



<p>RETURN BIDS TO : RETOURNER LES SOUMISSIONS À:</p> <p>Bid Receiving – Department of Foreign Affairs, Trade and Development (DFATD)</p> <p>Réception des soumissions – Ministère des Affaires étrangères, commerce et développement (MAECD)</p> <p>200 Promenade du Portage, Gatineau, QC K1A 0G4</p> <p>Bid E-mail / Courriel de soumission : receptionsoumission- bidsreceiving.spp@international.gc.ca</p> <p>REQUEST FOR PROPOSAL DEMANDE DE PROPOSITION</p> <p>Proposal to/Offer to: DFATD</p> <p>We hereby offer to provide to His Majesty the King in right of Canada, in accordance with the terms and conditions set out herein, referred to herein or attached here to, the goods, services, and construction listed herein and on any attached sheets at the price(s) set out therefor.</p> <p>Proposition à/Offre au: MAECD</p> <p>Nous offrons par la présente de fournir à Sa Majesté le Roi du chef du Canada, aux conditions énoncées ou incluses par référence dans la présente et aux appendices ci-jointes, les biens, services et construction énumérés ici sur toute feuille ci-annexée, au(x) prix indiqué(s).</p> <p>Comments — Commentaires : THIS DOCUMENT CONTAINS A SECURITY REQUIREMENT — LE PRÉSENT DOCUMENT COMPORTE UNE EXIGENCE EN MATIÈRE DE SÉCURITÉ</p> <p>Issuing Office – Bureau de distribution Department of Foreign Affairs, Trade and Development / Ministère des Affaires étrangères, commerce et développement 200 Promenade du Portage, Gatineau, QC K1A 0G4</p>	<p>Title — Sujet: Evaluation of the Departments of Foreign Affairs, Trade and Development's Weapons Threat Reduction Program (WTRP)</p>	
	<p>Standing Offer /Supply Arrangement Number : Numéro de l'offre à Commande / Arrangement en Matière d'approvisionnement :</p> <p>E60ZT-18TSPS/D</p>	
	<p>Solicitation No. - N° de l'invitation 24-246305</p>	<p>Date: October 23, 2023 23 octobre 2023</p>
	<p>Solicitation Closes - L'invitation prend fin</p> <p>At/à: 2 :00 PM / 14 h 00 On/le: November 13, 2023 13 november 2023</p>	<p>Time Zone - Fuseau horaire</p> <p>Eastern Standard Time (EST)</p>
	<p>F.O.B – F.A.B</p> <p>Plant-Usine: <input type="checkbox"/> Destination: X Other-Autre: <input type="checkbox"/></p>	
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<p>Destination of Goods, Services and Construction: Destination des biens, services et construction :</p> <p>Department of Foreign Affairs, Trade and Development (DFATD)</p> <p>Ministère des Affaires étrangères, commerce et développement (MAECD)</p>		
<p>TO BE COMPLETED BY THE BIDDER À ÊTRE COMPLETE PAR LE SOUMISSIONNAIRE</p>		
<p>Vendor/Firm Name and Address: Raison sociale et adresse du fournisseur/de l'entrepreneur :</p> <p>Name/nom : Address/adresse :</p> <p>E-Mail/courriel : Telephone No. - No de téléphone:</p>		
<p>Name and title of person authorized to sign on behalf of Vendor/Firm (Type or print) Nom et titre de la personne autorisée à signer au nom du fournisseur/de l'entrepreneur (taper ou écrire en caractères d'imprimerie)</p>		
<p>_____ Signature</p> <p>_____ Date</p>		



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TITLE

Bid solicitation #24-246305, issued under the framework of the E60ZT-18TSPS Supply Arrangement for task-based professional services, for the provision of the following professional services: A team of two Evaluation services Consultants and one Subject matter expert.

PART 1 – GENERAL INFORMATION

1.1 Introduction

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

- Part 1 General Information: provides a general description of the requirement;
- Part 2 Bidder Instructions: provides the instructions, clauses and conditions applicable to the bid solicitation;
- Part 3 Bid Preparation Instructions: provides Bidders with instructions on how to prepare their bid;
- Part 4 Evaluation Procedures and Basis of Selection: indicates how the evaluation will be conducted, the evaluation criteria that must be addressed in the bid, and the basis of selection;
- Part 5 Certifications and Additional Information: includes the certifications and additional information to be provided;
- Part 6 Security, Financial and Other Requirements: includes specific requirements that must be addressed by Bidders; and
- Part 7 Resulting Contract Clauses: includes the clauses and conditions that will apply to any resulting contract.

The Attachments include the List of Suppliers, Confidentiality Agreement, Information – Ontario Labour Legislation, Pricing Schedule, TSPS Flexible Grid, Technical and Financial criteria, Additional Certifications required with the bid, Additional Certifications required precedent to contract award.

The Annexes include the Statement of Work, the Basis of Payment, the Security Requirements Checklist, the Federal Contractors Program for Employment Equity – Certification.

The list of suppliers being invited to bid on this bid solicitation is provided as Attachment 1 to Part 1. This list will not be updated if additional suppliers request copies of the bid solicitation.



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1.2 Summary

This bid solicitation is being issued for the requirement of a professional services under the Supply Arrangement for task-based professional services. Department of Foreign Affairs Trade and Development (DFATD) Canada requires a team of two Evaluation services Consultants and one Subject matter expert. The work to be performed is detailed under Appendix "A" Statement of Work.

The initial period of this contract will be for nine (9) months with one (1) optional period of six (6) months under the same conditions.

1.3 Security

There are security requirements associated with this requirement. For additional information, consult Part 6 - Security, Financial and Other Requirements, and Part 7 - 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.

1.4 Accessibility

Considering accessibility criteria and features is obligatory with this requirement. For additional information consult the [Treasury Board Contracting Policy](#).

1.5 Trade Agreements

The requirement is subject to the provisions of the World Trade Organization Agreement on Government Procurement (WTO-AGP), the Canada-European Union Comprehensive Economic and Trade Agreement (CETA), and the Canadian Free Trade Agreement (CFTA), Canada - Chile Free Trade Agreement, Canada-Colombia Free Trade Agreement, Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP), Canada-Honduras Free Trade Agreement, Canada-Korea Free Trade Agreement, Canada-Panama Free Trade Agreement, Canada-Peru Free Trade Agreement, Canada-Ukraine Free Trade Agreement (CUFTA), Canada-United Kingdom Trade Continuity Agreement (Canada-UK TCA).

1.6 Debriefings

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

1.7 Conflict of Interest

1. In order to protect the integrity of the procurement process, bidders are advised that Canada may reject a bid in the following circumstances:
 - a. if the Bidder, any of its subcontractors, any of their respective employees or former employees was involved in any manner in the preparation of the bid solicitation or in any situation of conflict of interest or appearance of conflict of interest;
 - b. if the Bidder, any of its subcontractors, any of their respective employees or former employees had access to information related to the bid solicitation that was not available to other bidders and that would, in Canada's opinion, give or appear to give the Bidder an unfair advantage.



2. The experience acquired by a bidder who is providing or has provided the goods and services described in the bid solicitation (or similar goods or services) will not, in itself, be considered by Canada as conferring an unfair advantage or creating a conflict of interest. This bidder remains however subject to the criteria established above.
3. Where Canada intends to reject a bid under this section, the Contracting Authority will inform the Bidder and provide the Bidder an opportunity to make representations before making a final decision. Bidders who are in doubt about a particular situation should contact the Contracting Authority before bid closing. By submitting a bid, the Bidder represents that it does not consider itself to be in conflict of interest nor to have an unfair advantage. The Bidder acknowledges that it is within Canada's sole discretion to determine whether a conflict of interest, unfair advantage or an appearance of conflict of interest or unfair advantage exists.



ATTACHMENT 1 TO PART 1, LIST OF SUPPLIERS

This list will not be updated if additional suppliers request copies of the bid solicitation.

Only selected TSPS SA Holders currently holding a TSPS SA under the E60ZT-18TSPS series of SAs are invited to compete. SA Holders may not submit a bid in response to this bid solicitation unless they have been invited to do so. However, should an uninvited SA Holder wish to be invited, it may contact the Contracting Authority to request an invitation at any time prior to five business days before the published bid closing date, and an invitation will be made to that SA Holder unless it would not be consistent with the efficient operation of the procurement process. In no circumstance will such an invitation require Canada to extend a bid closing date. The following SA Holders have been initially invited to bid on this requirement.

SA Holders that are invited to compete as a joint venture must submit a bid as that joint venture SA Holder, forming no other joint venture to bid. Any joint venture must be already qualified under the E60ZT-18TSPS series as that joint venture at the time of bid closing in order to submit a bid.

