

Lambert M@DM@Ottawa-Hull

From: Kempton LA@ADM(PA)@Ottawa-Hull
Sent: October 13, 2020 6:22 AM
To: Vance Gen JH@CDS@Ottawa-Hull; Thomas J@DM@Ottawa-Hull
Cc: Kennedy C@DM@Ottawa-Hull; Mulawyshyn BGen AP@CDS@Ottawa-Hull; Cadieu MGen TJ@SJS@Ottawa-Hull
Subject: Heads up on media articles

Good morning DM and Chief,

You may recall a few weeks ago I alerted you to a media query we had regarding EMIC Consulting. They provide an audience and analysis course to the MILPA group.

Dr. Emma Briant, an expert on Cambridge Analytica, published an article yesterday, making reference to DND CAF.

Commentary: Governments Have Failed to Learn from the Cambridge Analytica Scandal (E. Briant, Organized Crime and Corruption Reporting Project: occrp.org)

Today, on the front page of the Citizen, they have published their article. (Below)

We still have questions in from the reporter so I believe there is more to come on this from the Citizen; We should discuss today. I will work with your offices to find some time.

Thanks

Laurie

Military spent over \$1M on propaganda education

The Canadian Forces spent more than \$1 million on behaviour modification training used by the parent firm of Cambridge Analytica, the company that was the centre of a scandal in which personal data of Facebook users was provided to U.S. President Donald Trump's political campaign. The two contracts to train military and civilian public affairs staff at National Defence headquarters in Ottawa were revealed Monday in a report by Emma Briant, a professor at Bard College in the U.S. and a specialist in researching military propaganda. Briant noted the training the Canadian military staff received is a direct descendent of SCL Group's "behavioural dynamics methodology" which promises to help military clients analyze and profile groups to find the best strategy to effectively influence a target audience's behaviour. A spokesperson for the Department of National Defence said the intent of the training contracts was to have military public affairs staff "better identify and understand key audiences" so they could create communications campaigns that "are more customized and beneficial." Staff were also taught strategic campaign planning and "audience research," he added. The Canadian contracts were awarded to Emic Consulting, a British firm. Emic's director Gaby van den Berg...[said the company] has no relationship with SCL and she has no professional interest or experience in election campaigning. Brig. Gen. Jay Janzen, director general of military strategic communications, authorized the contracts to Emic, said [spokesperson Dan] Le Bouthillier. Janzen's efforts have full support of the defence leadership, including Chief of the Defence Staff Gen. Jon Vance, deputy minister Jody Thomas and Defence Minister Harjit Sajjan. (D. Pugliese, Ctz: *Ottawa Citizen*; CDS, DND spokesperson quoted, MND, DMND & BGen Jay Janzen mentioned)

Sent from my iPhone

s.19(1)

Lambert M@DM@Ottawa-Hull

From: Kennedy C@DM@Ottawa-Hull
Sent: October 13, 2020 9:52 AM
To: Damy J@DM@Ottawa-Hull
Cc: Seguin A@DM@Ottawa-Hull
Subject: Re: Training Questions

Ok, we are talking with the Chief and DM now.

COS DM
343-998-7510

On Oct 13, 2020, at 9:48 AM, Damy J@DM@Ottawa-Hull <JUNIORS.DAMY@forces.gc.ca> wrote:

FYSA – Will keep you in the loop after the call

Juniors Damy

Conseiller spécial, Bureau de la sous-ministre
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juniors.damy@forces.gc.ca / Tel: 613-904-5173 (Carling) – 613-996-5106 (Pearkes) / Cell: 613-668-2435

From: Horgan K@MND@Ottawa-Hull
Sent: October-13-20 9:01 AM
To: Damy J@DM@Ottawa-Hull <JUNIORS.DAMY@forces.gc.ca>
Cc: Hersi A@MND@Ottawa-Hull <AYAN.HERSI@forces.gc.ca>; ElKhoury C@MND@Ottawa-Hull <CAROLE.EL-KHOURY@forces.gc.ca>; Gordon E@MND@Ottawa-Hull <EMILY.GORDON@forces.gc.ca>
Subject: Training Questions

Hi Juniors,

Reaching out to you in Ashley absence.

reached out to us to ask to set up a call regarding the story below:

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David Pugliese - Ottawa Citizen , A1 / FRONT - 2020-10-13

He was given some more information, added below, and it was suggested he have a call with BGen Janzen's team, we are good to send the invite out if you can confirm that PA would be ready for this discussion. It will be scheduled for later this morning.

Thanks!
Katie

Subject: Actor and Audience Analysis training contract

Outlet: Ottawa Citizen

Deadline: Oct 5 - 1400

Issue:

Reporter has questions about contracts awarded last year to EMIC consulting Inc. by DND:
<https://search.open.canada.ca/en/ct/id/dnd-mdn,C-2019-2020-Q2-01802>.

Response:

Q. What was the 2019 contract/course about?

The contract, which sought Actor and Audience Analysis training, was subsequently renamed the Audience Research and Campaign Design Course.

This seven-week-long training course was primarily aimed at Canadian Armed Forces members of the Military Public Affairs Branch, with the intent of having them better identify and understand key audiences, thus resulting in communications campaigns/plans that are more customized and beneficial.

Major components of the training included:

- Strategic Campaign Planning;
- Research design, Audience Research (qualitative and quantitative);
- Designing Effective Communications Campaigns;
- Implementing Campaigns and measuring effectiveness.

Q. How much did the contract cost?

The maximum contracted amount for the course was \$615,285. The actual amount billed and paid to the contractor was \$549,275.

This amount also provides DND/CAF with proprietary usage of the methodology and courseware in order to provide in-house training once sufficient capacity and expertise exists to do so.

The amount covered the cost of all course instructors and all subject matter experts briefing the course, including accommodations and expenses to deliver the training in the national capital region. It also included all course materials, case study costs, and any other costs required to support the training.

Q. Who approved it? The ADM(PA)? The DM?

Expenditure authorities for both contracts was given by the Director General of Military Strategic Communications, BGen Jay Janzen, who has the required financial delegation to do so.

Contract initiation and completion was done in accordance with regulations, while the contract process was managed by ADM(Mat) contracting staff.

Q. How many people took the course?

The training, which occurred over a seven-week-long period from September to November 2019, had 20 students, as well as 5 individuals auditing the course.

Course candidates included military public affairs officers/military imagery technicians (16) and civilian employees. The five who audited the course were military public affairs officers.

In addition, approximately 200 other individuals received a half-day familiarization session as part of the contract. The half-day familiarisation was not a course. It simply provided an overview of the concepts covered in the full course, as well as a summary of the findings of the case study (recruiting women into the combat trades of the Armed Forces).

Q. Is any such training planned for 2020?

A similar training course this year and a contract was awarded to Emic Consulting last month.

The maximum contract amount is \$578,285, with training planned from now until November.

The scope of the contract, deliverables, and number of students is very similar to last year.

At our request, the course was reformatted in order to be delivered via live video learning due to COVID-19 considerations.

It is expected that this will be the last year we contract this course, as we will then have sufficient expertise to run training ourselves going forward.

Q. Since this was not an official course for CAF public affairs (i.e. part of their trade training) what budget did the money to pay for it come from? I understand that the money came from PA Operations and Maintenance budget.

The course contract was paid from funding that was earmarked to support Military PA professional development and modernization efforts. (Note: A discussion has already been had with the reporter to explain the basics of the financial aspects, including SWE vs O&M)

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David Pugliese - Ottawa Citizen , A1 / FRONT - 2020-10-13

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Lambert M@DM@Ottawa-Hull

From: Damy J@DM@Ottawa-Hull
Sent: October 13, 2020 9:55 AM
To: Kennedy C@DM@Ottawa-Hull
Cc: Seguin A@DM@Ottawa-Hull
Subject: RE: Training Questions

Ack

Juniors Damy

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From: Kennedy C@DM@Ottawa-Hull
Sent: October-13-20 9:54 AM
To: Damy J@DM@Ottawa-Hull <JUNIORS.DAMY@forces.gc.ca>
Cc: Seguin A@DM@Ottawa-Hull <ALEXANDRE.SEGUIN2@forces.gc.ca>
Subject: Re: Training Questions

Please ensure ADM PA and SJS are invited. Not Jay's group at this time. LAK will decide who to bring along.

COS DM
343-998-7510

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He was given some more information, added below, and it was suggested he have a call with BGen Janzen's team, we are good to send the invite out if you can confirm that PA would be ready for this discussion. It will be scheduled for later this morning.

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From: Damy J@DM@Ottawa-Hull
Sent: October 13, 2020 9:57 AM
To: Kennedy C@DM@Ottawa-Hull
Cc: Seguin A@DM@Ottawa-Hull
Subject: RE: Training Questions

Ok

Juniors Damy

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Change of direction, please do invite Jay.

Pls see my BBM.

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Lambert M@DM@Ottawa-Hull

From: Rinfret MJ@ADM(PA)@Ottawa-Hull
Sent: October 13, 2020 9:58 AM
To: Damy J@DM@Ottawa-Hull
Subject: RE: MNDO Call - Ottawa Citizen Article

ok

From: Damy J@DM@Ottawa-Hull
Sent: October 13, 2020 9:58 AM
To: Rinfret MJ@ADM(PA)@Ottawa-Hull <MARIE-JOSEE.RINFRET@forces.gc.ca>
Subject: RE: MNDO Call - Ottawa Citizen Article

Change of direction again, please make sure Jay is invited ☺
Merci

Juniors Damy

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From: Rinfret MJ@ADM(PA)@Ottawa-Hull
Sent: October-13-20 9:57 AM
To: Damy J@DM@Ottawa-Hull <JUNIORS.DAMY@forces.gc.ca>
Subject: RE: MNDO Call - Ottawa Citizen Article

OK, merci.

From: Damy J@DM@Ottawa-Hull
Sent: October 13, 2020 9:56 AM
To: Rinfret MJ@ADM(PA)@Ottawa-Hull <MARIE-JOSEE.RINFRET@forces.gc.ca>
Subject: RE: MNDO Call - Ottawa Citizen Article

Actually, please do not invite anyone from Janzen's group at this time but let's make sure Laurie participate. SJS will be there as well Thanks

-J

Juniors Damy

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From: Rinfret MJ@ADM(PA)@Ottawa-Hull
Sent: October-13-20 9:34 AM
To: Damy J@DM@Ottawa-Hull <JUNIORS.DAMY@forces.gc.ca>
Subject: RE: MNDO Call - Ottawa Citizen Article

Thanks Juniors.

From: Damy J@DM@Ottawa-Hull
Sent: October 13, 2020 9:25 AM
To: Rinfret MJ@ADM(PA)@Ottawa-Hull <MARIE-JOSEE.RINFRET@forces.gc.ca>
Cc: Lebouthillier D@ADM(PA) DRMCC@Ottawa-Hull <DANIEL.LEBOUTHILLIER@forces.gc.ca>
Subject: RE: MNDO Call - Ottawa Citizen Article

DAO will reach out shortly to coordinate the call and it was suggested that someone from BGen Janzen's team participate as well. and will be there from MNDO.

Juniors Damy

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From: Damy J@DM@Ottawa-Hull
Sent: October-13-20 9:17 AM
To: Rinfret MJ@ADM(PA)@Ottawa-Hull <MARIE-JOSEE.RINFRET@forces.gc.ca>
Cc: Lebouthillier D@ADM(PA) DRMCC@Ottawa-Hull <DANIEL.LEBOUTHILLIER@forces.gc.ca>
Subject: MNDO Call - Ottawa Citizen Article

Bonjour Marie-Josée,

MNDO is asking for a call this morning on the following article. MTF shortly but heads up

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To: Horgan K@MND@Ottawa-Hull
Cc: Hersi A@MND@Ottawa-Hull; ElKhoury C@MND@Ottawa-Hull; Gordon E@MND@Ottawa-Hull
Subject: RE: Training Questions

To be specific, Laurie Anne Kempton and DOS SJS need to be on the call. Thank you very much ☺

Juniors Damy

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Sent: October-13-20 9:57 AM
To: Horgan K@MND@Ottawa-Hull <KATE.HORGAN@forces.gc.ca>
Cc: Hersi A@MND@Ottawa-Hull <AYAN.HERSI@forces.gc.ca>; ElKhoury C@MND@Ottawa-Hull <CAROLE.EL-KHOURY@forces.gc.ca>; Gordon E@MND@Ottawa-Hull <EMILY.GORDON@forces.gc.ca>
Subject: RE: Training Questions

Please invite SJS as well thanks

Juniors Damy

Conseiller spécial, Bureau de la sous-ministre
Ministère de la défense nationale / Gouvernement du Canada
juniors.damy@forces.gc.ca / Tel: 613-904-5173 (Carling) – 613-996-5106 (Pearkes) / Cel: 613-668-2435

Special Advisor, Office of the Deputy Minister
Department of National Defence / Government of Canada
juniors.damy@forces.gc.ca / Tel: 613-904-5173 (Carling) – 613-996-5106 (Pearkes) / Cell: 613-668-2435

From: Damy J@DM@Ottawa-Hull
Sent: October-13-20 9:22 AM
To: Horgan K@MND@Ottawa-Hull <KATE.HORGAN@forces.gc.ca>
Cc: Hersi A@MND@Ottawa-Hull <AYAN.HERSI@forces.gc.ca>; ElKhoury C@MND@Ottawa-Hull <CAROLE.EL-KHOURY@forces.gc.ca>; Gordon E@MND@Ottawa-Hull <EMILY.GORDON@forces.gc.ca>
Subject: RE: Training Questions

Alright then, Emily can reach out to coordinate. Thank you very much
-J

Juniors Damy

Conseiller spécial, Bureau de la sous-ministre

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juniors.damy@forces.gc.ca / Tel: 613-904-5173 (Carling) – 613-996-5106 (Pearkes) / Cel: 613-668-2435

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juniors.damy@forces.gc.ca / Tel: 613-904-5173 (Carling) – 613-996-5106 (Pearkes) / Cell: 613-668-2435

From: Horgan K@MND@Ottawa-Hull
Sent: October-13-20 9:18 AM
To: Damy J@DM@Ottawa-Hull <JUNIORS.DAMY@forces.gc.ca>
Cc: Hersi A@MND@Ottawa-Hull <AYAN.HERSI@forces.gc.ca>; ElKhoury C@MND@Ottawa-Hull <CAROLE.EL-KHOURY@forces.gc.ca>; Gordon E@MND@Ottawa-Hull <EMILY.GORDON@forces.gc.ca>
Subject: Re: Training Questions

We also agree! Checked in with [redacted] and he has confirmed that he'll be joining the call from MNDO Comms side. Looks like they also need the answers to whatever question [redacted] might have!

Departmental Assistant's Office
kate.horgan@forces.gc.ca / Tel. : (343) 550-4581

Bureau de liaison ministérielle
kate.horgan@forces.gc.ca / Tél.: (343) 550-4581

On Oct 13, 2020, at 9:12 AM, Damy J@DM@Ottawa-Hull <JUNIORS.DAMY@forces.gc.ca> wrote:

Let me re-phrase ☺ Since [redacted] and [redacted] are usually tracking all PA stuff, I just want to make sure that we're not organizing a call while they might already have answers to [redacted] questions... We know how they communicate well over there ☺

Juniors Damy

Conseiller spécial, Bureau de la sous-ministre
Ministère de la défense nationale / Gouvernement du Canada
juniors.damy@forces.gc.ca / Tel: 613-904-5173 (Carling) – 613-996-5106 (Pearkes) / Cel: 613-668-2435

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Department of National Defence / Government of Canada
juniors.damy@forces.gc.ca / Tel: 613-904-5173 (Carling) – 613-996-5106 (Pearkes) / Cell: 613-668-2435

From: Horgan K@MND@Ottawa-Hull
Sent: October-13-20 9:09 AM
To: Damy J@DM@Ottawa-Hull <JUNIORS.DAMY@forces.gc.ca>
Cc: Hersi A@MND@Ottawa-Hull <AYAN.HERSI@forces.gc.ca>; ElKhoury C@MND@Ottawa-Hull <CAROLE.EL-KHOURY@forces.gc.ca>; Gordon E@MND@Ottawa-Hull <EMILY.GORDON@forces.gc.ca>
Subject: Re: Training Questions

Ayan is flagging to [redacted] and [redacted] and most likely one of them will be in attendance for the call.

Departmental Assistant's Office
kate.horgan@forces.gc.ca / Tel. : (343) 550-4581

s.19(1)

Bureau de liaison ministérielle
kate.horgan@forces.gc.ca/ Tél.: (343) 550-4581

On Oct 13, 2020, at 9:07 AM, Damy J@DM@Ottawa-Hull
<JUNIORS.DAMY@forces.gc.ca> wrote:

Hi there,

I will reach out to PA first and get back to you. In the meantime is tracking
request? Normally all PA stuff are going through and so I would not be
surprised that they's been tracking the possibility of this article.

Thanks
-J

Juniors Damy

Conseiller spécial, Bureau de la sous-ministre
Ministère de la défense nationale / Gouvernement du Canada
juniors.damy@forces.gc.ca / Tel: 613-904-5173 (Carling) – 613-996-5106 (Pearkes) /
Cel: 613-668-2435

Special Advisor, Office of the Deputy Minister
Department of National Defence / Government of Canada
juniors.damy@forces.gc.ca / Tel: 613-904-5173 (Carling) – 613-996-5106 (Pearkes) /
Cell: 613-668-2435

From: Horgan K@MND@Ottawa-Hull
Sent: October-13-20 9:01 AM
To: Damy J@DM@Ottawa-Hull <JUNIORS.DAMY@forces.gc.ca>
Cc: Hersi A@MND@Ottawa-Hull <AYAN.HERSI@forces.gc.ca>; ElKhoury
C@MND@Ottawa-Hull <CAROLE.EL-KHOURY@forces.gc.ca>; Gordon
E@MND@Ottawa-Hull <EMILY.GORDON@forces.gc.ca>
Subject: Training Questions

Hi Juniors,

Reaching out to you in Ashley absence.

reached out to us to ask to set up a call regarding the story below:

Military spent over \$1M on propaganda education

The Canadian Forces spent more than \$1 million on behaviour modification training used by the parent firm of Cambridge Analytica, the company that was the centre of a scandal in which personal data of Facebook users provided to U.S. President Donald Trump's political campaign. The two contracts to train...

David Pugliese - Ottawa Citizen , A1 / FRONT - 2020-10-13

He was given some more information, added below, and it was suggested he have a call with BGen Janzen's te are good to send the invite out if you can confirm that PA would be ready for this discussion. It will be schedul later this morning.

Thanks!
Katie

Subject: Actor and Audience Analysis training contract

Outlet: Ottawa Citizen

Deadline: Oct 5 - 1400

Issue:

Reporter has questions about contracts awarded last year to EMIC consulting Inc. by DND: <https://search.open.canada.ca/en/ct/id/dnd-mdn,C-2019-2020-Q2-01802>.

Response:

Q. What was the 2019 contract/course about?

The contract, which sought Actor and Audience Analysis training, was subsequently renamed the Audience Research and Campaign Design Course.

This seven-week-long training course was primarily aimed at Canadian Armed Forces members of the Military Public Affairs Branch, with the intent of having them better identify and understand key audiences, thus resulting in communications campaigns/plans that are more customized and beneficial.

Major components of the training included:

- Strategic Campaign Planning;
- Research design, Audience Research (qualitative and quantitative);
- Designing Effective Communications Campaigns;
- Implementing Campaigns and measuring effectiveness.

Q. How much did the contract cost?

The maximum contracted amount for the course was \$615,285. The actual amount billed and paid to the contractor was \$549,275.

This amount also provides DND/CAF with proprietary usage of the methodology and courseware in order to provide in-house training once sufficient capacity and expertise exists to do so.

The amount covered the cost of all course instructors and all subject matter experts briefing the course, including accommodations and expenses to deliver the training in the national capital region. It also included all course materials, case study costs, and any other costs required to support the training.

Q. Who approved it? The ADM(PA)? The DM?

Expenditure authorities for both contracts was given by the Director General of Military Strategic Communications, BGen Jay Janzen, who has the required financial delegation to do so.

Contract initiation and completion was done in accordance with regulations, while the contract process was managed by ADM(Mat) contracting staff.

Q. How many people took the course?

The training, which occurred over a seven-week-long period from September to November 2019, had 20 students, as well as 5 individuals auditing the course.

Course candidates included military public affairs officers/military imagery technicians (16) and civilian employees. The five who audited the course were military public affairs officers.

In addition, approximately 200 other individuals received a half-day familiarization session as part of the contract. The half-day familiarisation was not a course. It simply provided an overview of the concepts covered in the full course, as well as a summary of the findings of the case study (recruiting women into the combat trades of the Armed Forces).

Q. Is any such training planned for 2020?

A similar training course this year and a contract was awarded to Emic Consulting last month.

The maximum contract amount is \$578,285, with training planned from now until November.

The scope of the contract, deliverables, and number of students is very similar to last year.

At our request, the course was reformatted in order to be delivered via live video learning due to COVID-19 considerations.

It is expected that this will be the last year we contract this course, as we will then have sufficient expertise to run training ourselves going forward.

Q. Since this was not an official course for CAF public affairs (i.e. part of their trade training) what budget did the money to pay for it come from? I understand that the money came from PA Operations and Maintenance budget.

The course contract was paid from funding that was earmarked to support Military PA professional development and modernization efforts. (Note: A discussion has already been had with the reporter to explain the basics of the financial aspects, including SWE vs O&M)

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The Canadian Forces spent more than \$1 million on behaviour modification training used by the parent firm of Cambridge Analytica, the company that was the centre of a scandal in which personal data of Facebook users provided to U.S. President Donald Trump's political campaign. The two contracts to train...

David Pugliese - Ottawa Citizen , A1 / FRONT - 2020-10-13

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kate.horgan@forces.gc.ca / Tel. : (343) 550-4581

Bureau de liaison ministérielle
kate.horgan@forces.gc.ca / Tél.: (343) 550-4581

Lambert M@DM@Ottawa-Hull

From: Kennedy C@DM@Ottawa-Hull
Sent: October 13, 2020 11:40 AM
To: Thomas J@DM@Ottawa-Hull
Subject: Fwd: MNDO RFI T: PA Training Questions

COS DM
343-998-7510

Begin forwarded message:

From: "Horgan K@MND@Ottawa-Hull" <KATE.HORGAN@forces.gc.ca>
Date: October 13, 2020 at 11:16:06 AM EDT
To: "Damy J@DM@Ottawa-Hull" <JUNIORS.DAMY@forces.gc.ca>
Cc: "Cloutier A@MND@Ottawa-Hull" <ANDREANNE.CLOUTIER@forces.gc.ca>, "++MND Dept Assistant / Adjoint Ministériel MDN@MND@Ottawa-Hull" <MNDDeptAssistant.AdjointMinisterielMDN@forces.gc.ca>, "Kennedy C@DM@Ottawa-Hull" <CHRISTINE.KENNEDY@forces.gc.ca>, "Mulawyshyn BGen AP@CDS@Ottawa-Hull" <ALAN.MULAWYSHYN@forces.gc.ca>
Subject: MNDO RFI T: PA Training Questions

Hi Juniors,

As you are tracking, please find below the RFI's from this morning's call regarding the Audience Research and Campaign Design Course.

1. MNDO would like a list of other countries, especially NATO countries, who have used Emic Consulting and this specific type of training. If possible, they would also like what these countries are using this training for which may help shift the narrative.
2. What other items could be grouped into this story that have not yet been brought up in the article?
3. If the privacy commissioner contacts ADM(PA), please notify MNDO.

Thanks,
Katie

Departmental Assistant's Office
kate.horgan@forces.gc.ca / Tel. : (343) 550-4581

Bureau de liaison ministérielle
kate.horgan@forces.gc.ca / Tél.: (343) 550-4581

Lambert M@DM@Ottawa-Hull

From: Tyler J@ADM(PA) DGPA@Ottawa-Hull
Sent: October 13, 2020 12:17 PM
To: Damy J@DM@Ottawa-Hull; Janzen BGen JH@ADM(PA) DPAP0@Ottawa-Hull
Cc: Rinfret MJ@ADM(PA)@Ottawa-Hull; Blouin D@ADM(PA) DPAPI@Ottawa-Hull
Subject: RE: Follow-up - MNDO Call Ottawa Citizen Article

Looping in Jay – he has confirmed he will send to DMO.

Thanks,

Jennifer Tyler
ADMO, ADM(PA) | BB: 613-854-9261

From: Damy J@DM@Ottawa-Hull
Sent: October 13, 2020 11:59 AM
To: Tyler J@ADM(PA) DGPA@Ottawa-Hull <JENNIFER.TYLER@forces.gc.ca>
Cc: Rinfret MJ@ADM(PA)@Ottawa-Hull <MARIE-JOSEE.RINFRET@forces.gc.ca>; Blouin D@ADM(PA) DPAPI@Ottawa-Hull <DANIEL.BLOUIN@forces.gc.ca>
Subject: Re: Follow-up - MNDO Call Ottawa Citizen Article

He will send it yo whom please?

Juniors Damy
Special Advisor DMO
613 668 2435

On Oct 13, 2020, at 11:48 AM, Tyler J@ADM(PA) DGPA@Ottawa-Hull <JENNIFER.TYLER@forces.gc.ca> wrote:

Hi Juniors,

Item 1 will be sent from BGen Janzen.
Items 2 and 3 will come tomorrow.

Thanks,

Jennifer Tyler
ADMO, ADM(PA) | BB: 613-854-9261

From: Rinfret MJ@ADM(PA)@Ottawa-Hull
Sent: October 13, 2020 11:13 AM
To: Damy J@DM@Ottawa-Hull <JUNIORS.DAMY@forces.gc.ca>; Tyler J@ADM(PA) DGPA@Ottawa-Hull <JENNIFER.TYLER@forces.gc.ca>; Blouin D@ADM(PA) DPAPI@Ottawa-Hull <DANIEL.BLOUIN@forces.gc.ca>
Subject: RE: Follow-up - MNDO Call Ottawa Citizen Article

Merci beaucoup Juniors. Jenn and Dan : FYI below.

From: Damy J@DM@Ottawa-Hull
Sent: October 13, 2020 11:11 AM
To: Rinfret MJ@ADM(PA)@Ottawa-Hull <MARIE-JOSEE.RINFRET@forces.gc.ca>
Subject: Follow-up - MNDO Call Ottawa Citizen Article
Importance: High

Allo Marie-Josée,

Below some follow-ups coming out the call that just happened, FYSA the ADM and BGen Janzen were on the call:

1. A list of other allies and NATO country using this course and company. **Due: before noon today (BGen Janzen said he has that list)**
2. The narrative to put the course in its proper context. **Due: could you provide an ETA?**
3. A list of potential items related to this issue that might come out in the press. **Due: could you provide an ETA?**

Merci beaucoup
-J

Juniors Damy

Conseiller spécial, Bureau de la sous-ministre
Ministère de la défense nationale / Gouvernement du Canada
juniors.damy@forces.gc.ca / Tel: 613-904-5173 (Carling) – 613-996-5106 (Pearkes) / Cel: 613-668-2435

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s.20(1)(c)

s.20(1)(d)

Lambert M@DM@Ottawa-Hull

From: Janzen BGen JH@ADM(PA) DPAPO@Ottawa-Hull
Sent: October 13, 2020 12:33 PM
To: Damy J@DM@Ottawa-Hull
Cc: Kempton LA@ADM(PA)@Ottawa-Hull; Blouin D@ADM(PA) DPAPI@Ottawa-Hull; Tyler J@ADM(PA) DGPA@Ottawa-Hull; Rinfret MJ@ADM(PA)@Ottawa-Hull
Subject: List of Training Similar to Audience Research and Campaign Design Course

Hi Juniors,

The following is a list of training conducted by Emic Consulting or SCL Ltd that is similar to the training currently conducted in Canada.

