



**Return Bids to:**

Natural Resources Canada / Ressources naturelles Canada  
Bid Receiving/ Réception des soumissions  
See herein for bid submission instructions/ Voir ici pour les  
instructions de soumission des offres

**Request for Proposal (RFP)  
Demande de proposition (DDP)**

**Proposal To: Natural Resources Canada**

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

**Comments – Commentaires**

**Issuing Office – Bureau de distribution**

Finance and Procurement Management Branch  
Natural Resources Canada  
580 Booth Street, 5th Floor  
Ottawa, Ontario  
K1A 0E4

<b>Title – Sujet</b>	
Facilitation and Coordination of Expert Review Panels	
<b>Solicitation No. – No de l’invitation NRCan-5000075601</b>	<b>Date</b> July 21, 2023
<b>Requisition Reference No. - N° de la demande</b> 178685	
<b>Solicitation Closes – L’invitation prend fin at – à 02:00 PM Eastern Daylight Savings Time (EDT) on – le August 18, 2023</b>	
<b>Address Enquiries to: - Adresse toutes questions à:</b> <a href="mailto:moira.farkas@nrcan-rncan.gc.ca">moira.farkas@nrcan-rncan.gc.ca</a>	
<b>Telephone No. – No de telephone</b> (403) 462-1162	
<b>Destination – of Goods and Services:</b> <b>Destination – des biens et services:</b> See herein	
<b>Security – Sécurité</b>  There are security requirements associated with this requirement.	
<b>Vendor/Firm Name and Address</b> <b>Raison sociale et adresse du fournisseur/de l’entrepreneur</b>          <b>Telephone No.:- No. de téléphone:</b>  <b>Email – Courriel :</b>	
<b>Name and Title of person authorized to sign on behalf of Vendor/Firm (type or print)</b> <b>Nom et titre de la personne autorisée à signer au nom du fournisseur/de l’entrepreneur (taper ou écrire en caractères d’imprimerie)</b>	
<b>Name</b>	<b>Title</b>
_____	_____
<b>Signature</b>	<b>Date</b>
_____	_____



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The Articles contained in this document are mandatory in their entirety, unless otherwise indicated. Acceptance of these Articles, in their entirety, as they appear in this document, is a Mandatory requirement of this RFP.

**Suppliers submitting a proposal containing statements implying that their proposal is conditional on modification of these clauses or containing terms and conditions that purport to supersede these clauses or derogate from them will be considered non-responsive.**

Bidders with concerns regarding the provisions of the Bid Solicitation document (including the Resulting Contract Clauses) should raise such concerns in accordance with the Enquiries provision of this RFP.



## **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 Requirements: includes specific requirements that must be addressed by Bidders; and

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

The Annexes include the Statement of Work, the Basis of Payment and any other annexes.

### **1.2 Summary**

1.2.1 By means of the RFP, Natural Resources Canada (NRCan) is seeking proposals from bidders for resources who will support the development, operation and improvements of the two (2) Billion Trees program grants and contributions management system.

### **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 will be done in writing, by email.



## PART 2 - BIDDER INSTRUCTIONS

### 2.1 Standard Instructions, Clauses and Conditions

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

- **In the complete text content (except Section 1 and 3)**  
**Delete:** Public Works and Government Services Canada” and “PWGSC”  
**Insert:** “Natural Resources Canada.” and “NRCan”
- **At 02 Procurement Business Number:**  
**Delete:** “Suppliers are required to”  
**Insert:** “It is suggested that suppliers”
- **At 08 Transmission by facsimile or by Canada Post Corporation's (CPC) Connect service, article 1:**  
**Delete:** in its entirety
- **At 08 Transmission by facsimile or by Canada Post Corporation's (CPC) Connect service, article 2a:**  
**Delete:** : The only acceptable email address to use with CPC Connect for responses to bid solicitations issued by PWGSC headquarters is: [tpsgc.pareceptiondessomissions-apbidReceiving.pwgsc@tpsgc-pwgsc.gc.ca](mailto:tpsgc.pareceptiondessomissions-apbidReceiving.pwgsc@tpsgc-pwgsc.gc.ca). or, if applicable, the email address identified in the bid solicitation.  
**Insert:** The only acceptable email address to use with CPC Connect for responses to bid solicitation issued by NRCan is: [procurement-appvisionnement@NRCan-RNCan.gc.ca](mailto:procurement-appvisionnement@NRCan-RNCan.gc.ca)
- **At 08, Transmission by facsimile or by Canada Post Corporation's (CPC) Connect service, article 2b:**  
**Delete:** “six business days”  
**Insert:** “five business days”
- **At 20, Further information, article 2b:**  
**Delete:** in its entirety

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

Delete: 60 days  
Insert: 180 days

### 2.2 Submission of Bids

Bidders must submit all proposals electronically. Given the current constraints on NRCan’s networks, the electronic mail system has a limit of 1GB per single message received and a limit of 20GB per conversation. NRCan encourages bidders to submit all bids earlier than the closing time.



