between the current PA Policy and DFO's <i>Policy on New Fisheries for Forage Species</i> (DFO 2009b).	\$ _____



Milestone (Annex A – SOW)	Description	All-inclusive unit price (taxes excluded)
3.1.6	Identify and analyze the relative performance (i.e., advantages and disadvantages) of candidate modifications to the PA Policy and associated guidance to clarify or update policy elements such as diagrams and the reporting and visualization of indicators used to evaluate stock and fishery performance, in relation to the objectives of the PA Policy. This will include stock status designations of Critical, Cautious, Healthy, and 'at or above/below the removal reference', as well as indicators used in DFO's <i>Sustainability Survey for Fisheries</i> (which are used in Canada's Environmental Sustainability Indicators or CESI).	\$ _____
Total Price (taxes excluded) : (evaluated price of a bid)		\$ _____
Applicable Taxes Insert the amount, as applicable:		GST: \$ _____ HST: \$ _____ PST: \$ _____

*This excludes travel and living expenses.



PART 4. - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1. Evaluation Procedures

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

4.1.1. Technical Evaluation

4.1.1.1. Mandatory Technical Criteria

Refer to Attachment 1 to Part 4 - Flexible Grid

Refer to Attachment 2 to Part 4.

4.1.1.2. Point Rated Financial Criteria

Refer to Attachment 2 to Part 4. Point-rated technical criteria not addressed will be given a score of zero.

4.1.2. Financial Evaluation

For bid evaluation and Contractor selection purposes only, the evaluated price of a bid will be determined in accordance with the Pricing Schedule detailed in Attachment 1 to Part 3.

4.2 Basis of Selection – Highest Combined Rating of Technical Rating Merit (70%) and Price (30%)

1. To be declared responsive, a bid must:
 - (a) comply with all the requirements of the bid solicitation;
 - (b) meet all the mandatory evaluation criteria and flexible grid scores; and
 - (c) obtain the required minimum number of points specified in Attachment 2 to Part 4 for the point-rated technical criteria.
2. Bids not meeting 1(a) or 1(b) or 1(c) will be declared non-responsive.
3. The bid selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 70% for the technical merit and 30% for the price.
4. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of 70%.
5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 30%.
6. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
7. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.



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 \$50,000 (50).

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

		Bidder 1	Bidder 2	Bidder 3
Overall Technical Score		120/135	98/135	82/135
Bid Evaluated Price		\$60,000	\$55,000	\$50,000
Calculations	Technical Merit Score	$120/135 \times 70 = 62.22$	$98/135 \times 70 = 50.81$	$82/135 \times 70 = 42.52$
	Pricing Score	$50/60 \times 30 = 25.00$	$55/60 \times 30 = 27.50$	$50/50 \times 30 = 30.00$
Combined Rating		87.22	78.31	72.52
Overall Rating		1st	2nd	3rd



ATTACHMENT 1 to PART 4 - FLEXIBLE GRID

For this requirement, DFO requires the services of a one (1) Senior Statistical Analyst, one (1) Senior Evaluation Services Consultant, or one (1) Senior Performance Measurement Consultant, **OR** bidders can propose a team composed of a **maximum of three (3) members** within those categories.

It is at the discretion of the bidder to determine what resource(s) may be needed to deliver the RFP requirements. Note that Bidders can propose a team composed of a **maximum of three (3) members** within the listed consultant/analyst categories.

If more than one resource is presented in the bid, it **must** be clearly articulated which proposed resource meets a given evaluation criterion (but different proposed resources could be used to collectively meet the full set of criteria).

Each category has its own flexible grid. The flexible grid indicates the minimum level of points required to qualify for each level of expertise. Various amounts of points are given for education, professional certification and relevant experience.

The Bidder's proposed resource(s) will be assessed against the relevant category's flexible grid.

Only bids with a resource combination that meets the corresponding flexible grid(s) and that meet all the mandatories will be evaluated against the point rated criteria.

1) Experience

The experience **must** be demonstrated and be directly related to the category. Suppliers should provide complete details as to where, when, month and year, and how, through which activities/responsibilities, the stated qualifications/experience were obtained. Experience gained during formal education will not be considered work experience. All requirements for work experience will be obtained in a legitimate work environment as opposed to an educational setting. Co-op terms are considered work experience provided they are related to the required services. The month(s) of experience listed for a project whose time frame overlaps that of another referenced project, will only be counted once.

The qualifications and experience of the proposed category(s) will be assessed against the requirements set out in the resulting request for proposal (RFP). The identified user may request reference information. Canada reserves the right to request references from a supplier to conduct a reference check to verify the accuracy of the information provided. Should the reference(s) not confirm the required qualifications of the proposed consultant(s) to perform the required services, Canada reserves the right to go to the next supplier.

2) Education

Academic certification (degree, etc.) **must** be obtained through a recognized academic institution in the field of expertise. Points will only be awarded for the highest level of education achieved by the proposed resource.

If applicable, the proposed resource(s) **must** meet the education requirements detailed in the RFP for the consultant category for which they are being proposed. Where the resulting RFP requests the supplier to provide information about the education of the proposed individual, the individual must have obtained its education from a recognized Canadian university, college or high school, or the equivalent as established by a recognized Canadian academic credentials assessment service, if obtained outside Canada. The list of recognized organizations can be found under the [Canadian Information Centre for International Credentials](#) web site.

A copy of the relevant Academic certification(s) (e.g., degree, certificate, etc.) must be submitted with the Bid.



3) Relevant professional certification

The Bidder **MUST** demonstrate that the **each** proposed resource listed below meets the minimum number of points required for the relevant level and category as described in the Flexible Grid.