If you need any further amplification, please let me know.

Thanks!

Jay

Brigadier-General Jay H. Janzen

Director-General Military Public Affairs
Assistant Deputy Minister (Public Affairs)
Canadian Armed Forces / Government of Canada
Jay.Janzen@forces.gc.ca / Telephone: 613-901-4808 / Cellular : 613-617-4585

Directeur général – Affaires publiques militaires
Sous-ministre adjoint (Affaires publiques)
Forces armées canadiennes / Gouvernement du Canada
Jay.Janzen@forces.gc.ca / Téléphone: 613-901-4808 / Cellulaire : 613-617-4585

Lambert M@DM@Ottawa-Hull

From: s.20(1)(c) Damy J@DM@Ottawa-Hull
Sent: s.20(1)(d) October 13, 2020 12:51 PM
To: Kennedy C@DM@Ottawa-Hull
Cc: s.21(1)(b) Seguin A@DM@Ottawa-Hull
Subject: RE: Training Questions

Hi there,

Below are the action items coming out of the discussion and also the questions that were discussed.

Action items:

1. A list of other allies and NATO country using this course and company. (Answered as below)

The following is a list of training conducted by Emic Consulting or SCL Ltd that is similar to the training currently conducted in Canada.

2. A narrative to put the course in its proper context. (To be provided tomorrow)
3. A list of potential items related to this issue that might come out in the press. (To be provided tomorrow)

Question discussed during the call –
context .

about the lack of narrative to put this issue in proper

1. What the does the training entails?
2. How did the partnership with the company came about?
3. Is the course aimed at foreign or domestic missions?
4. What other countries are using the same course or company?
5. Are there other items related to this issue that could be reported in the press in the near future?
6. Any communication or issue with the Privacy Commissioner?

Juniors Damy

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juniors.damy@forces.gc.ca / Tel: 613-904-5173 (Carling) – 613-996-5106 (Pearkes) / Cell: 613-668-2435

From: Kennedy C@DM@Ottawa-Hull

Sent: October-13-20 9:57 AM

To: Damy J@DM@Ottawa-Hull <JUNIORS.DAMY@forces.gc.ca>
Cc: Seguin A@DM@Ottawa-Hull <ALEXANDRE.SEGUIN2@forces.gc.ca>
Subject: Re: Training Questions

Change of direction, please do invite Jay.

Pls see my BBM.

COS DM
343-998-7510

On Oct 13, 2020, at 9:48 AM, Damy J@DM@Ottawa-Hull <JUNIORS.DAMY@forces.gc.ca> wrote:

FYSA – Will keep you in the loop after the call

Juniors Damy

Conseiller spécial, Bureau de la sous-ministre
Ministère de la défense nationale / Gouvernement du Canada
juniors.damy@forces.gc.ca / Tel: 613-904-5173 (Carling) – 613-996-5106 (Pearkes) / Cel: 613-668-2435

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From: Horgan K@MND@Ottawa-Hull
Sent: October-13-20 9:01 AM
To: Damy J@DM@Ottawa-Hull <JUNIORS.DAMY@forces.gc.ca>
Cc: Hersi A@MND@Ottawa-Hull <AYAN.HERSI@forces.gc.ca>; ElKhoury C@MND@Ottawa-Hull
<CAROLE.EL-KHOURY@forces.gc.ca>; Gordon E@MND@Ottawa-Hull <EMILY.GORDON@forces.gc.ca>
Subject: Training Questions

Hi Juniors,

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David Pugliese - Ottawa Citizen , A1 / FRONT - 2020-10-13

He was given some more information, added below, and it was suggested he have a call with BGen Janzen's team, we are good to send the invite out if you can confirm that PA would be ready for this discussion. It will be scheduled for later this morning.

Thanks!
Katie

Subject: Actor and Audience Analysis training contract

Outlet: Ottawa Citizen

Deadline: Oct 5 - 1400

Issue:

Reporter has questions about contracts awarded last year to EMIC consulting Inc. by DND:
<https://search.open.canada.ca/en/ct/id/dnd-mdn,C-2019-2020-Q2-01802>.

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Q. How much did the contract cost?

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Q. How many people took the course?

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Q. Is any such training planned for 2020?

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David Pugliese - Ottawa Citizen , A1 / FRONT - 2020-10-13

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Bureau de liaison ministérielle
kate.horgan@forces.gc.ca / Tél.: (343) 550-4581

Lambert M@DM@Ottawa-Hull

From: Kempton LA@ADM(PA)@Ottawa-Hull
Sent: October 14, 2020 2:35 PM
To: Thomas J@DM@Ottawa-Hull
Cc: Vance Gen JH@CDS@Ottawa-Hull; Rouleau LGen MN@VCDS@Ottawa-Hull; Cadieu MGen TJ@SJS@Ottawa-Hull; Eyre LGen WD@C Army Asst C Army@Ottawa-Hull; Kennedy C@DM@Ottawa-Hull; Mulawyshyn BGen AP@CDS@Ottawa-Hull; Abboud Bgén JAD@VCDS@Ottawa-Hull
Subject: RE: Media query - 36 Canadian Brigade Training - update

Good afternoon DM,

We have an opportunity as we have received a media query from CBC NS for tomorrow morning. We are working with the Army to draft a statement and I will have something to share with everyone later this afternoon.

Thanks

Laurie

From: Thomas J@DM@Ottawa-Hull
Sent: October 14, 2020 12:50 PM
To: Kempton LA@ADM(PA)@Ottawa-Hull <LAURIE-ANNE.KEMPTON@forces.gc.ca>
Cc: Vance Gen JH@CDS@Ottawa-Hull <JONATHAN.VANCE@forces.gc.ca>; Rouleau LGen MN@VCDS@Ottawa-Hull <Michael.Rouleau@forces.gc.ca>; Cadieu MGen TJ@SJS@Ottawa-Hull <TREVOR.CADIEU@forces.gc.ca>; Eyre LGen WD@C Army Asst C Army@Ottawa-Hull <Wayne.Eyre@forces.gc.ca>; Kennedy C@DM@Ottawa-Hull <CHRISTINE.KENNEDY@forces.gc.ca>; Mulawyshyn BGen AP@CDS@Ottawa-Hull <ALAN.MULAWYSHYN@forces.gc.ca>; Abboud Bgén JAD@VCDS@Ottawa-Hull <DAVE.ABBOUD@forces.gc.ca>
Subject: Re: Media query - 36 Canadian Brigade Training - update

I believe we need a statement of some nature. This story is taking two paths. One of mocking the foolishness of the exercise and more seriously comment on the sinister nature of it. We can ignore the former. Must correct the record on the latter

Sent from my iPhone

On Oct 14, 2020, at 10:23 AM, Kempton LA@ADM(PA)@Ottawa-Hull <LAURIE-ANNE.KEMPTON@forces.gc.ca> wrote:

Good morning all –

Further to the article this morning, I am recommending against offering an interview. We have not been asked for one and will not be able to limit the interview to just questions about this training exercise; it will absolutely veer into questions about the EMIC training as well as IO in general. I am still working on what our communications around IO and the information space being a contested space should be and I think we need to hold until it's done and everyone is comfortable with it.

PA will propose a way forward in regards to communicating about this training exercise once the investigation is complete. There certainly may be interest from local outlets in NS who reported on this story over the weekend.

Thanks.

Laurie

From: Kempton LA@ADM(PA)@Ottawa-Hull
Sent: October 13, 2020 6:20 PM
To: Thomas J@DM@Ottawa-Hull <JODY.THOMAS@forces.gc.ca>; Vance Gen JH@CDS@Ottawa-Hull <JONATHAN.VANCE@forces.gc.ca>; Rouleau LGen MN@VCDS@Ottawa-Hull <Michael.Rouleau@forces.gc.ca>; Cadieu MGen TJ@SJS@Ottawa-Hull <TREVOR.CADIEU@forces.gc.ca>; Eyre LGen WD@C Army Asst C Army@Ottawa-Hull <Wayne.Eyre@forces.gc.ca>
Cc: Kennedy C@DM@Ottawa-Hull <CHRISTINE.KENNEDY@forces.gc.ca>; Mulawyshyn BGen AP@CDS@Ottawa-Hull <ALAN.MULAWYSHYN@forces.gc.ca>; Abboud Bgén JAD@VCDS@Ottawa-Hull <DAVE.ABBOUD@forces.gc.ca>
Subject: Media query - 36 Canadian Brigade Training - update

Good evening,

The reporter contacted us at 5:15pm asking for the lines as his deadline had passed and they were ready to go. At 5:30, the media office made the correct call to provide the lines to the reporter so that the story would not publish without a comment from DND/CAF.

We will revise the media lines once the investigation is complete or sooner, if we receive additional queries.

I will monitor the story and the coverage tomorrow morning and come forward with a recommendation regarding having a spokesperson for this issue. But we should be prepared to offer an interview.

Below is a quick snapshot of the engagement on the Ottawa Citizen story from this morning on social media. So far engagements are on the low-side but I expect that to grow over the coming days.

Thanks

Laurie

- So far, **engagement** on the topic of propaganda education and the DND/CAF is **within the low range**. There have been approximately **100 mentions** in the past 24 hours.
- Most mentions were from social media sources and users. **Most users expressed opposition to involvement of the SCL Group** due to past controversies related to corruption and unethical practices.
- A few users expressed belief that **Canadians should be concerned with how collected information is used**, rather than that it is being collected. For example, a few users expressed **support for using online information to better communication** between the DND/CAF and the public. However, these users also expressed **opposition to surveillance and providing information to third-parties**.

Assistant Deputy Minister (Public Affairs)
Sous-ministre adjointe (affaires publiques)
613.995.1497
343.548.6484

Lambert M@DM@Ottawa-Hull

From: Vance Gen JH@CDS@Ottawa-Hull
Sent: September 29, 2020 9:03 PM
To: Kempton LA@ADM(PA)@Ottawa-Hull; Thomas J@DM@Ottawa-Hull
Cc: Rochette C@Assoc DM@Ottawa-Hull; Kennedy C@DM@Ottawa-Hull; Mulawyshyn BGen AP@CDS@Ottawa-Hull; Seguin A@DM@Ottawa-Hull; Cadieu MGen TJ@SJS@Ottawa-Hull
Subject: Re: Heads up on Media Query

Thanks Laurie.

V/r,
JV

Sent from my BlackBerry 10 smartphone on the Rogers network.

From: Kempton LA@ADM(PA)@Ottawa-Hull
Sent: Tuesday, September 29, 2020 6:13 PM
To: Thomas J@DM@Ottawa-Hull
Cc: Vance Gen JH@CDS@Ottawa-Hull; Rochette C@Assoc DM@Ottawa-Hull; Kennedy C@DM@Ottawa-Hull; Mulawyshyn BGen AP@CDS@Ottawa-Hull; Seguin A@ADM(Pol) D Strat A@Ottawa-Hull; Cadieu MGen TJ@SJS@Ottawa-Hull
Subject: Re: Heads up on Media Query

To my knowledge, no. The price is high but was competed via RFP.

My overarching concern remains a growing narrative that can be drawn by some around DND/CAF and the information domain. The IO annex, this course etc are not related but others may try to connect them.

Sent from my iPhone

On Sep 29, 2020, at 18:08, Thomas J@DM@Ottawa-Hull <JODY.THOMAS@forces.gc.ca> wrote:

Thank you. Other than the Cambridge aspect is this contract or the ask of the company unusual?

Sent from my iPhone

On Sep 29, 2020, at 2:58 PM, Kempton LA@ADM(PA)@Ottawa-Hull <LAURIE-ANNE.KEMPTON@forces.gc.ca> wrote:

Good afternoon DM, Chief, and Associate,

I wanted to give you a heads up on a media query we have received from the Ottawa Citizen regarding a contract issued by ADM (PA) last year and issued again this year. The contract is to a British company, EMIC Consulting. The company was hired in 2019 by the DG MILPA to provide a course on Actor and Audience Analysis. . This training was

primarily aimed at Canadian Armed Forces members of the Military Public Affairs Branch, with the intent of having them better identify and understand key audiences, thus resulting in communications campaigns that are more customised and effective.

Major components of the training included: Strategic Campaign Planning, Research design, Audience Analysis (qualitative and quantitative), Designing Effective Communications Campaigns, Implementing Campaigns, Measures of Effectiveness, semiotic analysis, and a case study. The 2019 case study research topic was how the Canadian Armed Forces could improve efforts to recruit women into combat trades in the Armed Forces.

The value of the contract in 2019 was \$612,000 and is in a similar range for this year. The contract was issued via a competitive RFP, however, I believe only one bid was received. It was approved by the DG.

Some of the interest in this company stems from the fact that the founder of EMIC previously worked for SCL which is the parent company of Cambridge Analytica, which you may remember was outed for data mining, misappropriation of personal digital information as well as data analysis during electoral campaigns. Though Cambridge has ceased operations, it was back in the news today for allegedly using their database to disproportionately identify Black American votes as ripe for deterrence in voting for the Democratic nominee.

The course on Actor and Audience Analysis is not related to these activities by Cambridge Analytica, however, in light of the IO Annex and discussions around IO in general, this could get drawn in by the reporter.

Furthermore, the reporter is interested in how senior the signing authority for the contract was. I am in the process of doing due diligence to ensure there were no issues with the contracting process – I don't believe there were but want to be sure.

We are working on lines and will share them for approval but wanted you to be aware of this query before the lines come as it could become a sensitive story.

Thanks

Laurie

I have a few questions about a recent contract. A \$612,000 contract was awarded last year to EMIC consulting Inc by DND. Here are my questions:

-Can you tell me what were the deliverables and how many people were trained and from what DND/CF organizations?

Who are the attendees for that training?

Was the contract extended or renewed?

If so, what was the value of that contract?

What were/will be the deliverables from that?

When is the training being conducted?

Who will be the attendees for second tranche of training?

Who approved these two contracts? Was it approved by ADMPA and/or DM?

My deadline is Thursday at noon,

s.19(1)

From:
Sent: April 27, 2018 11:12 AM
To: Peebles Maj M@ADM(PA) DGPA@Ottawa-Hull
Cc: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Subject: Re: Request for a proposal
Attachments: 2018 AAA Course Requirements .docx

Hello Mark,

Thank you, this is very helpful.

The class size would be perfect, and October-November could work very well, though with the data collection break required we'd likely run into December (for example the first three weeks of October and the last week of November to the first week of December). Would that work?

With this kind of class size, just like in Riga we would have a maximum of about 4 to 5 staff on the busiest days of the course. At all times there will be two principal trainers, and then there would be additional trainers plus a few visiting guest lecturers but they will fly in and out, so 5 should be the maximum number of people present on any given day.

In order for me to create a rough outline of accommodation cost if we don't stay on base; what would be the area in Ottawa we should be staying in that's nearest to the learning centre?

I have attached the training venue requirements for you - any questions please let me know. Feel free to call me on my mobile.

I will leave out the case study costing for now, and of course we can discuss any ideas you may have and I can then check what is feasible and affordable.

A course content overview and initial proposal is in the making and will be with you just after the weekend.

On 25 Apr 2018, at 15:45, MARK.PEEBLES@forces.gc.ca wrote:

Hello

Thank you very much for this. Indeed, it was great catching up with you and gratifying to hear that you are starting up with your own company. With regard to your questions, I would offer the following feedback:

1. Where would you like to run the course? While no firm decision has yet been made, the current thought has us leaning towards Ottawa.
2. How many trainees will we have (give or take 5, i.e. 15-20..) We are considering a class size no larger than 24 students (4 x 6-person syndicates) with a minimum of 20 (4 x 5-person syndicates).
3. What dates are ideal for you? No precise dates have been considered at this time, but given the lead-time you require I would look at an October-November, 2018 timeframe.

s.19(1)

4. Would you like me to cost a venue, catering and accommodation or will you arrange this? (I can send you a list of the requirements) Our intent is to leverage existing DND facilities for training venue and catering to the extent possible. For example, our learning centre here has numerous classrooms and the building has a cafeteria. I would appreciate you itemizing accommodation and meal costs separately as we consider options for course location. Given that we would look to provide some personnel to act in such roles as course officer and administration/logistics officer, how many staff would you estimate having on the ground at any one time? That list of requirements would be very helpful for our planning purposes to see what we can provide from our own resources and what might have to be out-sourced.

5. What (type of) case study would you like to run? No decision has yet been reached in this regard. The ideas we discussed, along with the pros and cons, are being considered and we have reached out to our colleagues in Military Personnel Command for additional ideas. Our intent is to come up with a case study that will yield useful results for the CAF to follow up on, while respecting the primacy of training value to the students – and keeping cost in mind. We aim to find a case study that allows for audience segmentation beyond the CAF; is pertinent to an issue regarding the CAF and/or national security/defence; and is able to be meaningfully conducted close to the training location. More to follow as we come up with options. I would appreciate your perspective on the options we consider before we make a decision.

I hope that gives you enough to work with in coming up with your proposal. Let me know if you have any other questions as they come up in your drafting of the proposal. In the meantime, I would appreciate getting that list of requirements to help us consider course location options.

Best regards,

Mark

Major Mark A. Peebles

Public Affairs Officer, ADM Public Affairs
Department of National Defence / Government of Canada
mark.peebles@forces.gc.ca / Tel: 613-995-8871

Officier d'affaires publiques, SMA Affaires publiques
Ministère de la Défense nationale / Gouvernement du Canada
mark.peebles@forces.gc.ca / Tel: 613-995-8871

From:

Sent: April-24-18 7:46 PM

To: Peebles Maj M@ADM(PA) DGPA@Ottawa-Hull <MARK.PEEBLES@forces.gc.ca>;

Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>

Subject: Re: Request for a proposal

Dear Mark and LCol Allison,

Thank you very much for your call today Mark, it was very nice to catch up after such a long time, and I am excited about the prospect of working with you.

I can have a proposal to you early next week the absolute latest, but in order to provide you with an accurate costing it would be ideal to know what (type of) problem you would like to tackle as the case study, and roughly where you would like to run the course (location). Alternatively I could cost the course itself for you and add the case study at a later date.

The reason the case study and location matter is because I would need to obtain quotes for travel, data collection and an interview venue which form a significant portion of the cost of running a training course.

Class size also impacts the costs in two ways:

1. The more students the costlier the qualitative research training element; the quantitative research part makes no difference.
2. For class sizes above 30 students we need to add an extra principal trainer.

In terms of minimum class size, there isn't one really, though the cost of training 10 people is roughly equivalent to training 20-25 people, so I tend to recommend this class size which is also ideal for learning outcomes; students can work in syndicates, learn from each other, and there is more of a 'classroom dynamic' than with small class sizes. The largest class I ran to date had 38 trainees, and I wouldn't recommend going above 40 people maximum for this type of course. In classes of around 20-25 people we are able to give students enough individual attention and they can work in 4 syndicates for the case study. Larger syndicates tend to be less effective, more syndicates than 4 means presentation times and feedback time increases and takes away from lecture time (meaning we would have to lengthen some course days and as the work is already quite intensive for students as you may remember, I like to avoid doing this).

Train-the-Trainer Courses with a live case study are six weeks in duration, and need to be run in two phases to allow for data collection in-between.

There are two options:

Option 1: Phase 1: four weeks, followed by a four to five week break for data collection, then phase 2: two weeks

Option 2: Phase 1: three weeks, followed by a four to five week break for data collection, then phase 2: three weeks

Option 1 allows for qualitative fieldwork to take place before quantitative fieldwork;

Option 2 (the Riga course) means we will conduct quantitative research before qualitative research.

The best way to decide between the two is to look at the research design for the case study and see which makes more sense: segmentation followed by a TAA deep-dive (as in Riga, this would be option 2) or a scoping phase followed by hypothesis testing (for cases where little is known about a given problem beforehand (making it harder to design quantitative research without scoping) or cases where the best Target Audience is relatively obvious and there is no need for a quantitative segmentation).

s.19(1)
s.20(1)(b)
s.20(1)(c)

Pre-course planning time is ideally 5-6 months, but it can be done in about 4 months if: (a) you have a venue (with accommodation and catering) rather than require us to arrange (and cost) this, and (b) you can agree on a case study relatively quickly, as this is what takes most time to prepare. I also need to contract the trainers as almost all of them work as academics or consultants, so the more lead time to get them booked in, the better!

In short, the most important questions for you to consider so I can be most accurate in my proposal:

1. Where would you like to run the course?
2. How many trainees will we have (give or take 5, i.e. 15-20..)
3. What dates are ideal for you?
4. Would you like me to cost a venue, catering and accommodation or will you arrange this? (I can send you a list of the requirements)
5. What (type of) case study would you like to run?

In the mean time I will start preparing an overview of the training package for you to share with your colleagues.

With kind regards,

On 24 Apr 2018, at 19:06, <MARK.PEEBLES@forces.gc.ca>
<MARK.PEEBLES@forces.gc.ca> wrote:

Hi

Life moves fast. I back-briefed my immediate superior, LCol Doug Allison (C'd), and he would like a synopsis of a proposal to run a TAA course such as what was run at

Regarding a potential course, our intent would be that a live case study would be conducted as part of the training, and that it would be a "Train the Trainer" course where the CAF would have proprietary use of the methodology. In terms of training audience, we are estimating a size of 20-25 personnel. Some of the training audience are anticipated to be defence scientists with social science backgrounds.

I would ask the synopsis of your proposal to include specifics of the training package you would offer. While I am well-versed in the training you provide, a synopsis of the training, the methodology and what the CAF would get at the end of the training would help with those who are not as familiar. As well, and indication of maximum/minimum training audience size, course duration and a cost

estimate would be most helpful. I have briefed LCol Allison, and he understands the dynamic of how the more logistical responsibility for the course we take on, the less costly the course would be and the less pre-course planning time you would require. Having said that, and estimate of the amount of pre-course planning time you would require would be appreciated.

I understand that this will likely be the first of a number of correspondences on this matter. My line is always open, and I welcome your feedback, questions and suggestions.

Best regards,

Mark

Major Mark A. Peebles

Public Affairs Officer, ADM Public Affairs
Department of National Defence / Government of Canada
mark.peebles@forces.gc.ca / Tel: 613-995-8871

Officier d'affaires publiques, SMA Affaires publiques
Ministère de la Défense nationale / Gouvernement du Canada
mark.peebles@forces.gc.ca / Tel: 613-995-8871

Facilities en Infra Requirements 2018 AAA Course

1. Ideally the location will be accessible via public transport (guest lecturers will be flying in and out so within a few hours from an international airport). If this is not possible we could look at having more principal trainers on the ground for the duration of the course and bring in fewer guests.
2. For 20-25 students, we will need:
 - a. A lecture room that:
 - i. Can accommodate 25 people comfortably with a table and chair for each person and with room at the back for staff (either 5 chairs or ideally 5 tables with chairs). Also ideal but not essential would be to have a room with a door to enter at the back of the room so lecturers can go in and out without disturbing the class.
 - ii. Has a projector and audio system for the lectures – accessible via a computer that we can put memory sticks into, or that we can plug into our own laptops (in the latter case it is important that the audio system can also be connected to the laptop)
 - iii. Has WiFi to play videos and show websites during the course (that students should be able to access simultaneously when we talk about social media and data analytics.
 - b. 4 syndicate rooms for student work near the main lecture room, each to accommodate 6-7 people comfortably with desks and chairs, i.e. enough space to work, with enough room for staff to join and help with syndicate work. Ideally each syndicate room has a projector and a printer. If a projector isn't possible they can work with flipcharts or whiteboards too (a projector or presentation screen helps when a group has to work together on a presentation). The printer can be substituted by a printing facility nearby or shared printers in the hallway.
 - c. Ideal but not essential: A room for the lecturers (5 people comfortably with desks and chairs) where we can keep our books, papers, exams, and print handouts if needed (this can again also be a printer nearby)
3. In terms of accommodation, it is easiest and cheapest for our staff to be able to stay on base, unless there is a good and reasonably priced hotel near the lecture facilities. We will need max 5 rooms; 2 to 3 for permanent teaching staff and temporary / guest lecturers will switch over. We are easy when it comes to accommodation so no special requests other than a room with an ensuite and good WiFi. We can bring towels etc. as long as we know what is and isn't provided. As we will work evenings to grade homework, adapt materials to the class progress etc., having internet in or near the accommodation is important.
4. Catering for breakfast, lunch and dinner for the trainees and the instructors.
5. Coffee and tea break facilities near the classroom/syndicate rooms

Materials for the students:

New since Riga is that the Methodology folder has since become a beautiful reader of which all students will receive a copy.

During our last 3-4 courses, we have in addition created a shared Box folder where we uploaded all lecture and case study materials for students daily. They can access reading materials here too, and add their own materials and work in progress. This shared drive has taken the place of the folders with printed handouts of all slides. Our students generally prefer this option, but is up to you what you would like (folders or a share drive. The latter saves a lot on materials and printing costs, but does require a good WiFi connection).

From: Thompson LCol RM@ADM(PA) DPAP@Ottawa-Hull
Sent: May 2, 2018 9:05 PM
To: Allison LCol DE@ADM(PA) DPAP@Ottawa-Hull; Kasper
CC@ADM(PA) DPAP@Ottawa-Hull
Cc: Trim KR (Contractor)@ADM(PA) DPAP@Ottawa-Hull
Subject: RE: Request for a proposal

Doug – ack and we will provide you with an iss for consideration.

Christina - for discussion.

My initial thoughts are to focus on an aspect of Transition.