The following SA Holders have been initially invited to bid on this requirement:

Stream 2: Business consulting / Change management stream
Category: 2.12: Evaluation services Consultant (Intermediate)
Category: 2.12: Evaluation services Consultant (Senior)
Category: 2.14: Subject Matter expert (Senior)

1. ALINEA INTERNATIONAL LTD.
2. Altis Human Resources (Ottawa) Inc.
3. Deloitte Inc.
4. FERENCE & COMPANY CONSULTING LTD.
5. Goss Gilroy Inc.
6. Isheva Inc., Ranakan Inc. in JOINT VENTURE
7. Kelly Sears Consulting Group
8. Le Groupe-conseil baastel Itée
9. Malarsoft Technology Corporation
10. Modis Canada Inc
11. OLAV CONSULTING CORP., MOSHWA ABORIGINAL INFORMATION TECHNOLOGY CORPORATION, IN JOINT VENTURE
12. Pricewaterhouse Coopers LLP
13. Prompta Inc.
14. Samson & Associés CPA/Consultation Inc
15. The Right Door Consulting & Solutions Incorporated
16. THE SOURCE STAFFING SOLUTIONS INC.



PART 2 – BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

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

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

The 2003 (2023-06-08) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

Subsection 3.a) of Section 01, Integrity Provisions - Bid, of Standard Instructions 2003 incorporated by reference above is deleted in its entirety and replaced with the following:

- a) at the time of submitting an arrangement under the Request for Supply Arrangements (RFSA), the Bidder has already provided a list of names, as requested under the [Ineligibility and Suspension Policy](#). During this procurement process, the Bidder must immediately inform Canada in writing of any changes affecting the list of names.

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 only to **Department of Foreign Affairs Trade and Development (DFATD) Canada** as specified on page 1 of the bid solicitation: receptionsoumission-bidsreceiving.spp@international.gc.ca

2.3 Former Public Servant – Competitive Bid

Refer to Attachment 1 to Part 5 – Additional Certifications Required Precedent to Contract Award.

2.4 Inquiries - Bid Solicitation

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

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



2.5 Applicable Laws

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

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

2.6 Bid Challenge and Recourse Mechanisms

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



PART 3 – BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

If the Bidder chooses to submit its bid electronically, Canada requests that the Bidder submits its bid in accordance with section 08 of the [2003](#) standard instructions.

Canada requires that the bid must be gathered per section and separated as follows:

- Section I: Technical Bid (one (1) electronic copy via email)
- Section II: Financial Bid (one (1) electronic copy via email)
- Section III: Certifications (one (1) electronic copy via email)
- Section IV: Additional Information (one (1) electronic copy via email)

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

Due to the nature of the bid solicitation, bids transmitted by epost Connect service and by facsimile will not be accepted.

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.

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 insert prices 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 4.1.3, Financial Evaluation, of Part 4 of the bid solicitation; and article 7.6, Payment, of Part 7.



D. Price Breakdown

In their financial bids, bidders must provide a price breakdown in response to the pricing schedule detailed in Attachment 1 to Part 3.

Applicable Taxes

The price breakdown must not include the Applicable Taxes.

E. Electronic Payment of Invoices - Bid

Canada requests that bidders accept to be paid by the following Electronic Payment Instrument(s):

- () Direct Deposit (Domestic and International)

Section III: Certifications

In Section III of their bid, bidders should provide the certifications required under Part 5 and, as applicable, any associated additional information.

Section IV: Additional Information

In Section IV of their bid, bidders should provide:

1. their legal name;
2. their Procurement Business Number (PBN);
3. the name of the contact person (provide also this person's mailing address, phone and facsimile numbers and email address) authorized by the Bidder to enter into communications with Canada with regards to their bid, and any contract that may result from their bid;
4. for Part 2, article 2.3, Former Public Servant, of the bid solicitation: the required answer to each question; and, if the answer is yes, the required information;
5. for Part 6, article 6.1, Security Requirement, of the bid solicitation:
 - a) for each individual who will require access to classified or protected information, assets or sensitive work sites:
 - 1) the name of the individual;
 - 2) the date of birth of the individual; and
 - 3) if available, information confirming the individual meets the security requirement as indicated in Part 7 - Resulting Contract Clauses;

3.2 Accessibility Standards

In accordance with the [Treasury Board Contracting Policy](#) and the [Accessible Canada Act](#), federal departments and agencies must consider accessibility criteria and features when procuring goods or services. Therefore, bidders are encouraged to highlight all the accessibility features and components of their proposal for this requirement and must:

- (i) demonstrate how the proposed goods and/or services meet the accessibility requirement at delivery; or
- (ii) describe how it would deliver the proposed goods and/or services under any resulting contract in a way that satisfies the mandatory requirement.



ATTACHMENT 1 TO PART 3, PRICING SCHEDULE

The Bidder should complete this pricing schedule and include it in its financial bid once completed. As a minimum, the Bidder must respond to this pricing schedule by including in its financial bid for each stage proposed below its quoted all inclusive fixed price (in Can \$) for each stage proposed.

The price included in this pricing schedule includes the total estimated cost of any travel and living expenses that may need to be incurred for the Work described in Part 7 of the bid solicitation.

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.

Milestone No.	Description	Expected Delivery Date	The estimated proportion of the project payment	Firm price (CAN)
1	Draft Evaluation Framework	January 15, 2024	25%	\$
2	Evaluation Framework	Within one (1) week of receiving written, consolidated comments from the Project Authority		
3	Draft Evidence Binder for data collection activities completed	March 31, 2024	10%	\$
4	Draft Preliminary Findings Presentation	May 17, 2024	25%	\$
5	Final Preliminary Findings Presentation	Within one (1) week of receiving written, consolidated comments from the Project Authority		
6	Draft Evaluation Report	July 5, 2024	40%	\$
7	Final Evaluation Report	Within two (2) weeks of receiving written, consolidated comments from the Project Authority		
8	Final Evidence Binder	At the time of submission of the final evaluation report		
Bidder's Total Evaluated Price (Applicable Taxes excluded):				\$
Applicable Taxes Insert the amount, as applicable:				GST: \$ HST: \$ PST: \$
GRAND TOTAL				\$



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 Joint Venture Experience

- a) Where the Bidder is a joint venture with existing experience as that joint venture, it may submit the experience that it has obtained as that joint venture.

Example: A bidder is a joint venture consisting of members L and O. A bid solicitation requires that the bidder demonstrate experience providing maintenance and help desk services for a period of 24 months to a customer with at least 10,000 users. As a joint venture (consisting of members L and O), the bidder has previously done the work. This bidder can use this experience to meet the requirement. If member L obtained this experience while in a joint venture with a third party N, however, that experience cannot be used because the third party N is not part of the joint venture that is bidding.

- b) A joint venture bidder may rely on the experience of one of its members to meet any given technical criterion of this bid solicitation.

Example: A bidder is a joint venture consisting of members X, Y and Z. If a solicitation requires: (a) that the bidder have 3 years of experience providing maintenance service, and (b) that the bidder have 2 years of experience integrating hardware with complex networks, then each of these two requirements can be met by a different member of the joint venture. However, for a single criterion, such as the requirement for 3 years of experience providing maintenance services, the bidder cannot indicate that each of members X, Y and Z has one year of experience, totaling 3 years. Such a response would be declared non-responsive.

- c) Joint venture members cannot pool their abilities with other joint venture members to satisfy a single technical criterion of this bid solicitation. However, a joint venture member can pool its individual experience with the experience of the joint venture itself. Wherever substantiation of a criterion is required, the Bidder is requested to indicate which joint venture member satisfies the requirement. If the Bidder has not identified which joint venture member satisfies the requirement, the Contracting Authority will provide an opportunity to the Bidder to submit this information during the evaluation period. If the Bidder does not submit this information within the period set by the Contracting Authority, its bid will be declared non-responsive.

Example: A bidder is a joint venture consisting of members A and B. If a bid solicitation requires that the bidder demonstrate experience providing resources for a minimum number of 100 billable days, the bidder may demonstrate that experience by submitting either:

- Contracts all signed by A;
- Contracts all signed by B; or
- Contracts all signed by A and B in joint venture, or
- Contracts signed by A and contracts signed by A and B in joint venture, or
- Contracts signed by B and contracts signed by A and B in joint venture.

that show in total 100 billable days.



-
- d) Any Bidder with questions regarding the way in which a joint venture bid will be evaluated should raise such questions through the Enquiries process as early as possible during the bid solicitation period.

4.1.1.2 Mandatory Technical Criteria

Refer to Attachment 1 to Part 4 (Flex grid)

4.1.1.3 Point Rated Technical 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

Mandatory Financial Criteria

Refer to Attachment 2 to Part 4.

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

4.2.1 Highest Rated Within Budget

To be declared responsive, a bid must:

- a) comply with all the requirements of the bid solicitation;
- b) meet all mandatory technical evaluation criteria;
- c) obtain the required minimum number of points specified in Attachment 2 to Part 4 for the point rated technical criteria and
- d) meet the mandatory financial criteria.

The maximum funding available for the Contract resulting from the bid solicitation is **\$280,000.00** (Applicable Taxes extra). Bids valued in excess of this amount will be considered non-responsive. This disclosure does not commit Canada to pay the maximum funding available.

The required minimum of **98 points** overall for the technical evaluation criteria which are subject to point rating. The rating is performed on a scale of **140 points**.