Bids must be submitted no later than the date and time indicated on page 1 of the bid solicitation.

**Only bids submitted using CPC Connect service will be accepted.**

At least five (5) business days before the bid solicitation closing date, it is necessary for the Bidder to send an email requesting to open CPC Connect conversation to the following address:

<mailto:procurement-provisionnement@NRCan-RNCan.gc.ca>

**Note 1:** Bids will not be accepted if e-mailed directly to this address. This e-mail address is to be used to open CPC Connect conversation, as detailed in the Standard Instructions [2003 \(article 08, paragraph 2\)](#), or to send bids through CPC Connect message if the bidder is using its own licensing agreement for CPC Connect.

**Note 2:** Send as early as possible in order to ensure a response, Requests to open a CPC Connect conversation received after that time may not be answered.

**IMPORTANT:** It is requested that you write the bid solicitation number in "Subject" of the email:

**NRCan-5000075601 – Facilitation and Coordination of Expert Review Panels**

NRCan will not assume responsibility for proposals directed to any other location.

The onus is on the Bidder to ensure that the bid is submitted correctly using CPC Connect service. Not complying with the instructions may result in NRCan's inability to ascertain reception date and/or to consider the bid prior to contract award. Therefore, NRCan reserves the right to reject any proposal not complying with these instructions.

Due to the nature of the bid solicitation, bids transmitted by email, mail or facsimile to NRCan will not be accepted.

## 2.3 Former Public Servant

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

### Definitions

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

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



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

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

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

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

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

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

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

### **Work Force Adjustment Directive**

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

If so, the Bidder must provide the following information:

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

## **2.3 Enquiries - Bid Solicitation**

All enquiries must be submitted in writing to the Contracting Authority no later than five (5) business 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 Alberta.

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) business days before the bid closing date. Canada will have the right to accept or reject any or all suggestions.



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

### **3.1 Bid Preparation Instructions**

The Bidder must submit its bid electronically, Canada requests that the Bidder submits its bid in accordance with section 08 of the 2003 standard instructions. The CPC Connect system has a limit of 1GB per single message posted and a limit of 20GB per conversation.

Canada requests that Bidders provide their bid in separately bound sections as follows:

Section I: Technical Bid (1 electronic copy)

Section II: Financial Bid (1 electronic copy) in a separate file and document

Section III: Certifications (1 electronic copy)

**Prices should appear in the financial bid only. No prices should be indicated in any other section of the 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 Financial Proposal Form in Appendix "2". The total amount of Applicable Taxes must be shown separately.

#### **Exchange Rate Fluctuation**

*SACC Manual* clause C3011T (2013-1106), Exchange Rate Fluctuation

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

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



## PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

### 4.1 Evaluation Procedures

- (a) Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria.
- (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 Appendix “1” – Evaluation Criteria.

### 4.2 Basis of Selection

#### 4.2.1 Basis of Selection – Highest Combined Rating of Technical Merit and Price

To be declared responsive, a bid must:

- a. comply with all the requirements of the bid solicitation; and
  - b. meet all mandatory criteria; and
  - c. obtain the required minimum points specified for each criterion for the technical evaluation, and
  - d. obtain the required minimum of points for each of the resources for the technical evaluation criteria which are subject to point rating.
- Bids not meeting (a) or (b) or (c) and (d) will be declared non-responsive. The responsive bid with the highest number of points will be recommended for award of a contract.
  - 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.
  - 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%.
  - To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 30%.
  - For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
  - 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 \$45,000 (45).

The compliant bidder with the highest combined rating of technical merit (70%) and price (30%) will be recommended for contract award. See the example in the following table.

<b>Basis of Selection - Highest Combined Rating Technical Merit (70%) and Price (30%)</b>			
	<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>	$45/55 \times 30 = 24.55$	$45/50 \times 30 = 27$	$45/45 \times 30 = 30$
<b>Combined Rating</b>		84.18	73.15	77.70
<b>Overall Rating</b>		1st	3rd	2nd



## 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 property 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.

- Bidders who are incorporated, including those bidding as a joint venture, must provide a complete list of names of all individuals who are currently directors of the Bidder or, in the case of a private company, the owners of the company.
- Bidders bidding as sole proprietorship, as well as those bidding as a joint venture, must provide the name of the owner(s).
- Bidders bidding as partnerships do not need to provide lists of names.

Name of Bidder: \_\_\_\_\_

OR



Name of each member of the joint venture:

- Member 1: \_\_\_\_\_
- Member 2: \_\_\_\_\_
- Member 3: \_\_\_\_\_
- Member 4: \_\_\_\_\_

Identification of the administrators/owners:

SURNAME	NAME	TITLE

### 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

5.2.3.1.1 *SACC Manual* clause [A3005T](#) (2010-08-16)

#### 5.2.3.2 Education and Experience

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

#### 5.2.3.3 Former Public servant

<b>Former Public Servants</b> See the Article in Part 2 of the bid solicitation entitled Former Public Servant for a definition of "Former Public Servant".	Is the Bidder a FPS in receipt of a pension as defined in the bid solicitation? Yes <input type="checkbox"/> No <input type="checkbox"/> If yes, provide the information required by the Article in Part 2 entitled "Former Public Servant"
	Is the Bidder a FPS who received a lump sum payment under the terms of the Work Force Adjustment Directive? Yes <input type="checkbox"/> No <input type="checkbox"/> If yes, provide the information



	required by the Article in Part 2 entitled "Former Public Servant"
--	--

**SIGNATURE for CERTIFICATION**

The Contractor certifies having read and understood the information included in the present document and acknowledges receipt.