RMT

LCol R. Martell Thompson

Head, Military Strategic Communications – Personnel and Legal Services
Canadian Armed Forces
martell.thompson@forces.gc.ca / Tel : 613-901-8812 / BB: 613-790-2743

Chef des affaires publiques - Communications stratégiques militaires - Personnel et services
juridiques
Ministère de la Défense nationale / Gouvernement du Canada

martell.thompson@forces.gc.ca/ Tél. : 613-901-8812 / BB: 613-790-2743

From: Allison LCol DE@ADM(PA) DPAP@Ottawa-Hull
Sent: May-02-18 2:37 PM
To: Thompson LCol RM@ADM(PA) DPAP@Ottawa-Hull <Martell.Thompson@forces.gc.ca>
Subject: FW: Request for a proposal

Martell,

Re-send. See below

D. Allison
LCol/Lcol
DG Public Affairs FD/DG Affaires publiques DF
Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et
Forces armées canadiennes
Douglas.Allison@forces.gc.ca / Tel : 613-944-3291 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC : 944-
3291

From: Allison LCol DE@ADM(PA) DPAP@Ottawa-Hull
Sent: April-25-18 9:20 AM

s.19(1)

To: Peebles Maj M@ADM(PA) DGPA@Ottawa-Hull <MARK.PEEBLES@forces.gc.ca>; Thompson LCol RM@ADM(PA) DPAPO@Ottawa-Hull <Martell.Thompson@forces.gc.ca>
Subject: FW: Request for a proposal

Mark,

Some follow up:

- 4. Would you like me to cost a venue, catering and accommodation or will you arrange this? (I can send you a list of the requirements)

I would like to see the list of requirements so that we can determine whether DPALC fits the need as a venue. As well, we can start doing some costing so as to get an accurate budget.

Martell,

Is there an issue that you folks at MPC have that would be helped by the sort of TAA course that Mark Peebles attended? We are looking at running a course and some options for a real time case/study analysis, and wonder if there is a way that we can help you folks with a vexing/immediate problem. Candidates would be guided through the process, and analysis/recommendations/results would be handed over to you folks.

Thoughts please.

D. Allison
LCol/Lcol
DG Public Affairs FD/DG Affaires publiques DF
Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et Forces armées canadiennes
Douglas.Allison@forces.gc.ca / Tel : 613-944-3291 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC : 944-3291

From:

Sent: April-24-18 7:46 PM

To: Peebles Maj M@ADM(PA) DGPA@Ottawa-Hull <MARK.PEEBLES@forces.gc.ca>; Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>

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The reason the case study and location matter is because I would need to obtain quotes for travel, data collection and an interview venue which form a significant portion of the cost of running a training course.

A0447548_2-000043

Class size also impacts the costs in two ways:

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s.19(1)

s.20(1)(b)

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With kind regards,

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I understand that this will likely be the first of a number of correspondences on this matter. My line is always open, and I welcome your feedback, questions and suggestions.

Best regards,

Mark

Major Mark A. Peebles

Public Affairs Officer, ADM Public Affairs

Department of National Defence / Government of Canada
mark.peebles@forces.gc.ca / Tel: 613-995-8871

Officier d'affaires publiques, SMA Affaires publiques
Ministère de la Défense nationale / Gouvernement du Canada
mark.peebles@forces.gc.ca / Tel: 613-995-8871

s.19(1)

From: [Peebles Maj M@ADMPA\)_DGPA@Ottawa-Hull](mailto:Peebles_Maj_M@ADMPA)_DGPA@Ottawa-Hull)
Sent: May 3, 2018 8:56 AM
To: [Allison LCol DE@ADM\(PA\)_DPAPO@Ottawa-Hull](mailto:Allison_LCol_DE@ADM(PA)_DPAPO@Ottawa-Hull)
Subject: TAA course infrastructure requirements
Attachments: 2018 AAA Course Requirements (Peebles).docx

Sir,

Attached is the list sent us with my comments inserted. NPB is not the 100% solution, but looks viable. Let me know when you want to discuss before approaching DPALC.\

Mark

Major Mark A. Peebles

Public Affairs Officer, ADM Public Affairs
Department of National Defence / Government of Canada
mark.peebles@forces.gc.ca / Tel: 613-992-4584

Officier d'affaires publiques, SMA Affaires publiques
Ministère de la Défense nationale / Gouvernement du Canada
mark.peebles@forces.gc.ca / Tel: 613-992-4584

Facilities en Infra Requirements 2018 AAA Course

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 - a. A lecture room that:
 - i. Can accommodate 25 people comfortably with a table and chair for each person and with room at the back for staff (either 5 chairs or ideally 5 tables with chairs). Also ideal but not essential would be to have a room with a door to enter at the back of the room so lecturers can go in and out without disturbing the class.
 - ii. Has a projector and audio system for the lectures – accessible via a computer that we can put memory sticks into, or that we can plug into our own laptops (in the latter case it is important that the audio system can also be connected to the laptop)
 - iii. Has WiFi to play videos and show websites during the course (that students should be able to access simultaneously when we talk about social media and data analytics.
 - b. 4 syndicate rooms for student work near the main lecture room, each to accommodate 6-7 people comfortably with desks and chairs, i.e. enough space to work, with enough room for staff to join and help with syndicate work. Ideally each syndicate room has a projector and a printer. If a projector isn't possible they can work with flipcharts or whiteboards too (a projector or presentation screen helps when a group has to work together on a presentation). The printer can be substituted by a printing facility nearby or shared printers in the hallway.
 - c. Ideal but not essential: A room for the lecturers (5 people comfortably with desks and chairs) where we can keep our books, papers, exams, and print handouts if needed (this can again also be a printer nearby)
3. In terms of accommodation, it is easiest and cheapest for our staff to be able to stay on base, unless there is a good and reasonably priced hotel near the lecture facilities. We will need max 5 rooms; 2 to 3 for permanent teaching staff and temporary / guest lecturers will switch over. We are easy when it comes to accommodation so no special requests other than a room with an ensuite and good WiFi. We can bring towels etc. as long as we know what is and isn't provided. As we will work evenings to grade homework, adapt materials to the class progress etc., having internet in or near the accommodation is important.
4. Catering for breakfast, lunch and dinner for the trainees and the instructors.
5. Coffee and tea break facilities near the classroom/syndicate rooms

Materials for the students:

New since Riga is that the Methodology folder has since become a beautiful reader of which all students will receive a copy.

During our last 3-4 courses, we have in addition created a shared Box folder where we uploaded all lecture and case study materials for students daily. They can access reading materials here too, and add their own materials and work in progress. This shared drive has taken the place of the folders with printed handouts of all slides. Our students generally prefer this option, but is up to you what you would like (folders or a share drive. The latter saves a lot on materials and printing costs, but does require a good WiFi connection).

From: [Allison LCol DE@ADM\(PA\).DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: May 3, 2018 9:04 AM
To: [Therault BGen JM@ADMPA\).DGPA@Ottawa-Hull](mailto:Therault.BGen.JM@ADMPA).DGPA@Ottawa-Hull)
Subject: RE: TAA Case study options

If this get's leaked then I know whodunit.

D. Allison
LCol/Lcol
DG Public Affairs FD/DG Affaires publiques DF
Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et
Forces armées canadiennes
Douglas.Allison@forces.gc.ca / Tel : 613-944-3291 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC : 944-3291

From: Theriault BGen JM@ADMPA) DGPA@Ottawa-Hull
Sent: May-02-18 3:23 PM
To: Peebles Maj M@ADMPA) DGPA@Ottawa-Hull <MARK.PEEBLES@forces.gc.ca>; Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: TAA Case study options

Gents,

Following up on our recent discussion about TAA crse, we should reflect on possible case studies.

Op Honour and attraction for recruiting are the two obvious options. However, I am wondering if we should not use this first opportunity (pilot) to address a comms problem. For instance, how to counter the habits of leaking info anonymously to the media might be an interesting behavioural changes challenge.

Thoughts? For discussion next week.

Sent from my BlackBerry 10 smartphone on the Rogers network.

s.19(1)

From: Peebles Maj M@ADMPA DGPA@Ottawa-Hull
Sent: May 4, 2018 9:42 AM
To: Therault BGen JM@ADMPA DGPA@Ottawa-Hull
Cc: [Allison LCol DE@ADM\(PA\)](mailto:Allison LCol DE@ADM(PA)) DPAPO@Ottawa-Hull
Subject: Potential for DPALC to suppt TAA course
Attachments: 2018 AAA Course Requirements (Peebles).docx

Sir,

For your consideration. LCol Allison and I are looking at the possibility of DPALC supporting the TAA course we wish to run over the Oct-Nov period of 2018. In our estimation, it provides potentially the most cost-effective venue to run subj course due to its proximity to the majority of potential students, among other factors. [redacted] provided a list of infrastructure/logistical requirements for the course, which LCol Allison and I have reviewed and on which I have provided comments (inserted in the doc). Key unknowns are WiFi availability within the classroom; amount of classrooms/syndicate/staff rooms available; as well as proximity between these rooms. One thing not mentioned in the document, but which will need to be considered, is transport to and from the opinion research facility which will likely be sub-contracted by [redacted] s company.

I would ask that COS ADM (PA) be approached IOT get his perspective on DPALC's ability to support subj course during those timelines in light of the requirements identified. Please let me know if you have any questions, suggestions, or further guidance in this regard.

V/r,

Major Mark A. Peebles

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Ministère de la Défense nationale / Gouvernement du Canada
mark.peebles@forces.gc.ca / Tel: 613-992-4584

s.19(1)

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: June 25, 2018 5:21 PM
To:
Subject: Fw: Case study proposal
Attachments: Marketing and Attraction - Female Applicants; RE: Recruitment Marketing Analytics Dashboard - August 2017 - ADM(PA); Female occs of interest - 25 Jun 18.pdf

Have a look at these and let me know if they help

Sent from my BlackBerry 10 smartphone on the Bell network.

From: Mainguy LCol DS@CFRG@Borden <DAN.MAINGUY@forces.gc.ca>
Sent: Monday, June 25, 2018 4:34 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Subject: RE: Case study proposal

Doug,

Let me know if this helps. The last pdf deck extract tells a good story of where women tend to migrate vs where we have the largest occs to be filled. Even if we fill those occs that are most commonly desired by women, with women, we won't reach our 25.1% CAF representation by 2016. We need to find women who might be interested in some of the occs where we have a large number to fill (predominantly operator trades, tech and engineering).

Let me know if you need more.

Dan

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: June 25, 2018 12:44 PM
To: Mainguy LCol DS@CFRG@Borden <DAN.MAINGUY@forces.gc.ca>
Subject: FW: Case study proposal

Dan,

We are doing some scoping for the case study that you discussed with Maj Peebles. The contractor has some questions below. Is there anything you can point her to to help?

D. Allison
LCol/Lcol
DG Public Affairs FD/DG Affaires publiques DF
Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et Forces armées canadiennes
Douglas.Allison@forces.gc.ca / Tel : 613-944-3291 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC : 944-3291

s.19(1)

From:

Sent: June-22-18 5:29 PM

To: Peebles Maj M@ADMPA) DGPA@Ottawa-Hull <MARK.PEEBLES@forces.gc.ca>

Cc: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>

Subject: Re: Case study proposal

Dear Mark,

That sounds like a very good option.

I'm just back home from the course we ran this week (in a wifi-deprived location!) and I just wanted to send you a quick reply to say I chatted to a colleague about this briefly and we think this could work very well indeed.

I can scope a course using this example and will start work on that straight away so you can get a good idea of what it would look like.

Would it be possible (not urgent- this is not for scoping just to start thinking on our end!) to get some insight into past campaigns to recruit women (i.e. an overview list to facilitate a public domain search) and perhaps some statistics on trends when it comes to gender in the Canadian Armed Forces? Just top line of occupations available, the absolute numbers of staff within those and the percentage of women? This is to get an idea of what numbers we are trying to recruit and relative differences between professions that are 'easy' and 'hard' to recruit for.

I'll think through the details of course, but thus far we cannot think of any significant reasons this shouldn't be a great topic.

Will we have women on the course as well?

Kind regards,

Sent from my iPhone

On 20 Jun 2018, at 20:44, <MARK.PEEBLES@forces.gc.ca> <MARK.PEEBLES@forces.gc.ca> wrote:

Hello

I believe we have a case study for consideration regarding our intended course. Keeping in mind the factors we discussed such as proximity, narrowness and ethical considerations, I would ask your thoughts on the following case study:

The Canadian Armed Forces needs to recruit more women, writ-large. This is a high priority for the Government of Canada. While certain occupations (health-, logistics- and administration-related) have healthy numbers of women, others have many fewer women than is desirable. In fact, some of the former occupations receive more female applicants than positions available while the latter occupations receive far too few applications to make an appreciable difference in gender balance.

Further, the Royal Canadian Navy faces a number of occupations which are "distressed" – they don't have as many people as they need – male or female – and aren't recruiting enough to rectify the problem. A handful of occupations are both "distressed" and have very few females coming through the door to join them. The Royal Canadian Navy has identified Sonar Operators ([link](#) to occupation information)

as a priority. The behaviour at issue in this case study, then, is young women not coming through the doors of recruiting centres to become sonar operators.

I would propose a case study that would aim to have more women in the Greater Toronto Area (GTA, [link](#) for definition of the area discussed) go to recruiting centres to become sonar operators. This does not need to be narrowed down by visible minority, IMO; all women between the ages of 18-30 in the GTA could be included for consideration but I would have your feedback on it. The region is relatively close to where we would do the course in Gatineau, but has a large enough population size that we should be able to do quantitative research relatively efficiently.

What are your thoughts? Any suggestions on this? I welcome your feedback.

Best regards,

Mark

Major Mark A. Peebles

Public Affairs Officer, ADM Public Affairs
Department of National Defence / Government of Canada
mark.peebles@forces.gc.ca / Tel: 613-992-4584

Officier d'affaires publiques, SMA Affaires publiques
Ministère de la Défense nationale / Gouvernement du Canada
mark.peebles@forces.gc.ca / Tel: 613-992-4584

Ahmad A@ADM(PA) DPAPI@Ottawa-Hull

From: Leslie LCdr PDC@CFRG@Borden
Sent: October 18, 2017 10:52 AM
To: Owens LCol SM@CFRG@Borden; Mainguy LCol DS@CFRG@Borden; WOLANSKI LCol UJF@CFRG@Borden
Cc: Ryan Maj RJ@CFRG@Borden; Hendricks Capt JD@CFRG@Borden; Raby LCol SM@CFRG@Borden
Subject: Marketing and Attraction - Female Applicants
Attachments: Victoria ranked best Canadian city to be a woman.docx; The Best Cities.docx

Col Demers asked me several weeks ago, to look into some of the reasons why PACREG falls behind in its ability increase female enrolments into the CAF. Although the following articles may not be a causation, there is definitely a correlation that makes it difficult to attract women from this region to join our organization.

I think the interesting points from the articles, are the criteria that the Canadian Centre for Policy Alternatives (CCPA) use to base their ranking on:

- access to economic and personal security
- education
- health
- positions of leadership

Victoria, in particular, is an interesting demographic, because it is the only city out of Canada's 25 biggest cities, where more women are employed than men, and women account for nearly half of all senior managers and elected officials, including their Mayor. The other factor for Victoria specifically, is that it has a very low recruitable population, in the 19-30 yr old demographic...and, it is really, really nice there!

On the flip side, we may want to have a more concentrated effort in Windsor!

City/Ranking	AOR
1 Victoria 5 Vancouver 13 Kelowna 14 Abbotsford-Mission	PACIFIC
17 Winnipeg 18 Edmonton 19 Saskatoon 21 Regina 22 Calgary	PRAIRIES & THE NORTH
3 Hamilton 10 Toronto 12 London 16 St. Catharines-Niagara 20 Kitchener-Cambridge-Waterloo 23 Barrie 24 Oshawa 25 Windsor	SOUTHERN ONTARIO
2 Gatineau	

4 Kingston 11 Ottawa	NEON
6 Quebec City 8 Sherbrooke 15 Montreal	QUEBEC
7 St. John's 9 Halifax	ATLANTIC

LCdr | capc Patrick D.C. Leslie

R3 Customer Relations Management (CRM)

Canadian Forces Recruiting Group Headquarters

Canadian Armed Forces

Patrick.Leslie@forces.gc.ca / Tel: 705-424-1200 Ext 3788 / CSN: 270-3788

Quartier général du Groupe de recrutement des Forces canadiennes

Forces armées canadiennes

Patrick.Leslie@forces.gc.ca / Tél: 705-424-1200 Ext 3788 / RCCC: 270-3788

The Best (And Worst) Canadian Cities To Live In If You're A Woman



Chatelaine

Sarah Boesveld 1 day ago

Come for the botanical gardens and fresh ocean air, stay for the high levels of employment and strong showing of women in leadership.

For the third year in a row, Victoria has been ranked the best place to be a woman in Canada by the Canadian Centre for Policy Alternatives.

The CCPA's study, published Tuesday, looked at the nation's 25 largest communities and assessed how much women are paid compared to men, how employed they are compared to men, how many women are in leadership roles (both in politics and in the workplace), how healthy they are and how safe they feel (the report even drew data from *The Globe and Mail's* Unfounded series on sexual assaults).

Victoria — the only city on this list with a woman in the mayor's chair — leads the pack, but it's also slipping: Its wage gap has widened since last year.

Canada has a self-proclaimed feminist prime minister, and the CCPA's report notes that “the government is starting more regularly to ask questions about how their policies and programs impact men and women in distinct ways.” But the study doesn't really show a lot of progress in women's lives, says CCPA senior researcher and study author Kate McInturff. “Having done this for four years now, what's become clear is we've really stalled,” she says. “We've really stalled on the wage gap, we've stalled on the employment gap, we've stalled on levels of sexual assault ... we're just not seeing a lot of progress in closing those gaps.”

Here are some more takeaways:

- Hamilton climbed from the 13th spot last year to the third. This was mostly thanks to an increase in higher-ranking and better-paying jobs for women — not in politics, but in workplaces at large. “That is unfettered good news that more women are making it into management ranks,” McInturff says. Hamilton's manufacturing sector has been on the decline in recent years, while more young professionals have moved in. That might affect the rankings, McInturff says, though she'll have a better sense of that in next year's report once she can incorporate Census data.
- Edmonton and Calgary have some of the lowest levels of poverty on this list, but the highest wage gaps. Men there still tend to work in higher-paid job sectors, despite the drop in the price of

oil over the past few years. There's been no subsequent rise in income for women in their lines of work, which tend to be hospitality and retail. "We've seen what happens when you have a commodity bust – a lot of women lose those jobs," says McInturff.

- For the second straight year, Gatineau has the smallest wage gap in the country, with women earning 14 percent less than men. The smaller gap is attributed to the large number of public sector jobs in the city — research shows that wage gaps are smaller under public sector employers. Abbotsford-Mission, meanwhile, has the biggest wage gap of all 25 cities on the list, with women earning 44 percent less than men.

- Windsor, Ont., bottoms out the list once again, due to its low employment rates for both men and women, low wages and high poverty rates. But there are some bright spots in the southernmost Canadian city, which shares its border with Detroit. The report highlights *Her Windsor*, a new documentary made by women in the area, talking about their challenges but also their strength in being a close-knit, small city. McInturff says she always gives a shout-out to organizations on the ground who see the gaps and are working to close them. "It's like, 'Let's have Windsor be at the top next year. Let's connect each other and figure out what we need to do to make this better.'"

City/Ranking	AOR
1 Victoria 5 Vancouver 13 Kelowna 14 Abbotsford-Mission	PACIFIC
17 Winnipeg 18 Edmonton 19 Saskatoon 21 Regina 22 Calgary	PRAIRIES & THE NORTH
3 Hamilton 10 Toronto 12 London 16 St. Catharines-Niagara 20 Kitchener-Cambridge-Waterloo 23 Barrie 24 Oshawa 25 Windsor	SOUTHERN ONTARIO
2 Gatineau 4 Kingston 11 Ottawa	NEON
6 Quebec City 8 Sherbrooke 15 Montreal	QUEBEC
7 St. John's 9 Halifax	ATLANTIC

FY 2017-2018 - Advertising Campaigns

3 ad campaigns - 100+ Jobs, Priority Occupations, and Women & Diversity

16 different tactics - Facebook, YouTube, Search Engine Marketing (SEM), Cinema, job search sites, and more.

As of October 25, all three campaigns generated a total of:

Total impressions:	93,079,061
Total clicks:	3,205,758
Video views:	5,550,124

100+ Jobs Campaign							
Date	Campaign	Tactic	Type	Link	Impressions	clicks	Video Views
Jun 12 to Jul 31	100+ Jobs	Facebook	Video	Awareness/ no link	20,723,730	106,041	1,994,516
Jun 12 to Jul 9	100+ Jobs	YouTube	Video	Awareness/ no link	7,660,831	7,798	1,100,000
Sep-28	100+ Jobs	Snapchat	lens	Awareness/ no link	4,492,984	2,031,295	
Aug 21 to Dec 10	100+ Jobs	YouTube	Video	Campaign page: The CAF is Hiring	7,536,876	6,675	2,328,869
Oct 10 to Mar 26	100+ Jobs	Facebook	Video	Campaign page: The CAF is Hiring	2,252,462	61,223	126,739
Jul 17 to Mar 31	100+ Jobs	SEM	Paid search	~Campaign page: The CAF is Hiring ~Apply now page ~Job specific pages ~1000+ key words	8,516,657	413,891	
100+ Jobs Sub-total:					51,183,540	2,626,923	5,550,124

*total reach: The total # of unique users who have swiped, used, or viewed

Priority Occupations Campaign							
Oct 2 to Dec 24	Priority Occ.	Facebook	Static, and carousel	Driving to specific jobs on canada.ca	4,137,684	86,070	
Aug 4 - Jan 28	Priority Occ.	Job boards	Job posts	~Driving to specific jobs on canada.ca ~Apply now page	34,942,742	452,412	
PO Sub-total:					39,080,426	538,482	

*included job views as clicks

Diversity Campaign							
Sept 18 - Oct 1	Women	PCO FB+IG	Static	Campaign page: The CAF is Hiring	2,762,413	39,434	
Oct 23 to Dec 31	Women	Facebook	Static	Campaign page: The CAF is Hiring	52,682	919	
Women Sub-total:					2,815,095	40,353	

Grand total:					93,079,061	3,205,758	5,550,124
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Ahmad A@ADM(PA) DPAPI@Ottawa-Hull

From: Lanteigne P@ADM(PA) DMA@Ottawa-Hull
Sent: November 2, 2017 10:46 AM
To: Mainguy LCol DS@CFRG@Borden; Owens LCol SM@CFRG@Borden
Cc: Leslie LCol PDC@CFRG@Borden; Hurley Capt MW@CFRG@Borden; Smith
BMJ@ADM(PA) DMA@Ottawa-Hull
Subject: RE: Recruitment Marketing Analytics Dashboard - August 2017 - ADM(PA)
Attachments: CFRG Nov 2017.xlsx; Previous Page Flow Report for Canada.ca - Mon. 17 Jul. 2017 -
Thu. 2 Nov. 2017 - Chart.pdf; Previous Page Flow Report for Canada.ca - Mon. 17 Jul.
2017 - Thu. 2 Nov. 2017 - List.pdf

Good morning Dan and CFRG,

Please find attached a breakdown of all three campaigns and tactics that have been running so far, including dates, and links. Most of our ads are driving to the campaign page located on Canada.ca: The Canadian Armed Forces is Hiring.

The job boards (Indeed, Monster, Workopolis, etc), the Facebook Carousel, and SEM can drive to job specific pages, or the Apply now page. Search Engine Marketing (SEM) has 38 brands groups associated with creatives, and +1000 key words.

You may also find attached two previous page flow report that can help you shed light on the path taken to reach the Apply now page on Canada.ca.

In total, we have three campaigns, 16 tactics, and 240 creatives running since June 12, and driving traffic to our sites since July 17.

Hopefully this helps a little,

Patricia Lanteigne

Agente en marketing, Sous-ministre adjoint des Affaires publiques
Ministère de la Défense nationale / Gouvernement du Canada
Patricia.lanteigne@forces.gc.ca
Bureau : 819-939-9383

Marketing Officer, Assistant Deputy Minister of Public Affairs
Department of National Defence / Government of Canada
Patricia.lanteigne@forces.gc.ca
Office : 819-939-9383

From: Mainguy LCol DS@CFRG@Borden
Sent: November-02-17 10:13 AM
To: Owens LCol SM@CFRG@Borden <Soo.Owens@forces.gc.ca>; Smith BMJ@ADM(PA) DMA@Ottawa-Hull
<BRIGITTE.SMITH@forces.gc.ca>
Cc: Leslie LCol PDC@CFRG@Borden <PATRICK.LESLIE@forces.gc.ca>; Hurley Capt MW@CFRG@Borden
<Matthew.Hurley@forces.gc.ca>; Lanteigne P@ADM(PA) DMA@Ottawa-Hull <PATRICIA.LANTEIGNE@forces.gc.ca>
Subject: RE: Recruitment Marketing Analytics Dashboard - August 2017 - ADM(PA)

Brigitte,

Are we able to see the content and call to action of the ads that were in play during the period supporting the dashboard? I'm trying to determine cause and effect more directly. If I know that you are placing banner ads and other placements that relate to 8 specific Priority occupations and you are seeing an increased click-through rate from those ads to the occupation pages of those 8 occs, I would love to know which occs you are displaying in your ads so that we can monitor application in those occs and try to draw correlation and propose there to be causation if the numbers support it and all other variables remain relatively stable.

Are you able to provide an indication of what specific messaging is in play during these dashboard reviews? Is there a defined unique occ message that can be followed? For example – if the ad is a "Health Services" ad, it will not be easy to connect this to medical officer applications. But, if there's an ad for army communications information systems specialists, then we could look at those ads, the click-through rate to that post and whether it generated applications in our system.

Are we able to work together to see if there's an ability to connect these dots??

Thanks

Dan

From: Owens LCol SM@CFRG@Borden

Sent: November-02-17 9:49 AM

To: Smith BMJ@ADM(PA) DMA@Ottawa-Hull; Mainguy LCol DS@CFRG@Borden

Cc: Leslie LCdr PDC@CFRG@Borden; Hurley Capt MW@CFRG@Borden; Lanteigne P@ADM(PA) DMA@Ottawa-Hull

Subject: RE: Recruitment Marketing Analytics Dashboard - August 2017 - ADM(PA)

Thanks for including me in the correspondence. Agree with Dan that a more meaningful analysis to inform and shape marketing efforts is essential. Please let me know if there is a breakthrough in the ability to carry out this path analysis to the apply button. Such data would be helpful as part of our metrics.

Matt: FYI to be included in your Analytics Plan Service Paper. For further discussion.

LCol S.M. Owens

Senior Staff Officer Policy and Doctrine | Canadian Forces Recruiting Group Headquarters

Canadian Armed Forces

Soo.owens@forces.gc.ca | Tél : 705-424-1200 local 3086 | CSN: 270-3086 | FAX: 705-423-7926

Government of Canada

Officier supérieure d'état-major - Politique et doctrine | Quartier général du Group du recrutement des Forces Canadiennes

Forces Armées canadiennes

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Gouvernement du Canada

From: Smith BMJ@ADM(PA) DMA@Ottawa-Hull

Sent: November-02-17 9:32 AM

To: Mainguy LCol DS@CFRG@Borden <DAN.MAINGUY@forces.gc.ca>; Owens LCol SM@CFRG@Borden

<Soo.Owens@forces.gc.ca>

Cc: Leslie LCdr PDC@CFRG@Borden <PATRICK.LESLIE@forces.gc.ca>; Hurley Capt MW@CFRG@Borden

<Matthew.Hurley@forces.gc.ca>; Lanteigne P@ADM(PA) DMA@Ottawa-Hull <PATRICIA.LANTEIGNE@forces.gc.ca>

Subject: RE: Recruitment Marketing Analytics Dashboard - August 2017 - ADM(PA)

Dan, we have some of the stats on where the person landed from. We have some of the path information and where then dropped off. I doubt we have the ability to see each individual's path from ad to apply button but as you recall from our web meeting, it's something they are working on.