ATTACHMENT 1 to PART 4, TSPS FLEXIBLE GRID

Mandatory Technical Criteria

Bids must propose **two resources under the Evaluation Services Consultant category** (one Senior resource and one Intermediate resource) and **one resource under the Subject Matter Expert category** (one Senior resource), using relevant flexible grids.

Each Stream of services has its own set of flexible grids. The flexible grid indicates the minimum level of points required to qualify for each Level of Expertise. Various amounts of points are given for relevant education, professional certification and relevant experience. The flexible grid **must** be used for all categories in a Stream unless otherwise specified.

The TSPS Flexible Grids are available on the TSPS website at:

<http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/aact-tbps-anna-eng.html>

In preparing their response, Bidders are encouraged to consult the TSPS Annex "A": Streams and Categories website at: <http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/aact-tbps-anna-eng.html>) for additional information (such as Certifications Examples).



ProServices Contract - Flexible Grid Evaluation			
CONTRACTOR'S NAME:			
Name of Proposed Resource:			
Category:	2. Business Consulting/Change Management Stream 2.12 Evaluation services consultant		
Minimum Mandatory Education, Certification and Experience Requirements:	Relevant Education to the Consultant Category Graduate degree or higher: 35 points Undergraduate degree: 25 points		
Points required:	Professional certification Relevant Professional certification: 10 points		
Senior: Minimum 95 pts	Relevant Experience in Consultant Category ≥2 years and <4 years: 24 to 47 months—30 points ≥4 years and <6 years: 48 to 71 months—35 points ≥6 years and <10 years: 72 to 119 months—45 points ≥10 years: 120 + months—60 points		
Intermediate: Minimum 80 pts			
Junior: Minimum 65 pts			
Confirm Information Above (Provide details)		Points Achieved	Cross Ref. to Proposal
Education:			
Certification:			
Experience:			
Total Points Achieved:			
Comments:			
FINAL RESULTS FOR PROPOSED RESOURCE		MET	NOT MET
Evaluated by: _____ on _____ (Print Name) (Date) (Signature)			



ProServices Contract - Flexible Grid Evaluation			
CONTRACTOR'S NAME:			
Name of Proposed Resource:			
Category:	2. Business Consulting/Change Management Stream 2.14 Subject matter expert		
Minimum Mandatory Education, Certification and Experience Requirements:	Relevant Education to the Consultant Category Graduate degree or higher: 35 points Undergraduate degree: 25 points		
Points required:	Relevant Experience in Consultant Category		
Senior: Minimum 75 pts	≥2 years and <4 years: 24 to 47 months—20 points		
Intermediate: Minimum 65 pts	≥4 years and <6 years: 48 to 71 months—30 points		
Junior: Minimum 55 pts	≥6 years and <10 years: 72 to 119 months—35 points ≥10 years: 120 + months—50 points		
Confirm Information Above (Provide details)			Points Achieved
Education:			Cross Ref. to Proposal
Certification:			
Experience:			
Total Points Achieved:			
Comments:			
FINAL RESULTS FOR PROPOSED RESOURCE			MET
			NOT MET
Evaluated by: _____ on _____			
(Print Name)		(Date)	(Signature)



ATTACHMENT 2 TO PART 4, TECHNICAL AND FINANCIAL CRITERIA

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.

Point Rated Technical Criteria (RT) and Scores	Number of Points Awarded	Maximum Number of Points
RT1. Evaluation Team Lead (Senior Evaluation Consultant)		
RT1.1	<p>Team Lead Evaluation Experience: evaluation of international security program(s), international security project(s), international security relations or international security policy issue(s) (maximum 15 points)</p> <p>Using form TECH-3 - <i>Example of an Evaluation Assignment</i> in Annex "D", the Bidder should demonstrate that the proposed Evaluation Team Lead has led and completed at least three (3) Evaluation Assignments of international security program(s), international security project(s), international security relations or international security policy issue(s).</p> <p>To meet this requirement, the Evaluation Assignments should have been completed in the past 10 years as of the RFP closing date AND be at least 6 months in duration.</p> <p>In order to demonstrate the required experience, the bidder must provide the following information:</p> <ol style="list-style-type: none"> 1. Project name 2. Project summary (including the description of international security programs, projects, relations or policy issues included in evaluation scope) 3. Project start and completion dates 4. Contact name and email address (references*) <p>* References may be contacted to confirm the information provided.</p> <p>If the example presented is deemed ineligible, the Bidder will be awarded zero (0) points.</p> <p>Grading scale:</p> <ul style="list-style-type: none"> • Successfully completed three (3) relevant evaluation assignments – 15 points • Successfully completed two (2) relevant evaluation assignments – 10 points 	15 points



Point Rated Technical Criteria (RT) and Scores		Number of Points Awarded	Maximum Number of Points
	<ul style="list-style-type: none"> Successfully completed one (1) relevant evaluation assignment – 5 points 		
RT1.2	<p>Team Lead Evaluation Experience: evaluation of weapons of mass destruction (WMD) non-proliferation, threat reduction and/or disarmament policy or programming (maximum 15 points)</p> <p>Using form TECH-3 - <i>Example of an Evaluation Assignment</i> in Annex “D”, the Bidder should describe a maximum of three (3) examples of evaluation assignments of WMD non-proliferation, threat reduction and/or disarmament policy or programming conducted in the last ten (10) years, for which the proposed Evaluation Team Lead was responsible for evaluation planning, data collection and analysis, and report writing.</p> <p>If the example presented is deemed ineligible, the Bidder will be awarded zero (0) points.</p> <p>Grading scale:</p> <ul style="list-style-type: none"> Successfully completed three (3) relevant evaluation assignments – 15 points Successfully completed two (2) relevant evaluation assignments – 10 points Successfully completed one (1) relevant evaluation assignment – 5 points 		15 points
Evaluation Team Lead/Senior Evaluation Consultant Sub-total			30 points
RT2. Evaluation Team Member (Intermediate Evaluation Consultant)			
RT2.1	<p>Team Member Evaluation Experience: evaluation of international security program(s), international security project(s), international security relations <u>or</u> international security policy issue(s) (maximum 10 points)</p> <p>Using form TECH-3 - <i>Example of an Evaluation Assignment</i> in Annex “D”, the Bidder should describe a maximum of three (3) examples of evaluation assignments of international security program, international security project, international security relations or international security policy conducted in the last ten (10) years, for which the proposed Evaluation Team Member was a team member responsible for carrying out assigned tasks.</p>		10 points



Point Rated Technical Criteria (RT) and Scores	Number of Points Awarded	Maximum Number of Points
<p>Assigned tasks should represent evaluation activities with defined scope, timeframe and being integral to the completion of the evaluation mandate. The Bidder should clearly indicate the tasks completed by the Evaluation Team Member.</p> <p>If the example presented is deemed ineligible, the Bidder will be awarded zero (0) points.</p> <p>Grading scale:</p> <ul style="list-style-type: none"> • Successfully completed assigned tasks in three (3) relevant evaluation assignments – 10 points • Successfully completed assigned tasks in two (2) relevant evaluation assignments – 7 points • Successfully completed assigned in one (1) relevant evaluation assignment – 3 points 		
<p>RT2.2</p> <p>Team Member Evaluation Experience: evaluation of weapons of mass destruction (WMD) non-proliferation, threat reduction and/or disarmament policy or programming (maximum 10 points)</p> <p>Using form TECH-3 - <i>Example of an Evaluation Assignment</i> in Annex "D", the Bidder should describe a maximum of three (3) examples of evaluation assignments of WMD non-proliferation, threat reduction and/or disarmament policy or programming conducted in the last ten (10) years, for which the proposed Evaluation Team Member was a team member responsible for carrying out assigned tasks.</p> <p>Assigned tasks should represent evaluation activities with defined scope, timeframe and being integral to the completion of the evaluation mandate. The Bidder should clearly indicate the tasks completed by the Evaluation Team Member.</p> <p>Grading scale:</p> <ul style="list-style-type: none"> • Successfully completed assigned tasks in three (3) relevant evaluation assignments – 10 points • Successfully completed assigned tasks in two (2) relevant evaluation assignments – 7 points • Successfully completed assigned in one (1) relevant evaluation assignment – 3 points 		10 points
Team Member/Intermediate Evaluation Consultant Sub-total		20 points