2.12 Flexible Grids

Bids which fail to meet the mandatory Flexible Grid Criteria will be declared non-responsive, and will be given no further consideration. The professional certification **must** be valid and relevant to the specific consultant category. A maximum of 1 certification will receive points.

a) Statistical Analyst Flexible Grid

Senior – Statistical Analyst - FLEXIBLE GRID	
Name(s) of Proposed Resource(s): _____	
Levels of Expertise	
Senior:	Minimum 95 pts
Intermediate:	Minimum 70 pts
Junior:	Minimum 50 pts
Education to the Consultant Category	
University (PhD, Graduate, Undergraduate, degree):	35 pts
College or CEGEP Diploma/Certificate:	25 pts
Professional Certification	
Relevant Professional Certification:	15 pts
Relevant Experience in Consultant Category	
≥1 yrs and <2 yrs: 12 to 23 months	10 pts
≥2 yrs and <4 yrs: 24 to 47 months	20 pts
≥4 yrs and <6 yrs: 48 to 71 months	25 pts
≥6 yrs and <8 yrs: 72 to 95 months	35 pts
≥8 yrs and <10 yrs: 96 to 119 months	50 pts
≥10 yrs: 120 + months	60 pts



b) Evaluation Services Consultant Flexible Grid

Senior – Evaluation Services Consultant - FLEXIBLE GRID	
Name(s) of Proposed Resource(s): _____	
Levels of Expertise	
Senior:	Minimum 95 pts
Intermediate:	Minimum 80 pts
Junior:	Minimum 65 pts
Education to the Consultant Category	
Graduate degree or higher:	35 pts
Undergraduate degree:	25 pts
Professional Certification	
Relevant Professional Certification:	10 pts
Relevant Experience in Consultant Category	
≥2 yrs and <4 yrs: 24 to 47 months	30 pts
≥4 yrs and <6 yrs: 48 to 71 months	35 pts
≥6 yrs and <10 yrs: 72 to 119 months	45 pts
≥10 yrs: 120 + months	60 pts

c) Performance Measurement Consultant Flexible Grid

Senior – Performance Measurement Consultant - FLEXIBLE GRID	
Name(s) of Proposed Resource(s): _____	
Levels of Expertise	
Senior:	Minimum 65 pts
Intermediate:	Minimum 55 pts
Junior:	Minimum 45 pts
Education to the Consultant Category	
Graduate degree or higher:	30 pts
Undergraduate degree:	25 pts
Relevant Experience in Consultant Category	
≥2 yrs and <4 yrs: 24 to 47 months	25 pts
≥4 yrs and <6 yrs: 48 to 71 months	30 pts



≥6 yrs and <10yrs: 72 to 119 months	35 pts
≥10 yrs: 120 + months	40 pts



ATTACHMENT 2 TO PART 4 – MANDATORY TECHNICAL EVALUATION CRITERIA

The Bidder **must** include the following tables in the proposal, indicating how the proposed resource(s) meet both the mandatory and point-rated technical criteria. All cross-references within the proposal to the mandatory technical criteria and pointed rated technical criteria must be identified and, including consistent use of page numbers, project numbers and other referencing tools to verify that the criterion has been met.

For example, where a bidder includes a table saying “evidence of R2 criteria a) is on page 3,” the information is easily found on page 3 and is presented in a way that brings the evaluators’ attention to the information (e.g., using a heading).

The Bidder **must** include, within its proposal for a contract, detailed, up-to-date, resumé(s) of the proposed resource(s). The Bidder must ensure that the proposed resource’s/(s’) resumé is detailed to enable an evaluation and identifies relevant training and experience as it relates to the requirements of the work to be performed and associated criteria.

1. Mandatory Technical Criteria

The bid must meet the mandatory technical criteria specified below. The Bidder must provide the necessary documentation to support compliance with this requirement.

Bids which fail to meet the mandatory technical criteria will be declared non-responsive. Each mandatory technical criterion should be addressed separately.

No.	Mandatory Technical Criteria (MT)	Proposal Page No.
<p>MT1</p>	<p>A minimum of one of the Bidder’s proposed resource must have a minimum of 60 months of experience analyzing fishery data and developing fish stock assessment tools for fisheries scientists.</p> <p>The Bidder must include the following information for this experience:</p> <ol style="list-style-type: none"> 1. Client Organization 2. Description 3. Dates and duration of service period (MM-YYYY to MM-YYYY) 4. The name, title, and email address of Project Authority or client contact; or, at least one citation from primary or secondary literature resulting from the work. <p>Note that the project list need not be exhaustive but should aim to cover the relevant time span of the proposed resource’s experience in the stated subject matter.</p>	
<p>MT2</p>	<p>A minimum of one of the Bidder’s proposed resource must have a minimum of five (5) scientific publications in peer-reviewed journals in one or more of the following topics related to fish stock assessment:</p>	



No.	Mandatory Technical Criteria (MT)	Proposal Page No.
	<ol style="list-style-type: none"> 1. Evaluating relative performance of fisheries harvest control rules; 2. Fisheries policy options for harvest control rules or reference points (domestically or internationally); 3. Consideration of non-stationarity in developing and operationalizing reference points in harvest strategies; 4. Providing science advice in support of implementing a precautionary approach to fisheries management (domestically or internationally), 5. Any other aspect of the Canadian Fisheries Act Fish Stocks Provisions. <p>All publications must demonstrate evidence of consideration of international practices in their analyses or conclusions.</p>	
<p>MT3</p>	<p>A minimum of one of the Bidder's proposed resource must have participated as a reviewer, research document author, or assessment lead in a minimum of five (5) advisory processes at the Canadian Science Advisory Secretariat (CSAS), the International Council for the Exploration of the Sea (ICES) or the Northwest Atlantic Fisheries Organization (NAFO), on topics that pertain to fisheries.</p>	

2. Point Rated Technical Criteria

Bids which meet all the mandatory technical criteria will be evaluated and scored as specified in the tables inserted below.

Bids which fail to obtain the required minimum number of points specified will be declared non-responsive. Each point rated technical criterion should be addressed separately.