\_\_\_\_\_  
Name

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Authorized Representative



## **PART 6 – SECURITY REQUIREMENTS**

### **6.1 Security Requirements**

6.1.1 Before award of a contract, the following conditions must be met:

- a. the Bidder must hold a valid organization security clearance as indicated in Part 7 - Resulting Contract Clauses;
- b. the Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work sites must meet the security requirement as indicated in Part 7 - Resulting Contract Clauses;
- c. the Bidder must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites;





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

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

### **7.1 Statement of Work**

The Contractor must perform the Work in accordance with the Statement of Work at Annex "A" and the Contractor's technical bid entitled \_\_\_\_\_, dated \_\_\_\_\_. *(to be completed at contract award)*

#### **7.1.2 Task Authorization**

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

##### **7.1.2.1 Task Authorization Process**

1. The Technical Authority will provide the Contractor with a description of the task using the Task Authorization form specified in Annex E.
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 Technical Authority, within 15 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 Technical 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.

##### **7.1.2.2 Minimum Work Guarantee - All the Work - Task Authorizations**

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



For each authorized task:

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

For all authorized tasks:

- 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
- the total amount, exclusive of Applicable Taxes, expended to date against all authorized TAs.

## 7.2 Standard Clauses and Conditions

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

### 7.2.1 General Conditions

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

As applicable, replace references to Public Works and Government Services Canada (PWGSC) with Natural Resources Canada (NRCan).

### 7.2.2 Supplemental General Conditions

The following clauses apply to and form part of this contract:

4006 (2010-08-16), Contractor to Own Intellectual Property Rights in Foreground Information

## 7.3 Security Requirements

The following security requirement (SRCL#178685 and related clauses provided by the [Contract Security Program](#) apply and form part of the Contract:

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



## 7.4 Term of Contract

### 7.4.1 Period of the Contract

The period of the Contract is from date of Contract Award to March 31, 2025.

### 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 (3) additional one year period(s) 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 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.

### 7.4.3 Comprehensive Land Claims Agreements (CLCAs)

The Contract does not include deliveries of services within locations within Yukon, Northwest Territories, Nunavut, Quebec, or Labrador that are subject to Comprehensive Land Claims Agreements (CLCAs). Any requirements for deliveries of services within locations within Yukon, Northwest Territories, Nunavut, Quebec, or Labrador that are subject to CLCAs will have to form part of a separate contract.

## 7.5 Authorities

### 7.5.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: Moira Farkas  
Title: Senior Procurement Officer  
Organization: Natural Resources Canada  
Address: 5320 122 Street, Edmonton, AB T6H 3S5  
Telephone: 403-462-1162  
E-mail address: [moira.farkas@nrcan-rncan.gc.ca](mailto:moira.farkas@nrcan-rncan.gc.ca)

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

### 7.5.2 Project Authority (to be provided at contract award)

The Project Authority for the Contract is:

Name:  
Title:  
Organization:  
Address:  
Telephone:  
Facsimile:  
E-mail address:

The Project Authority is the representative of the department or agency for whom the Work is being carried out



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

### 7.5.3 Contractor's Representative *(to be provided at contract award)*

Name:  
Title:  
Organization:  
Address:  
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 – Limitation of Expenditure

The Contractor will be paid for its costs reasonably and properly incurred in the performance of the Work, in accordance with the Basis of Payment in Annex "B" to a limitation of expenditure of \$ \_\_\_\_\_ (*insert the amount at contract award*). Customs duties are included and Applicable Taxes are extra.

### 7.7.2 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 \$ \_\_\_\_\_. (*to be provided at contract award*). Customs duties are included and Applicable Taxes are extra.
2. No increase in the total liability of Canada will be authorized or paid to the Contractor unless an increase has been approved, in writing, by the Contracting Authority.
3. The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:
  - a. when it is 75 percent committed, or
  - b. four (4) months before the contract expiry date, or
  - c. as soon as the Contractor considers that the sum is inadequate for the completion of the Work required in all authorized TAs, inclusive of any revisions, whichever comes first.
4. If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority, a written estimate for the additional funds required. Provision of such information by the Contractor does not increase Canada's liability.

### 7.7.3 Method of Payment

#### Monthly Payment

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



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

## 7.8 Invoicing Instructions

Invoices shall be submitted using **the following method**:

E-mail:

[Invoicing-Facturation@nrcan-rncan.gc.ca](mailto:Invoicing-Facturation@nrcan-rncan.gc.ca)

**Note:** Attach "PDF" file. No other formats will be accepted

Please do not submit invoices using more than one method as this will not expedite payment.