Point Rated Technical Criteria (RT) and Scores	Number of Points Awarded	Maximum Number of Points
RT3: Expert in Non-proliferation/Disarmament		
<p>RT3.1</p>	<p>Experience in Non-proliferation/Disarmament (maximum 15 points)</p> <p>The Bidder should demonstrate the level of experience of the proposed expert in non-proliferation and disarmament.</p> <p>Points will be awarded as follows:</p> <ul style="list-style-type: none"> • More than one hundred and twenty (120) months of work experience in non-proliferation/disarmament research, policy and/or implementation of non-proliferation/disarmament regimes: 15 points • Between sixty (60) months to less than one hundred and twenty (120) months of work experience in non-proliferation/disarmament research, policy and/or implementation of non-proliferation/disarmament regimes: 10 points • Between twenty-four (24) months to less than sixty (60) months of work experience in non-proliferation/disarmament research, policy and/or implementation of non-proliferation/disarmament regimes: 5 points • Less than twenty-four (24) months of work experience in non-proliferation/disarmament research, policy and/or implementation of non-proliferation/disarmament regimes: 1 point <p>The Bidder needs to provide a resume of the consultant to validate the information.</p>	<p>15 points</p>
<p>RT3.2</p>	<p>Publication and Knowledge Sharing (maximum 5 points)</p> <p>The Bidder should demonstrate experience of the proposed resource in publishing and sharing knowledge on non-proliferation and disarmament topics.</p> <p>“Publications” include research papers/articles, policy reports/white papers, books and book chapters, briefings and fact sheets, op-eds and commentaries, research policy briefs, peer reviewed blogs, working papers. The expert must be listed as an author or contributing party to the publication to qualify.</p> <p>“Knowledge sharing events” include conferences, workshops and seminars, webinars and online forums, roundtable and expert panel discussions, policy briefings, research colloquia, public/private lectures. The</p>	<p>5 points</p>



Point Rated Technical Criteria (RT) and Scores		Number of Points Awarded	Maximum Number of Points
	<p>expert must have been a speaker or presenter for the experience to qualify.</p> <p>Points will be awarded as follows:</p> <ul style="list-style-type: none"> • Combination of 16 or more knowledge-sharing events and publications on non-proliferation/disarmament: 5 points • Combination of 6-15 knowledge-sharing events and publications on non-proliferation/disarmament: 3 points • Combination of 5 or less knowledge-sharing events and publications on non-proliferation/disarmament: 1 point <p>The Bidder needs to provide a resume of the consultant to validate the information.</p>		
Non-proliferation/Disarmament Expert Sub-total			20 points
RT4. Evaluation Technical Proposal			
R4.1 Evaluation Approach and Methodology			
RT4.1	<p>The Bidder should propose an approach and methodology for the evaluation with a detailed description of how the proposed evaluation team will undertake the Evaluation Assignment and meet the objectives of the evaluation.</p> <p>The proposed approach and methodology will be assessed on the following elements:</p> <ol style="list-style-type: none"> 1. Demonstrated knowledge and understanding of weapons threat reduction programming context 2. Clarity and appropriateness of the proposed approach 3. Clear description of the methodology and proposed lines of evidence, data collection, sampling and analysis plans 4. Identification of possible evaluation methodology limitations and strategies to mitigate those. <p>The assessment and rating will be based on an 8-point scale per each element identified above, for a maximum of 32 points total for Approach and Methodology.</p>		32 points
RT4.2 Workplan			
RT4.2	<p>The Bidder should provide a work plan that shows the capacity to deliver the project. It will be assessed on the clarity and level of detail in the proposed work plan, using the following elements:</p>		28 points



Point Rated Technical Criteria (RT) and Scores	Number of Points Awarded	Maximum Number of Points
<ol style="list-style-type: none"> 1. Level of effort and breakdown of tasks by resource 2. Clear description and scheduling of key activities, milestones and deliverables 3. Budget allocations and management 4. Identification of risks to the implementation of the evaluation mandate on time, on scope and on budget and mitigation strategies <p>The assessment and rating will be based on a 7-point scale per each element identified above, for a maximum of 28 points for Workplan.</p>		
RT4.3 Quality Assurance		
RT4.3	<p>The bidder should demonstrate that either a) a quality management system has been developed, implemented, and documented for the organization with evidence that is verifiable if requested, or b) the proposed team has a sound quality management plan for the execution of this evaluation.</p> <p>A sound Quality Management Plan should include the following elements:</p> <ol style="list-style-type: none"> 1. A detailed overview of the Quality Management System that is in place, including monitoring and management tools (e.g., dashboards), that demonstrate how deliverables in this Evaluation Assignment will be provided on-time, on-budget, and to meet quality expectations of the Statement of Work. 2. An overview of how the Bidder ensures independence and neutrality during evaluative activities. 3. A detailed description of the process that is in place to review and approve each project deliverable prior to their submission to the Project Authority. 4. A description of how demand from a number of concurrent products, projects, processes or contracts will be satisfied, and the risk of losing team members is mitigated. 5. A description of how team members are assigned to tasks that match their level of education, training, and experience. <p>The assessment and rating will be based on a 2-point scale per each element identified above, for a maximum of 10 points for Quality Assurance.</p>	10 points
Evaluation Technical Proposal Sub-total		70 points



Point Rated Technical Criteria (RT) and Scores	Number of Points Awarded	Maximum Number of Points
Total Technical Component (Pass mark = 98 (70%))		140 points

Mandatory Financial Criteria

Bids must meet the mandatory financial criteria specified in the table inserted below.

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

Mandatory Financial Criteria (MF)		
Number	Mandatory Financial Criterion	Bid Preparation Instructions
MF1	The total value of the contract must be presented as an all-inclusive firm price and must be below the \$280,000.00 threshold (excluding applicable taxes).	The bidder must complete the Pricing Schedule detailed in Attachment 1 to Part 3.



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.

5.1.2 Additional Certifications Required with the Bid

The Bidder must provide with its bid the required additional certifications included in Attachment 1 to Part 5, Additional Certifications Required with the Bid.

5.2 Certifications Precedent to Contract Award and Additional Information

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

5.2.1 Integrity Provisions – Required Documentation

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

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](https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html#) website (<https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html#>).

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

The Bidder must provide with its bid the required additional certifications included in Attachment 2 to Part 5, Additional Certifications Precedent to Contract Award.



ATTACHMENT 1 TO PART 5, ADDITIONAL CERTIFICATIONS REQUIRED WITH THE BID

1. 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. 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.

3. 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.

Signature

Date



ATTACHMENT 2 TO PART 5, ADDITIONAL CERTIFICATIONS REQUIRED PRECEDENT TO CONTRACT AWARD

1. Non disclosure Agreement

I, _____ (*resource name*), recognize that in the course of my work as an employee or subcontractor of _____, I may be given access to information by or on behalf of Canada in connection with the Work, pursuant to Contract Serial No. _____ between Her Majesty the King in right of Canada, represented by the Minister of Foreign Affairs, Trade and Development Canada, including any information that is confidential or proprietary to third parties, and information conceived, developed or produced by the Contractor as part of the Work. For the purposes of this agreement, information includes but not limited to: any documents, instructions, guidelines, data, material, advice or any other information whether received orally, in printed form, recorded electronically, or otherwise and whether or not labeled as proprietary or sensitive, that is disclosed to a person or that a person becomes aware of during the performance of the Contract.

I agree that I will not reproduce, copy, use, divulge, release or disclose, in whole or in part, in whatever way or form any information described above to any person other than a person employed by Canada on a need to know basis. I undertake to safeguard the same and take all necessary and appropriate measures, including those set out in any written or oral instructions issued by Canada, to prevent the disclosure of or access to such information in contravention of this agreement.

I also acknowledge that any information provided to the Contractor by or on behalf of Canada must be used solely for the purpose of the Contract and must remain the property of Canada or a third party, as the case may be.

I agree that the obligation of this agreement will survive the completion of the Contract Serial No.:

_____.

Signature

Date



PART 6 – SECURITY, FINANCIAL AND OTHER REQUIREMENTS

6.1 Security Requirement

6.1.1 At the date of bid closing, the following conditions must be met:

- a. the Bidder must hold a valid organization security clearance as indicated in Part 7 - Resulting Contract Clauses;
- 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;

6.1.2 For additional information on security requirements, Bidders should refer to the [Contract Security Program](http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html) of Public Works and Government Services Canada (<http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>) website.

6.2 Financial Capability

SACC Manual clause A9033T(2012-07-16) Financial Capability



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 in Annex “A”.

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 with the following replacements:

Section 08 – Replacement of Specific Individuals, of 2035 (2022-12-01) General Conditions – Higher Complexity – Services is deleted and replaced with the following:

1. if the Contractor is unable to provide the services of any specific individual identified in the Contract to perform the services, the Contractor must within five working days of the individual's departure or failure to commence Work (or, if Canada has requested the replacement, within ten working days of Canada's notice of the requirement for a replacement) provide to the Contracting Authority:
 - a. the name, qualifications and experience of a proposed replacement immediately available for Work; and
 - b. security information on the proposed replacement as specified by Canada, if applicable.

Any assessment of the information provided will occur as per 2 (b) below.

2. Subject to an Excusable Delay, where Canada becomes aware that a specific individual identified under the Contract to provide services has not been provided or is not performing, the Contracting Authority may elect to:
 - a. exercise Canada's rights or remedies under the Contract or at law, including terminating the Contract for default under Article titled “Default of the Contractor”; or
 - b. assess the information provided under 1 (a) and (b) above or, if it has not yet been provided, require the Contractor propose a replacement to be rated by the Technical Authority. The replacement must have qualifications and experience that meet or exceed those obtained for the original resource and be acceptable to Canada. Upon assessment of the replacement, Canada may accept the replacement, exercise the rights in 2 (a) above, or require the Contractor to propose another replacement within five working days' notice.
3. Where an Excusable Delay applies, Canada may require 2 (b) above instead of terminating under the “Excusable Delay” Article. An Excusable Delay does not include resource unavailability due to allocation of the resource to another Contract or project (including those for the Crown) being performed by the Contractor or any of its affiliates.