A bid must obtain a minimum of 40 points to be considered responsive. The rating is performed on a scale of **70 points**

No.	Point Rated Criteria (RT)	Scoring Guide	Cross Reference to Proposal [Completed by Bidder]
<p>RT1</p>	<p>One of the Bidder's proposed resource(s) should have a minimum of 60 months' experience analyzing fishery data and developing assessment tools for fisheries scientists.</p> <p>The Bidder must include the following information for this experience:</p> <ol style="list-style-type: none"> 1. Client Organization 	<p>61 months' experience up to 90 months experience = 5 pts</p> <p>91 months' experience up to 119 months' experience = 10 pts</p>	



No.	Point Rated Criteria (RT)	Scoring Guide	Cross Reference to Proposal [Completed by Bidder]
	<p>2. Description 3. Dates and duration of service period (MM-YYYY to MM-YYYY) 4. The name, title, and email address of Project Authority or client contact; or, at least one citation from primary or secondary literature resulting from the work.</p> <p>Note that the project list need not be exhaustive but should aim to cover the relevant time span of the proposed resource's experience in the stated subject matter.</p>	<p>120 months' experience or more = 15 pts</p> <p>Maximum Score: 15</p>	
RT2	<p>One of the Bidder's proposed resource(s) should have published scientific findings in peer-reviewed journals on one or more of the following topics: quantitative evaluation of relative performance of fisheries harvest control rules; fisheries policy options for harvest control rules or reference points (domestically or internationally); consideration of non-stationarity in developing and operationalizing reference points in harvest strategies; or, any aspect of these topics with respect to the Canadian <i>Fisheries Act</i> Fish Stocks Provisions.</p>	<p>One (1) to three (3) publications = 5 points</p> <p>Four (4) to six (6) publications = 10 points</p> <p>Seven (7) or more publications = 15 points</p> <p>Maximum Score: 15</p>	
RT3	<p>One of the Bidder's proposed resource(s) should have published peer-reviewed scientific findings on the following topic: providing science advice in support of implementing a Precautionary Approach to fisheries management (domestically or internationally).</p>	<p>One (1) to three (3) publications = 5 points</p> <p>Four (4) to six (6) publications = 10 points</p> <p>Seven (7) or more publications = 15 points</p> <p>Maximum Score: 15</p>	
RT4	<p>One of the Bidder's proposed resource should have experience presenting theoretical or technical presentations to fisheries scientists, fisheries management groups, partners or stakeholders to communicate scientific findings and advice.</p> <p>The Bidder must include the following information for this experience:</p>	<p>One (1) to three (3) presentations = 5 points</p> <p>Four (4) to six (6) presentations = 10 points</p>	



No.	Point Rated Criteria (RT)	Scoring Guide	Cross Reference to Proposal [Completed by Bidder]
	<ol style="list-style-type: none"> 1. Client Organization 2. Description 3. The name, title, and email address of Project Authority or client. 	Seven (7) or more presentations = 15 points Maximum Score: 15	
RT5	One of the bidder's proposed resource(s) should have participated as a reviewer, research document author, or assessment lead in more than five (5) scientific advisory processes at the Canadian Science Advisory Secretariat (CSAS), International Council for the Exploration of the Sea (ICES) or the Northwest Atlantic Fisheries Organization (NAFO), on topics that pertain to fisheries.	Six (6) to 10 scientific advisory process = 5 points More than 10 scientific advisory process = 10 points Maximum Score: 10	
Maximum Points		70	
Overall minimum score (required)		40/70	



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 declaration form available on the [Forms for the Integrity Regime](http://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-eng.html) website (<http://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-eng.html>), to be given further consideration in the procurement process.

5.1.2. Additional Certifications Required with the Bid

The Bidder must provide with its bid the required additional certifications included in Attachment 1 to Part 5 - Bid Submission Form and Attachment 2 to Part 5 - List of Names For Integrity Verification Form

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 provided will render the bid non-responsive. Attachment 3 to Part 5 – Additional Certifications Required Precedent to Contract Award.

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.

5.2.2. Federal Contractors Program for Employment Equity - Bid Certification

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "FCP Limited Eligibility to Bid" list available at the bottom of the page of the [Employment and Social Development Canada \(ESDC\) - Labour's](#) website.

Canada will have the right to declare a bid non-responsive if the Bidder, or any member of the Bidder if the Bidder is a Joint Venture, appears on the "[FCP Limited Eligibility to Bid](#)" list at the time of contract award.



5.2.3. Additional Certifications Precedent to Contract Award

5.2.3.1. Status and Availability of Resources

SACC Manual clause [A3005T \(2010-08-16\)](#), Status and Availability of Resources

5.2.3.2. Education and Experience

SACC Manual clause [A3010T \(2010-08-16\)](#) Education and Experience

5.2.3.3. Certifications – Contract

Compliance with the certifications provided by the Contractor in its bid is a condition of the Contract and subject to verification by Canada during the term of the Contract. If the Contractor does not comply with any certification or it is determined that any certification made by the Contractor in its bid is untrue, whether made knowingly or unknowingly, Canada has the right, pursuant to the default provision of the Contract, to terminate the Contract for default.

5.2.4. Former Public Servant

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

Definitions

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

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

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

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



[of Parliament Retiring Allowances Act](#), R.S. 1985, c. M-5, and that portion of pension payable to the [Canada Pension Plan Act](#), R.S., 1985, c. C-8.