Invoices and all documents relating to a contract must be submitted on the Contractor's own form and shall bear the Contract number: *(to be provided at Contract Award)*, and Task Authorization number.

**Invoicing Instructions to suppliers:** <http://www.nrcan.gc.ca/procurement/3485>

## 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 Alberta.

### 7.11 Priority of Documents

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

- (a) the Articles of Agreement;
- (b) the supplemental general conditions [4006](#) (2010-08-16), Contractor to Own Intellectual Property Rights in Foreground Information;
- (c) the general conditions [2035](#) (2022-12-01) General Conditions - Higher Complexity - Services, apply to and form part of the Contract;
- (d) Annex A, Statement of Work;
- (e) Annex B, Basis of Payment;
- (f) Annex C, Security Requirements Checklist

### 7.12 Foreign Nationals (Canadian Contractor OR Foreign Contractor)

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



OR

SACC Manual clause [A2001C](#) (*insert date*) Foreign Nationals (Foreign Contractor)

### 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 Dispute Resolution

The parties agree to maintain open and honest communication about the Work throughout and after the performance of the contract.

- (a) 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.
- (b) 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.
- (c) Options of alternative dispute resolution services can be found on Canada's Buy and Sell website under the heading "[Dispute Resolution](#)".



## ANNEX “A” STATEMENT OF WORK

### SW.1.0 TITLE

Facilitation and Coordination of Expert Review Panels

### SW.2.0 BACKGROUND

Natural Resources Canada’s (NRCan) 2 Billion Trees Program (2BT) provides funding to support projects to support Canada’s 2030 Paris Agreement greenhouse gases emissions reduction target and establish the building blocks to get to net-zero by 2050. This support also increases collaboration between Indigenous peoples and other natural resource development stakeholders, including governments, industry, and non-governmental organizations. Planting trees will contribute to the restoration of habitat and provide a multitude of other social, cultural, environmental, and economic benefits.

A multi-disciplinary, inclusive and independent Expert Review Panel (ERP) is important to the CFS program’s evaluation process. The ERPs will assess 2BT applications based on rated criteria that may include, but is not limited to:

- Eligible projects will contribute to incremental planting and associated management of trees and forests. This includes monitoring trees after planting.
- Eligible projects will contribute clear benefits in terms of net carbon sequestration and greenhouse gas (GHG) emission reductions in the period to 2050.
- Eligible projects will seek to achieve co-benefits.
- Eligible projects will contribute to planting that is ecologically suitable or otherwise appropriate for its location, given site conditions.
- Eligible projects will result in permanent additions to forest, improve existing forest or allow for permanent protection of forests.
- Eligible projects will include environmentally acceptable practices that improve forest health, diversity in species and/or mix and coincide with practices normally associated with sound reforestation, afforestation and urban tree/forest plantation establishment and management (intent of this to cover specific practices that will be deployed and to quantify the plan).
- Eligible projects will include seedling or vegetative cutting source (nursery, stool bed), species and density of initial planting, and validation of availability.
- Eligible applicants have the capacity to carry out the proposed project and ensure its successful implementation.
- Eligible projects have proposed a reasonable and realistic timeline and project plan, have considered potential challenges and have appropriate risk mitigation measures in place.
- Eligible projects have requested an appropriate level of funding and have the financial capacity to manage the project.

The 2BT has a year-round ongoing intake of project applications and accepts applications online. The program sets deadlines for applications to facilitate batch reviews of applications throughout the year; and based on the availability of funding, reserves the option to review applications individually or in small batches at other times of the year, as needed.

NRCan makes funding decisions for submitted applications, informed by internal analysis, and supported by recommendations from a convened ERP, which are an advisory body of subject matter experts (SMEs). When NRCan receives an application, the 2BT program will conduct a preliminary assessment of completeness and mandatory eligibility. An ERP will be convened and tasked to review and assess applications that meet the completeness and mandatory eligibility requirements, and rate project applications through a consensus-based process. Results from the ERPs process will form a recommendation on the merits and risks of each proposed project to the program that may be considered as part of its funding decision process.



Facilitation and coordination requirements for ERPs under this contract will be convened as/when required by NRCan to review applications received by the Program between when the Contract is Awarded until March 2025. NRCan reserves the option to extend the contract for a further three (3) year term until March 2028.

### **SW.3.0 OBJECTIVES**

Each year the amount of funding requested will need to coincide with the available program Budget. The purpose of having an ERP is to ensure that government funding is distributed in a transparent manner through an objective and fair process. Final funding decisions are made by NRCan management, informed by the independent reviews of applications by SMEs and the consolidated comments and recommendations of the ERP and other considerations as are relevant.