It will be easier when we are only using one server. Right now, Quebec still points to forces.ca and 2 applications (find a recruiter and find a job) are also on forces.ca. This causes a break in the link and we can't follow the user all the way through.

Merci,
Brigitte Smith

Gestionnaire, Publicité et marketing
Sous-ministre adjoint (affaires publiques) Défense nationale, Gouvernement du Canada
Brigitte.Smith@forces.gc.ca Tel 819-939-9464, BlackBerry 613-854-4427

Manager, Advertising and marketing
Assistant Deputy Minister (Public Affairs) National Defence, Government of Canada
Brigitte.Smith@forces.gc.ca Tél 819-939-9464, BlackBerry 613-854-4427

45 blvd sacré-cœur, Gatineau, Québec K1A 0K2

From: Mainguy LCol DS@CFRG@Borden
Sent: November-01-17 6:42 PM
To: Owens LCol SM@CFRG@Borden <Soo.Owens@forces.gc.ca>; Smith BMJ@ADM(PA) DMA@Ottawa-Hull <BRIGITTE.SMITH@forces.gc.ca>
Cc: Leslie LCdr PDC@CFRG@Borden <PATRICK.LESLIE@forces.gc.ca>; Hurley Capt MW@CFRG@Borden <Matthew.Hurley@forces.gc.ca>; Lanteigne P@ADM(PA) DMA@Ottawa-Hull <PATRICIA.LANTEIGNE@forces.gc.ca>
Subject: FW: Recruitment Marketing Analytics Dashboard - August 2017 - ADM(PA)
Importance: High

Soo / Brigitte,

We need to use this information and dissect the data, comparing it to the online application activity.

1. Does an ad lead to an application?
2. I know that the analytics are strong enough to link a paid digital ad to an arrival on the page the ad refers the reader to. Can we follow that arrival to an actual apply now button selection? Essentially determining causation and not merely a non-linear correlation.
3. I know that we've had a huge upswing in online applications over the last 2 – 3 months (1,000's over normal historic figures). Can we find out where the person landed and how they got to where they landed (ie – via an online ad, generic search, favorite page, etc) before the pressed apply now?

Dan

From: Lanteigne P@ADM(PA) DMA@Ottawa-Hull
Sent: November-01-17 1:40 PM
To: Mainguy LCol DS@CFRG@Borden; Leslie LCdr PDC@CFRG@Borden; Grant Capt IJG@CFRG@Borden
Cc: Kavanagh SA@ADM(PA) DMA@Ottawa-Hull; Smith BMJ@ADM(PA) DMA@Ottawa-Hull
Subject: Recruitment Marketing Analytics Dashboard - August 2017 - ADM(PA)

Good afternoon,

Please find attached the Recruitment Marketing Analytics Dashboard for the month of August.

Let me know if you have any questions.

Regards

Patricia Lanteigne
Agente en marketing, Sous-ministre adjoint des Affaires publiques
Ministère de la Défense nationale / Gouvernement du Canada
Patricia.lanteigne@forces.gc.ca

Patricia Lanteigne

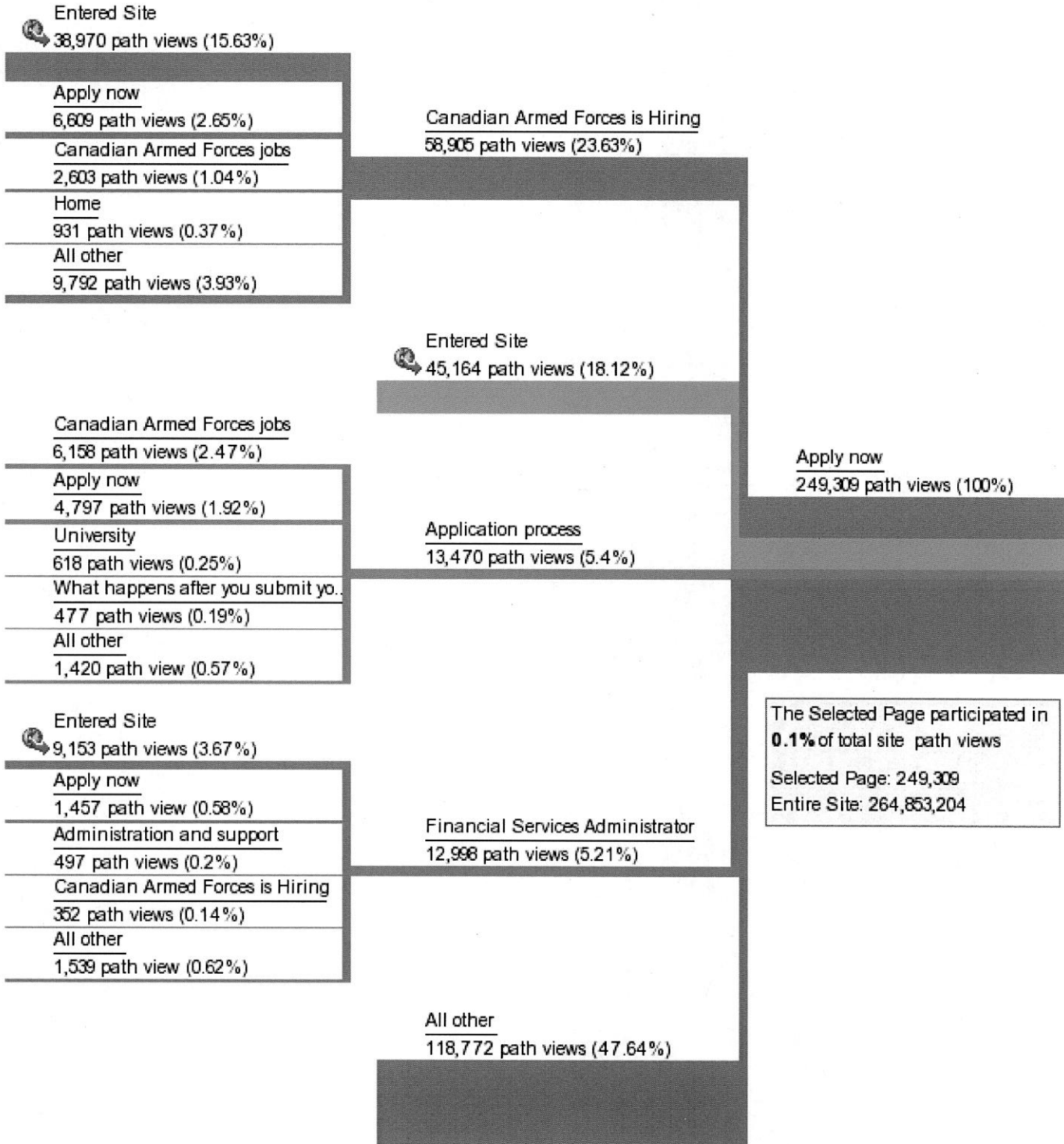
Marketing Officer, Assistant Deputy Minister of Public Affairs / DGMEC
Department of National Defence / Government of Canada
Government of Canada
Patricia.lanteigne@forces.gc.ca

Previous Page Flow Report

Mon. 17 Jul. 2017 - Thu. 2 Nov. 2017

Report Type: Graphical
 Filter: All Paths

Selected Page: Apply now
 2nd level branches: 5
 3rd level branches: 5



Previous Page Flow Report

Report Suite: Canada.ca

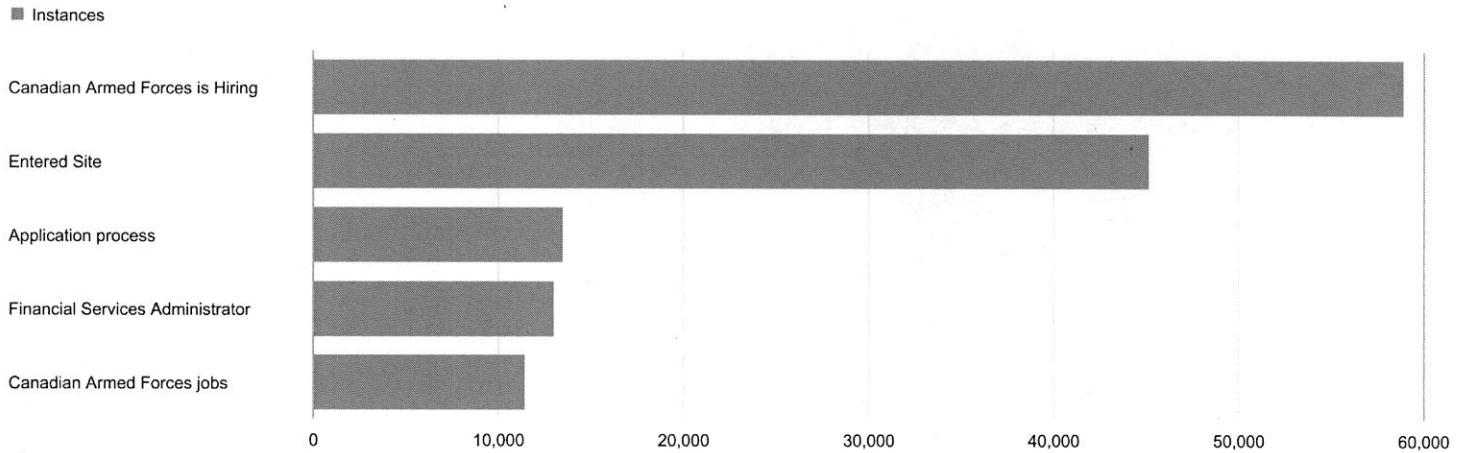
Date: Mon. 17 Jul. 2017 - Thu. 2 Nov. 2017

Segment: All Visits (No Segment)



Report Type: Tabular
 Filter: All Paths

Selected Page: Apply now
 Percent Shown as: Number



Previous Page Flow Report | All Visits (No Segment) | Mon. 17 Jul. 2017 - Thu. 2 Nov. 2017 | Graph generated by Adobe Analytics at 10:17 AM EDT, 2 Nov 2017

Apply now

Previous Pages	Instances	Percent
1. Canadian Armed Forces is Hiring	58,905	23.6%
2. Entered Site	45,164	18.1%
3. Application process	13,470	5.4%
4. Financial Services Administrator	12,998	5.2%
5. Canadian Armed Forces jobs	11,416	4.6%
6. Health Care Administration Officer	5,962	2.4%
7. Infantry Soldier	5,789	2.3%
8. Cook	5,482	2.2%
9. Career options	4,356	1.7%
10. University	3,924	1.6%
11. Pilot	3,756	1.5%
12. College	3,134	1.3%
13. Full-time or part-time jobs	3,113	1.2%
14. Supply Technician	3,016	1.2%
15. Postal Clerk	2,763	1.1%
16. Military Police	2,675	1.1%
17. Medical Officer	2,637	1.1%
18. Medical Technician	2,591	1.0%
19. Marine Technician	2,546	1.0%
20. Intelligence Officer	2,324	0.9%
21. Army Communication and Information Systems Specialist	2,102	0.8%
22. Signals Officer	2,040	0.8%
23. Human Resources Administrator	1,928	0.8%
24. Mobile Support Equipment Operator	1,924	0.8%
25. Vehicle Technician	1,560	0.6%
26. Nursing Officer	1,449	0.6%
27. Armoured Soldier	1,427	0.6%
28. Graduate programs	1,274	0.5%
29. Logistics Officer	1,225	0.5%
30. Artillery Soldier	1,202	0.5%

Previous Page Flow Report

Report Suite: Canada.ca

Date: Mon. 17 Jul. 2017 - Thu. 2 Nov. 2017

Segment: All Visits (No Segment)



Apply now

Previous Pages	Instances	
31. Weapons Engineering Technician	1,137	0.5%
32. Firefighter	1,137	0.5%
33. Military Police Officer	1,111	0.4%
34. Dental Technician	1,101	0.4%
35. Avionics System Technician	952	0.4%
36. Page Not Found	923	0.4%
37. Steward	890	0.4%
38. Air Combat Systems Officer	793	0.3%
39. Jobs in national security and defence	778	0.3%
40. Dental Officer	763	0.3%
41. Electronic-Optronics Technician - Land	753	0.3%
42. Electrical and Mechanical Engineering Officer	750	0.3%
43. Legal Officer	749	0.3%
44. Intelligence Operator	729	0.3%
45. Infantry Officer	707	0.3%
46. Medical Assistant	700	0.3%
47. Public Affairs Officer	673	0.3%
48. Basic search	600	0.2%
49. Social Work Officer	598	0.2%
50. What happens after you submit your application – Aptitude test	569	0.2%
51. Bioscience Officer	533	0.2%
52. Home	530	0.2%
53. Combat Engineer	526	0.2%
54. Find a job	503	0.2%
55. Sonar Operator	489	0.2%
56. Aerospace Engineering Officer	477	0.2%
57. Construction Engineering Officer	447	0.2%
58. Frequently Asked Questions	419	0.2%
59. Aerospace Control Officer	405	0.2%
60. Imagery Technician	401	0.2%
61. Pharmacy Officer	387	0.2%
62. Naval Combat Information Operator	380	0.2%
63. Medical Laboratory Technologist	377	0.2%
64. Paid education	365	0.1%
65. National Defence	360	0.1%
66. Naval Communicator	351	0.1%
67. Engineer Officer	349	0.1%
68. Chaplain	340	0.1%
69. Electrical Distribution Technician	333	0.1%
70. Weapons Technician – Land	331	0.1%
71. Postuler Maintenant	325	0.1%
72. Aviation Systems Technician	321	0.1%
73. Communications and Electronics Engineering (Air) Officer	316	0.1%
74. Boatswain	307	0.1%
75. Armour Officer	301	0.1%
76. Aircraft Structures Technician	294	0.1%
77. Paid education and other benefits	288	0.1%
78. Construction Technician	284	0.1%

Previous Page Flow Report

Report Suite: Canada.ca

Date: Mon. 17 Jul. 2017 - Thu. 2 Nov. 2017

Segment: All Visits (No Segment)



Apply now

Previous Pages	Instances	
79. Materials Technician	281	0.1%
80. Personnel Selection Officer	269	0.1%
81. Geomatics Technician	265	0.1%
82. Aerospace Telecommunication and Information Systems Technician	263	0.1%
83. Biomedical Electronics Technologist	261	0.1%
84. Canadian Forces Aboriginal Entry Program	261	0.1%
85. Water, Fuels and Environmental Technician	243	0.1%
86. Communicator Research Operator	239	0.1%
87. Training Development Officer	228	0.1%
88. Aerospace Control Operator	219	0.1%
89. Navy, Army or Air Force	214	0.1%
90. Naval Electronic Sensor Operator	211	0.1%
91. Plumbing and Heating Technician	204	0.1%
92. Maritime Surface and Sub-surface Officer	200	0.1%
93. Contact us	198	0.1%
94. National security and defence	194	0.1%
95. Electrical Generating Systems Technician	189	0.1%
96. Officer or Non-Commissioned Member	187	0.1%
97. Ammunition Technician	186	0.1%
98. Refrigeration and Mechanical Systems Technician	180	0.1%
99. Traffic Technician	173	0.1%
100. Fields of work	164	0.1%
101. What happens after you submit your application – Enrolment	164	0.1%
102. Physiotherapy Officer	162	0.1%
103. Medical Radiation Technologist	156	0.1%
104. Canadian Armed Forces	142	0.1%
105. Training	138	0.1%
106. Artillery Officer	135	0.1%
107. Life in the military	133	0.1%
108. Air Weapons Systems Technician	133	0.1%
109. Airborne Electronic Sensor Operator	130	0.1%
110. Naval Combat Systems Engineering Officer	129	0.1%
111. Basic training	128	0.1%
112. Marine Systems Engineering Officer	118	0.0%
113. Women in Force Program	106	0.0%
114. Benefits for CAF members	101	0.0%
115. What happens after you submit your application – Medical exam and fitness test	101	0.0%
116. Training for military members	98	0.0%
117. Health care	92	0.0%
118. Meteorological Technician	92	0.0%
119. Jobs and the workplace	91	0.0%
120. Public service jobs	81	0.0%
121. Instructions	74	0.0%
122. Military Pay	65	0.0%
123. Public service and military	63	0.0%
124. Departments and agencies	60	0.0%
125. Service commitment in the CAF	59	0.0%
126. Combat Specialists	57	0.0%

Previous Page Flow Report

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Apply now

Previous Pages	Instances	
127. What happens after you submit your application – Interview	53	0.0%
128. Information for families	53	0.0%
129. Musician	53	0.0%
130. Other specialty occupations	49	0.0%
131. Post-Secondary Recruitment	49	0.0%
132. All services	49	0.0%
133. Summer training programs	46	0.0%
134. Administration and support	44	0.0%
135. Mobile centre	44	0.0%
136. What happens after you submit your application – Reliability screening	41	0.0%
137. Canadian Army implements an expedited enrollment process for its Primary Reserve Force	40	0.0%
138. Officier du développement de l'instruction	39	0.0%
139. My Account for Individuals	38	0.0%
140. Government of Canada jobs	38	0.0%
141. Programs for Indigenous peoples	37	0.0%
142. Engineers	36	0.0%
143. Wildfires in British Columbia	34	0.0%
144. Exit Survey	34	0.0%
145. Public protection	34	0.0%
146. Canada.ca	34	0.0%
147. Operating Room Technician	33	0.0%
148. Website Survey	32	0.0%
149. Technicians	32	0.0%
150. Service Canada	31	0.0%
151. Aboriginal Leadership Opportunities Year	29	0.0%
152. Military education and training	27	0.0%
153. GC Jobs	27	0.0%
154. Marine Engineer	25	0.0%
155. Education and training benefits	25	0.0%
156. Housing benefits	25	0.0%
157. Family benefits	23	0.0%
158. Air and ship's crew	22	0.0%
159. Get to know your Canadian Armed Forces	22	0.0%
160. Services and benefits for the military	19	0.0%
161. Les Forces armées canadiennes embauchent!	19	0.0%
162. Employment Insurance benefits	19	0.0%
163. Access My Service Canada Account	19	0.0%
164. Youth and student employment	17	0.0%
165. Telecommunications	16	0.0%
166. Canada Revenue Agency	16	0.0%
167. Internet reporting service	16	0.0%
168. Moving and relocation	15	0.0%
169. Emplois dans les Forces armées canadiennes	15	0.0%
170. Military colleges	15	0.0%
171. Terms and Conditions	15	0.0%
172. Treaties, laws and regulations	14	0.0%
173. My Service Canada Account	14	0.0%
174. How government works	13	0.0%

Previous Page Flow Report

Report Suite: Canada.ca

Date: Mon. 17 Jul. 2017 - Thu. 2 Nov. 2017

Segment: All Visits (No Segment)



Apply now

Previous Pages	Instances	
175. Public pensions	13	0.0%
176. Starting a business	12	0.0%
177. Profiles	12	0.0%
178. Canadian Army Reserve Armouries across Canada get set to welcome the public	12	0.0%
179. Thank you	12	0.0%
180. Pensions and retirement	12	0.0%
181. Youth	10	0.0%
182. Non-Commissioned Member training	10	0.0%
183. Benefits	9	0.0%
184. Accueil	9	0.0%
185. Payroll	9	0.0%
186. Hull Technician	9	0.0%
187. Officer training	9	0.0%
188. The Women in Force Program, a new Canadian Armed Forces initiative for women	9	0.0%
189. How to apply	8	0.0%
190. Bill C-6 Receives Royal Assent	8	0.0%
191. Social media	8	0.0%
192. CRA login services	8	0.0%
193. Job opportunities	8	0.0%
194. Income tax	8	0.0%
195. Contact	7	0.0%
196. Hiring and managing employees	7	0.0%
197. Workplace standards	7	0.0%
198. Eligibility requirements	7	0.0%
199. Public Service Commission	6	0.0%
200. Drafting and Survey Technician	6	0.0%
Total	249,309	

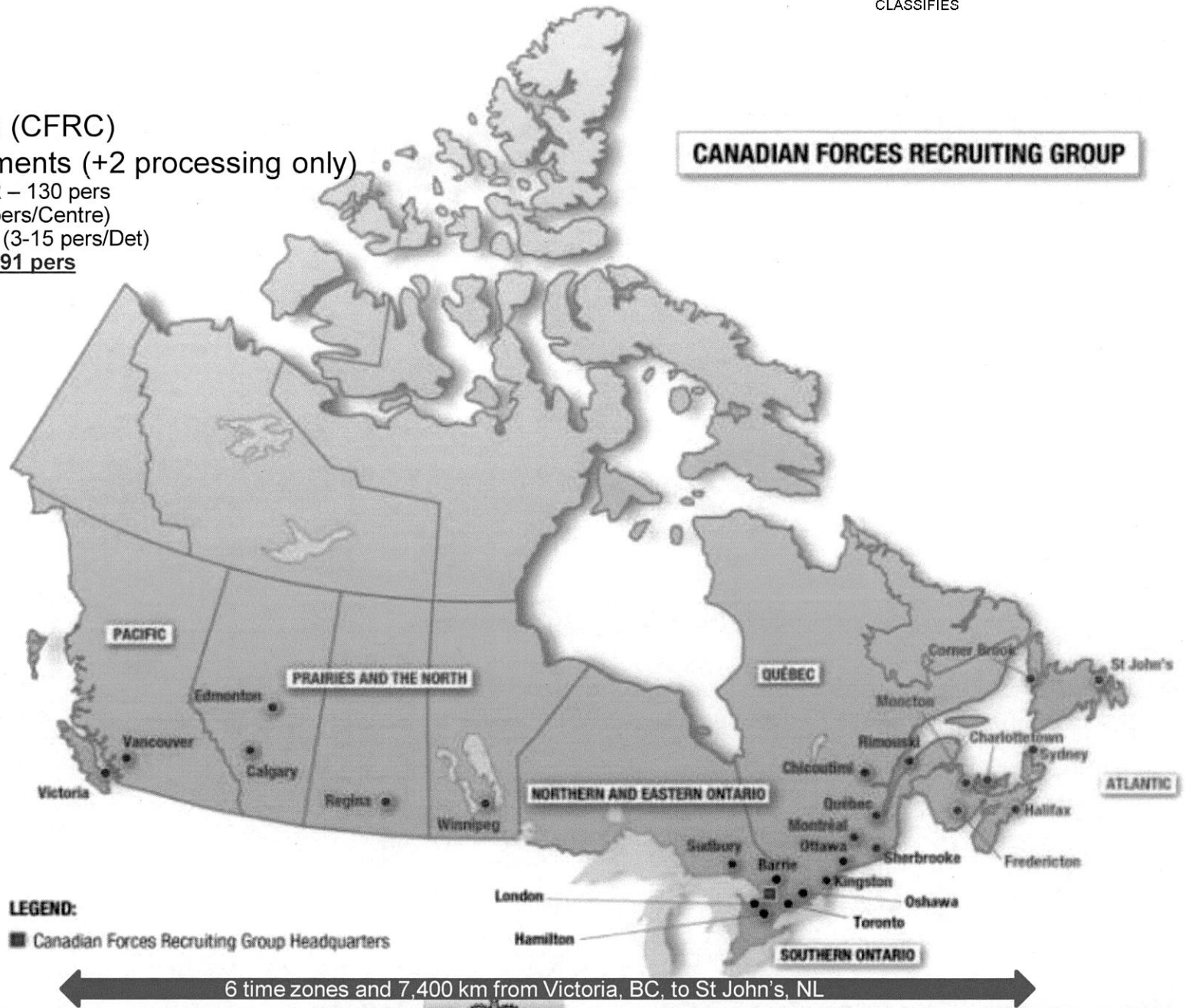
CFRG

6 Regional Centres (CFRC)

24 Tactical Detachments (+2 processing only)

- HQ + ROC / QG + COR – 130 pers
- CFRCs /CRFC – (~15 pers/Centre)
- Dets / Détachements – (3-15 pers/Det)
- Total 691 PY's / total 691 pers