Former Public Servant in Receipt of a Pension

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

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

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

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

Work Force Adjustment Directive

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

If so, the Bidder must provide the following information:

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



ATTACHMENT 1 TO PART 5 BID SUBMISSION FORM

BID SUBMISSION FORM		
Bidder's full legal name (For joint ventures, this must be the representative member of the joint venture.)		
Authorized Representative of Bidder for evaluation purposes (e.g., clarifications)	Name	
	Title	
	Address	
	Telephone #	
	Email	
Bidder's <u>Procurement Business Number (PBN)</u> [see the Standard Instructions 2003] [Note to Bidders: Please ensure that the PBN you provide matches the legal name under which you have submitted your bid. If it does not, the Bidder will be determined based on the legal name provided, not based on the PBN, and the Bidder will be required to submit the PBN that matches the legal name of the Bidder.]		
Jurisdiction of Contract: Province or territory in Canada the Bidder wishes to be the legal jurisdiction applicable to any resulting contract (if other than as specified in the solicitation)		
Joint Venture Information: To be provided only if the Bidder is a joint venture.	Members of the joint venture	
	Representative Member of the joint venture	
On behalf of the Bidder, by signing below, I confirm that I have read the entire bid solicitation including the documents incorporated by reference into the bid solicitation and I certify that: <ol style="list-style-type: none"> 1. The Bidder considers itself and its proposed resources able to meet all the mandatory requirements described in the bid solicitation; 2. This bid is valid for the period requested in the bid solicitation; 3. All the information provided in the bid is complete, true and accurate; and 4. If the Bidder is awarded a contract, it will accept all the terms and conditions set out in the resulting contract clauses included in the bid solicitation. 		
Signature of Authorized Representative of Bidder and Date		



ATTACHMENT 2 TO PART 5 LIST OF NAMES FOR INTEGRITY VERIFICATION FORM

According to section 17 of the above-mentioned policy, Bidders are required to submit a list of the full names of all the following people identified in the table below for the applicable organization type of the Bidder.

Organization Type	List of Full Names to Include
Publicly-owned Corporation	All current directors
Privately-owned Corporation	All owners of the corporation
Joint Venture	All current directors
Sole Proprietor (including when bidding as a joint venture)	All owners
Partnership	<i>No names are required</i>

Providing the required names is a mandatory requirement for award of a contract. Failure to provide the list of names will preclude the Bidder from being awarded a contract.

Sample table to be submitted:

Owner's / Director's Name	Title
[printed name (first and last)]	(e.g. CEO, COO, VP of X, Director of X, Owner)

*Bidders to insert rows as required, depending on the number of directors.

Note: Bidders that are a partnership (excluding joint ventures) do not need to submit a list of names



ATTACHMENT 3 TO PART 5 - ADDITIONAL CERTIFICATIONS REQUIRED PRECEDENT TO CONTRACT AWARD

1. Status and Availability of Resources

The Bidder certifies that, should it be awarded a contract as a result of the bid solicitation, every individual proposed in its bid will be available to perform the Work as required by Canada's representatives and at the time specified in the bid solicitation or agreed to with Canada's representatives. If for reasons beyond its control, the Bidder is unable to provide the services of an individual named in its bid, the Bidder may propose a substitute with similar qualifications and experience. The Bidder must advise the Contracting Authority of the reason for the substitution and provide the name, qualifications and experience of the proposed replacement. For the purposes of this clause, only the following reasons will be considered as beyond the control of the Bidder: death, sickness, maternity and parental leave, retirement, resignation, dismissal for cause or termination of an agreement for default.

If the Bidder has proposed any individual who is not an employee of the Bidder, the Bidder certifies that it has the permission from that individual to propose his/her services in relation to the Work to be performed and to submit his/her résumé to Canada. The Bidder must, upon request from the Contracting Authority, provide a written confirmation, signed by the individual, of the permission given to the Bidder and of his/her availability.

2. Education and Experience

The Bidder certifies that all the information provided in the résumés and supporting material submitted with its bid, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Bidder to be true and accurate. Furthermore, the Bidder warrants that every individual proposed by the Bidder for the requirement is capable of performing the Work described in the resulting contract.

I, the Bidder (or an authorized agent of the Bidder), attest and certify that all the above declarations are true and complete in every regard.

SIGNATURE: _____

DATE: _____

PRINTED NAME: _____



PART 6. - RESULTING CONTRACT CLAUSES

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

6.1. Statement of Work

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

6.2. Standard Clauses and Conditions

As this contract is issued by Fisheries and Oceans Canada (DFO), any reference to Public Works and Government Services Canada or PWGSC or its Minister contained in any term, condition or clause of this contract, including any individual SACC clauses incorporated by reference, will be interpreted as reference to DFO or its Minister.

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.

6.2.1. General Conditions

[2035](#) (2022-12-01), General Conditions - Higher Complexity - Services, apply to and form part of the Contract.

Subsection 12 of [2035](#) (2013-03-21) General Conditions - Higher Complexity - Services - Invoice Submission, is amended as follows:

Delete: [2035 12](#) (2013-03-21), Invoice Submission

Insert: **Invoice Submission**

1. Invoices must be submitted in the Contractor's name to DFO.invoicing-facturation.MPO@DFO-MPO.gc.ca with a cc to: **[will be determined at contract award]**. 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. Contractor's Name and remittance physical address;
 - b. Contractor's CRA Business Number or Procurement Business Number (PBN);
 - c. Invoice Date;
 - d. Invoice Number;
 - e. Invoice Amount (broken down into item and tax amounts);
 - f. Invoice Currency (if not in Canadian dollars);
 - g. DFO Reference Number (PO Number or other valid reference number);
 - h. DFO Contact Name (DFO employee who initiated the order or to whom the goods were sent. **Note:** Invoice will be return to the Contractor if that information is not provided);
 - i. Description of the goods or services supplied (provide details of expenditures (such as item, quantity, unit of issue, fixed time labour rates and level of effort, subcontracts, as applicable) in accordance with the Basis of Payment, exclusive of Applicable Taxes;
 - j. Deduction for holdback, if applicable;
 - k. The extension of the totals, if applicable; and
 - l. 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.