The Contractor will be required to:

- Facilitate consensus-based decisions making by convening ERPs. Document the Panel's findings and recommendations based on the merits and risks of each assessed application.
- Achieving consensus from SMEs' discussions in ERPs (as required based on the program's need)
- Report back on each ERP's consensus findings and recommendations to NRCan
- Poll and report to NRCan on lessons learned from each successive ERP (as required based on the program's need)

### **SW.4.0 PROJECT REQUIREMENTS**

#### **SW.4.1 TASKS, DELIVERABLES, MILESTONES AND SCHEDULE**

The work will be assigned on an as and when needed basis via Task Authorizations.

##### **To convene and manage Expert Review Panels**

The Contractor will be tasked to undertake a range of activities to see the effective delivery of funding recommendations to NRCan on the merits and risks (independent and relative) of applications submitted.

This includes:

- Conferring with the Project Authority to co-develop a strategy for reviewing applications (either individually, or in larger groups of applications);
- Coordinating the onboarding, training, and access to NRCan systems for SMEs
- Collecting and collating for each application, the individual scores and comments prior to the consensus meeting.
- Convening and managing SMEs throughout the duration of each ERP;
- Facilitating, documenting, and reporting on consensus discussions for each ERP, summarizing recommendations to NRCan on the individual and relative merits and risks of proposed projects. Where multiple applications are being reviewed, the Contractor may submit one report, that collates the summaries and recommendations for each project.
- Providing reports on lessons learned for each successive ERP, with advice for improvements.

##### **SW.4.1.1 INFORMATION ON TASKS AUTHORIZATIONS:**

The 2 Billion Trees program launched an ongoing Call for Proposals (CFP) in December 2022. Review periods will take place throughout 2023-2024 and beyond, until such point as there is no grant or contribution funding available.





As part of this ongoing call, NRCan will set a deadline for application submissions and will notify potential applicants via email and website. Outside of any Calls for Proposals, based on available funding, NRCan may elect to have individual or small batches of applications received throughout the year to be assessed ad hoc by SMEs, or may elect to hold them until a subsequent review period.

Additional application streams are anticipated to be available in 2023-2024. The assessment process and timing for these streams is still being determined but applications received through these streams will also be subject to review by an ERP.

Note: Any and all subsequent Task Authorizations will be dependent on the continued availability of funds, and/or the identification of new funds.

#### **SW.4.2 METHOD AND SOURCE OF ACCEPTANCE**

All deliverables and services rendered under any contract are subject to inspection by the Project Authority. The Project Authority shall have the right to reject any deliverables that are not considered satisfactory or require their correction before payment will be authorized.

#### **SW.5.0 OTHER TERMS AND CONDITIONS OF THE SOW**

##### **SW.5.1 CONTRACTOR'S OBLIGATIONS**

In addition to the obligations outlined in Section 4 of this Statement of Work, the Contractor must:

- Sign and comply with the terms of a non-disclosure agreement provided to the Contractor by NRCan;
- Maintain all documentation in a secure area.
- Treat and keep all documents and proprietary information as confidential.
- Identify any conflicts of interest with NRCan or individual applicants and identified project partners
- Submit all written draft reports in electronic Microsoft Word and/or Excel format; and final reports in PDF format.
- Confer with the Project Authority, as necessary throughout the term of the contract.
- Ensure that no documents deemed Protected (or higher) are stored or maintained on the contractor's premises outside of the NRCan digital repository/telework environment.

\*All work must be performed within the Citrix Telework environment and then saved in GCDocs or other NRCan approved repository (i.e. none of the documentation/files may be downloaded to contractor's local PC.

##### **SW.5.2 NRCan's OBLIGATIONS**

NRCan will facilitate the completion of the project by managing the meetings providing access to documentation, networks, etc. including the following:

- Ensure that no document deemed Protected (or higher) be shared with the contractor (hard copy) outside the NRCan network.
- Access to facilities and meeting rooms with associated equipment, telephone, etc., as required;
- Access to a staff member who will be available to coordinate activities;
- Provide comments on any draft reports within five (5 working days) and/or,
- Offer other reasonable assistance or support, as appropriate.



### **SW.5.3 LOCATION OF WORK, WORK SITE AND DELIVERY POINT**

The Expert Review Panel sessions will be held virtually. Bi-weekly meetings (virtually) will be held as required to ensure project delivery.

When connecting a device to the NRCan network, the contractor must utilize a trusted (non-public) WiFi access point.

### **SW.5.4 LANGUAGE OF WORK**

Work directly with NRCan can be completed in English however the Contractor will need to be able to operate in both Official Languages to support the facilitation and coordination of Expert Review Panels.