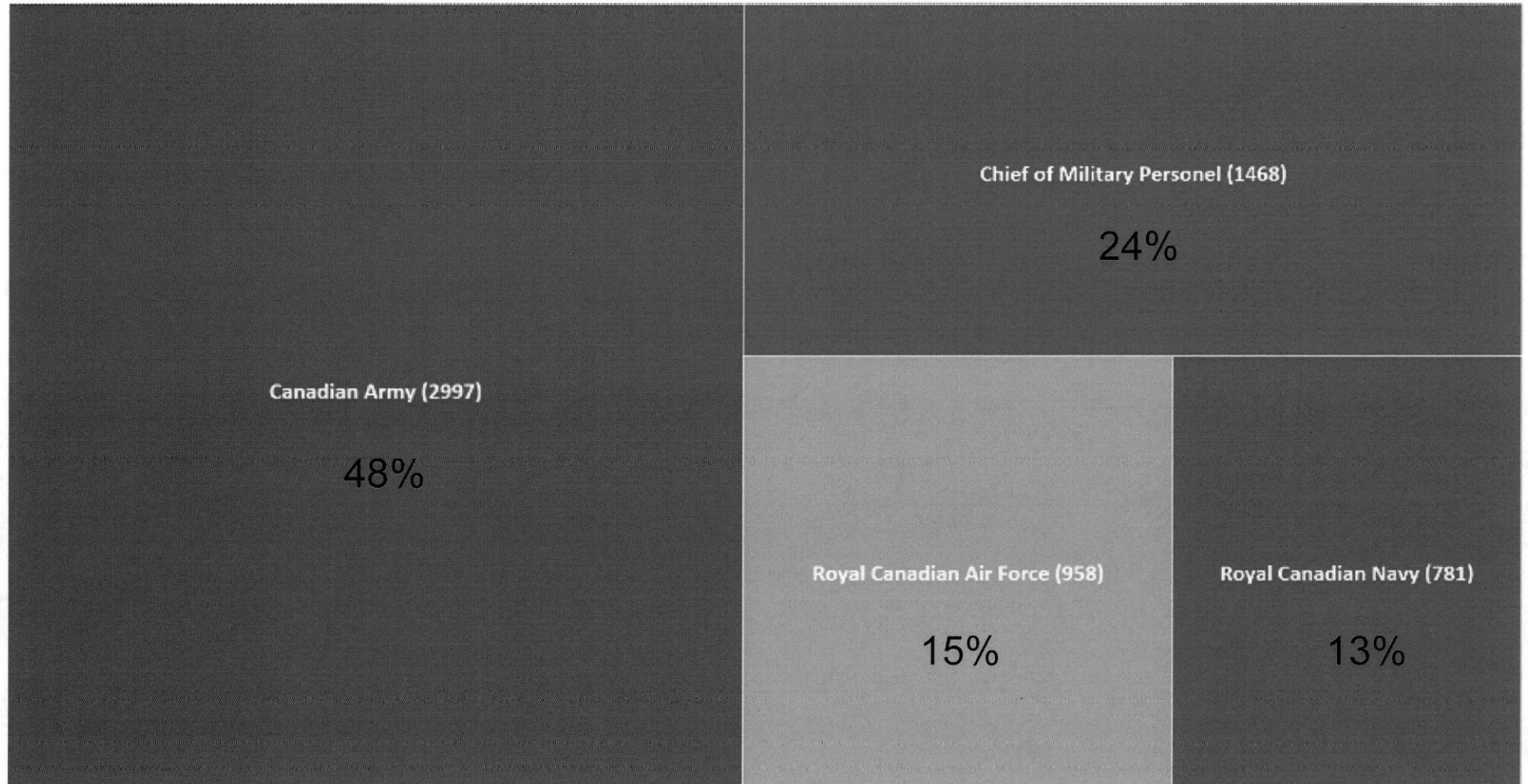
CANADIAN FORCES RECRUITING GROUP



Reg Force Enrollments – FY 16/17



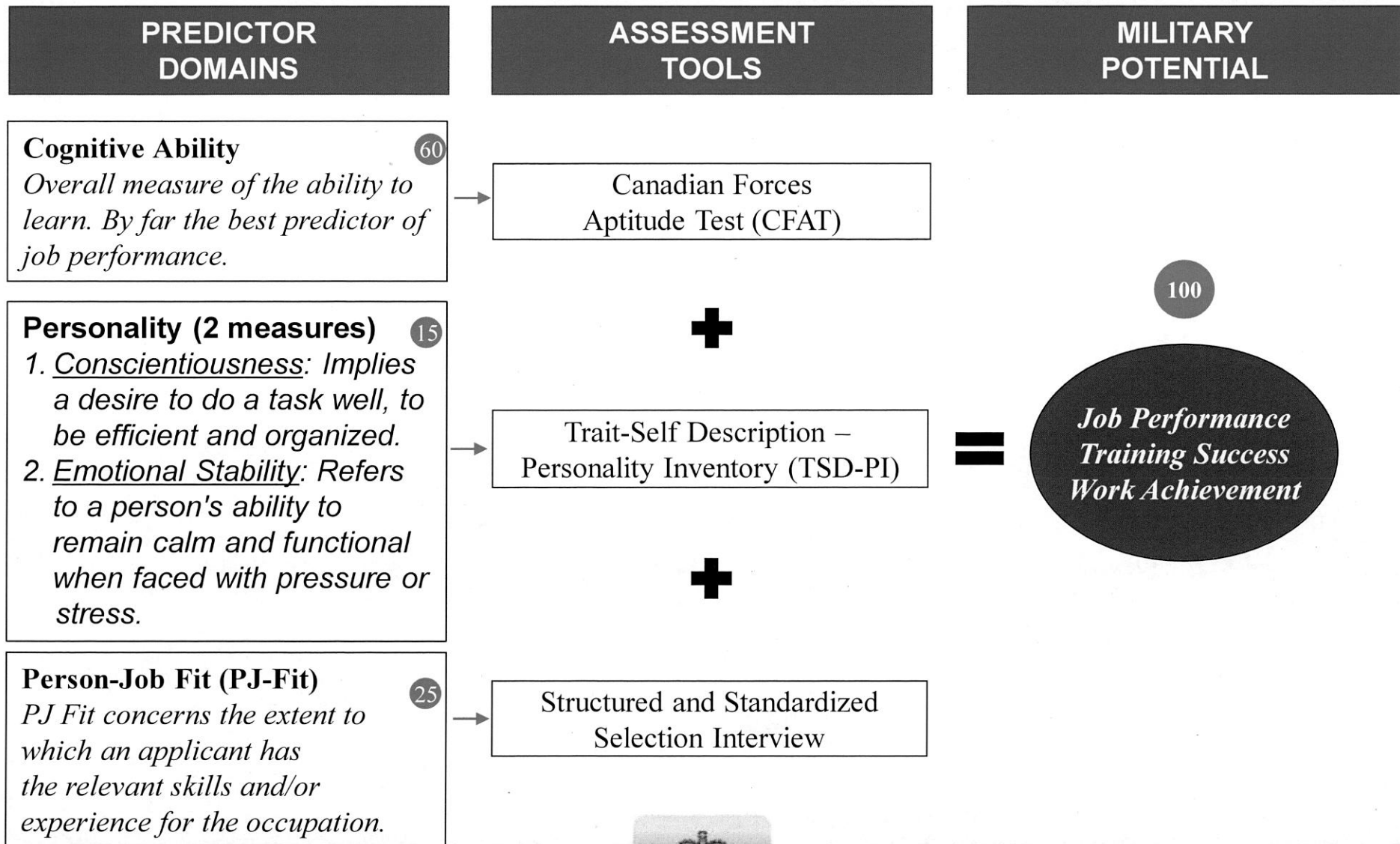
SIP Total by Envir – FY 17/18



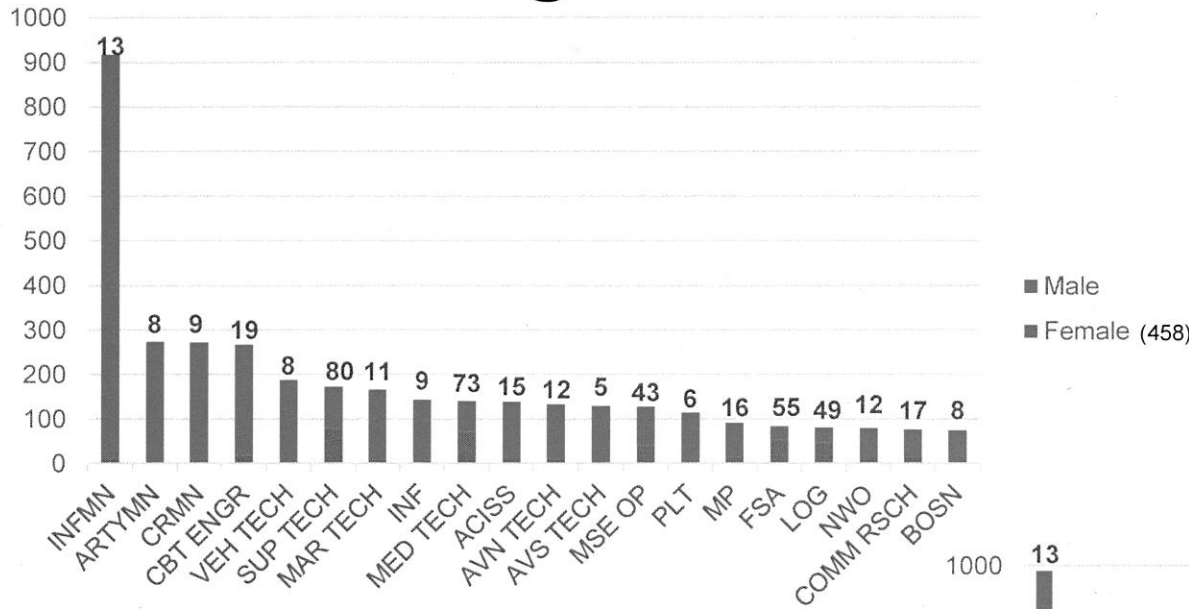
SIP by Occupation – FY 18/19



CAF Selection and Assessment Model



Largest 20 MOSID Enrolled 17-18

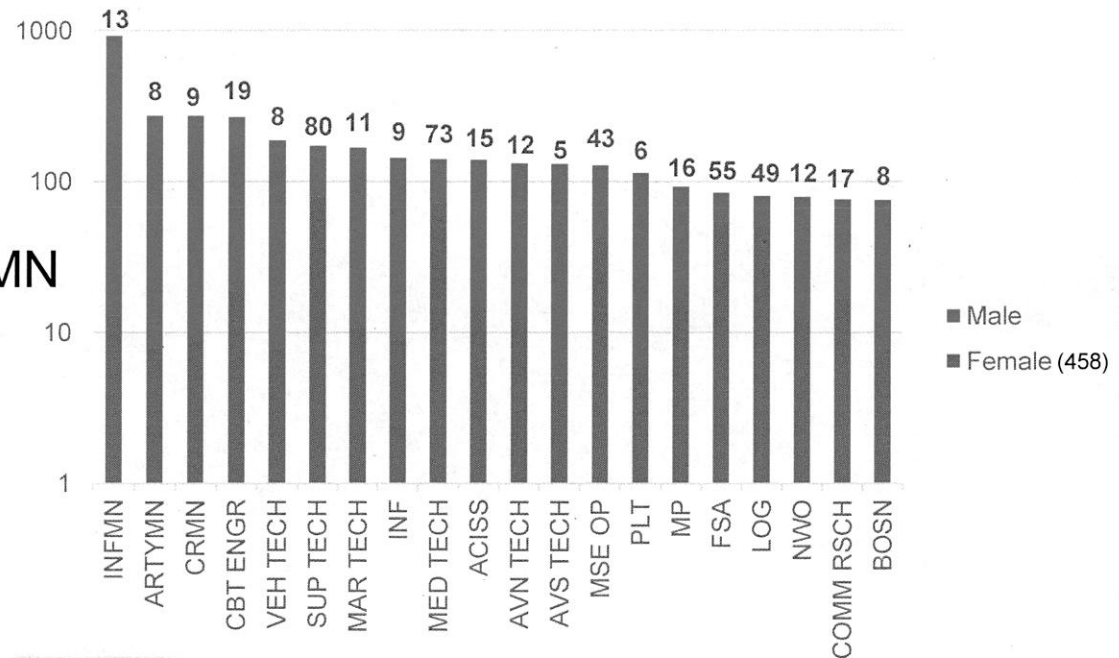


Enrollments 17-18:

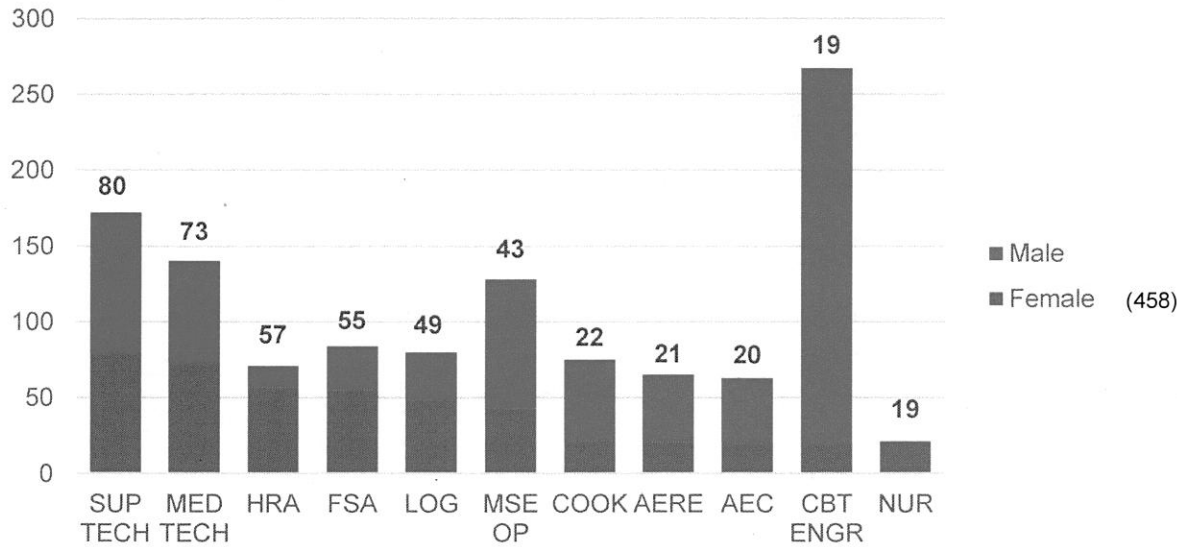
Female 17%

Male 83%

~33% of SIP (INF MN + ARTY MN + CRM N + CBT ENGR MOSIDs)
 only ~3% of female (33/1042)
 or <1% of overall SIP intake

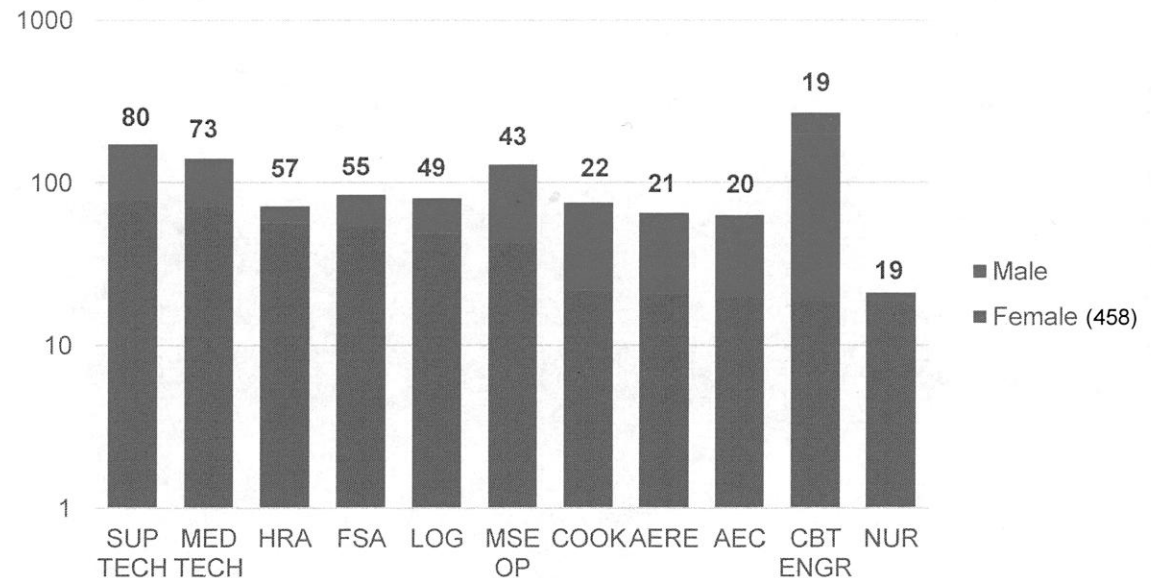


11 Top MOSID for Female Enrollment 17-18



Enrollments 17-18:
 Female 17%
 Male 83%

~39% (458/1,166) of female applicants in 11 MOSID
 (~25% of SIP)
 or 9% of overall SIP intake



s.19(1)

From:
Sent: June 27, 2018 4:44 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Cc: Mainguy LCol DS@CFRG@Borden
Subject: Re: Case study proposal

Thank you Doug, and nice to be connected with you Dan,

Could we schedule a call for Monday? I am in the Netherlands next week and I believe 16:00 for me would be a reasonable time in the morning for you?

Alternatively how about Tuesday or Thursday your morning?

Best wishes and many thanks in advance,

> On 27 Jun 2018, at 16:42, <DOUGLAS.ALLISON@forces.gc.ca>
<DOUGLAS.ALLISON@forces.gc.ca> wrote:

>

> Hi

>

> I have included LCol Dan Mainguy on this e-mail. Dan is the Attractions and Marketing guy at our Recruiting Group and will be able to help you with your questions below.

>

> Dan,

>

> Thx Buddy :)

>

> Cheers

>

> Doug

>

>

>

> -----Original Message-----

> From:

> Sent: June-25-18 8:33 PM

> To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>

> Subject: Re: Case study proposal

>

> Thank you Doug,

>

> That's very useful. I do think I may need a quick chat with someone to read the bar charts properly (and by that I mean ensure I get the acronyms right!) - who would be best to contact for this?

>

> The analysis of cities is interesting - though we will focus only on GTA it would be quite interesting to hypothesise about differences with 'best cities' for women.

>

> May we broaden the scope of the research slightly from Sonar operators to other distressed occupations too or would you like the trainees to only work towards recruiting more female sonar

s.19(1)

operators?

>

> And lastly I have a question about the link Mark sent me to the description of Sonar operators; it only mentions education criteria under 'entry plans' - where can I find general recruitment criteria? I.e. I assume all applicants need to be Canadian citizens and meet some sort of mental and physical fitness criteria etc.?

>

> Kind regards,

>

>

>> On 25 Jun 2018, at 23:20, <DOUGLAS.ALLISON@forces.gc.ca>
<DOUGLAS.ALLISON@forces.gc.ca> wrote:

>>

>>

>>

>> Have a look at these and let me know if they help

>>

>> Sent from my BlackBerry 10 smartphone on the Bell network.

>> From: Mainguy LCol DS@CFRG@Borden <DAN.MAINGUY@forces.gc.ca>

>> Sent: Monday, June 25, 2018 4:34 PM

>> To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull

>> Subject: RE: Case study proposal

>>

>>

>> Doug,

>>

>> Let me know if this helps. The last pdf deck extract tells a good story of where women tend to migrate vs where we have the largest occs to be filled. Even if we fill those occs that are most commonly desired by women, with women, we won't reach our 25.1% CAF representation by 2016. We need to find women who might be interested in some of the occs where we have a large number to fill (predominantly operator trades, tech and engineering).

>>

>> Let me know if you need more.

>>

>> Dan

>>

>> From: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull

>> Sent: June 25, 2018 12:44 PM

>> To: Mainguy LCol DS@CFRG@Borden <DAN.MAINGUY@forces.gc.ca>

>> Subject: FW: Case study proposal

>>

>> Dan,

>>

>> We are doing some scoping for the case study that you discussed with Maj Peebles. The contractor has some questions below. Is there anything you can point her to to help?

>>

>>

>> D. Allison

>> LCol/Lcol

>> DG Public Affairs FD/DG Affaires publiques DF Department of National

>> Defence & Canadian Armed Forces/ Ministère de la Défense nationale et

>> Forces armées canadiennes

>> Douglas.Allison@forces.gc.ca<mailto:Douglas.Allison@forces.gc.ca> /

>> Tel : 613-944-3291 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC :

s.19(1)

>> 944-3291

>>

>>

>>

>> From:

>> Sent: June-22-18 5:29 PM

>> To: Peebles Maj M@ADMPA) DGPA@Ottawa-Hull

>> <MARK.PEEBLES@forces.gc.ca<mailto:MARK.PEEBLES@forces.gc.ca>>

>> Cc: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull

>> <DOUGLAS.ALLISON@forces.gc.ca<mailto:DOUGLAS.ALLISON@forces.gc.ca>>

>> Subject: Re: Case study proposal

>>

>> Dear Mark,

>>

>> That sounds like a very good option.

>>

>> I'm just back home from the course we ran this week (in a wifi-deprived location!) and I just wanted to send you a quick reply to say I chatted to a colleague about this briefly and we think this could work very well indeed.

>>

>> I can scope a course using this example and will start work on that straight away so you can get a good idea of what it would look like.

>>

>> Would it be possible (not urgent- this is not for scoping just to start thinking on our end!) to get some insight into past campaigns to recruit women (i.e. an overview list to facilitate a public domain search) and perhaps some statistics on trends when it comes to gender in the Canadian Armed Forces? Just top line of occupations available, the absolute numbers of staff within those and the percentage of women? This is to get an idea of what numbers we are trying to recruit and relative differences between professions that are 'easy' and 'hard' to recruit for.

>>

>> I'll think through the details of course, but thus far we cannot think of any significant reasons this shouldn't be a great topic.

>>

>> Will we have women on the course as well?

>>

>> Kind regards,

>>

>>

>> Sent from my iPhone

>>

>> On 20 Jun 2018, at 20:44,

>> <MARK.PEEBLES@forces.gc.ca<mailto:MARK.PEEBLES@forces.gc.ca>>

>> <MARK.PEEBLES@forces.gc.ca<mailto:MARK.PEEBLES@forces.gc.ca>> wrote:

>> Hello

>>

>> I believe we have a case study for consideration regarding our intended course. Keeping in mind the factors we discussed such as proximity, narrowness and ethical considerations, I would ask your thoughts on the following case study:

>>

>> The Canadian Armed Forces needs to recruit more women, writ-large. This is a high priority for the Government of Canada. While certain occupations (health-, logistics- and administration-related) have healthy numbers of women, others have many fewer women than is desirable. In fact, some of the former occupations receive more female applicants than positions

available while the latter occupations receive far too few applications to make an appreciable difference in gender balance.

>>

>> Further, the Royal Canadian Navy faces a number of occupations which are “distressed” – they don’t have as many people as they need – male or female – and aren’t recruiting enough to rectify the problem. A handful of occupations are both “distressed” and have very few females coming through the door to join them. The Royal Canadian Navy has identified Sonar Operators ([link<http://esfsecev-ty3014>](http://esfsecev-ty3014) to occupation information) as a priority. The behaviour at issue in this case study, then, is young women not coming through the doors of recruiting centres to become sonar operators.

>>

>> I would propose a case study that would aim to have more women in the Greater Toronto Area (GTA, [link<http://esfsecev-ty3014>](http://esfsecev-ty3014) for definition of the area discussed) go to recruiting centres to become sonar operators. This does not need to be narrowed down by visible minority, IMO; all women between the ages of 18-30 in the GTA could be included for consideration but I would have your feedback on it. The region is relatively close to where we would do the course in Gatineau, but has a large enough population size that we should be able to do quantitative research relatively efficiently.

>>

>> What are your thoughts? Any suggestions on this? I welcome your feedback.

>>

>> Best regards,

>>

>> Mark

>>

>>

>>

>>

>>

>> Major Mark A. Peebles

>>

>> Public Affairs Officer, ADM Public Affairs Department of National

>> Defence / Government of Canada

>> mark.peebles@forces.gc.ca<<mailto:michael.wiesefeld@forces.gc.ca>> /

>> Tel: 613-992-4584

>>

>> Officier d'affaires publiques, SMA Affaires publiques Ministère de la

>> Défence nationale / Gouvernement du Canada

>> mark.peebles@forces.gc.ca<<mailto:michael.wiesefeld@forces.gc.ca>> /

>> Tel: 613-992-4584

>>

>> <Mail Attachment.eml><Mail Attachment.eml><Female occs of interest -

>> 25 Jun 18.pdf>

>

s.19(1)

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: June 29, 2018 1:19 PM
To:
Cc: Mainguy LCol DS@CFRG@Borden
Subject: Re: Case study proposal

Thx folks for support.

Dan

Enjoy the long weekend

Sent from my BlackBerry 10 smartphone on the Bell network.

Original Message

From:
Sent: Friday, June 29, 2018 10:09 AM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Cc: Mainguy LCol DS@CFRG@Borden
Subject: Re: Case study proposal

Dear Dan,

Thank you so very much for your time today. I'm fascinated by this topic so I look forward to thinking through a potential study design.

We talked about three further pieces of information for now, though really only one of these is important for scoping (the first):

- If you would be so kind to send me the list of recruitment criteria for all professions (the generic ones) and any additional criteria for the professions you would most like to recruit women into, that would be much appreciated.

- I would also be very interested to know if there is any area where proportionately more women are recruited (or if this is spread the same for men and women)

- And lastly it would be great to know if there is any indication that women are influenced more or less than men by family or friends in uniform when it comes to their decision to join (or of course whether it is the same).

Dear Doug,

I will be putting all the pieces together this coming week and will email you as soon as possible - Friday the latest.

With kind regards, and enjoy your weekends!

> On 27 Jun 2018, at 16:42, <DOUGLAS.ALLISON@forces.gc.ca>
> <DOUGLAS.ALLISON@forces.gc.ca> wrote:

>

> Hi

>

> I have included LCol Dan Mainguy on this e-mail. Dan is the Attractions and Marketing guy at our Recruiting Group and will be able to help you with your questions below.

>

> Dan,

s.19(1)

>
> Thx Buddy :)
>
> Cheers
>
> Doug
>
>
>
>
> -----Original Message-----
> From:
> Sent: June-25-18 8:33 PM
> To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
> Subject: Re: Case study proposal
>
> Thank you Doug,
>
> That's very useful. I do think I may need a quick chat with someone to read the bar charts properly (and by that I mean ensure I get the acronyms right!) - who would be best to contact for this?
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>
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>> <DOUGLAS.ALLISON@forces.gc.ca> wrote:
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>>
>>
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>> Sent: Monday, June 25, 2018 4:34 PM
>> To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull
>> Subject: RE: Case study proposal
>>
>>
>> Doug,
>>
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>>
>> Let me know if you need more.
>>
>> Dan
>>
>> From: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull

s.19(1)

>> Sent: June 25, 2018 12:44 PM
>> To: Mainguy LCol DS@CFRG@Borden <DAN.MAINGUY@forces.gc.ca>
>> Subject: FW: Case study proposal
>>
>> Dan,
>>
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>> D. Allison
>> LCol/Lcol
>> DG Public Affairs FD/DG Affaires publiques DF Department of National
>> Defence & Canadian Armed Forces/ Ministère de la Défense nationale et
>> Forces armées canadiennes
>> Douglas.Allison@forces.gc.ca<mailto:Douglas.Allison@forces.gc.ca> /
>> Tel : 613-944-3291 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC :
>> 944-3291
>>
>>
>>
>> From:
>> Sent: June-22-18 5:29 PM
>> To: Peebles Maj M@ADMPA) DGPA@Ottawa-Hull
>> <MARK.PEEBLES@forces.gc.ca<mailto:MARK.PEEBLES@forces.gc.ca>>
>> Cc: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull
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>> Subject: Re: Case study proposal
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A0447555_3-000085

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s.19(1)

s.20(1)(b)

From: s.20(1)(c)
Sent: July 3, 2018 8:54 AM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Cc: Mainguy LCol DS@CFRG@Borden
Subject: Re: Case study proposal

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course time, 4-5 week break, 3 weeks course time will work. Please let me know what you would prefer.

Thank you again and best wishes,

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>> Thx Buddy :)

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>> Cheers

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>> Doug

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>> -----Original Message-----

>> From:

>> Sent: June-25-18 8:33 PM

>> To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>

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Sent: July 3, 2018 12:36 PM
To: : Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull; Leslie LCdr PDC@CFRG@Borden; Reavely Maj BA@CFRG HQ@Borden; Hendricks Capt JD@CFRG@Borden
Cc: Owens LCol SM@CFRG@Borden
Subject: Re: Case study proposal

LCdr Leslie,

Need your assistance with the more detailed ques outlined below.

1. Can you please outline the general requirements and enrollment process (ACE, CFAT/TSD, interview, medical, and any of the specialist assessment protocols by occ).
3. Do we have any DGMPPRA data (or survey details) on whether women are influenced by military family connections more than men when deciding to join the CAF? I know that we have the general data that supports the overall theory but unsure if it's broken down by sex.

Maj Reavely,

For your Women's Diversity rep:

2. Can we get a geographic heat map of where our women's enrollments come from in the past FY? We have a heat map that displays 'all enrollments' but need to compare he women's data to see if it follows the overall trend. (please see Capt Hurley for his assistance on this one).

Please respond and cc all on distribution. Thanks!

Dan

Sent from my BlackBerry 10 smartphone on the Rogers network.