6.3. Security Requirements

The following security requirement (SRCL and related clauses provided by the [Contract Security Program](#) apply and form part of the Contract:

No Security Requirement, **escort required at DFO site(s)**

- 6.3.1 The Contractor and all individuals assigned to work on the Contract MUST NOT have access to PROTECTED or CLASSIFIED information/assets.
- 6.3.2 The Contractor and all individuals assigned to work on the Contract MUST NOT have unescorted access to restricted areas of Fisheries and Oceans Canada (DFO) facilities, or Canadian Coast Guard vessels.
- 6.3.3 The Contractor and all individuals assigned to work on the Contract MUST NOT remove any PROTECTED or CLASSIFIED information/assets from DFO site(s).
- 6.3.4 Subcontracts or arrangement with a third party are not to be awarded without the prior written permission of the Contracting Authority (i.e. a new SRCL must be submitted and processed following the same procedure as for the initial contract).

6.4. Term of Contract

6.4.1. Period of the Contract

The period of the Contract is from date of Contract award to March 31, 2026 inclusive.

6.5. Authorities

6.5.1. Contracting Authority

The Contracting Authority for the Contract is:

Name: Tammy O'Toole
 Title: Contract Specialist
 Directorate: Procurement Services and Procurement hub, Department of Fisheries & Oceans
 Address: 200 Kent Street, Ottawa, ON,
 Telephone: 343-550-1758
 E-mail address: Tammy.Otoole@dfo-mpo.ca

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

6.5.2. Project Authority

The Project Authority for the Contract is: **[will be determined at contract award]**

Name: _____
 Title: _____



Organization: _____

Address: _____

Telephone: _____

E-mail address: _____

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

6.5.3. Contractor's Representative

The Contractor's Representative for the Contract is: **[will be determined at contract award]**.

Name: _____

Title: _____

Organization: _____

Address: _____

Telephone: _____

Facsimile: _____

E-mail address: _____

6.6. 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.

Note to Bidders: The above clause will be deleted if the Contractor of the contract resulting contract from solicitation # 30002646C is not a former public servant.

6.7. Payment

6.7.1. Basis of Payment

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 Annex B, Basis of Payment. 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 approved, in writing, by the Contracting Authority before their incorporation into the Work.

6.7.2. Travel and Living Expenses

1. The Contractor will be reimbursed its authorized travel and living expenses reasonably and properly incurred in the performance of the Work, at cost, without any allowance for profit and/or administrative overhead, in accordance with the meal, and private vehicle allowances specified in Appendices B, C and D of the National Joint Council Travel Directive, and with the other provisions of the directive referring to "travellers", rather than those referring to "employees", to a limitation of expenditure of \$ **[will be determined at contract award]**.
2. Canada will not pay the Contractor any incidental expense allowance for authorized travel.



3. All travel must have the prior written authorization of the Project Authority.
4. All payments are subject to government audit.

6.7.3. Method of Payment - Milestone Payments – Not Subject to Holdback

Canada will make milestone payments in accordance with Annex B – Basis of Payment and the payment provisions of the Contract if:

- a. an accurate and complete claim for payment and any other document 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; and,
- c. all work associated with the milestone and as applicable any deliverable required has been completed and accepted by Canada.

6.7.4. Electronic Payment of Invoices – Contract

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

- i. Acquisition Card;
- ii. Direct Deposit (Domestic and International)

6.8. Invoicing Instructions

- 6.8.1.** The Contractor must submit invoices in accordance with subsection 6.2.1 entitled “Invoice Submission” above. Invoices cannot be submitted until all work identified in the invoice is completed.
- 6.8.2.** Payments will be made provided that the invoice(s) are emailed to DFO Accounts Payable at DFO.invoicing-facturation.MPO@DFO-MPO.gc.ca with a cc to **[will be determined at contract award]** and provides the required information as stated in subsection 6.8.1 above.

6.9. Certifications and Additional Information

6.9.1 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.

6.10. Applicable Laws

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



6.11. Priority of Documents

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

- (a) the Articles of Agreement;
- (b) the general conditions [2035](#) (2022-12-01) General Conditions Higher Complexity-Services;
- (c) Annex A, Statement of Work;
- (d) Annex B, Basis of Payment;
- (e) the Contractor's bid dated **[will be determined at contract award]**.

6.12. Foreign Nationals (Canadian Contractor) **OR** (Foreign Contractor)

SACC Manual clause [A2000C](#) (2006-06-16) Foreign Nationals (Canadian Contractor)

OR

SACC Manual clause [A2001C](#) (2006-06-16) Foreign Nationals (Foreign Contractor)

Note to Bidders: Only 1 of the above SACC manual clauses will apply to any resulting contract, depending on the Contractor's status.

6.13. Insurance Requirements – No Specific Requirement

SACC Manual clause [G1005C](#) (2016-01-28), Insurance - No Specific Requirement

6.14. Dispute Resolution

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

6.15. Environmental Considerations

As part of Canada's policy directing federal departments and agencies to take the necessary steps to acquire products and services that have a lower impact on the environment than those traditionally acquired, Contractors should:

- a) Paper consumption:
 - Provide and transmit draft reports, final reports in electronic format. Should printed material be required, double sided printing in black and white format is the default unless otherwise specified by the Project Authority.
 - Printed material is requested on minimum recycled content of 30% and/or certified as originating from a sustainably managed forest.
 - Recycle unneeded printed documents (in accordance with Security requirements).



b) Travel requirements:

- The Contractor is encouraged to use video and/or teleconferencing where possible to cut down unnecessary travel.
- Use of Properties with Environmental Ratings: Contractors to the Government of Canada may access the PWGSC Accommodation directory, which includes Eco-Rated properties. When searching for accommodation, Contractors can go to the following link and search for properties with Environmental Ratings, identified by Green Keys or Green Leafs that will honour the pricing for Contractors.
- Use public transportation or another method of green transportation as much as possible.



ANNEX A - STATEMENT OF WORK

1.0 Title: Review of the technical elements of Fisheries and Oceans Canada's ("DFO") A fishery decision-making framework incorporating the precautionary approach ("PA Policy", DFO 2009a)

1.1 Objective

This RFP is intended to develop key Science recommendations to support revisions to the PA Policy.