## **ANNEX “B” BASIS OF PAYMENT**

(To be completed at contract award)



**ANNEX "C" SECURITY REQUIREMENTS CHECK LIST**



Government  
of Canada / Gouvernement  
du Canada

Contract Number / Numéro du contrat 173923
Security Classification / Classification de sécurité UNCLASSIFIED

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

PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE			
1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine Natural Resources Canada		2. Branch or Directorate / Direction générale ou Direction CFS/TEJ/B/2BT	
3. a) Subcontract Number / Numéro du contrat de sous-traitance		3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant	
4. Brief Description of Work / Brève description du travail Ongoing Evaluation/Facilitation Expert Review Panel			
5. a) Will the supplier require access to Controlled Goods? Le fournisseur aura-t-il accès à des marchandises contrôlées?		<input checked="" type="checkbox"/> No Non	<input type="checkbox"/> Yes Oui
5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques?		<input checked="" type="checkbox"/> No Non	<input type="checkbox"/> Yes Oui
6. Indicate the type of access required / Indiquer le type d'accès requis			
6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? (Specify the level of access using the chart in Question 7. c) (Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c)		<input type="checkbox"/> No Non	<input checked="" type="checkbox"/> Yes Oui
6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé.		<input checked="" type="checkbox"/> No Non	<input type="checkbox"/> Yes Oui
6. c) Is this a commercial courier or delivery requirement with no overnight storage? S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit?		<input checked="" type="checkbox"/> No Non	<input type="checkbox"/> Yes Oui
7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès			
Canada <input checked="" type="checkbox"/>	NATO / OTAN <input type="checkbox"/>	Foreign / Etranger <input type="checkbox"/>	
7. b) Release restrictions / Restrictions relatives à la diffusion			
No release restrictions Aucune restriction relative à la diffusion <input checked="" type="checkbox"/>	All NATO countries Tous les pays de l'OTAN <input type="checkbox"/>	No release restrictions Aucune restriction relative à la diffusion <input type="checkbox"/>	
Not releasable A ne pas diffuser <input type="checkbox"/>			
Restricted to: / Limité à: <input type="checkbox"/> Specify country(ies) / Préciser le(s) pays:	Restricted to: / Limité à: <input type="checkbox"/> Specify country(ies) / Préciser le(s) pays:	Restricted to: / Limité à: <input type="checkbox"/> Specify country(ies) / Préciser le(s) pays:	
7. c) Level of Information / Niveau d'information			
PROTECTED A PROTÉGÉ A <input checked="" type="checkbox"/>	NATO UNCLASSIFIED NATO NON CLASSIFIÉ <input type="checkbox"/>	PROTECTED A PROTÉGÉ A <input type="checkbox"/>	
PROTECTED B PROTÉGÉ B <input checked="" type="checkbox"/>	NATO RESTRICTED NATO DIFFUSION RESTREINTE <input type="checkbox"/>	PROTECTED B PROTÉGÉ B <input type="checkbox"/>	
PROTECTED C PROTÉGÉ C <input type="checkbox"/>	NATO CONFIDENTIAL NATO CONFIDENTIEL <input type="checkbox"/>	PROTECTED C PROTÉGÉ C <input type="checkbox"/>	
CONFIDENTIAL CONFIDENTIEL <input type="checkbox"/>	NATO SECRET NATO SECRET <input type="checkbox"/>	CONFIDENTIAL CONFIDENTIEL <input type="checkbox"/>	
SECRET SECRET <input type="checkbox"/>	COSMIC TOP SECRET COSMIC TRÈS SECRET <input type="checkbox"/>	SECRET SECRET <input type="checkbox"/>	
TOP SECRET TRÈS SECRET <input type="checkbox"/>		TOP SECRET TRÈS SECRET <input type="checkbox"/>	
TOP SECRET (SIGINT) TRÈS SECRET (SIGINT) <input type="checkbox"/>		TOP SECRET (SIGINT) TRÈS SECRET (SIGINT) <input type="checkbox"/>	

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité  
UNCLASSIFIED





Contract Number / Numéro du contrat 173923
Security Classification / Classification de sécurité UNCLASSIFIED

**PART A (continued) / PARTIE A (suite)**

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

9. Will the supplier require access to extremely sensitive INFOSEC information or assets?  
Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate?  
Short Title(s) of material / Titre(s) abrégé(s) du matériel :  
Document Number / Numéro du document :  No / Non  Yes / Oui

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

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

<input checked="" type="checkbox"/> RELIABILITY STATUS COTE DE FIABILITE	<input type="checkbox"/> CONFIDENTIAL CONFIDENTIEL	<input type="checkbox"/> SECRET SECRET	<input type="checkbox"/> TOP SECRET TRÈS SECRET
<input type="checkbox"/> TOP SECRET - SIGINT TRÈS SECRET - SIGINT	<input type="checkbox"/> NATO CONFIDENTIAL NATO CONFIDENTIEL	<input type="checkbox"/> NATO SECRET NATO SECRET	<input type="checkbox"/> COSMIC TOP SECRET COSMIC TRÈS SECRET
<input type="checkbox"/> SITE ACCESS ACCÈS AUX EMPLACEMENTS	Special comments: Commentaires spéciaux : _____		

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

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

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

**INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS**

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

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

**PRODUCTION**

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

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

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

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



Contract Number / Numéro du contrat 173923
Security Classification / Classification de sécurité UNCLASSIFIED

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

For users completing the form manually use the summary chart below to indicate the category(ies) and level(s) of safeguarding required at the supplier's site(s) or premises.  
Les utilisateurs qui remplissent le formulaire manuellement doivent utiliser le tableau récapitulatif ci-dessous pour indiquer, pour chaque catégorie, les niveaux de sauvegarde requis aux installations du fournisseur.