Original Message

From:
Sent: Friday, June 29, 2018 10:09 AM
To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull
Cc: Mainguy LCol DS@CFRG@Borden
Subject: Re: Case study proposal

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Sent: July 3, 2018 3:43 PM
To:
Subject: Re: Case study proposal

Trg venue may be Gatineau vice Ottawa. Same for all intents and purposes.

In terms of language, English is fine.

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> - And lastly it would be great to know if there is any indication that women are influenced more or less than men by family or friends in uniform when it comes to their decision to join (or of course whether it is the same).
>
> Dear Doug,
>
> I will be putting all the pieces together this coming week and will email you as soon as possible - Friday the latest.
>
> With kind regards, and enjoy your weekends!
> Gaby

>
>> On 27 Jun 2018, at 16:42, <DOUGLAS.ALLISON@forces.gc.ca>
<DOUGLAS.ALLISON@forces.gc.ca> wrote:
>>
>> Hi
>>
>> I have included LCol Dan Mainguy on this e-mail. Dan is the Attractions and Marketing guy at our Recruiting Group and will be able to help you with your questions below.
>>
>> Dan,
>>
>> Thx Buddy :)
>>
>> Cheers
>>
>> Doug
>>
>>
>>
>>
>> -----Original Message-----
>> From:
>> Sent: June-25-18 8:33 PM
>> To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
>> Subject: Re: Case study proposal
>>
>> Thank you Doug,
>>
>> That's very useful. I do think I may need a quick chat with someone to read the bar charts properly (and by that I mean ensure I get the acronyms right!) - who would be best to contact for this?
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>> The analysis of cities is interesting - though we will focus only on GTA it would be quite interesting to hypothesise about differences with 'best cities' for women.
>>
>> May we broaden the scope of the research slightly from Sonar operators to other distressed occupations

s.19(1)

too or would you like the trainees to only work towards recruiting more female sonar operators?

>>

>> And lastly I have a question about the link Mark sent me to the description of Sonar operators; it only mentions education criteria under 'entry plans' - where can I find general recruitment criteria? I.e. I assume all applicants need to be Canadian citizens and meet some sort of mental and physical fitness criteria etc.?

>>

>> Kind regards,

>>

>>

>>> On 25 Jun 2018, at 23:20, <DOUGLAS.ALLISON@forces.gc.ca>
<DOUGLAS.ALLISON@forces.gc.ca> wrote:

>>>

>>>

>>>

>>> Have a look at these and let me know if they help

>>>

>>> Sent from my BlackBerry 10 smartphone on the Bell network.

>>> From: Mainguy LCol DS@CFRG@Borden <DAN.MAINGUY@forces.gc.ca>

>>> Sent: Monday, June 25, 2018 4:34 PM

>>> To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull

>>> Subject: RE: Case study proposal

>>>

>>>

>>> Doug,

>>>

>>> Let me know if this helps. The last pdf deck extract tells a good story of where women tend to migrate vs where we have the largest occs to be filled. Even if we fill those occs that are most commonly desired by women, with women, we won't reach our 25.1% CAF representation by 2016. We need to find women who might be interested in some of the occs where we have a large number to fill (predominantly operator trades, tech and engineering).

>>>

>>> Let me know if you need more.

>>>

>>> Dan

>>>

>>> From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull

>>> Sent: June 25, 2018 12:44 PM

>>> To: Mainguy LCol DS@CFRG@Borden <DAN.MAINGUY@forces.gc.ca>

>>> Subject: FW: Case study proposal

>>>

>>> Dan,

>>>

>>> We are doing some scoping for the case study that you discussed with Maj Peebles. The contractor has some questions below. Is there anything you can point her to to help?

>>>

>>>

>>> D. Allison

>>> LCol/Lcol

>>> DG Public Affairs FD/DG Affaires publiques DF Department of National

>>> Defence & Canadian Armed Forces/ Ministère de la Défense nationale et

>>> Forces armées canadiennes

>>> Douglas.Allison@forces.gc.ca<<mailto:Douglas.Allison@forces.gc.ca>> /

>>> Tel : 613-944-3291 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC :

>>> 944-3291

>>>

>>>

>>>

>>> From:

>>> Sent: June-22-18 5:29 PM

>>> To: Peebles Maj M@ADMPA) DGPA@Ottawa-Hull

>>> <MARK.PEEBLES@forces.gc.ca<<mailto:MARK.PEEBLES@forces.gc.ca>>>

s.19(1)

>>> Cc: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull
>>> <DOUGLAS.ALLISON@forces.gc.ca<mailto:DOUGLAS.ALLISON@forces.gc.ca>>
>>> Subject: Re: Case study proposal
>>>
>>> Dear Mark,
>>>
>>> That sounds like a very good option.
>>>
>>> I'm just back home from the course we ran this week (in a wifi-deprived location!) and I just wanted to send you a quick reply to say I chatted to a colleague about this briefly and we think this could work very well indeed.
>>>
>>> I can scope a course using this example and will start work on that straight away so you can get a good idea of what it would look like.
>>>
>>> Would it be possible (not urgent- this is not for scoping just to start thinking on our end!) to get some insight into past campaigns to recruit women (i.e. an overview list to facilitate a public domain search) and perhaps some statistics on trends when it comes to gender in the Canadian Armed Forces? Just top line of occupations available, the absolute numbers of staff within those and the percentage of women? This is to get an idea of what numbers we are trying to recruit and relative differences between professions that are 'easy' and 'hard' to recruit for.
>>>
>>> I'll think through the details of course, but thus far we cannot think of any significant reasons this shouldn't be a great topic.
>>>
>>> Will we have women on the course as well?
>>>
>>> Kind regards,
>>>
>>>
>>> Sent from my iPhone
>>>
>>> On 20 Jun 2018, at 20:44,
>>> <MARK.PEEBLES@forces.gc.ca<mailto:MARK.PEEBLES@forces.gc.ca>>
>>> <MARK.PEEBLES@forces.gc.ca<mailto:MARK.PEEBLES@forces.gc.ca>> wrote:
>>> Hello
>>>
>>> I believe we have a case study for consideration regarding our intended course. Keeping in mind the factors we discussed such as proximity, narrowness and ethical considerations, I would ask your thoughts on the following case study:
>>>
>>> The Canadian Armed Forces needs to recruit more women, writ-large. This is a high priority for the Government of Canada. While certain occupations (health-, logistics- and administration-related) have healthy numbers of women, others have many fewer women than is desirable. In fact, some of the former occupations receive more female applicants than positions available while the latter occupations receive far too few applications to make an appreciable difference in gender balance.
>>>
>>> Further, the Royal Canadian Navy faces a number of occupations which are "distressed" – they don't have as many people as they need – male or female – and aren't recruiting enough to rectify the problem. A handful of occupations are both "distressed" and have very few females coming through the door to join them. The Royal Canadian Navy has identified Sonar Operators (link<<http://esfsecev-ty3014>> to occupation information) as a priority. The behaviour at issue in this case study, then, is young women not coming through the doors of recruiting centres to become sonar operators.
>>>
>>> I would propose a case study that would aim to have more women in the Greater Toronto Area (GTA, link<<http://esfsecev-ty3014>> for definition of the area discussed) go to recruiting centres to become sonar operators. This does not need to be narrowed down by visible minority, IMO; all women between the ages of 18-30 in the GTA could be included for consideration but I would have your feedback on it. The region is relatively close to where we would do the course in Gatineau, but has a large enough population size that we should be able to do quantitative research relatively efficiently.
>>>

A0447558_4-000100

>>> What are your thoughts? Any suggestions on this? I welcome your feedback.
>>>
>>> Best regards,
>>>
>>> Mark
>>>
>>>
>>>
>>>
>>> Major Mark A. Peebles
>>>
>>> Public Affairs Officer, ADM Public Affairs Department of National
>>> Defence / Government of Canada
>>> mark.peebles@forces.gc.ca<<mailto:michael.wiesenfeld@forces.gc.ca>> /
>>> Tel: 613-992-4584
>>>
>>> Officier d'affaires publiques, SMA Affaires publiques Ministère de la
>>> Défense nationale / Gouvernement du Canada
>>> mark.peebles@forces.gc.ca<<mailto:michael.wiesenfeld@forces.gc.ca>> /
>>> Tel: 613-992-4584
>>>
>>> <Mail Attachment.eml><Mail Attachment.eml><Female occs of interest -
>>> 25 Jun 18.pdf>
>>
>

s.19(1)

From: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull
Sent: July 9, 2018 9:21 AM
To: Peebles Maj M@ADMPA) DGPA@Ottawa-Hull
Subject: FW: Case study proposal

-----Original Message-----

From:
Sent: July-03-18 3:45 PM
To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: Re: Case study proposal

Excellent, thank you very much Doug!

> On 3 Jul 2018, at 21:42, <DOUGLAS.ALLISON@forces.gc.ca> <DOUGLAS.ALLISON@forces.gc.ca>
> wrote:

>

>

>

> Trg venue may be Gatineau vice Ottawa. Same for all intents and purposes.

>

> In terms of language, English is fine.

>

> Will confirm dates soonest possible

>

> Sent from my BlackBerry 10 smartphone on the Bell network.

> Original Message

> From:

> Sent: Tuesday, July 3, 2018 8:53 AM

> To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull

> Cc: Mainguy LCol DS@CFRG@Borden

> Subject: Re: Case study proposal

>

>

> Dear Doug and Dan,

>

> I hope you are well.

>

> A few quick questions in addition to the below if I may please as I am

> pulling together a possible sampling frame;

>

> 1. What is the age cut-off for recruitment of women into the professions we are recruiting for
> please?

>

> 2. The training venue will most likely be at 101 Colonel By Dr, Ottawa, ON K1A 0K2, is that
> correct? I can change this but I have requested quotations near here so I just wanted to double
> check.

>

> 3. According to the online census data available from StatCan, the population of the Toronto
> CMA (they don't have an option to define 'Greater Toronto Area', so for the sake of the argument
> I'm using the CMA) is 5,928,040, of which 5,154,905 only speak English and a further 500,000

s.19(1)

s.20(1)(b)

s.20(1)(c)

speaking English and French. My question: there doesn't seem to be a compelling reason to conduct qualitative research in any other language than English, what is your opinion on this?

>

> 4. If you communicate in multiple languages as standard, would you wish us to include a French speaking component to the quantitative part of the research?

>

> 5. Mark and I last talked about potential course dates to be around October/November this year; we schedule courses in two parts of three weeks to allow for data collection (if there is a quantitative component). Provisionally of course, could I look at dates for the course in two parts: part 1 before Christmas and part 2 after the New Year?

Otherwise any 3 weeks

course time, 4-5 week break, 3 weeks course time will work. Please let me know what you would prefer.

>

> Thank you again and best wishes,

>

>

>

>

>

>> On 29 Jun 2018, at 16:09,

wrote:

>>

>> Dear Dan,

>>

>> Thank you so very much for your time today. I'm fascinated by this topic so I look forward to thinking through a potential study design:

>>

>> We talked about three further pieces of information for now, though really only one of these is important for scoping (the first):

>>

>> - If you would be so kind to send me the list of recruitment criteria for all professions (the generic ones) and any additional criteria for the professions you would most like to recruit women into, that would be much appreciated.

>>

>> - I would also be very interested to know if there is any area where
>> proportionately more women are recruited (or if this is spread the
>> same for men and women)

>>

>> - And lastly it would be great to know if there is any indication that women are influenced more or less than men by family or friends in uniform when it comes to their decision to join (or of course whether it is the same).

>>

>> Dear Doug,

>>

>> I will be putting all the pieces together this coming week and will email you as soon as possible - Friday the latest.

>>

>> With kind regards, and enjoy your weekends!

>>

>>

>>> On 27 Jun 2018, at 16:42, <DOUGLAS.ALLISON@forces.gc.ca>

<DOUGLAS.ALLISON@forces.gc.ca> wrote:

>>>

>>> Hi

s.19(1)

>>>

>>> I have included LCol Dan Mainguy on this e-mail. Dan is the Attractions and Marketing guy at our Recruiting Group and will be able to help you with your questions below.

>>>

>>> Dan,

>>>

>>> Thx Buddy :)

>>>

>>> Cheers

>>>

>>> Doug

>>>

>>>

>>>

>>>

>>> -----Original Message-----

>>> From:

>>> Sent: June-25-18 8:33 PM

>>> To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull

>>> <DOUGLAS.ALLISON@forces.gc.ca>

>>> Subject: Re: Case study proposal

>>>

>>> Thank you Doug,

>>>

>>> That's very useful. I do think I may need a quick chat with someone to read the bar charts properly (and by that I mean ensure I get the acronyms right!) - who would be best to contact for this?

>>>

>>> The analysis of cities is interesting - though we will focus only on GTA it would be quite interesting to hypothesise about differences with 'best cities' for women.

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>>> May we broaden the scope of the research slightly from Sonar operators to other distressed occupations too or would you like the trainees to only work towards recruiting more female sonar operators?

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>>> And lastly I have a question about the link Mark sent me to the description of Sonar operators; it only mentions education criteria under 'entry plans' - where can I find general recruitment criteria? I.e. I assume all applicants need to be Canadian citizens and meet some sort of mental and physical fitness criteria etc.?

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>>> Kind regards,

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>>>

>>>> On 25 Jun 2018, at 23:20, <DOUGLAS.ALLISON@forces.gc.ca>

<DOUGLAS.ALLISON@forces.gc.ca> wrote:

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>>>>

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>>>> Have a look at these and let me know if they help

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>>>> Sent from my BlackBerry 10 smartphone on the Bell network.

>>>> From: Mainguy LCol DS@CFRG@Borden <DAN.MAINGUY@forces.gc.ca>

>>>> Sent: Monday, June 25, 2018 4:34 PM

>>>> To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull

s.19(1)

>>>> Subject: RE: Case study proposal

>>>>

>>>>

>>>> Doug,

>>>>

>>>> Let me know if this helps. The last pdf deck extract tells a good story of where women tend to migrate vs where we have the largest occs to be filled. Even if we fill those occs that are most commonly desired by women, with women, we won't reach our 25.1% CAF representation by 2016. We need to find women who might be interested in some of the occs where we have a large number to fill (predominantly operator trades, tech and engineering).

>>>>

>>>> Let me know if you need more.

>>>>

>>>> Dan

>>>>

>>>> From: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull

>>>> Sent: June 25, 2018 12:44 PM

>>>> To: Mainguy LCol DS@CFRG@Borden <DAN.MAINGUY@forces.gc.ca>

>>>> Subject: FW: Case study proposal

>>>>

>>>> Dan,

>>>>

>>>> We are doing some scoping for the case study that you discussed with Maj Peebles. The contractor has some questions below. Is there anything you can point her to to help?

>>>>

>>>>

>>>> D. Allison

>>>> LCol/Lcol

>>>> DG Public Affairs FD/DG Affaires publiques DF Department of

>>>> National Defence & Canadian Armed Forces/ Ministère de la Défense

>>>> nationale et Forces armées canadiennes

>>>> Douglas.Allison@forces.gc.ca<mailto:Douglas.Allison@forces.gc.ca> /

>>>> Tel : 613-944-3291 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC :

>>>> 944-3291

>>>>

>>>>

>>>>

>>>> From:

>>>> Sent: June-22-18 5:29 PM

>>>> To: Peebles Maj M@ADM(PA) DGPA@Ottawa-Hull

>>>> <MARK.PEEBLES@forces.gc.ca<mailto:MARK.PEEBLES@forces.gc.ca>>

>>>> Cc: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull

>>>> <DOUGLAS.ALLISON@forces.gc.ca<mailto:DOUGLAS.ALLISON@forces.gc.ca>>

>>>> Subject: Re: Case study proposal

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>>>> Dear Mark,

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>>>> That sounds like a very good option.

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>>>> I'm just back home from the course we ran this week (in a wifi-deprived location!) and I just wanted to send you a quick reply to say I chatted to a colleague about this briefly and we think this could work very well indeed.

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s.19(1)

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>>>> Would it be possible (not urgent- this is not for scoping just to start thinking on our end!) to get some insight into past campaigns to recruit women (i.e. an overview list to facilitate a public domain search) and perhaps some statistics on trends when it comes to gender in the Canadian Armed Forces? Just top line of occupations available, the absolute numbers of staff within those and the percentage of women? This is to get an idea of what numbers we are trying to recruit and relative differences between professions that are 'easy' and 'hard' to recruit for.

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>>>> I'll think through the details of course, but thus far we cannot think of any significant reasons this shouldn't be a great topic.

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>>>> Will we have women on the course as well?

>>>>

>>>> Kind regards,

>>>>

>>>>

>>>> Sent from my iPhone

>>>>

>>>> On 20 Jun 2018, at 20:44,

<MARK.PEEBLES@forces.gc.ca<mailto:MARK.PEEBLES@forces.gc.ca>>

<MARK.PEEBLES@forces.gc.ca<mailto:MARK.PEEBLES@forces.gc.ca>> wrote:

>>>> Hello

>>>>

>>>> I believe we have a case study for consideration regarding our intended course. Keeping in mind the factors we discussed such as proximity, narrowness and ethical considerations, I would ask your thoughts on the following case study:

>>>>

>>>> The Canadian Armed Forces needs to recruit more women, writ-large. This is a high priority for the Government of Canada. While certain occupations (health-, logistics- and administration-related) have healthy numbers of women, others have many fewer women than is desirable. In fact, some of the former occupations receive more female applicants than positions available while the latter occupations receive far too few applications to make an appreciable difference in gender balance.

>>>>

>>>> Further, the Royal Canadian Navy faces a number of occupations which are "distressed" – they don't have as many people as they need – male or female – and aren't recruiting enough to rectify the problem. A handful of occupations are both "distressed" and have very few females coming through the door to join them. The Royal Canadian Navy has identified Sonar Operators (link<<http://esfsecev-ty3014>> to occupation information) as a priority. The behaviour at issue in this case study, then, is young women not coming through the doors of recruiting centres to become sonar operators.

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>>>>

>>>> What are your thoughts? Any suggestions on this? I welcome your feedback.

>>>>

>>>> Best regards,
>>>>
>>>> Mark
>>>>
>>>>
>>>>
>>>> Major Mark A. Peebles
>>>>
>>>> Public Affairs Officer, ADM Public Affairs Department of National
>>>> Defence / Government of Canada
>>>> mark.peebles@forces.gc.ca<mailto:michael.wiesefeld@forces.gc.ca> /
>>>> Tel: 613-992-4584
>>>>
>>>> Officier d'affaires publiques, SMA Affaires publiques Ministère de
>>>> la Défence nationale / Gouvernement du Canada
>>>> mark.peebles@forces.gc.ca<mailto:michael.wiesefeld@forces.gc.ca> /
>>>> Tel: 613-992-4584
>>>>
>>>> <Mail Attachment.eml><Mail Attachment.eml><Female occs of interest
>>>> -
>>>> 25 Jun 18.pdf>
>>>
>>
>

s.19(1)

s.20(1)(b)

s.20(1)(c)

s.21(1)(b)

From: Peebles Maj M@ADM(PA), DGPA@Ottawa-Hull
Sent: July 10, 2018 1:07 PM
To: Allison LCol DE@ADM(PA), DPAPQ@Ottawa-Hull
Subject: FW: Offer:
Attachments:

Sir,

We should sit down and discuss next steps now that the offer is in. I will aim to have a TD estimate for the course done by tomorrow morning.

Mark

-----Original Message-----

From: ()
Sent: July-10-18 8:33 AM
To: Allison LCol DE@ADM(PA) DPAPQ@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>; Peebles Maj M@ADM(PA) DGPA@Ottawa-Hull <MARK.PEEBLES@forces.gc.ca>
Subject: Offer:

Dear LCol Allison and Mark,

Thank you again for your enquiry into a Strategic Communication and Behaviour Change training course and for all your help in understanding your requirement.

this

s.19(1)

is because we will work this through in much more detail and in collaboration with you as part of course preparation; the information I have gathered to date has been to enable us to request fieldwork options and quotations and assess the feasibility of the case study overall:

Please let me know of any questions you have at this stage and of any further detail you would like me to provide at this point.

With kind regards,

**Pages 110 to / à 124
are withheld pursuant to sections
sont retenues en vertu des articles**

20(1)(b), 20(1)(c)

**of the Access to Information Act
de la Loi sur l'accès à l'information**

s.19(1)

From: Mainguy_LCol_DS@CFRG@Borden
Sent: July 11, 2018 11:55 AM
To:
Cc: [Allison_LCol_DE@ADM\(PA\)_DPAPO@Ottawa-Hull; Peebles Maj M@ADMPA\)_DGPA@Ottawa-Hull](mailto:Allison_LCol_DE@ADM(PA)_DPAPO@Ottawa-Hull; Peebles_MajM@ADMPA)_DGPA@Ottawa-Hull)
Subject: Case Study
Attachments: Female Enrolment Heat Map.pptx; FW: Case study proposal; RE: Case study proposal

Good morning and I hope all is well.

I have included three files for your information/review.

They address your specific questions on studies and information relative to female applicants over this past FY. The heat-map slide deck includes two slides: the entire enrolment pool and the female enrolment pool.

The other two pieces speak to the process and criteria for enrolment into the CAF. I'll summarize for you here:

Initial eligibility criteria: A-C-E

A = age must be 17 to 57

C = must be a Canadian Citizen

E = must be at least grade 10 graduate (different occupations demand higher academic prerequisites)

Canadian Forces Aptitude Test (CFAT)

Trait Self-descriptor (TSD)

Interview and Personality Inventory

General medial fitness evaluation

All candidates must pass each element listed above. The CFAT will filter available occupations based on cognitive predictors. Actual available positions in the Canadian Armed Forces will also further filter what's available from what's suitable.

Beyond the basics, there are several occupation specific selection tests/boards (Pilot, Aerospace Controller, Military Police, Legal Officers, Social Workers, Chaplains, etc)

Let me know if you need more.

Dan

Lieutenant Colonel Dan Mainguy, CD, P.Log

SSO Marketing and Attractions, Canadian Forces Recruiting Group Headquarters

Canadian Armed Forces

Dan.mainguy@forces.gc.ca / Tel: 705-424-1200 Ext 3136 / Cel: 705-790-7073

A0447573_1-000125

OEM Marketing et attractions, Quartier général du Groupe de recrutement des Forces
canadiennes
Forces armées canadiennes
Dan.mainguy@forces.gc.ca / Tél: 705-424-1200 poste 3136 / Cel: 705-790-7073

Both Genders Enrolled



Female Enrollment



Male Enrolled



Ahmad A@ADM(PA) DPAPI@Ottawa-Hull

From: Rogers Capt DS@CFRG HQ@Borden
Sent: July 10, 2018 11:19 AM
To: Mainguy LCol DS@CFRG@Borden
Subject: FW: Case study proposal

Sir

FYC.

You already covered the majority of the steps.

Verification of Age Citizenship and Education.

Aptitude testing (CFAT/TSD for all, Maritime Officer Selection Test (MOST) for 00207 NWO, and Written Communication Proficiency Test (WCPT) for 00203 PAO, Threshold Language Test (TLT) for allophones) Non-prescription drugs Pre-enrolment security clearance pre-assessment Reliability screening Interview Medical Selection Offer Enrolment

I have reached out to DGMPRA for any info they have regarding your third question.

D. Rogers, Capt

RPSO 2, Canadian Forces Recruiting Group Headquarters Canadian Armed Forces donna.rogers@forces.gc.ca / Tel: 705-424-1200 Ext 2435 / CSN: 270-2435 / Cel: 705-791-5781

OSPR 2, Quartier Général du Groupe du recrutement des Forces Canadiennes Forces armées canadiennes donna.rogers@forces.gc.ca / Tél.: 705-424-1200 poste 2435 / RCCC: 270-2435 / Tél. cell. : 705-791-5781

DISCLAIMER: This communication (including all attachments) is intended solely for the use of the person or persons to whom it is addressed and should be treated as confidential. If you are not the intended recipient, any use, distribution, printing or copying of this email is strictly prohibited. If you have received this email in error, please delete it immediately from your system and notify the originator. Thank you for your cooperation.

-----Original Message-----

From: Leslie LCdr PDC@CFRG@Borden
Sent: July-06-18 4:00 PM
To: Rogers Capt DS@CFRG HQ@Borden <Donna.Rogers@forces.gc.ca>
Cc: Mainguy LCol DS@CFRG@Borden <DAN.MAINGUY@forces.gc.ca>
Subject: FW: Case study proposal

Donna...

I wasn't able to get this this task before proceeding on leave today.

Can you provide answers to questions 1 & 3 for LCol Mainguy. One should be easy enough, and I would recommend reaching out to Maj Julie Labrecque for assistance on #3.

LCdr|Capc Patrick D.C. Leslie
Recruiting Personnel Selection Officer
Canadian Forces Recruiting Group Headquarters Canadian Armed Forces patrick.leslie@forces.gc.ca / Tel: 705-424-1200
Ext 3070 / CSN: 270-3070

OSPR, Quartier Général du Groupe du recrutement des Forces canadiennes Forces armées canadiennes
patrick.leslie@forces.gc.ca / Tél.: 705-424-1200 poste 3070 / RCCC: 270-3070

-----Original Message-----

From: Mainguy LCol DS@CFRG@Borden

Sent: July-03-18 12:36 PM

To: >; Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull
<DOUGLAS.ALLISON@forces.gc.ca>; Leslie LCdr PDC@CFRG@Borden <PATRICK.LESLIE@forces.gc.ca>; Reavely Maj
BA@CFRG HQ@Borden <BENJAMIN.REAVELY@forces.gc.ca>; Hendricks Capt JD@CFRG@Borden
<Josephine.Hendricks@forces.gc.ca>

Cc: Owens LCol SM@CFRG@Borden <Soo.Owens@forces.gc.ca>

Subject: Re: Case study proposal

LCdr Leslie,

Need your assistance with the more detailed ques outlined below.

1. Can you please outline the general requirements and enrollment process (ACE, CFAT/TSD, interview, medical, and any of the specialist assessment protocols by occ).
3. Do we have any DGMPRA data (or survey details) on whether women are influenced by military family connections more than men when deciding to join the CAF? I know that we have the general data that supports the overall theory but unsure if it's broken down by sex.

Maj Reavely,

For your Women's Diversity rep:

2. Can we get a geographic heat map of where our women's enrollments come from in the past FY? We have a heat map that displays 'all enrollments' but need to compare the women's data to see if it follows the overall trend. (please see Capt Hurley for his assistance on this one).

Please respond and cc all on distribution. Thanks!

Dan

Sent from my BlackBerry 10 smartphone on the Rogers network.

Original Message

From:

Sent: Friday, June 29, 2018 10:09 AM

To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull

Cc: Mainguy LCol DS@CFRG@Borden

Subject: Re: Case study proposal

s.19(1)

Dear Dan,

Thank you so very much for your time today. I'm fascinated by this topic so I look forward to thinking through a potential study design.

We talked about three further pieces of information for now, though really only one of these is important for scoping (the first):

- If you would be so kind to send me the list of recruitment criteria for all professions (the generic ones) and any additional criteria for the professions you would most like to recruit women into, that would be much appreciated.
- I would also be very interested to know if there is any area where proportionately more women are recruited (or if this is spread the same for men and women)
- And lastly it would be great to know if there is any indication that women are influenced more or less than men by family or friends in uniform when it comes to their decision to join (or of course whether it is the same).