The objective of this project is obtain the services of one or more senior fisheries science analysts to provide an evaluation and statistical performance review of the technical elements of Fisheries and Oceans Canada's ("DFO") *A Fishery Decision-Making Framework Incorporating the Precautionary Approach* ("PA Policy", DFO 2009a), and technical analyses of potential revisions, additions or clarifications to the PA Policy, taking into account:

- the need to implement the PA Policy across diverse species life histories and data availabilities,
- a broad range of assessment paradigms from traditional stock assessment to full management strategy evaluation, and
- international best practices in the sustainable management of fisheries under the precautionary approach.

Actual revisions to the current PA Policy will be led by another DFO sector (Domestic Fisheries Policy), who may or may not choose to modify the policy on the basis of scientific recommendations, and who may further hold consultations with other DFO sectors, Indigenous communities, other governments, as well as the general Canadian public, all of whom may contribute suggestions and candidate revisions to the Policy. It is recognized that the work acquired through this RFP will need to be scoped such that it focuses on key areas pertinent to Science for advice on possible policy revision (rather than an exhaustive list of all possible revisions).

1.2 Background

DFO has a mandate to sustainably manage fisheries and aquaculture, among other activities. In 2009, DFO released the Sustainable Fisheries Framework, a suite of policies that provide the basis for ensuring that Canadian fisheries support conservation and sustainable use of resources. One of the policies in the Sustainable Fisheries Framework is the PA Policy (DFO 2009a), which describes a general fishery decision-making framework for implementing harvest strategies that incorporate the precautionary approach to fisheries management.

A review of the technical elements of the policy and supporting technical analyses are required to support consideration of possible updates to the PA Policy, to help ensure the policy functions as intended to support the management of Canadian key harvested fish stocks. Previous work has examined various aspects of the PA Policy and identified technical challenges, topics that might benefit from clarification and topics that might benefit from additional operational guidance (DFO 2016, DFO 2021, Marentette and Kronlund 2020).

From its outset, the PA Policy was intended to be updated periodically to ensure it remains consistent with international best practices, but has not been updated since its inception in 2009. The PA Policy will also be used as the framework with which to interpret and implement the Fish Stocks provisions of the 2019 amended *Fisheries Act*. These provisions will come into force with the prescription of major fish stocks by regulation.

To date, DFO Science has not engaged in any work related to the requirements of this RFP, save some preliminary scoping work with Domestic Fisheries Policy to ensure that work conducted under this RFP remains relevant to DFP's requirements. Specifically, DFO Science has not formed any CSAS steering committees or drafted any Terms of Reference for the peer review meetings expected



to follow from the work under this RFP. Finally, there is not (nor has there been within the past 12 months) any contracted resource performing the services described in this RFP.

1.3 Terminology

- CSAS: Canadian Science Advisory Secretariat
- DFO: Fisheries and Oceans Canada
- HDR: harvest decision rule
- LRP: limit reference point
- PA Policy: A policy entitled *A fishery Decision-Making Framework Incorporating the Precautionary Approach*, issued in 2009
- RR: removal reference
- TRP: target reference point
- USR: upper stock reference

2.0 Reference Documents

Note: Existing publications are foundational to this RFP and can support delivery of some requirements, but are not themselves sufficient. In fact, both DFO 2022 and DFO 2023 identify broad areas where policy improvement could be made that would need further scientific work in order to develop concrete Scientific recommendations in order to be actionable. Given the recent publication of guidance on LRPs, the work under this RFP is also more likely to focus on evaluation of Science considerations in the rationale for, formulation and/or implementation of and/or interaction among the full suite of reference points in the current PA Policy (e.g., Limit Reference Point, Upper Stock Reference, Target Reference Point, Removal Reference).

DFO. 2009a. A fishery decision-making framework incorporating the precautionary approach. Last modified 2009-03- 23. Available at: <http://www.dfo-mpo.gc.ca/reports-rapports/regs/sff-cpd/precaution-eng.htm>

DFO. 2009b. Policy on New Fisheries for Forage Species. Last modified 2009-03- 23. Available at: <https://www.dfo-mpo.gc.ca/reports-rapports/regs/sff-cpd/forage-eng.htm>

DFO. 2016. Proceedings of the National Peer Review on the Development of Technical Guidelines for the Provision of Scientific Advice on the Various Elements of Fisheries and Oceans Canada Precautionary Approach Framework; February 28-March 1, 2012. DFO Can. Sci. Advis. Sec. Proceed. Ser. 2015/005. Available at: https://www.dfo-mpo.gc.ca/csas-sccs/Publications/Pro-Cr/2015/2015_005-eng.html

DFO. 2021. Science Advice for Precautionary Approach Harvest Strategies under the Fish Stocks Provisions. DFO Can. Sci. Advis. Sec. Sci. Advis. Rep. 2021/004. Available at: https://www.dfo-mpo.gc.ca/csas-sccs/Publications/SAR-AS/2021/2021_004-eng.html

DFO. 2022. Methodologies and Guidelines for Defining Limit Reference Points for Pacific Salmon. DFO Can. Sci. Advis. Sec. Sci. Advis. Rep. 2022/030. Available at: https://www.dfo-mpo.gc.ca/csas-sccs/Publications/SAR-AS/2022/2022_030-eng.html

DFO. 2023. Science Advice on Guidance for Limit Reference Points under the Fish Stocks Provisions. DFO Can. Sci. Advis. Sec. Sci. Advis. Rep. 2023/009. Available at: https://www.dfo-mpo.gc.ca/csas-sccs/Publications/SAR-AS/2023/2023_009-eng.html

Marentette, J.R. and Kronlund, A.R. 2020. A Cross-Jurisdictional Review of International Fisheries Policies, Standards and Guidelines: Considerations for a Canadian Science Sector Approach. Can. Tech. Rep. Fish. Aquat. Sci. 3342: xiii + 169 p. Available at : <https://waves-vagues.dfo-mpo.gc.ca/Library/4085937x.pdf>



3.0 Requirements

3.1 Scope of Work

The Project Requirements include:

3.1.1 Identify and analyze relative performance (i.e., advantages and disadvantages) of candidate modifications to the reference points used in the PA Policy. This includes how the reference points are defined and explained, as well as any associated provisional default values to be used for the reference points, as they relate to the objectives of the PA Policy. The range of candidate modifications to be assessed will take into account diverse life histories and data availabilities, various assessment paradigms (i.e., from traditional stock assessment to full-scale management strategy evaluation), and international best practices regarding reference points and objectives they should represent. Reference points to be analyzed include (but are not limited to) the limit reference point (LRP), removal reference (RR), upper stock reference (USR) and target reference point (TRP) of the current PA Policy.