For users completing the form online (via the Internet), the summary chart is automatically populated by your responses to previous questions.  
Dans le cas des utilisateurs qui remplissent le formulaire en ligne (par Internet), les réponses aux questions précédentes sont automatiquement saisies dans le tableau récapitulatif.

**SUMMARY CHART / TABLEAU RÉCAPITULATIF**

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

12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED?  
La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE?  No / Non  Yes / Oui
- If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification".  
Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire.
12. b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED?  
La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE?  No / Non  Yes / Oui
- If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification" and indicate with attachments (e.g. SECRET with Attachments).  
Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire et indiquez qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).



**Last page of SRCL#178685 to be provided at Contract Award.**



**ANNEX “D” TASK AUTHORIZATION FORM**

TASK AUTHORIZATION				
<b>Contractor:</b>				
			<b>Financial coding:</b>	
<b>Contract number:</b>				
<b>Task number:</b>			<b>Date:</b>	
<b>TA Request (for completion by Technical authority)</b>				
<b>1. Task Description of the Work required:</b>				
<b>2. Date</b>		From:	To:	
<b>3. Work location</b>				
<b>4. Travel Requirement</b>		[ ] Yes [ ] No Specify:		
<b>5. Others Conditions /Restrains</b>		[ ] Yes [ ] No Specify:		
<b>6. Basis of paiement :</b>		Total estimate Cost (Firm Per Diem) [ ]		
<b>7. Level of security clearance required for the contractor’s personnel</b>		[X] Reliability [ ] Secret		
<b>8. Linguistic need</b>		[ ] English and French [X] English [ ] French The categories of personnel requiring bilingualism include:		
<b>TA Proposal [For completion by Contractor]</b>				
<b>9. Cost breakdown for reference purposes</b>				
Name + Level of Proposed resource	PWGSC Security File Number	Firm Per Diem Rate	Estimated # of Days	Total cost
<b>Professional services -estimated cost</b>	<b>Total:</b>			\$
				<b>Taxes:</b>
				\$
<b>Grand Total:</b>				\$





TA Approval		
<b>10. Signing Authorities</b>	Signature	Date
Name, Title and Signature of Individual Authorized to Sign on Behalf of Contractor: _____		
Name, Title and Signature of the Contracting Authority _____		
<b>11. Basis of Payment and Invoicing</b>		
In Accordance with the article entitled "Basis of Payment" in the contract.  Payment to be made based on receipt of detailed monthly invoices for services rendered, subject to full acceptance by the Project/Technical Authority. Total of payments not to exceed the contract value.  Invoices shall be sent in accordance with the invoicing instructions included in the Terms and Conditions of the contract.		



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## APPENDIX "1" - EVALUATION CRITERIA

### **Mandatory Technical Criteria**

The Mandatory Criteria listed below will be evaluated on a simple pass/fail basis. Proposals which fail to meet the mandatory criteria will be deemed non-responsive.

Bidders are advised to address each criterion in sufficient depth to permit a complete requisite analysis and assessment by the evaluation team. Proposals failing to adequately respond to the mandatory criteria may be excluded from further considerations. The proposal should address each of the criteria in the order in which they appear.

Bidders are advised that only listing experience without providing any supporting data to describe responsibilities, duties and relevance to the criteria will not be considered demonstrated for the purpose of this evaluation.

Bidders are advised that only listing experience without providing any supporting data to describe responsibilities, duties and relevance to the criteria will not be considered demonstrated for the purpose of this evaluation.

**Bidders are requested to cross reference the mandatory technical and point-rated criteria** in a concise format by using page, paragraph(s) & sub-paragraphs as applicable to their supporting technical documentation.

The Bidder 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 shall not be considered work experience. All criteria for work experience shall 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.

Bidders are also advised that the month(s) of experience listed for a project whose time frame overlaps that of another referenced project will only be counted once. For example: project one time frame is July 2001 to December 2001; project two time frame is October 2001 to January 2002; the total months of experience for these two project references is seven (7) months.



Item	Mandatory Criteria	Proposal Page #
M1	<p>The bidder must demonstrate their experience facilitating expert review panels. In order to demonstrate this experience, the Bidder must provide written summaries of up to two (2) similar* projects delivered within the past five (5) years (60 months) from date of bid closing. Within each project summary, the Bidder must provide the following information:</p> <ol style="list-style-type: none"> <li>1. Name of client and brief description of the project</li> <li>2. Brief description of the type and scope of services provided, methodology used and results</li> <li>3. Brief description of the role the Bidder played in providing these services (was the Bidder the Prime Contractor or a sub-contractor on the project)</li> <li>4. Duration of the project, including the start and end dates (month/year to month/year)</li> <li>5. Extent to which services were provided on time, on budget and in accordance with the established project objectives; and</li> <li>6. Name, telephone number and/or email address of the client reference to whom the Bidder reported.</li> </ol> <p>The contact information may be used to validate the information provided.</p> <p>* Similar projects defined as: advisory committees, standards review committees, proposal review panels, and industry or academic review panel.</p>	

### **Point Rated Technical Criteria**

The criteria contained herein will be used by NRCan to evaluate each proposal that has met all the mandatory criteria.