4. The Contractor must not, in any event, allow performance of the Work by unauthorized replacement persons. The Contracting Authority may order that a resource stop performing the Work. In such a case, the Contractor must immediately comply with the order. The fact that the Contracting Authority does not order that a resource stop performing the Work does not relieve the Contractor from its responsibility to meet the requirements of the Contract.
5. The obligations in this article apply despite any changes that Canada may have made to the Client's operating environment.

Section 17 - Interest on Overdue Accounts, of 2035 (2022-12-01) General Conditions - Higher Complexity - Services - will not apply to payments made by credit cards.

With respect to **Section 30 - Termination for Convenience**, of 2035 (2022-12-01) General Conditions - Higher Complexity - Services, Subsection 04 is deleted and replaced with the following Subsections 04, 05 and 06:

- 04) The total of the amounts, to which the Contractor is entitled to be paid under this section, together with any amounts paid, due or becoming due to the Contractor must not exceed the Contract
- 05) Where the Contracting Authority terminates the entire Contract and the Articles of Agreement include a Minimum Work Guarantee, the total amount to be paid to the Contractor under the Contract will not exceed the greater of:
 - a. the total amount the Contractor may be paid under this section, together with any amounts paid, becoming due other than payable under the Minimum Revenue Guarantee, or due to the Contractor as of the date of termination; or
 - b. the amount payable under the Minimum Work Guarantee, less any amounts paid, due or otherwise becoming due to the Contractor as of the date of termination.
- 06) The Contractor will have no claim for damages, compensation, loss of profit, allowance arising out of any termination notice given by Canada under this section except to the extent that this section expressly provides. The Contractor agrees to repay immediately to Canada the portion of any advance payment that is unliquidated at the date of the termination.

7.2.2 Non-Disclosure Agreement

The Contractor must obtain from its employee(s) or subcontractor(s) the completed and signed non-disclosure agreement of the attachment 2 to part 5, additional certifications required precedent to contract award, and provide it to the Contracting Authority before they are given access to information by or on behalf of Canada in connection with the Work.

7.3 Security Requirement

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

1. The Contractor/Bidder must, at all times during the performance of the Contract/Standing Offer, hold a valid SECRET STATUS issued or recognized by the Department of Foreign Affairs, Trade and Development Canada (DFATD) or by the Canadian and International Industrial Security Directorate (CIISD), Public Services and Procurement Canada (PSPC).
2. The Contractor/Bidder is NOT approved for document safeguarding.
3. Processing of PROTECTED / CLASSIFIED information on automatic/electronic data processing equipment at the Contractor's/Bidder's site is NOT permitted under this contract/standing offer.



4. Subcontracts, which contain security requirements, are NOT to be awarded without the prior written permission of the Personnel Security Section CSCP/DGAC or by CSP/PSPC.
5. The Contractor/Bidder must comply with the provisions of the:
 - (a) Security Requirements Check List, attached at Annex "C".
 - (b) Industrial Security Manual (Latest Edition).

7.4 Term of Contract

7.4.1 Period of the Contract

The period of the Contract will be for nine (9) months from date of Contract award.

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 one additional period of six (6) months under the same conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions as set out in the Basis of Payment.

Canada may exercise this option at any time by sending a written notice to the Contractor at least 30 calendar days before the expiry date of the Contract. The option may only be exercised by the Contracting Authority, and will be evidenced for administrative purposes only, through a contract amendment.

7.4.3 Termination on Thirty Days Notice

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

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

7.5 Authorities

7.5.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: Martine Bray
Title: Senior Procurement officer
Foreign Affairs Trade and Development Canada

E-mail address: Martine.Bray@international.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 (insert at contract award)

The Project Authority for the Contract is:

Name: _____
Title: _____
Organization: _____
Address: _____
Telephone: ___ - ___ - ____
Facsimile: ___ - ___ - ____
E-mail address: _____

Insert, as applicable:

In its absence, the Project Authority 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 (insert at contract award)

Name: _____
Title: _____
Organization: _____
Address: _____
Telephone: ___ - ___ - ____

7.6 Payment

7.6.1 Basis of Payment

7.6.1.1 Limitation of Expenditures (insert at contract award)

For the Work described in the Statement of Work in Annex "A".

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 duty are included, and Applicable Taxes are extra.

7.6.2 Canada's Total Liability

No increase in the total liability of Canada or in the price of the Work resulting from any design changes, modifications or interpretations of the Work, will be authorized or paid to the Contractor unless these design changes, modifications or interpretations have been approved, in writing, by the Contracting



Authority before their incorporation into the Work. The Contractor must not perform any work or provide any service that would result in Canada's total liability being exceeded before obtaining the written approval of the Contracting Authority. The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:

1. when it is 75 percent committed, or
2. four (4) months before the Contract expiry date, or
3. As soon as the Contractor considers that the contract funds provided are inadequate for the completion of the Work,

whichever comes first.

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.

7.6.3 Method of Payment

Canada will make milestone payments in accordance with the Schedule of Milestones detailed in the Pricing Schedule detailed in Attachment 1 to Part 3 and in accordance with the Annex "B".

7.6.4 Electronic Payment of Invoices - Contract

The Contractor accepts to be paid using any of the following Electronic Payment Instruments:

- a. Direct Deposit (Domestic and International);

7.6.5 Discretionary Audit

The Bidder must provide, on Canada's request, one or more of the following price support, if applicable:

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

7.7 Invoicing Instructions

The Contractor must submit invoices in accordance with the following instructions. Invoices cannot be submitted until all work identified in the invoice is completed.



Each invoice must specify the following:

- a. Company name, address, etc.;
- b. Client address;
- c. Date of the invoice;
- d. Contract Number;
- e. Description of work completed and level of effort per category
- f. Total dollar amount;

Applicable Taxes must be calculated on the total amount of the invoice. Invoices must be distributed as follows:

One (1) copy must be forwarded to the Project Authority identified under the section entitled "Authorities" of the Contract.

7.8 Certifications and Additional Information

7.8.1 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.

7.9 Applicable Laws (insert at contract award)

The Contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in _____. *(insert the name of the province or territory as specified by the Bidder in its bid, if applicable.)*

7.10 Priority of Documents (insert at contract award)

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

- (a) the Articles of Agreement;
- (b) the general conditions 2035 (2022-12-01) General Conditions - Higher Complexity - Services;
- (c) Annex "A", Statement of Work;
- (d) Annex "B", Basis of Payment;
- (e) Annex "C", Security Requirements Check List;
- (f) the Contractor's bid dated _____ *(Insert the date of the bid).*

7.11 Foreign Nationals

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



7.12 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.

7.13 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.

7.14 Dispute Resolution

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



ANNEX “A”, STATEMENT OF WORK

1.0 TITLE:

Evaluation of the Departments of Foreign Affairs, Trade and Development’s Weapons Threat Reduction Program (WTRP) 2018-19 to 2023-24

2.0 BACKGROUND:

The Evaluation Division (PRA) of the Department of Foreign Affairs, Trade and Development (DFATD) is undertaking an evaluation of the [Weapons Threat Reduction Program](#) (WTRP). The evaluation is included in the departmental 5-Year Evaluation Plan to meet the requirements of the Treasury Board *Policy on Results* and section 42.1 of the *Financial Administration Act*.

The WTRP is Canada’s flagship contribution to the G7-led, 31-member *Global Partnership Against the Spread of Weapons and Materials of Mass Destruction*.¹ Established in 2002 and formerly known as the Global Partnership Program, the WTRP is DFATD’s longest standing security assistance program. The WTRP has provided over \$1.5 billion since its inception to reduce the threat posed by the proliferation and use of weapons of mass destruction (WMD) and select conventional weapons² through projects related to chemical, biological, radiological and nuclear (CBRN) security, as well as the universalization of various conventional arms control regimes.

The WTRP has Terms and Conditions that set parameters for program-funded programming. These Terms and Conditions have been periodically reviewed, with the WTRP receiving ongoing funding authorities in 2018 and the Minister for Foreign Affairs receiving exceptional contracting authorities to support the WTRP. The mandate of the WTRP has been revised several times, with notable changes occurring in 2012 that expanded the program’s geographical coverage from the countries in the former Soviet Union to global programming, and in 2018 that saw the inclusion of conventional weapons programming with a focus on supporting international conventions for the non-proliferation of conventional weapons.

The **mandate of the WTRP** is to implement projects, in cooperation with G7 and other nations and relevant organizations, that reduce threats to Canadians and the international community posed by the proliferation and/or terrorist use of weapons and materials of mass destruction and select conventional weapons.