Dear Doug,

I will be putting all the pieces together this coming week and will email you as soon as possible - Friday the latest.

With kind regards, and enjoy your weekends!

> On 27 Jun 2018, at 16:42, <DOUGLAS.ALLISON@forces.gc.ca> <DOUGLAS.ALLISON@forces.gc.ca> wrote:

>

> Hi

>

> I have included LCol Dan Mainguy on this e-mail. Dan is the Attractions and Marketing guy at our Recruiting Group and will be able to help you with your questions below.

>

> Dan,

>

> Thx Buddy :)

>

> Cheers

>

> Doug

>

>

>

>

> -----Original Message-----

> From:

> Sent: June-25-18 8:33 PM

> To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull

> <DOUGLAS.ALLISON@forces.gc.ca>

> Subject: Re: Case study proposal

>

> Thank you Doug,

s.19(1)

>

> That's very useful. I do think I may need a quick chat with someone to read the bar charts properly (and by that I mean ensure I get the acronyms right!) - who would be best to contact for this?

>

> The analysis of cities is interesting - though we will focus only on GTA it would be quite interesting to hypothesise about differences with 'best cities' for women.

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> May we broaden the scope of the research slightly from Sonar operators to other distressed occupations too or would you like the trainees to only work towards recruiting more female sonar operators?

>

> And lastly I have a question about the link Mark sent me to the description of Sonar operators; it only mentions education criteria under 'entry plans' - where can I find general recruitment criteria? I.e. I assume all applicants need to be Canadian citizens and meet some sort of mental and physical fitness criteria etc.?

>

> Kind regards,

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>> On 25 Jun 2018, at 23:20, <DOUGLAS.ALLISON@forces.gc.ca> <DOUGLAS.ALLISON@forces.gc.ca> wrote:

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>>

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>> Have a look at these and let me know if they help

>>

>> Sent from my BlackBerry 10 smartphone on the Bell network.

>> From: Mainguy LCol DS@CFRG@Borden <DAN.MAINGUY@forces.gc.ca>

>> Sent: Monday, June 25, 2018 4:34 PM

>> To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull

>> Subject: RE: Case study proposal

>>

>>

>> Doug,

>>

>> Let me know if this helps. The last pdf deck extract tells a good story of where women tend to migrate vs where we have the largest occs to be filled. Even if we fill those occs that are most commonly desired by women, with women, we won't reach our 25.1% CAF representation by 2016. We need to find women who might be interested in some of the occs where we have a large number to fill (predominantly operator trades, tech and engineering).

>>

>> Let me know if you need more.

>>

>> Dan

>>

>> From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull

>> Sent: June 25, 2018 12:44 PM

>> To: Mainguy LCol DS@CFRG@Borden <DAN.MAINGUY@forces.gc.ca>

>> Subject: FW: Case study proposal

>>

>> Dan,

>>

>> We are doing some scoping for the case study that you discussed with Maj Peebles. The contractor has some questions below. Is there anything you can point her to to help?

>>

>>

s.19(1)

>> D. Allison
>> LCol/Lcol
>> DG Public Affairs FD/DG Affaires publiques DF Department of National
>> Defence & Canadian Armed Forces/ Ministère de la Défense nationale et
>> Forces armées canadiennes
>> Douglas.Allison@forces.gc.ca<mailto:Douglas.Allison@forces.gc.ca> /
>> Tel : 613-944-3291 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC :
>> 944-3291
>>
>>
>>
>> From:
>> Sent: June-22-18 5:29 PM
>> To: Peebles Maj M@ADM(PA) DGPA@Ottawa-Hull
>> <MARK.PEEBLES@forces.gc.ca<mailto:MARK.PEEBLES@forces.gc.ca>>
>> Cc: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
>> <DOUGLAS.ALLISON@forces.gc.ca<mailto:DOUGLAS.ALLISON@forces.gc.ca>>
>> Subject: Re: Case study proposal
>>
>> Dear Mark,
>>
>> That sounds like a very good option.
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>> I'm just back home from the course we ran this week (in a wifi-deprived location!) and I just wanted to send you a quick reply to say I chatted to a colleague about this briefly and we think this could work very well indeed.
>>
>> I can scope a course using this example and will start work on that straight away so you can get a good idea of what it would look like.
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<MARK.PEEBLES@forces.gc.ca<mailto:MARK.PEEBLES@forces.gc.ca>> wrote:
>> Hello
>>
>> I believe we have a case study for consideration regarding our intended course. Keeping in mind the factors we discussed such as proximity, narrowness and ethical considerations, I would ask your thoughts on the following case study:

>>

>> The Canadian Armed Forces needs to recruit more women, writ-large. This is a high priority for the Government of Canada. While certain occupations (health-, logistics- and administration-related) have healthy numbers of women, others have many fewer women than is desirable. In fact, some of the former occupations receive more female applicants than positions available while the latter occupations receive far too few applications to make an appreciable difference in gender balance.

>>

>> Further, the Royal Canadian Navy faces a number of occupations which are “distressed” – they don’t have as many people as they need – male or female – and aren’t recruiting enough to rectify the problem. A handful of occupations are both “distressed” and have very few females coming through the door to join them. The Royal Canadian Navy has identified Sonar Operators ([link<http://esfsecev-ty3014>](http://esfsecev-ty3014) to occupation information) as a priority. The behaviour at issue in this case study, then, is young women not coming through the doors of recruiting centres to become sonar operators.

>>

>> I would propose a case study that would aim to have more women in the Greater Toronto Area (GTA, [link<http://esfsecev-ty3014>](http://esfsecev-ty3014) for definition of the area discussed) go to recruiting centres to become sonar operators. This does not need to be narrowed down by visible minority, IMO; all women between the ages of 18-30 in the GTA could be included for consideration but I would have your feedback on it. The region is relatively close to where we would do the course in Gatineau, but has a large enough population size that we should be able to do quantitative research relatively efficiently.

>>

>> What are your thoughts? Any suggestions on this? I welcome your feedback.

>>

>> Best regards,

>>

>> Mark

>>

>>

>>

>>

>> Major Mark A. Peebles

>>

>> Public Affairs Officer, ADM Public Affairs Department of National

>> Defence / Government of Canada

>> mark.peebles@forces.gc.ca<<mailto:michael.wiesefeld@forces.gc.ca>> /

>> Tel: 613-992-4584

>>

>> Officier d'affaires publiques, SMA Affaires publiques Ministère de la

>> Défence nationale / Gouvernement du Canada

>> mark.peebles@forces.gc.ca<<mailto:michael.wiesefeld@forces.gc.ca>> /

>> Tel: 613-992-4584

>>

>> <Mail Attachment.eml><Mail Attachment.eml><Female occs of interest -

>> 25 Jun 18.pdf>

>

Ahmad A@ADM(PA) DPAPI@Ottawa-Hull

From: Waruszynski BT@CMP DRPFS@Ottawa-Hull
Sent: July 11, 2018 9:13 AM
To: Rogers Capt DS@CFRG HQ@Borden
Cc: Mainguy LCol DS@CFRG@Borden
Subject: RE: Case study proposal

Hello Capt Rogers and LCol Mainguy,

Please let me know if you require additional information.

We have conducted a comprehensive study to determine the perceptions, issues/challenges, and recommendations of women currently serving in the CAF.

Best regards,

Barbara

-----Original Message-----

From: Rogers Capt DS@CFRG HQ@Borden
Sent: July-11-18 7:56 AM
To: Waruszynski BT@CMP DRPFS@Ottawa-Hull <BARBARA.WARUSZYNSKI@forces.gc.ca>
Cc: Mainguy LCol DS@CFRG@Borden <DAN.MAINGUY@forces.gc.ca>
Subject: RE: Case study proposal

Barbara

Thank you very much for the info.

I am going to leave this with LCol Mainguy as it relates to marketing and attractions.

D. Rogers, Capt

RPSO 2, Canadian Forces Recruiting Group Headquarters Canadian Armed Forces donna.rogers@forces.gc.ca / Tel: 705-424-1200 Ext 2435 / CSN: 270-2435 / Cel: 705-791-5781

OSPR 2, Quartier Général du Groupe du recrutement des Forces Canadiennes Forces armées canadiennes donna.rogers@forces.gc.ca / Tél.: 705-424-1200 poste 2435 / RCCC: 270-2435 / Tél. cell. : 705-791-5781

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-----Original Message-----

From: Waruszynski BT@CMP DRPFS@Ottawa-Hull
Sent: July-10-18 4:00 PM
To: Rogers Capt DS@CFRG HQ@Borden <Donna.Rogers@forces.gc.ca>; Mainguy LCol DS@CFRG@Borden <DAN.MAINGUY@forces.gc.ca>
Cc: Labrecque Maj JMN@CMP DHRD@Ottawa-Hull <JULIE.LABRECQUE@forces.gc.ca>; Straver M@CMP DRWA@Ottawa-Hull <MICHELLE.STRAVER@forces.gc.ca>
Subject: RE: Case study proposal

Hello Capt Rogers,

We just completed two studies on women in the CAF. The first study looked at the perceptions of women in the Regular Force on recruitment and employment in the CAF. The research objectives include: (1) to understand the reasons why CAF women join the military; (2) to examine the possible reasons why women are not joining the CAF; and (3) to determine how women currently serving in the military could contribute to improving CAF recruitment strategies, Department of National Defence (DND) outreach, and other initiatives that would help to increase the representation of women in the Canadian military. The findings also take into consideration the issues impacting the retention of Regular Force women in the CAF.

The women in the Regular Force study looked at the perceptions of 335 women in the Regular Force across 12 Canadian bases or units located in Gagetown, Halifax, Valcartier, the National Capital Region, Petawawa, Kingston, Trenton, Borden, Shilo, Winnipeg, Edmonton, and Esquimalt (total of 45 focus groups). The focus groups examined the issues impacting the attraction, motivation, recruitment, career experiences, and retention of women in the CAF. We have a scientific letter that outlines the topline findings for the qualitative study and a scientific report that will be out shortly (with DRDC Publications).

We only examined women's perceptions. Although family members and friends were generally supportive of these women joining the Canadian military, the greatest influencers were family members and friends who currently serve or previously served in the military. In other words, support from family members and friends to enroll in the CAF was far greater when family members or friends were in the military. As a result, many of these family members and friends helped to influence the decision to join the military. As a result, familiarity with the CAF was an important motivating factor for many women. Participants who enrolled in the Cadets and the Primary Reserve also felt a greater affiliation with the military.

The second study examined the same objectives as above, although this time, with women in the Primary Reserve. We are in the process of analyzing the data. However, we will only have the topline findings available by the end of the calendar year.

You can also ask Michelle Straver if she can help you with any statistics regarding women in specific occupations/trades. She is an excellent resource and great colleague.

I hope this helps you.

Barbara

Dr. Barbara Waruszynski
DGMPPRA

-----Original Message-----

From: Rogers Capt DS@CFRG HQ@Borden
Sent: July-10-18 3:06 PM

To: Mainguy LCol DS@CFRG@Borden <DAN.MAINGUY@forces.gc.ca>; Waruszynski BT@CMP DRPFS@Ottawa-Hull <BARBARA.WARUSZYNSKI@forces.gc.ca>
Cc: Labrecque Maj JMN@CMP DHRD@Ottawa-Hull <JULIE.LABRECQUE@forces.gc.ca>
Subject: FW: Case study proposal

Sir

I spoke to DHRD and they suggested you look at the Earncliffe study. I searched on the S Drive and do not see anything saved under that name. Maj Labrecque thought you might have already seen a copy since the report was released in 2016/2017?

<https://ml-fd.caf-fac.ca/en/2017/03/3672>

Ms Waruszynski does DGMPRA have data (or survey details) on whether women are influenced by military family connections more than men when deciding to join the CAF? I know that we have the general data that supports the overall theory but unsure if it's broken down by sex.

D. Rogers, Capt

RPSO 2, Canadian Forces Recruiting Group Headquarters Canadian Armed Forces donna.rogers@forces.gc.ca / Tel: 705-424-1200 Ext 2435 / CSN: 270-2435 / Cel: 705-791-5781

OSPR 2, Quartier Général du Groupe du recrutement des Forces Canadiennes Forces armées canadiennes donna.rogers@forces.gc.ca / Tél.: 705-424-1200 poste 2435 / RCCC: 270-2435 / Tél. cell. : 705-791-5781

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http://cmp-cpm.mil.ca/assets/CMP_Intranet/docs/en/support/dgmpira/dgmpira-contract-report-drdc-rddc-2071-c003.pdf

-----Original Message-----

From: Labrecque Maj JMN@CMP DHRD@Ottawa-Hull

Sent: July-10-18 1:50 PM

To: Rogers Capt DS@CFRG HQ@Borden <Donna.Rogers@forces.gc.ca>; Rankin KJ@CMP DRPG@Ottawa-Hull <KAREN.RANKIN@forces.gc.ca>

Cc: Blanchette Maj CD@CFRG@Borden <Christina.Blanchette@forces.gc.ca>; Waruszynski BT@CMP DRPFS@Ottawa-Hull <BARBARA.WARUSZYNSKI@forces.gc.ca>; Perron Maj N@VCDS DCFGA@Ottawa-Hull <NANCY.PERRON@forces.gc.ca>; Hynes Maj HCO@SJS D Log Prog@Ottawa-Hull <HEATHER.HYNES2@forces.gc.ca>

Subject: RE: Case study proposal

Good day Capt Rogers,

On DHRD side we do not collect data on this topic as DGMPRA is doing all of our research. You can verify self-id at the following link, updated on a regular basis. To note that our WHIMS system has been down for a little while preventing us to update date. Other data are available upon request. http://cmp-cpm.mil.ca/assets/CMP_Intranet/docs/en/support/ee-stats-slide.pdf

However, you might want to contact Mrs Barbara Warunszynski (Cc) to that effect. There is information collected on this topic.

You might also want to dig back into Earncliffe study: The Recruitment and Employment of Women in the Canadian Armed Forces, Sept 2016 that CFRG contracted.

CCd in this email are Maj Nancy Perron who will replace me in the upcoming week and Maj Heather Hynes, our Women and Persons with disability desk officer.

For your consideration.

Maj Julie Labrecque, CD

CAF Diversity Officer, Director of Human Rights and Diversity 3-2 Department of National Defence / Government of Canada Julie.labrecque@forces.gc.ca / Tel: 613-901-8989 / CSN: 225-8989

Officier de la diversité des FAC, Direction des droits de la personne et diversité 3-2 Ministère de la Défense nationale / Gouvernement du Canada Julie.labrecque@forces.gc.ca / Tél. : 613-901-8989 / RCCC : 225-8989

-----Original Message-----

From: Rogers Capt DS@CFRG HQ@Borden

Sent: July-10-18 11:21 AM

To: Labrecque Maj JMN@CMP DHRD@Ottawa-Hull <JULIE.LABRECQUE@forces.gc.ca>; Rankin KJ@CMP DRPG@Ottawa-Hull <KAREN.RANKIN@forces.gc.ca>

Cc: Blanchette Maj CD@CFRG@Borden <Christina.Blanchette@forces.gc.ca>

Subject: FW: Case study proposal

Ma'am

Marketing and Attractions is requesting your assistance with a case study proposal.

Specifically, does DGMPRA have data (or survey details) on whether women are influenced by military family connections more than men when deciding to join the CAF? I know that we have the general data that supports the overall theory but unsure if it's broken down by sex.

Any assistance is appreciated.

D. Rogers, Capt

RPSO 2, Canadian Forces Recruiting Group Headquarters Canadian Armed Forces donna.rogers@forces.gc.ca / Tel: 705-424-1200 Ext 2435 / CSN: 270-2435 / Cel: 705-791-5781

OSPR 2, Quartier Général du Groupe du recrutement des Forces Canadiennes Forces armées canadiennes
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-----Original Message-----

From: Leslie LCdr PDC@CFRG@Borden
 Sent: July-06-18 4:00 PM
 To: Rogers Capt DS@CFRG HQ@Borden <Donna.Rogers@forces.gc.ca>
 Cc: Mainguy LCol DS@CFRG@Borden <DAN.MAINGUY@forces.gc.ca>
 Subject: FW: Case study proposal

Donna...

I wasn't able to get this this task before proceeding on leave today.

Can you provide answers to questions 1 & 3 for LCol Mainguy. One should be easy enough, and I would recommend reaching out to Maj Julie Labrecque for assistance on #3.

LCdr|Capc Patrick D.C. Leslie
 Recruiting Personnel Selection Officer
 Canadian Forces Recruiting Group Headquarters Canadian Armed Forces patrick.leslie@forces.gc.ca / Tel: 705-424-1200
 Ext 3070 / CSN: 270-3070

OSPR, Quartier Général du Groupe du recrutement des Forces canadiennes Forces armées canadiennes
 patrick.leslie@forces.gc.ca / Tél.: 705-424-1200 poste 3070 / RCCC: 270-3070

-----Original Message-----

From: Mainguy LCol DS@CFRG@Borden
 Sent: July-03-18 12:36 PM
 To: >; Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
 <DOUGLAS.ALLISON@forces.gc.ca>; Leslie LCdr PDC@CFRG@Borden <PATRICK.LESLIE@forces.gc.ca>; Reavely Maj
 BA@CFRG HQ@Borden <BENJAMIN.REAVELY@forces.gc.ca>; Hendricks Capt JD@CFRG@Borden
 <Josephine.Hendricks@forces.gc.ca>
 Cc: Owens LCol SM@CFRG@Borden <Soo.Owens@forces.gc.ca>
 Subject: Re: Case study proposal

LCdr Leslie,

Need your assistance with the more detailed ques outlined below.

1. Can you please outline the general requirements and enrollment process (ACE, CFAT/TSD, interview, medical, and any of the specialist assessment protocols by occ).
3. Do we have any DGMPRA data (or survey details) on whether women are influenced by military family connections more than men when deciding to join the CAF? I know that we have the general data that supports the overall theory but unsure if it's broken down by sex.

s.19(1)

Maj Reavely,

For your Women's Diversity rep:

2. Can we get a geographic heat map of where our women's enrollments come from in the past FY? We have a heat map that displays 'all enrollments' but need to compare the women's data to see if it follows the overall trend. (please see Capt Hurley for his assistance on this one).

Please respond and cc all on distribution. Thanks!

Dan

Sent from my BlackBerry 10 smartphone on the Rogers network.

Original Message

From:

Sent: Friday, June 29, 2018 10:09 AM

To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull

Cc: Mainguy LCol DS@CFRG@Borden

Subject: Re: Case study proposal

Dear Dan,

Thank you so very much for your time today. I'm fascinated by this topic so I look forward to thinking through a potential study design.

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With kind regards, and enjoy your weekends!

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s.19(1)

>
> Dan,
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>
> Cheers
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> Doug
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> From:
> Sent: June-25-18 8:33 PM
> To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
> <DOUGLAS.ALLISON@forces.gc.ca>
> Subject: Re: Case study proposal
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>> Sent: Monday, June 25, 2018 4:34 PM
>> To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
>> Subject: RE: Case study proposal
>>
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>>

>> Let me know if you need more.

>>

>> Dan

>>

>> From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull

>> Sent: June 25, 2018 12:44 PM

>> To: Mainguy LCol DS@CFRG@Borden <DAN.MAINGUY@forces.gc.ca>

>> Subject: FW: Case study proposal

>>

>> Dan,

>>

>> We are doing some scoping for the case study that you discussed with Maj Peebles. The contractor has some questions below. Is there anything you can point her to to help?

>>

>>

>> D. Allison

>> LCol/Lcol

>> DG Public Affairs FD/DG Affaires publiques DF Department of National

>> Defence & Canadian Armed Forces/ Ministère de la Défense nationale et

>> Forces armées canadiennes

>> Douglas.Allison@forces.gc.ca<mailto:Douglas.Allison@forces.gc.ca> /

>> Tel : 613-944-3291 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC :

>> 944-3291

>>

>>

>>

>> From:

>> Sent: June-22-18 5:29 PM

>> To: Peebles Maj M@ADMPA) DGPA@Ottawa-Hull

>> <MARK.PEEBLES@forces.gc.ca<mailto:MARK.PEEBLES@forces.gc.ca>>

>> Cc: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull

>> <DOUGLAS.ALLISON@forces.gc.ca<mailto:DOUGLAS.ALLISON@forces.gc.ca>>

>> Subject: Re: Case study proposal

>>

>> Dear Mark,

>>

>> That sounds like a very good option.

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>> I'm just back home from the course we ran this week (in a wifi-deprived location!) and I just wanted to send you a quick reply to say I chatted to a colleague about this briefly and we think this could work very well indeed.

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>>

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>> I believe we have a case study for consideration regarding our intended course. Keeping in mind the factors we discussed such as proximity, narrowness and ethical considerations, I would ask your thoughts on the following case study:

>>

>> The Canadian Armed Forces needs to recruit more women, writ-large. This is a high priority for the Government of Canada. While certain occupations (health-, logistics- and administration-related) have healthy numbers of women, others have many fewer women than is desirable. In fact, some of the former occupations receive more female applicants than positions available while the latter occupations receive far too few applications to make an appreciable difference in gender balance.

>>

>> Further, the Royal Canadian Navy faces a number of occupations which are "distressed" – they don't have as many people as they need – male or female – and aren't recruiting enough to rectify the problem. A handful of occupations are both "distressed" and have very few females coming through the door to join them. The Royal Canadian Navy has identified Sonar Operators (link<<http://esfsecev-ty3014>> to occupation information) as a priority. The behaviour at issue in this case study, then, is young women not coming through the doors of recruiting centres to become sonar operators.

>>

>> I would propose a case study that would aim to have more women in the Greater Toronto Area (GTA, link<<http://esfsecev-ty3014>> for definition of the area discussed) go to recruiting centres to become sonar operators. This does not need to be narrowed down by visible minority, IMO; all women between the ages of 18-30 in the GTA could be included for consideration but I would have your feedback on it. The region is relatively close to where we would do the course in Gatineau, but has a large enough population size that we should be able to do quantitative research relatively efficiently.

>>

>> What are your thoughts? Any suggestions on this? I welcome your feedback.

>>

>> Best regards,

>>

>> Mark

>>

>>

>>

>>

>> Major Mark A. Peebles

>>

>> Public Affairs Officer, ADM Public Affairs Department of National
>> Defence / Government of Canada
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>> Défence nationale / Gouvernement du Canada
>> mark.peebles@forces.gc.ca<mailto:michael.wiesefeld@forces.gc.ca> /
>> Tel: 613-992-4584
>>
>> <Mail Attachment.eml><Mail Attachment.eml><Female occs of interest -
>> 25 Jun 18.pdf>
>

From: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull
Sent: July 23, 2018 12:59 PM
To: +D Svcs C 4 Procurement - DC Svcs 4 Aquisitions@ADM(Mat) D Svcs C@Ottawa-Hull; Peebles Maj M@ADMPA) DGPA@Ottawa-Hull
Cc: Porter DW@ADM(Mat) D Svcs C@Ottawa-Hull; El-Zarka B@ADM(PA) COS(PA)@Ottawa-Hull; Cosentino C (Contractor)@ADM(PA) DGPASP@Ottawa-Hull; Janzen BGen JH@ADM(PA) DPAP0@Ottawa-Hull
Subject: RE: TAA Requirement
Attachments: EIR TAA.xlsx; Procurement Risk Assessment Tool (PRAT) - TAA.doc; SOW ADM (PA) TAA.doc; srcl TAA.pdf

Kent,

I have attached the bulk of the paperwork here for a first steer from you folks. Can you advise whether I have made any glaring errors.

Of note, BGen Janzen will have to sign some of the docs due to sec 32 requirements. Am I OK to sign the others as the project director/lead?

From: +D Svcs C 4 Procurement - DC Svcs 4 Aquisitions@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: July-20-18 2:14 PM
To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>; Peebles Maj M@ADMPA) DGPA@Ottawa-Hull <MARK.PEEBLES@forces.gc.ca>
Cc: +D Svcs C 4 Procurement - DC Svcs 4 Aquisitions@ADM(Mat) D Svcs C@Ottawa-Hull <P-OTG.DSvcsC4Proc@intern.mil.ca>; Porter DW@ADM(Mat) D Svcs C@Ottawa-Hull <DAVID.PORTER2@forces.gc.ca>; El-Zarka B@ADM(PA) COS(PA)@Ottawa-Hull <BERNADETTE.EL-ZARKA@forces.gc.ca>; Cosentino C (Contractor)@ADM(PA) DGPASP@Ottawa-Hull <CONNIE.COSENTINO@forces.gc.ca>; Janzen BGen JH@ADM(PA) DPAP0@Ottawa-Hull <JAY.JANZEN@forces.gc.ca>
Subject: TAA Requirement

Good Afternoon All

As discussed in yesterday's meeting, please see the following:

1. EIR and PRAT (completed and signed):
 - a. EIR Instructions found at below MMI1355 link; and
 - b. PRAT was completed but requires signature
2. SRCL – Since there is no security requirement, only box 13 of the SRCL needs to be signed by the appropriate authority. The SRCL can be found at: <http://collaboration-admpa.forces.mil.ca/sites/DI/SafetySecurity/vcds-srcl-writable-form.pdf> ;
3. Link to MMI 1355 - http://materiel.mil.ca/assets/MAT_Intranet/docs/en/business-functions-engineering-maintenance/mmi-1355-contracting-in-excess-of-25k.pdf ;
4. Contract Request Processing Time document (attached) – Please note the comments are for D Svcs C 4 purposes only. The estimated timelines indicated are accurate and will give you an idea of the process timeframe;
5. Procurement Schedule Tool (attached) – For your use as you see fit. What's useful in this doc is it identifies who's responsible for which activity;
6. Statement of Work (SOW) template and example (attached); and

7. Evaluation Criteria template and example (attached)

If you have any questions about any of the documentation, please don't hesitate to contact me.

Thanks and have a great weekend.

Kent

Kent Johnston

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From: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: July-12-18 9:39 AM
To: Peebles Maj M@ADMPA) DGPA@Ottawa-Hull <MARK.PEEBLES@forces.gc.ca>
Cc: +D Svcs C 4 Procurement - DC Svcs 4 Aquisitions@ADM(Mat) D Svcs C@Ottawa-Hull <P-OTG.DSvcsC4Proc@intern.mil.ca>; Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: BDI Methodology Requirement

Morning Mark

Sounds good; I'll pass up my chain for discussion.

Will advise soonest.