Proposals will be evaluated using the evaluation grid provided on the following criteria:

Item	Point Rated Technical Criteria	Points Breakdown	Maximum Points
R1	<p><b>The Bidder's Understanding of the Work</b></p> <p>The Bidder's approach includes an understanding of the role of the expert review panel, and the role of the Contractor.</p>	<p>The Bidder will be evaluated based on their understanding of the following and participation in the delivery of work:</p> <p><b>3 Points</b> for addressing the role of the 2BT program and review process, and NRCan's funding application process</p> <p><b>3 points</b> for addressing the role of the expert review panel</p> <p><b>4 points</b> for addressing the role of the Contractor</p>	<p><b>10</b></p>



<b>R2</b>	<p><b>The Bidder's Approach to the Work</b></p> <p>The Bidder's approach demonstrates a realistic and achievable deliverable framework including practical time schedule, achievable milestones and work assignments.</p>	<p>The Bidder will be evaluated based on addressing the following in their approach and in the delivery of work:</p> <p><b>5 points</b> for outlining the activities</p> <p><b>5 points</b> for outlining the deliverables</p> <p><b>5 points</b> for outlining milestones and timelines</p> <p><b>5 points</b> for highlighting the extent of staff participation in each of the activities under the contract (e.g., NRCan staff participating in all activities)</p>	<b>20</b>
<b>R3</b>	<p><b>Bidder's Facilitation Team</b></p> <p>The Bidder proposes a strong team with experience in facilitating reviews of funding proposals.</p>	<p>The Bidder will be evaluated based on the following:</p> <p><b>10 points</b> for Proposed Bidder / team including roles and their detailed CVs highlighting work undertaken in the area of project management including: Facilitating consensus-based decisions making discussion; achieving consensus from discussions with differing views; and, documenting and reporting on the findings and recommendations of a group discussion</p> <p><b>5 points</b> if majority of the team is diverse (Indigenous, regional representative, bilingual)</p> <p><b>3 points</b> if majority of the team is bilingual</p>	<b>18</b>
<b>Total Points Available</b>			<b>48 points</b>
<b>Minimum Points Required</b>			<b>24 points</b>



**APPENDIX “2” - FINANCIAL PROPOSAL FORM**

**Limitation of Expenditure – Firm Per Diem Rate**

The financial evaluation will be conducted by evaluating the Total Tendered Price using these Price Tables as completed by the Bidders. As a minimum, the Bidder must respond to this pricing schedule by providing firm, all-inclusive per diem rates for each of the following categories of personnel in its financial bid once completed.

**In respect of the Estimated Level of Effort (Days) listed below, the estimated number of days is for evaluation purposes only during the solicitation process and does not represent a commitment of the future usage by Canada.**

**Initial Contract Period: Date of Contract Award to March 31, 2025**

Category of Personnel	Level of Expertise	Estimated Level of Effort (Days)	All-inclusive Per Diem Rate	Total Cost
Facilitator	Senior	25	\$	\$
Notetaker	Senior	25	\$	\$
<b>Total Initial Period for financial proposal evaluation (taxes extra):</b>				<b>\$</b>

**Option Period #1: April 1, 2025 – March 31, 2026**

Category of Personnel	Level of Expertise	Estimated Level of Effort (Days)	All-inclusive Per Diem Rate	Total Cost
Facilitator	Senior	25	\$	\$
Notetaker	Senior	25	\$	\$
<b>Total Option Period #1 for financial proposal evaluation (taxes extra):</b>				<b>\$</b>

**Option Period #2: April 1, 2026 – March 31, 2027**

Category of Personnel	Level of Expertise	Estimated Level of Effort (Days)	All-inclusive Per Diem Rate	Total Cost
Facilitator	Senior	25	\$	\$
Notetaker	Senior	25	\$	\$
<b>Total Option Period #2 for financial proposal evaluation (taxes extra):</b>				<b>\$</b>

**Option Period #3: April 1, 2027 – March 31, 2028**

Category of Personnel	Level of Expertise	Estimated Level of Effort (Days)	All-inclusive Per Diem Rate	Total Cost
Facilitator	Senior	25	\$	\$
Notetaker	Senior	25	\$	\$
<b>Total Option Period #3 for financial proposal evaluation (taxes extra):</b>				<b>\$</b>

**Total Tendered Price (Initial Period + Option Period #1 + Option Period #2 + Option Period #3) for financial proposal evaluation (taxes extra):** \$ \_\_\_\_\_

Under any resulting contract, Canada will not accept travel and living expenses that may need to be incurred by the contractor for any relocation of resources required to satisfy its contractual obligations.