The WTRP has an annual funding level of \$73 million, which comes from Canada’s International Assistance Envelope. The main funding mechanism for the WTRP is through transfer payments under Vote 10 (grants and contributions) to eligible recipients (\$63.5 million). The Program’s operating funds under Vote 1 are used for management and operational expenses (\$6M) and to support the participation of Canadian government departments and agencies (OGDs) in the provision of WTRP assistance (\$3M). The WTRP also received additional programming funds to support Canada’s response to the COVID-19 pandemic and the war in Ukraine. Programming disbursements are primarily non-official development assistance (non-ODA).

¹ The Global Partnership was formed at the G8 Kananaskis Summit in Canada in 2002 and began as a 10-year, US \$20 billion initiative aimed at addressing the threat of weapons of mass destruction proliferation to non-state actors and states of proliferation concern. The partnership focussed its programming at the Former Soviet Union, but in 2008 G8 Leaders agreed to expand programming geographically in response to the global scope of WMD threats. Originally launched as a G8 initiative, the partnership retains strong affiliation with the G7 (e.g. rotational G7 Presidency) and now includes 31 members.

² Conventional weapons programming became part of WTRP’s mandate in 2018, with a focus on supporting to international conventions for the non-proliferation of conventional weapons.



WTRP programming is organized by priority area portfolios that include:

- **Nuclear and radiological security** to prevent terrorists and states of proliferation concern from acquiring or trafficking in nuclear and radiological materials thereby mitigating nuclear terrorism threats;
- **Biological security** to strengthen capacities in high-priority countries and regions of the world to prevent, detect and respond to biological threats;
- **Chemical weapons** to mitigate chemical weapons threats by supporting chemical weapons destruction, monitoring and verification activities, assisting States Parties to fulfill obligations under the Chemical Weapons Convention and addressing emerging threats posed by chemical weapons;
- **Support for the Implementation of UNSCR 1540** to support UN Member States that require assistance to meet their obligations under UNSCR 1540, to deliver CBRN training and related equipment, and to enhance WMD-related export controls and border security measures;
- **Conventional weapons** to provide discrete contributions to strengthen the universalization of treaties and conventions related to the proliferation of conventional weapons, including small arms and light weapons and non-discriminatory weapons, such as landmines and cluster munitions.

Funded programming includes provision of technical and specialized instruction; needs assessment, data collection and analysis; sharing of best practices; provision of tools and materials; technical and specialized advice; infrastructure and equipment support; outreach and awareness raising. These activities ultimately contribute to the achievement of the Program's ultimate outcome: Reduced threats to Canadians and the international community posed by the proliferation and use of weapons of mass destruction (including related materials) and conventional weapons by state and non-state actors.

WTRP is a key component of the Peace and Security Pillar of Canada's *Feminist International Assistance Policy* (FIAP) and contributes to supporting the government priority of keeping Canadians safe and working with allies to combat terrorism.

3.0 OBJECTIVE(S):

The purpose of the evaluation is to provide evidence-based, timely and neutral information in support of the department's accountability and learning objectives. The evaluation will assess the ongoing relevance and performance of the WTRP. The evaluation scope will cover the WTRP since 2018 when the Program received ongoing funding authorities and expanded its mandate to support the universalization of treaties and conventions related to conventional weapons. **The core reference period for the evaluation will be from 2018-19 to 2023-24.**

The **objectives of this evaluation** are to:

1. Assess the program's relevance and performance in delivering against its mandate.
2. Formulate lessons and identify areas for improvement at the program and corporate levels.

The program's recent evaluations were completed in 2017,³ [2015](#) and in [2012](#).

The evaluation will be undertaken by a team of consultants sought through competitive procurement mechanisms and will include two (2) evaluators and one (1) subject matter expert in non-proliferation and disarmament.

3.1 Evaluation Questions

This evaluation will focus on a narrow set of evaluation criteria and questions that includes:

³ The report was not published and will be made available to the Consultant.



Issue	Question and Sub-questions	Thematic coverage
Relevance	<ol style="list-style-type: none"> 1. To what extent has the WTRP aligned its investments and activities with significant WMD threats and non-proliferation priorities? <ol style="list-style-type: none"> 1.1. How well has the WTRP responded to emerging risks and opportunities? 1.2. How changes in programming environment (including the WTRP policy framework and commitments, evolution of threats and factors driving their proliferation) have facilitated or inhibited the responsiveness of WTRP's investments? 	<ul style="list-style-type: none"> ▪ Expanded mandate and authorities ▪ Programming – policy linkages ▪ FIAP and National Action Plan on Women, Peace and Security ▪ Technology
Effectiveness	<ol style="list-style-type: none"> 2. What progress has the WTRP made toward the achievement of its intermediate and ultimate outcomes?⁴ 3. What unintended outcomes have occurred as a result of the WTRP and what has been their significance?⁵ 	<ul style="list-style-type: none"> ▪ Performance measurement practices ▪ Gender equality ▪ Environmental protection ▪ Factors that support or hinder outcome achievement
Sustainability	<ol style="list-style-type: none"> 4. What lessons could be drawn from the WTRP in enabling long-term sustainability of outcomes? 	

The evaluation's scope and focus will include evaluative evidence and analysis to inform the thematic issues of gender equality and environmental protection. This will include the development of evaluation indicators that address these thematic issues in relevant evaluation questions.

3.2 Evaluation Methods

The evaluation will employ a mixed-methods design collecting relevant data from multiple lines of inquiry in relation to the evaluation questions. The Consultant will use judgement and expertise to determine the most appropriate methods to answer the evaluation questions. Methods will include at minimum, but not be limited to:

- **Key Informant Interviews and/or Focus Groups:** In-person and virtual interviews with program staff, key internal and external stakeholders and implementing partners to solicit their perspectives on the program's relevance, effectiveness and sustainability.
- **Database review:** The program uses two databases to record project information. Quantitative data will be extracted and compiled to provide a global overview of program disbursements and trends (e.g., portfolio breakdown, duration of projects, gender equality ratings).⁶

⁴ The WTRP Logic Model is included in Annex 1.

⁵ The WTRP Terms and Conditions mention 2 unintended outcomes: strengthened mutually beneficial international relationships, and positive environmental or health impacts in countries and regions where WMD threat reduction programming is implemented. The evaluation will include those, as well any other unintended outcomes identified through data collection and analysis.

⁶ The Evaluation Division (PRA) will provide the Consultant with data on program disbursements and trends in relation to the evaluation questions.



- **Portfolio case studies:** Funded projects across 5 WTRP portfolios operate in unique operational, geographic and political contexts. The evaluation will undertake a case study for each portfolio, with the goal to provide in-depth assessment of the results achieved by the portfolios and factors that facilitated or inhibited project implementation and results achievement. Each case study may sample funded initiatives or stand-alone projects within the WTRP portfolios. Case studies will include a combination of virtual/remote data collection and in person data collection during field visits to selected countries. Methods will include key informant interviews, in-depth review of project documentation, on-site observation and others. Field visits will be planned with a view of available budget.
- **Document Review:** A review of program documents (e.g., priority review documents, performance reporting, previous evaluations, audits and other assessments), corporate documents (e.g., policies, departmental plans and performance reports, mission reports, bilateral non-proliferation controls and sanctions), relevant OGD reports and Global Partnership documents will be used to contribute information on the program's relevance and performance.
- **Literature Review:** A review of peer reviewed articles and publications from partner governments, key international organization and security think-tanks will be undertaken to identify developments in WMD proliferation and the driving factors associated with the evolution of WMD threats, as well as an overview of historical CBRN events and research and analysis of their estimated impact costs, and will contribute to the discussion on the relevance and sustainability issues.
- **Review of data on CBRN security and incidents:** A review of published databases managed by think-tanks, educational institutions and multilateral organizations will be conducted to gather data on country-level CBRN capacity and nature and evolution of CBRN threats. These datasets may include: Nuclear Threat Initiative (NTI) Nuclear Security Index; Global Health Security Index; Violent Non-State Actor CBRN Event Database; Centre for Nonproliferation Studies (CNS) Global Incidents and Trafficking Database; Global Terrorism database; IAEA Incident and Trafficking database and INTERPOL reports.

4.0 SCOPE OF WORK: TASKS, DELIVERABLES AND MILESTONES:

The evaluation will employ a mixed-method evaluation design, supported by multiple lines of inquiry, to provide a neutral and comprehensive assessment in relation to the evaluation questions, covering the period between 2018-19 and 2023-2024.

The evaluation will be managed by the Evaluation Division (PRA). The evaluation process will include three phases: Planning, Data Collection and Analysis, and Reporting.

Phase 1. Planning

The purpose of this phase is to develop and finalize a detailed evaluation framework to guide the conduct of the evaluation and the achievement of evaluation objectives. The framework must include a detailed methodological design with an evaluation matrix, description of evaluation methods, sampling approach, data analysis approach, data collection tools, quality assurance plan, as well as a detailed work plan with resource allocation.

Tasks:

1. Conduct a start-up meeting with the Project Authority to define expectations, confirm roles and responsibilities and set up a plan for ongoing updates.
2. Complete a detailed review of provided program-related documentation.
3. Conduct preliminary interviews with a sample of key stakeholders or experts.
4. Validate the suitability of the evaluation questions.
5. Conduct a [GBA+ analysis](#) to inform evaluation design.
6. Complete the privacy protection and safeguarding of information checklist.
7. Develop an evaluation matrix and a corresponding sampling and data collection plan.