3.1.2 Identify and analyze relative performance (i.e., advantages and disadvantages) of candidate modifications to the PA Policy and associated guidance on the development, implementation and evaluation of harvest decision rules (HDRs) that are aimed to meet the objectives of the PA Policy, as well as risk-equivalent provisional default rules that may be adopted as HDRs. The range of candidate modifications to be assessed will take into account diverse life histories and data availabilities, varying assessment paradigms (i.e., from traditional stock assessment to full-scale management strategy evaluation), and international best practices, and will include evaluation of the relative performance of the provisional default HDRs of the current PA Policy.

3.1.3 Identify and analyze the relative performance (i.e., advantages and disadvantages) of candidate modifications to the PA Policy and associated guidance for choosing risk tolerance and taking into account risk and uncertainty, including provisional default risk tolerance categories that may be provided to guide choice of management measures. The range of candidate modifications to be assessed will take into account diverse life histories and data availabilities, varying assessment paradigms (i.e., from traditional stock assessment to full-scale management strategy evaluation), and international best practices, and will include evaluation of the provisional risk tolerance categories in the current PA Policy.

3.1.4 Identify and analyze the relative performance (i.e., advantages and disadvantages) of candidate modifications to the PA Policy and associated guidance for taking into account environmental conditions, including climate change, in precautionary approach elements such as reference points and HDRs, and will include evaluation of time-varying reference points. The range of candidate modifications to be assessed will take into account diverse life histories and data availabilities, varying assessment paradigms (i.e., from traditional stock assessment to full-scale management strategy evaluation), and international best practices.

3.1.5 Identify and analyze the relative performance (i.e., advantages and disadvantages) of candidate modifications to the PA Policy and associated guidance for the management of multi-species fisheries and forage fish fisheries. The candidate modifications to be assessed will address the development and implementation of precautionary approach elements such as reference points and HDRs for these cases, and will take into account diverse life histories and data availabilities, varying assessment paradigms (i.e., from traditional stock assessment to full-scale management strategy evaluation), and international best practices. In the case of forage fish, the review will also take into account differences between the current PA Policy and DFO's *Policy on New Fisheries for Forage Species* (DFO 2009b).

3.1.6 Identify and analyze the relative performance (i.e., advantages and disadvantages) of candidate modifications to the PA Policy and associated guidance to clarify or update policy elements such as diagrams and the reporting and visualization of indicators used to evaluate stock and fishery



performance, in relation to the objectives of the PA Policy. This will include stock status designations of Critical, Cautious, Healthy, and 'at or above/below the removal reference', as well as indicators used in DFO's *Sustainability Survey for Fisheries* (which are used in Canada's Environmental Sustainability Indicators or CESI).

3.3. Tasks

For each requirement, the tasks include:

3.2.1 Complete technical literature reviews as necessary to support the identification of candidate modifications to be assessed in requirements 3.1.1 to 3.1.6. Work to finalize the list of candidate modifications will be completed in collaboration with a multi-sector DFO steering committee convened by the Project Authority.

3.2.2 Complete technical analyses such as closed-loop simulation as necessary to support the analysis (i.e., advantages and disadvantages) of proposed modifications identified in Step 3.2.1. Note that the number and types of closed-loop simulation required by the project have not been determined yet.

3.2.3 Support the development of, lead and/or participate in meetings and/or workshops with client sectors (fisheries management, strategic policy) to elucidate objectives, understand implementation needs, and/or communicate the results of technical reviews and analyses.

3.2.4 Provide results of both literature reviews and closed-loop simulations in the form of one or more technical papers that may be submitted for peer review, e.g., through the CSAS office. Note that the number and types of closed-loop simulation required by the project have not been determined yet.

3.2.5 Presentation and defense of, and subsequent completion of, technical papers submitted for peer review, e.g., through the CSAS office. This includes post-review revisions required for research document publication.

3.3 Deliverables and Acceptance Criteria

The deliverables and acceptance criteria include:

3.3.1 Attendance at progress review meetings including the Contractor and the Project Authority at least once per month for the duration of work until deliverable 3.2.3 is met. Specific deliverables for each progress review meeting will be determined at the close of the preceding progress review meeting, and may include (but are not limited to) outlines, presentations, short discussion papers, worked examples, etc.

3.3.2 Presentation materials, including but not limited to PowerPoint files and open-source software tools, to support progress meetings and workshops as necessary.

3.3.3 One or more technical papers containing the full suite of reviews, analyses and recommendations for requirements 3.1.1 to 3.1.6, provided in a form that may be submitted for peer review, i.e., working paper(s) according to the formats required by DFO's CSAS office.

3.3.4 Presentation materials, including but not limited to PowerPoint files and open-source software tools, to support peer review of the technical papers.

4.0 Travel Requirements

4.1 It is anticipated that a maximum of one in-person meeting will be required per project requirement (i.e., up to six in-person meetings in total for the project). Each meeting is expected to be 4-5 days in



duration and take place in a centralized location depending on participation (e.g., Ottawa, Montreal, Vancouver).

4.2 Meeting arrangements will be at the discretion of the Project Authority. It is expected that CSAS review meetings will be the only meetings for which travel may be required.

5.0 Department obligations

Canada’s roles and responsibilities will be to supply information, data and reference material as required to complete the reviews and analyses. Specifically, this will include any material relevant to the work that is not publicly available, such as draft reports, unpublished documents, proposed policy options for evaluation, other policy information, etc.