8. Develop data collection instruments and protocols.
9. Develop a detailed work plan and provide detailed plans for field visits.
10. Complete and submit the draft evaluation framework for review and approval.

Deliverables

- Draft evaluation framework that includes a detailed methodological design (validated evaluation questions, evaluation matrix, data collection and analysis plan with the description of evaluation methods, sampling and data analysis approach, data collection tools and protocols, quality assurance plan) and a work plan, with detailed plans for field visits.
- Final evaluation framework.

Phase 2. Data Collection and Analysis

During this phase, the Consultant will collect qualitative and quantitative data that will inform the evaluation based on the approved evaluation framework. This phase must include data collection missions to provide field-level insight into the performance and sustainability of WTRP projects.

Tasks:

1. Undertake all methodologies outlined in the evaluation framework.
2. Proactively bring up any issues or challenges encountered in the data collection process to the Project Authority.
3. Provide a debriefing following field visits (within 1 week of completing field visits).
4. Collate and share all original data gathered.
5. Develop an evidence binder including a preliminary summary and synthesis of findings for all lines of evidence by evaluation question and indicator.

Deliverables

- Draft evidence binder that includes a detailed account of completed data collection activities (e.g., list of interviewees, bibliography for the literature review); raw interview, focus group and observation notes; and a preliminary summary of emerging findings for each line of evidence.

Phase 3. Reporting

In the final phase of the evaluation, the Consultant must prepare the Preliminary Findings Presentation and the Draft and Final Evaluation Reports. The PRA Project Authority is responsible for sharing draft deliverables with the Program and will provide consolidated comments to the Consultant.

Tasks:

1. Draft a preliminary findings presentation, based on information contained in the evidence binder, and present it to the Project Authority.
2. Integrate PRA's comments into the final preliminary findings presentation.
3. Present the final preliminary findings to the WTRP management and other key stakeholders as deemed appropriate.
4. Draft an evaluation report that integrates WTRP management feedback and, if applicable, additional information on preliminary findings.
5. Revise the evaluation report based on PRA's and program's comments on the draft report.
6. Provide the Project Authority with the final evaluation report and with a summary of how major comments were integrated.

Deliverables:

- Draft Preliminary Findings Presentation document.
- Final Preliminary Findings Presentation document and virtual presentation of the findings.



- Draft Evaluation Report. The report and the evaluation must conform to the OECD/DAC (2010) [Quality Standards for Development Evaluation](#) and Treasury Board [Standard on Evaluation](#). A template will be provided to the Consultant upon the awarding of the contract. The Consultant must present evaluation findings in an accessible format for the reader.
- Final Evaluation Report.
- Evaluation evidence binder containing all data analysis and synthesis summaries that consolidate evidence from each line of inquiry, arranged by evaluation question and indicator.

4.1 Deliverable Matrix

All deliverables must be prepared in English and submitted to the Project Authority. All deliverables must be submitted electronically and in Microsoft Office format using Project Authority’s templates that have been designed in consideration of accessibility requirements as per the schedule below (to be confirmed based on contract start date at the time of evaluation planning).

Deliverable	Delivery Date
Deliverable 1: Draft Evaluation Framework	January 15, 2024
Deliverable 2: Evaluation Framework	Within one (1) week of receiving written, consolidated comments from the Project Authority
Deliverable 3: Draft Evidence Binder for data collection activities completed	March 31, 2024
Deliverable 4: Draft Preliminary Findings Presentation	May 17, 2024
Deliverable 5: Final Preliminary Findings Presentation	Within one (1) week of receiving written, consolidated comments from the Project Authority
Deliverable 6: Draft Evaluation Report	July 5, 2024
Deliverable 7: Final Evaluation Report	Within two (2) weeks of receiving written, consolidated comments from the Project Authority
Deliverable 8: Final Evidence Binder	At the time of submission of the final evaluation report

4.2 Method of Acceptance

All deliverables and services are subject to inspection by the Project Authority. The Project Authority has the right to reject any deliverables that are not considered satisfactory based on established evaluation standards and require their re-submission before payment is authorized.

5.0 TRAVEL:

This evaluation assignment requires field data collection to inform case studies, as noted in section 4. It is expected that the evaluation team will collect data from two (2) field visits in developing regions receiving WTRP assistance (West Africa, Southeast Asia; to be confirmed at the time of evaluation planning). Each field visit may cover more than one country and more than one WTRP portfolio.

6.0 CONSTRAINTS:

6.1. Schedule

The anticipated completion date for this mandate is 9 months, with work undertaken between November 24, 2023 and August 15, 2024. Two months will be dedicated to evaluation planning; 4 months to data collection and analysis and 3 months dedicated to reporting. The final evaluation report must be approved by the Project Authority no later than August 15, 2024.



6.2. Team composition

There must be three members of the evaluation team. The Consultant must provide qualified individuals for the following positions:

- Evaluation Team Lead (Senior Evaluator),
- Evaluation Team member (Intermediate Evaluator), and
- Subject matter expert in non-proliferation and disarmament.

Additional support team members may be selected by the Consultant upon their discretion, which may include local consultants and translators to support field visits, experts to support specific methodology.

6.3. Language requirements

The working language for this evaluation mandate is English. All briefings and reports must be provided in English. The Consultant must have the ability to conduct interviews in French at the request of interviewees and in local language, as required, during field work.

6.4. Security Requirements

The Consultant may be required to access and review classified and protected program information. To facilitate access to this information, the Evaluation Team Lead selected for this assignment must, therefore, possess a valid **secret** security clearance in accordance with Government of Canada security requirements.

6.5. Adherence to the Privacy Protection checklist

As a representative of DFATD, the Consultant will ensure that they maintain a high ethical standard in all work and interactions on behalf of DFATD. In particular, the consultants(s) will take appropriate steps to:

- protect participants' personal information
- safeguard participants' physical, psychological and social safety
- comply with international standards and best practices for the ethical conduct of evaluations, which apply to the collection of personal information, the storage of information, and the creation and maintenance of safer spaces to share information
- take special effort to protect privacy and apply the "do no harm" principle when working in fragile contexts and engaging with vulnerable populations.

The consultant(s) will:

- work with DFATD's partners to identify the best way in which to approach participation in the evaluation
- establish an agreed-upon method for recording and storing participant data and specify how they will protect the privacy of evaluation participants. This will include mutually agreed-upon destruction timelines and methods for all information collected during the evaluation.
- ensure that they administer the informed consent script and agree on a process for participants to withdraw their consent during the interview.

6.6. Location of work

Apart from the data collection missions agreed upon in the evaluation framework, the assignment is intended to be remote with the Consultant participating in virtual conference calls and meetings with the Project Authority (PRA) and evaluation stakeholders.



6.7. Use of virtual platforms for data collection

The Consultant will conduct remote data collection to gather primary data from a variety of stakeholders. To the extent possible, the Consultant must use MS Teams for virtual interviews. The Consultant must seek approval from the Project Authority to use another external platform (e.g. Zoom). The Consultant must provide the Project Authority with recordings, transcripts and/or notes from completed interviews and focus groups.

7.0 CLIENT SUPPORT:

The DFATD Project Authority in PRA will act as the main contact person for the Consultant. The Project Authority will review progress against the established work plan; and review, provide comments on and approve identified deliverables.

The Project Authority will liaise with the WRTP and will provide the Consultant with contact information and facilitate introductions with key stakeholders. The Project Authority may provide additional data that could be used to feed into evaluation findings and conclusions.

8.0 MEETINGS:

A combination of virtual and written communication channels will be established between the Project Authority and the Consultant. **Virtual meetings** will include: start-up meeting; debrief and feedback on the evaluation framework; pre-field visits meeting; preliminary findings presentations; debrief and feedback on the evaluation report. In addition, a one-hour meeting will be scheduled every two weeks to discuss issues.

The Consultant shall submit **written progress reports** on the same day every week as agreed upon with the Project Authority. The update shall include the work conducted over the past week, the work to be conducted over the next week, any issues that have arisen or foreseen delays and mitigation strategies to address them.