6.0 Timeframe and delivery dates

a) Timeframe: Overall timelines for deliverables associated with each project requirement will be established by mutual agreement of the Contractor and the Project Authority, and may be subject to change based on operational needs. A delivery schedule for RFP milestones will be developed between the contractor and Project Authority.

b) Timeframe: Project requirements may not be addressed in the sequence presented. The Contractor may be required to work on two or more project requirements concurrently at the discretion of the Project Authority.

7.0 Location of Work

The Work must be completed using the Contractor’s equipment and at the Contractor’s place of business. The Work will be complete remotely, unless virtual meetings or workshops are considered infeasible at the discretion of the Project Authority.

8.0 Language of Work

The Contractor must be fluent in written, oral and comprehensive English at the advanced level as per the table below.

LANGUAGE PROFICIENCY GRID			
Legend	Oral	Comprehension	Written
Basic	A person speaking at this level can: Ask and answer simple questions; Give simple instructions; and Give uncomplicated directions relating to routine work situations.	A person reading at this level can: Fully understand very simple texts; Grasp the main idea of texts about familiar topics; and Read and understand elementary points of information such as dates, numbers, or names from relatively more complex texts to perform routine job-related tasks.	A person writing at this level can: Write isolated words, phrases, simple statements or questions on very familiar topics using words of time, place or person.
Intermediate	A person speaking at this level can:	A person reading at this level can:	A person writing at this level can:



	Sustain a conversation on concrete topics; report on actions taken; Give straightforward instructions to employees; and Provide factual descriptions and explanations.	Grasp the main idea of most work-related texts; Identify specific details; and Distinguish main from subsidiary ideas.	Deal with explicit information on work-related topics since they have sufficient mastery of grammar and vocabulary.
Advanced	A person speaking at this level can: Support opinions; and understand and express hypothetical and conditional ideas	A person reading at this level can: Understand most complex details, inferences and fine points of meaning; and Have a good comprehension of specialized or less familiar material.	A person writing at this level can: Write texts where ideas are developed and presented in a coherent manner.



ANNEX B - BASIS OF PAYMENT

During the period of the Contract, for Work performed in accordance with the Contract, the Contractor will be paid as specified below.

Milestone (Annex A – SOW)	Description	All-inclusive unit price (taxes excluded)
3.1.1	Identify and analyze relative performance (i.e., advantages and disadvantages) of candidate modifications to the reference points used in the PA Policy. This includes how the reference points are defined and explained, as well as any associated provisional default values to be used for the reference points, as they relate to the objectives of the PA Policy. The range of candidate modifications to be assessed will take into account diverse life histories and data availabilities, various assessment paradigms (i.e., from traditional stock assessment to full-scale management strategy evaluation), and international best practices regarding reference points and objectives they should represent. Reference points to be analyzed include (but are not limited to) the limit reference point (LRP), removal reference (RR), upper stock reference (USR) and target reference point (TRP) of the current PA Policy.	\$ _____
3.1.2	Identify and analyze relative performance (i.e., advantages and disadvantages) of candidate modifications to the PA Policy and associated guidance on the development, implementation and evaluation of harvest decision rules (HDRs) that are aimed to meet the objectives of the PA Policy, as well as risk-equivalent provisional default rules that may be adopted as HDRs. The range of candidate modifications to be assessed will take into account diverse life histories and data availabilities, varying assessment paradigms (i.e., from traditional stock assessment to full-scale management strategy evaluation), and international best practices, and will include evaluation of the relative performance of the provisional default HDRs of the current PA Policy.	\$ _____
3.1.3	Identify and analyze the relative performance (i.e., advantages and disadvantages) of candidate modifications to the PA Policy and associated guidance for choosing risk tolerance and taking into account risk and uncertainty, including provisional default risk tolerance categories that may be provided to guide choice of management measures. The range of candidate modifications to be assessed will take into account diverse life histories and data availabilities, varying assessment paradigms (i.e., from traditional stock assessment to full-scale management strategy evaluation), and international best practices, and will include evaluation of the provisional risk tolerance categories in the current PA Policy.	\$ _____



Milestone (Annex A – SOW)	Description	All-inclusive unit price (taxes excluded)
3.1.4	Identify and analyze the relative performance (i.e., advantages and disadvantages) of candidate modifications to the PA Policy and associated guidance for taking into account environmental conditions, including climate change, in precautionary approach elements such as reference points and HDRs, and will include evaluation of time-varying reference points. The range of candidate modifications to be assessed will take into account diverse life histories and data availabilities, varying assessment paradigms (i.e., from traditional stock assessment to full-scale management strategy evaluation), and international best practices.	\$ _____
3.1.5	Identify and analyze the relative performance (i.e., advantages and disadvantages) of candidate modifications to the PA Policy and associated guidance for the management of multi-species fisheries and forage fish fisheries. The candidate modifications to be assessed will address the development and implementation of precautionary approach elements such as reference points and HDRs for these cases, and will take into account diverse life histories and data availabilities, varying assessment paradigms (i.e., from traditional stock assessment to full-scale management strategy evaluation), and international best practices. In the case of forage fish, the review will also take into account differences between the current PA Policy and DFO's <i>Policy on New Fisheries for Forage Species</i> (DFO 2009b).	\$ _____
3.1.6	Identify and analyze the relative performance (i.e., advantages and disadvantages) of candidate modifications to the PA Policy and associated guidance to clarify or update policy elements such as diagrams and the reporting and visualization of indicators used to evaluate stock and fishery performance, in relation to the objectives of the PA Policy. This will include stock status designations of Critical, Cautious, Healthy, and 'at or above/below the removal reference', as well as indicators used in DFO's <i>Sustainability Survey for Fisheries</i> (which are used in Canada's Environmental Sustainability Indicators or CESI).	\$ _____
Total Price (taxes excluded) :		\$ _____