ANNEX 1. WTRP Logic Model

ULTIMATE OUTCOME	Reduced threats to Canadians and the international community posed by the proliferation and use of weapons of mass destruction, including related materials, and conventional weapons (WMD-CW) by state and non-state actors.			
INTERMEDIATE OUTCOMES	Improved prevention, detection, and response to proliferation and use of WMD by intermediaries.		Improved gender-responsive prevention, detection, and response to proliferation and use of WMD-CW by intermediaries.	Increased universalization, compliance and enforcement by intermediaries of legal or policy frameworks related to the non-proliferation and use of WMD-CW by state and non-state parties.
IMMEDIATE OUTCOMES	Increased awareness, knowledge, skills, and capacity of intermediaries to prevent, detect, and respond to WMD proliferation and use.	Increased capacity of intermediaries to use and maintain equipment, tools, resources, and infrastructure for the prevention, detection, and response to WMD proliferation/use.	Increased gender-responsive awareness, knowledge, skills and capacity by intermediaries in the prevention, detection and response to WMD-CW proliferation and use.	Increased capacity by intermediaries to design, strengthen, implement and monitor legal and/or policy frameworks related to the non-proliferation and use of WMD-CW by state and non-state actors.
EXAMPLE OUTPUTS	<ul style="list-style-type: none"> ▪ Capacity building training and workshops on prevention, detection, and response to WMD proliferation and use. ▪ Conferences and outreach activities on raising awareness and knowledge of prevention, detection and response to WMD proliferation and misuse. ▪ Training and coaching on the use and maintenance of equipment, tools and infrastructure. 	<ul style="list-style-type: none"> ▪ Equipment, tools and infrastructure provided to intermediaries. ▪ Manuals, handbooks or other resources provided to intermediaries. 	<ul style="list-style-type: none"> ▪ Gender-responsive capacity building training and workshops on prevention, detection, and response to WMD-CW proliferation/use. ▪ Conferences and outreach activities on raising awareness and knowledge of gender-inclusive prevention, detection and response to WMD-CW proliferation/use. ▪ Gender-inclusive training and coaching on the use and maintenance of equipment, tools and infrastructure. 	<ul style="list-style-type: none"> ▪ Legislative and technical capacity-building support on legal and policy framework design, implementation, and amendment. ▪ Training, workshops, and conferences on network building, regional coordination/collaboration, and information sharing. ▪ Institutional support provided to NACD treaties and conventions.

The WTRP Terms and Conditions identifies two unintended outcomes of programming activities that fall outside of the WTRP objectives:

- Cultivation or strengthening mutually beneficial **relationships** (e.g. bilateral with target/key emerging countries/partners, bilateral and multilateral security relationships and other important international relationships) which will enhance leadership in contributing to international peace and security;
- Positive **environmental or health impacts** in countries and regions where WMD threat reduction programming is implemented.



ANNEX “B”, BASIS OF PAYMENT

During the term of the contract, the contractor will be paid as specified below for work performed in accordance with the Annex “A” - Statement of Work and the Pricing Schedule detailed in Attachment 1 to Part 3.

1.0 BASIS OF PAYMENT (will be completed at contract award)

His Majesty the King in right of Canada agrees to pay the Contractor a sum not to exceed \$ _____, plus applicable taxes, for the work performed in accordance to the Statement of Work.

A - Contract Period (From ____ to ____) (will be completed at contract award)

2.0 METHOD OF PAYMENT - Progress Payments (Schedule of Milestones)

Progress payments against milestones will be made for services rendered upon completion and acceptance of the deliverables outlined below to the approval of the Departmental Representative, following receipt of detailed invoices:

- A first payment of no more than \$ _____ (will be completed at contract award) (plus applicable taxes) will be made after the delivery and acceptance of the **Deliverable 1 and 2**.
- A second payment of no more than \$ _____ (will be completed at contract award) (plus applicable taxes) will be made after the delivery and acceptance of the **Deliverable 3**
- A third payment of no more than \$ _____ (will be completed at contract award) (plus applicable taxes) will be made after the delivery and acceptance of the **Deliverable 4 and 5**.
- A fourth payment of no more than \$ _____ (will be completed at contract award) (plus applicable taxes) will be made after the delivery and acceptance of the **Deliverable 6, 7 and 8**.

All payments will be contingent upon Global Affairs Canada's satisfaction with the deliverables as described in ANNEX “A”.

TOTAL ESTIMATED COST- Contract Period: \$ _____ (insert amount at contract award)

3.0 COST REIMBURSABLE EXPENSES

There will be no Authorized travel and living expenses for this Work.

Concerning the requirements to travel described in the Statement of Work in Annex “A”, 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.

4.0 INVOICING INSTRUCTIONS

The Contractor must submit invoices in accordance with the following instructions. Invoices cannot be submitted until all work identified in the invoice is completed.



Each invoice must specify the following:

- a. Company name, address, etc.;
- b. Client address;
- c. Date of the invoice;
- d. Contract Number;
- e. Description of work completed and level of effort per category
- f. Total dollar amount;

Applicable Taxes must be calculated on the total amount of the invoice. Invoices must be distributed as follows:

One (1) copy must be forwarded to the Project Authority identified under the section entitled "Authorities" of the Contract.

B - Option to Extend the Term of the Contract Period (From _____ to _____) (will be completed at contract)

(This section is only applicable if the option to extend the Contract is exercised by Canada.

During the extended period of the Contract, the Contractor will be paid the firm price of \$ _____ (will be completed at contract award) to perform all the Work related to the completion of the contract.



ANNEX "C", SECURITY REQUIREMENTS CHECK LIST



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

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

PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE		
1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine	2. Branch or Directorate / Direction générale ou Direction PFM/PRD/PRA - Evaluation Directorate	
3. a) Subcontract Number / Numéro du contrat de sous-traitance	3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant	
4. Brief Description of Work / Brève description du travail To undertake an evaluation of the Weapons Threat Redution Program, as per the departmental 5-Year Evaluation Plan, including evaluation planning, data collection and analysis, and report writing		
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 / Étranger <input type="checkbox"/>
7. b) Release restrictions / Restrictions relatives à la diffusion		
No release restrictions / Aucune restriction relative à la diffusion <input checked="" type="checkbox"/>	All NATO countries / Tous les pays de l'OTAN <input type="checkbox"/>	No release restrictions / Aucune restriction relative à la diffusion <input type="checkbox"/>
Not releasable / À ne pas diffuser <input type="checkbox"/>		
Restricted to: / Limité à: <input type="checkbox"/>	Restricted to: / Limité à: <input type="checkbox"/>	Restricted to: / Limité à: <input type="checkbox"/>
Specify country(ies): / Préciser le(s) pays:	Specify country(ies): / Préciser le(s) pays:	Specify country(ies): / Préciser le(s) pays:
7. c) Level of Information / Niveau d'information		
PROTECTED A / PROTÉGÉ A <input type="checkbox"/>	NATO UNCLASSIFIED / NATO NON CLASSIFIÉ <input type="checkbox"/>	PROTECTED A / PROTÉGÉ A <input type="checkbox"/>
PROTECTED B / PROTÉGÉ B <input 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 checked="" 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"/>

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Security Classification / Classification de sécurité





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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
											A	B	C			
Information / Assets / Renseignements / Biens / Production																
IT Media / Support TI																
IT Link / Lien électronique																

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

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? No / Non Yes / Oui
 La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE?

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).

Security Classification / Classification de sécurité
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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 :

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 :

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

10. a) Personnel security screening level required / Niveau de contrôle de la sécurité du personnel requis
RELIABILITY STATUS / COTE DE FIABILITÉ
CONFIDENTIAL / CONFIDENTIEL
SECRET / SECRET
TOP SECRET / TRÈS SECRET
TOP SECRET - SIGINT / TRÈS SECRET - SIGINT
NATO CONFIDENTIAL / NATO CONFIDENTIEL
NATO SECRET / NATO SECRET
COSMIC TOP SECRET / COSMIC TRÈS SECRET
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?
If Yes, will unscreened personnel be escorted?
Dans l'affirmative, le personnel en question sera-t-il escorté?

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?
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?

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?

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?
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?

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of Canada

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UNCLASSIFIED

PART D - AUTHORIZATION / PARTIE D - AUTORISATION

13. Organization Project Authority / Chargé de projet de l'organisme

Name (print) - Nom (en lettres moulées)	Title - Titre	Signature

Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date

14. Organization Security Authority / Responsable de la sécurité de l'organisme

Name (print) - Nom (en lettres moulées)	Title - Titre	Signature

Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date

15. Are there additional instructions (e.g. Security Guide, Security Classification Guide) attached?
Des instructions supplémentaires (p. ex. Guide de sécurité, Guide de classification de la sécurité) sont-elles jointes?

No / Non Yes / Oui

16. Procurement Officer / Agent d'approvisionnement

Name (print) - Nom (en lettres moulées)	Title - Titre	Signature

Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date

17. Contracting Security Authority / Autorité contractante en matière de sécurité

Name (print) - Nom (en lettres moulées)	Title - Titre	Signature
Jacques Saumur	Quality Assurance Officer	Saumur, Jacques 0 Digitally signed by Saumur, Jacques 0 Date: 2019.10.30 08:19:27 -04'00'

Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel jacques.saumur@tpsgc-pwgsc.gc.ca	Date



ANNEX “D”, FORM TECH-3
EVALUATION ASSIGNMENT EXAMPLE

The Bidder is requested to complete this form for the proposed Intermediate and Senior Evaluation Consultant.

MAXIMUM TWO (2) PAGES PER EVALUATION ASSIGNMENT.

Evaluation Assignment Title:	
Country of evaluation assignment:	Contract value:
Evaluation assignment period: From (yy-mm)	To (yy-mm)
Description of the evaluation assignment:	
Role and responsibility of proposed individual:	
Client reference (name, title, organization, email, phone number)	