Thanks

Kent

Kent Johnston

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From: Peebles Maj M@ADMPA) DGPA@Ottawa-Hull
Sent: July-12-18 9:30 AM
To: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull <KENT.JOHNSTON@forces.gc.ca>
Cc: +D Svcs C 4 Procurement - DC Svcs 4 Aquisitions@ADM(Mat) D Svcs C@Ottawa-Hull <P-OTG.DSvcsC4Proc@intern.mil.ca>; Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: BDI Methodology Requirement

Morning Kent,

Attached are the EIR, PRAT, SRCL docs filled out, as well as a synopsis of our requirement for information. I looked at the TBIPS and TSPS sites and found nothing there that matched what we need. Let me know who the best person in your organization would be to discuss this requirement with regard to arcs of fire and guidance on process. My DG would like for this discussion to happen before next Friday, if possible. Do not hesitate to get in touch with me if you have any questions regarding what I've provided.

Regards,

Mark

Major Mark A. Peebles

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From: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: July-10-18 4:17 PM
To: Peebles Maj M@ADM(PA) DGPA@Ottawa-Hull <MARK.PEEBLES@forces.gc.ca>
Cc: +D Svcs C 4 Procurement - DC Svcs 4 Aquisitions@ADM(Mat) D Svcs C@Ottawa-Hull <P-OTG.DSvcsC4Proc@intern.mil.ca>
Subject: BDI Methodology Requirement

Hi Maj Peebles

As per our discussion, I've attached the documents required to initiate a requirement.

The type of resource(s) you're looking for may be available under the Task-Based Informatics Professional Services (TBIPS) or Task and Solutions Professional Services (TSPS) Methods of Supply. These are mandatory Methods of Supply put in place by PSPC. The links to the websites are below. In it are Workstreams and Categories (For TBIPS: <http://www.tpsgc-pwgsc.gc.ca/app-acq/sptb-tbps/categories-eng.html> ; For TSPS: <http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/spctsc-tspsc-eng.html>). If any fit under your requirement, we're obligated to use these methods. Note that there are links to pre-approved Security Requirements Check Lists (SRCLs) at this link: <http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/31-eng.html> . If your requirement does fit under TBIPS or TSPS, one of these SRCLs may be appropriate as well. If not, I've attached a blank SRCL that will need to be completed by you (or the Technical Authority if it is not you) – the contract number will need to be added to the top of the form.

TBIPS - <http://www.tpsgc-pwgsc.gc.ca/app-acq/sptb-tbps/index-eng.html>

TSPS - <http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/spctsc-tspsc-eng.html>

If there is any IM/IT related to this requirement, all IM/IT requirements must be approved through IM Group Procurement Alignment Review Validation at: +IM GP PROC Alignment Rev@ADM(IM) DIMCBM@Ottawa-Hull. Generally, you email your Statement of Work (SOW) to the +IM GP email address for their review. Once they have responded with an approval email, the approval should be forwarded to the D Svcs C positional mailbox CC'd above.

Lastly, Evaluation Criteria will be required for the resource(s) as well. However, since you're not at the stage yet, just provide the EIR and PRAT at this point. Once your requirement is assigned to one of our officers, they'll be in touch about the eval criteria, security and other procurement and contracting details.

Until your requirement is assigned to one of the officers, please send all correspondence to the +D Svcs C 4 Procurement email CC'd above.

Thanks

Kent

Kent Johnston

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EXPENDITURE INITIATION REQUEST (EIR) FORM

REQUIREMENT TITLE / REFERENCE:		DATE (11/Jul/2018)								
ORIGINAL	MODIFICATION & NO.									
1) Project Manager (PM) or Technical Authority (TA)										
Name:	Doug Allison									
Title:	DG Public Affairs FD									
Designation:										
Organization:	ADM (PA)									
Address:	101 Col By Drive, Ottawa, ON									
Telephone Number:	613-944-3291									
Facsimile (optional):										
Email:	Douglas.Allison@forces.gc.ca									
2) Requirement - MANDATORY										
<p>Summary of the Requirement Target Audience Analysis (TAA) is a required capability to support Joint Targeting, Information Operations and Strategic Communication. Joint Targeting and Information Operations are SSC-related initiatives which have, or will have, CDS initiating directives for implementation. ADM (PA) plans to provide a TAA capability that will support these initiatives in FY 18/19. This will require the training of CAF and DND personnel on a suitable TAA methodology, which does not currently exist in the CAF nor DND. There are no suitable foreign military options which could deliver in time. It is therefore necessary to engage an entity to provide training on a methodology suitable for the CAF's needs. The Behavioral Dynamics Institute methodology is endorsed by NATO and is being used by the Dutch military already.</p> <p>Basis of Payment</p>										
Recurring Requirement										
3) Description of Goods and/or Services										
<input checked="" type="checkbox"/> List of Deliverables, Statement of Work/Requirement or Quote is attached										
<input type="checkbox"/> Line Item Details attached										
<input type="checkbox"/> Hazardous Material										
<input type="checkbox"/> Controlled Goods										
<input type="checkbox"/> Quality Assurance (QA)										
<input type="checkbox"/> Technical Data Package (TDP)										
4) Technical Evaluation - MANDATORY except for Sole Source Requirements. Select one of the following:										
Selection Methodology - Select one of the following										
<input checked="" type="checkbox"/>	Lowest-Priced Responsive Proposal (Evaluation based on <i>Mandatory</i> criteria only)									
<input type="checkbox"/>	Lowest-Priced Responsive Proposal (Evaluation based on a combination of <i>Mandatory</i> and <i>Point-Rated</i> criteria)									
<input type="checkbox"/>	Lowest Responsive <i>Cost-per-Point</i> Proposal									
<input type="checkbox"/>	Highest Responsive Combined Rating of <i>Technical Merit</i> and <i>Price</i> (e.g. 60/40 or 70/30)									
<input type="checkbox"/>	Highest-Rated Responsive Proposal within a Specified <i>Maximum Budget</i>									
<input type="checkbox"/>	See attached <i>Mandatory</i> Technical Evaluation Criteria (for simple goods or services)									
<input type="checkbox"/>	See attached <i>Evaluation Plan</i> (for complex goods or services)									
5) Security Requirements - MANDATORY										
<input checked="" type="checkbox"/>	Completed Security Requirements Check List (SRCL) form attached									
6) Procurement Strategy Considerations - MANDATORY (select one)										
<input type="checkbox"/>	Competitive Requirement									
<input checked="" type="checkbox"/>	Sole Source Requirement									
<input type="checkbox"/>	Sole Source Requirement and exception 6 (d) of the GCRs applies.									
<input type="checkbox"/>	Internal DND (QETE, NETE, AETE, FMF, 202WD, etc.) Source									
<input type="checkbox"/>	Other Government Department (OGD) Source - specify:									
<input type="checkbox"/>	National Security Exception-see attached substantiation									
<input type="checkbox"/>	No Substitute Requirement - see attached substantiation									
<input type="checkbox"/>	Other Source Considerations - specify:									
7) Funding - REQUIRED (See section 10 below for multi-year funding requirement information).										
Provide the estimated FUNDED value of the requirement (taxes excluded). Financial coding information is provided in section 10 below.		Funded AMOUNT: \$520,000.00								
8) Expenditure Initiation Authority.										
"I confirm this is a valid and approved requirement. I also certify that I have the required designated financial authority to proceed with this authorization."		// Signature //								
Date (DD/MMM/YYYY) Name: BGen J. Janzen Designation: DGMSC										
9) FAA Section 32 - Approval for TOTAL amount required.										
"I certify that funding is available in accordance with Section 32 of the Financial Administration Act (FAA) in the amount specified above. I also certify that I have the required designated financial authority to proceed with this authorization."		// Signature //								
Date (DD/MMM/YYYY) Name: BGen J. Janzen Designation: DGMSC										
10) Total requirement value CASH FLOW Information - For each Fiscal Year and/or Financial Coding. Include the funded and unfunded requirement, including all option years.										
Serial	FY	Amount	Fund	FC	CC or WBS	GL	IO	Source of funding	Funded or Unfunded	Remarks
1	18/19	\$520,000.00								
2		\$0.00								
3		\$0.00								
4		\$0.00								
5		\$0.00								
6		\$0.00								
7		\$0.00								
8		\$0.00								
9		\$0.00								
10		\$0.00								
11) Procurement Initiation Authority (PIA). ** For requirements outside of ADM(Mat) **										
Identify and provide the total estimated value of the requirement. The amount indicated herein is the amount of the FUNDED and UNFUNDED portion of the requirement (all taxes included).		Total Tax 13% \$67,600.00								
		TOTAL AMOUNT (Taxes Included): \$587,600.00								
Recommended by (optional) - applicable authority recommends the approval of the requirement identified.		// Signature //								
Date (DD/MMM/YYYY) Name: Designation:										
Approval - The applicable authority approves this requirement, certifies that the necessary approvals have been obtained and requests that the goods and/or services described herein be acquired and provided.		// Signature //								
Date (DD/MMM/YYYY) Name: Designation:										

Procurement Risk Assessment Tool (PRAT)

Instructions:

The originating Procurement Authority is responsible to:

- 1) use this form only when exercising Procurement Initiation Authority (PIA) (refer to PAM 1.4);
- 2) complete this form for each specific requirement, with the input from the Technical Authority (TA) or LCMM if clarifications are required.
- 3) answer all questions;
- 4) answer score 1 (low risk) if a question does not apply to your specific requirement;
- 5) Sum the Score Column to determine the risk level of the requirement:

If the total score is:

23-29 inc.	the requirement is low risk
30-56 inc.	the requirement is medium risk
57-97 inc.	the requirement is high risk

- 6) Sign the form on the last page.
- 7) File the completed form in the procurement file with the requirement.

Cat.	#	Factors & Considerations	Low Risk = 1	Medium Risk = 2-3	High Risk = 4-5	Score
REQUIREMENTS DEFINITION	1	Recurring requirement: Is your requirement a <u>possible</u> recurring requirement which may limit competition in the future?	Score 1: Standalone requirement Or A recurring competitive requirement	Score 3: Non-competitive and follow-on requirement to a previous supplier OR Intellectual property (IP) or similar (e.g. unique expertise) resulting from the requirement may limit competition for future requirements for maintenance and support	Score 4: Intellectual property (IP) or similar (e.g. unique expertise) resulting from the requirement may limit competition for future requirements EXCLUDING maintenance and support	1
	2	Delivery/Lead time: What is the likely delivery lead time of your requirement in relation to your need / DND requirement(s)? Issues which may cause delay in delivery: <ul style="list-style-type: none"> ▪ Weather conditions ▪ Social conditions (ex.: possibility of a strike) ▪ Availability of raw material ▪ Shortage of labour in a specific field ▪ Rare and/or specialized expertise ▪ Economic conditions (budget cuts, budget freeze, etc) 	Score 1: No or negligible issues and delays will have little to no effect on DND business	Score 2: Potential for some issues / moderate delays or delays will have some effect on DND business	Score 4: Potential for significant issues / long lead time likely or delays will have significant effect on DND business	2

Cat.	#	Factors & Considerations	Low Risk = 1	Medium Risk = 2-3	High Risk = 4-5	Score
PROCUREMENT	3	Duration of contract: What is the duration of your requirements (including options)?	Score 1: Requirement has a duration of 3 years or less.	Score 2: >3 ≤ 4 years Score 3: >4 ≤ 5 years	Score 4: > 5 ≤ 10 years Score 5: > 10 years	1
	4	Advance approvals: Does your requirement contain a request for advance approvals such as: <ul style="list-style-type: none"> ▪ pre-approved amendments, ▪ pre-approved amounts for unscheduled work, design changes, etc. This DOES NOT include defined options such as: <ul style="list-style-type: none"> ▪ option years on a service contract ▪ option items on a goods contract 	Score 1: No advance approvals	Score 2: Advance approvals for anticipated additional work Score 3: Advance approvals for unscheduled work, design changes or work arising	Score 4: Advance approvals and conditions other than: <ul style="list-style-type: none"> ▪ Advance approvals for anticipated additional work ▪ Advance approvals for unscheduled work, design changes or work arising 	1
	5	Subcontract arrangements: Will your requirement require subcontract arrangements?	Score 1: No sub-contracts anticipated	Score 2: Possibility of sub-contracts but typical for this type of requirement	Score 4: Possibility of sub-contract(s) that are atypical for this type of requirement	2
	6	Comprehensive Land Claims Agreements (CLCAs): Will CLCAs apply to your requirement? Refer to PAM 3.1.1.1.3.4	Score 1: CLCAs do not apply	Score 3: CLCAs apply. The final delivery of the goods / services or the performance of the work take place in a Comprehensive Land Claims Settlement Area		1
	7	Urgent Approval of the procurement strategy: Does your requirement require an urgent approval?	Score 1: No urgency	Score 3: Urgent approval is required and is the result of unforeseen or emergency circumstances	Score 4: Urgent approval is required and is attributable to planning issues	4
	8	Extent of competition: Will your requirement be competed? Refer to PAM 3.1.1.1	Score 1: Competitive procurement using GETS (excluding Advance Contract Award Notifications (ACAN) requirements)	Score 2: Competitive procurement using a source list.	Score 5: Non-Competitive procurement (including ACAN requirements)	5
	9	Complaints and Challenges from industry: Is a history of industry's complaints or challenges associated to this type of requirement? Refer to PAM 4.4	Score 1: No complaints and/or challenges are expected	Score 3: Potential for complaints and/or challenges	Score 5: History of CITT challenges, ministerial or other type of complaints associated to this requirement or to similar types of requirement	1

Cat.	#	Factors & Considerations	Low Risk = 1	Medium Risk = 2-3	High Risk = 4-5	Score
	10	Occupational Health Safety and Environment (OHS&E): Does your requirement include any OHS&E issue?	Score 1: No OHS&E Issues	Score 2: Potential for some OHS&E issues but mitigation strategies have been identified Score 3: Potential for some OHS&E issues but no mitigation strategies have been identified	Score 5: History of OHS&E issues for the same or similar requirements (e.g. major workers' compensation claims, environmental claims, statutory penalties for safety infractions, etc.)	1
	11	Intellectual Property (IP): Does your requirement include any IP? <u>Refer to PAM 3.2.8, table 3.2.8-1, 5th block, Intellectual Property</u>	Score 1: No IP. Or Canada to own copyright Or Contractor to own IP, including copyright		Score 5: Canada to own IP	5
	12	Security: <u>Is there a requirement to ensure the security of federal government data, information, assets, human resources or other elements at risk?</u> Does your requirement require a Security Requirements Checklist (SRCL)? <u>Refer to PAM 1.7 and to PAM 3.2.12</u>	Score 1: No sensitive data or information is involved Assets and human resources will not be at risk SRCL is not required	Score 2: Either: Contractor personnel will require security screening (Protected A, B, or C) Or A Designated Organization Screening (DOS) is required (Protected A, B, or C)	Score 4: Contractor must hold a Facility Security Clearance (FSC) OR Contractor personnel will be required to hold a valid security clearance (Classified, Secret, Top Secret or NATO Secret) OR The contractor must hold a controlled goods registration	1
	13	<u>Bid Evaluation:</u> What type of Bid Evaluation criteria will be used to evaluate to bids? <u>Refer to PAM 3.5</u>	Score 1: Mandatory criteria only OR Combination of mandatory and point-rated criteria without qualitative judgment (e.g. a quantitative scoring grid is being used)	Score 2: Evaluation includes mandatory and point-rated criteria requiring subjectivity	Score 4: Evaluation includes multiple layers requiring assessment, making the evaluation complicated (e.g. combination of mandatory criteria, mandatory point rated criteria, point rated criteria without subjectivity and point rated criteria with subjectivity)	2

Cat.	#	Factors & Considerations	Low Risk = 1	Medium Risk = 2-3	High Risk = 4-5	Score
	14	<p>Contractor Selection Methodology: What type of contractor selection methodology will be used?</p> <p><u>Refer to PAM 3.5</u></p>	<p>Score 1: Lowest-priced responsive bid OR not applicable (directed contract)</p>	<p>Score 2: Lowest cost-per-point responsive proposal</p> <p>Score 3: Highest compliant combined rating of technical merit and price where the factor for price \geq 30% OR Highest rated compliant proposal within a stipulated maximum budget</p>	<p>Score 4: Highest responsive combined rating of technical merit and price where the factor for price is less than (<) 30%</p> <p>Score 5: Highest technical responsive bid where price is not a factor in evaluation</p>	1
MARKET/SUPPLIER CAPABILITY	15	<p>Procurement Set-Aside for Aboriginal Business (PSAB): Do you anticipate any complaints with regards to the decision to use PSAB or not?</p> <p><u>Refer to PAM 3.1.1.1.3.5</u></p>	<p>Score 1: There is no expectation of complaint with regard to the decision to set aside or not</p>	<p>Score 2: Some complaints are anticipated with regard to the decision to set aside or not</p>	<p>Score 5: There is a history of complaints related to this type of requirement with regard to the decision to set aside or not</p>	1
	16	<p>Potential vendors: Are there many potential vendors in the market that can fulfil your requirement?</p>	<p>Score 1: There are many potential Vendors in the market.</p>	<p>Score 2: There is a limited number of interested Vendors in the market..</p>	<p>Score 4: There is only one potential qualified Vendor. Or There are likely no potential Vendors that can meet the requirement.</p>	4
	17	<p>Market Conditions: Are there any market conditions that may impact the contract deliverables?</p> <p>Some examples are:</p> <ul style="list-style-type: none"> ▪ The source of supply is unique or unreliable ▪ There is competition for scarce materials ▪ There is a risk of currency fluctuation ▪ There is a possibility of a strike 	<p>Score 1: No market issues</p>	<p>Score 2: Some market conditions may impact contract deliverables</p>	<p>Score 4: Known difficulties with market conditions that will impact contract deliverables and require contingency</p>	2
Financial Character	18	<p>Progress Reporting: Will progress reports be required?</p>	<p>Score 1: No progress reports required OR Well-defined progress report structure</p>		<p>Score 4: Progress reporting is required but reporting process has not been defined yet.</p>	1
	19	<p>Basis of Payment: What will be the basis of payment?</p> <p>Note: If multiple bases of payments apply, score it according to the most risky method (i.e. other</p>	<p>Score 1: Firm price (e.g. firm unit price for goods) Or Ceiling price</p>	<p>Score 2: Any Basis of payment other than firm price or ceiling price</p>	<p>Score 4: Unable to determine an appropriate basis of payment (input from the Contracting Authority (CA) is required)</p>	1

Cat.	#	Factors & Considerations	Low Risk = 1	Medium Risk = 2-3	High Risk = 4-5	Score
OTHER RELATE		than firm price or ceiling price) Refer to PAM 3.1.2				
	20	Method(s) of Payment: What will be the method(s) of payment? Note: If multiple methods of payments apply, score it according to the most risky method (i.e. other than payment upon delivery and acceptance) Refer to PAM 3.1.3	Score 1: Payment upon delivery and acceptance	Score 2: -Progress (e.g. bi-weekly, monthly, quarterly) or milestones payments or -Payment in advance by acquisition card or -Payment in advance for Foreign Military Sales or -Advance payments for maintenance contracts (IM/IT) or -Advance payments for subscriptions and insurance premiums Score 3: Advance payments where there is a long and entrenched tradition or practice of receiving advance payments from the purchaser in a particular industry or segment of industry (other than IM/IT maintenance contracts, subscriptions or insurance premiums) Justification must be kept on file	Score 5: Advance Payments under one or more of the following situations: -in exceptional situations, such as armament purchases or extended warranty service, where up-front payments must be made to the supplier -where there is economic advantage to Canada that clearly outweighs the financial cost associated with the advance payment -the contractor could suffer hardship or provide financing only with difficulty or at rates considered to be uneconomical -the value of the contract is considered to be beyond the assessed financial capabilities of the contractor OR Any other situation where advance payments are to be made Justification must be kept on file	1
	21	Minimum Guarantees (profit, revenue, work guarantees) to the supplier: Will the department request that the contract include any minimum guarantees to the supplier?	Score 1: No guarantees Or Unknown at this point Or No work guarantee clause included	Score 2: Guarantees ≤ 10% of contract value	Score 4: Guarantees > 10% ≤ 20% of Contract value Score 5: Guarantees > 20% of Contract Value	1
	22	Performance Incentives (liquidated damages, holdbacks, etc.): Will the contract include any performance incentives?	Score 1: No Performance Incentives. OR Standard 10% holdback terms		Score 4: Performance Incentives required, beyond the standard, such as liquidated damages	1
	23	Public Interest and Sensitivity: Will your requirement raise any public interest or does it contain any sensitivity?	Score 1: No Public awareness concern as it is a standard contract for common goods or services	Score 3: Some media attention is possible	Score 4: Has already been in media and expect continuation of coverage Or	3

Cat.	#	Factors & Considerations	Low Risk = 1	Medium Risk = 2-3	High Risk = 4-5	Score
					Expect negative coverage and significant upward briefing	
TOTAL SCORE						43

If the total score is: 23-29 inc., the requirement is **low risk**
 30-56 inc., the requirement is **medium risk**
 57-97 inc., the requirement is **high risk**

Risk Level: _____ Medium _____

Name of the Procurement Authority (PA): Doug Allison

Position/rank of the PA: DGMSC Force Development

Signature of the PA: D. Allison LCOL Date: 25/7/18 Phone number: 613 944-3291

When the risk level has been assessed as medium (and the requirement is above \$2M) or high, the requirement and PRAT must be forwarded to the Director of your procurement directorate (refer to PAM 1.4).

Procurement directorate: _____

Name of the Procurement Authority (PA): _____

Position/rank of the PA: _____

We agree with the above procurement risk assessment of the requirement and the PIA functions will be exercised by us.

Signature of the PA: _____ Date: _____ Phone number: _____

ANNEX A - STATEMENT OF WORK

1. BACKGROUND

- 1.1. The Chief of Defence Staff (CDS) directed the implementation of a Joint Targeting Capability which includes munitions- and non-munitions targeting. CAF targeting doctrine calls for Target Audience Analysis (TAA) as part of the targeting process. The CDS has directed that the Joint Targeting Capability reach interim operating capability by September of 2019. In *Strong, Secure, Engaged*, the Government committed to "...the development of military-specific information operations...", and ongoing efforts by Chief of Force Development aim to improve capabilities Information Operations-related capabilities – Public Affairs among them.
- 1.2. ADM (PA), as the Functional Authority for the Public Affairs Branch, is responsible for military public affairs and, thus, responsible for developing military public affairs capabilities to support CDS direction, Defence Policy and CAF Joint Doctrine. ADM (PA) has identified TAA as a capability it will acquire to support Joint Targeting, Information Operations and Strategic Communication as part of its initiative to operationalize the Public Affairs Branch.
- 1.3. As the ADM (PA) staff in charge of developing the operational capabilities of the Public Affairs Branch, this office's research has concluded that the CAF does not have a sufficient TAA methodology and must seek a civilian entity to train CAF personnel on this methodology in order to meet the requirement.

2. OBJECTIVE

- 2.1. The expected outcome of this contract is that the Contractor will have trained a group of DND/CAF personnel in its TAA methodology. By retaining proprietary usage of the methodology and courseware, DND/CAF will then be able to provide in-house training to a sufficient core of personnel. This will contribute to creating a sustainable TAA capability program that will support Joint Targeting, Information Operations and Strategic Communications in the long-term.

3. SCOPE

- 3.1. The contractor must conduct a course teaching a TAA methodology in Canada to CAF and DND personnel in order to create a core body of CAF and DND personnel who can apply the methodology in support of CAF operations. Further, the contractor must provide the CAF with proprietary usage rights for the methodology as well as the courseware in order to enable a sustained CAF capability using the methodology.

4. CONSTRAINTS

- 4.1. The course must be conducted with the following constraints:
 - (a) The course must be conducted in the National Capital Region of Canada;
 - (b) The course must be conducted at a DND facility;
 - (c) Training must be carried out during weekdays, with no weekend training;
 - (d) Training must be carried out in English;
 - (e) The course must be completed by 31 March 2019;
 - (f) The course must entail a live case study to assist in applying the methodology;
 - i. The live case study must pertain to CAF/DND issues, with the resulting findings being practically applicable to CAF/DND;

- ii. The live case study must be conducted in a manner consistent with accepted ethical norms pertaining to public opinion research;
- iii. The live case study must be conducted using a target audience within the region between the Greater Toronto Area and the National Capital Region;
- (g) The course must involve a blend of classroom lectures, syndicate work, student presentations and activities;
- (h) Course material must be updated to reflect any developments in Target Audience Analysis and Strategic Communication over the past calendar year; and
- (i) The students must receive examinations consisting of written, individual and syndicate presentations

5. TECHNICAL ENVIRONMENT

- 5.1. The course will be conducted using non-departmental networks (ie-civilian internet) through Wi-Fi connectivity. Microsoft Office applications (Outlook, PowerPoint, Word, etc.) will be used.

6. TASKS AND DELIVERABLES

The Contractor must:

- 6.1. design and conduct a Target Audience Analysis course which ends no later than 31 March, 2019 that will teach up to 24 students the methodology to a level where they can apply the methodology to conduct Target Audience Analysis;
- 6.2. arrange and provide appropriate equipment for instruction (ie-instructor computers and pointers), minus those already provided by the place of instruction (ie-electronic projectors and flip charts);
- 6.3. provide all learning material, including but not limited to, books, slide decks and reference documents (electronic or paper) for up to 24 students;
- 6.4. design a detailed curriculum and lecture/activity schedule with examinations/assessments at the mid- and end-course points;
- 6.5. develop, facilitate and arrange the logistics for an in-course live case study, to include conducting qualitative (ie-focus groups) and quantitative public opinion research. [J1][A2][J3]
- 6.6. The Contractor will refine the student findings from the live case study into a briefing document for consideration by the Department of National Defence no later than one month after the completion of training;
- 6.7. design, conduct and assess written examinations, individual and syndicate presentations.

7. REPORTING REQUIREMENTS

- 7.1. The Contractor must provide a financial status report at the mid- and end-course points which must contain, at a minimum, the following information:
 - (a) Reporting Start Date;
 - (b) Reporting End Date;
 - (c) Amount Spent on Services;
 - (d) Amount on Travel and Living; [J4][A5][J6]

- (e) GST/HST; and
 - (f) Total Spent;
- 7.2. A progress report must be completed by the Contractor for each resource and submitted to the Technical Authority at the quarter-, mid- and three-quarter marks of the course. At a minimum, each progress report must document the following information:
- (a) All significant activities performed in the period covered that may impact the conduct of the course;
 - (b) Status of any outstanding activities that may extend beyond normal timelines;
 - (c) Any training concerns regarding student performance;
 - (d) Any student concerns regarding course material or delivery;
 - (e) Description of any problems encountered which will require attention or escalation; and
 - (f) Any recommendations to update or change the course schedule.
- 7.3. All reports must be provided in one (1) hard copy and one (1) soft copy, in a format acceptable to the Technical Authority. The soft copy must be compatible with Microsoft Office 2003 or Adobe Reader.

8. LANGUAGE REQUIREMENTS

- 8.1. The instructor(s) must be fluent in the English language. Fluent means that the individuals must be able to communicate orally and in writing without any assistance and with minimal errors.

9. TRAVEL

- 9.1. Travel may be required by the Contractor. The Contractor will be paid for its authorized travel and living expenses reasonably and properly incurred in the performance of the Work performed, at cost, without any allowance for profit and administrative overhead, in accordance with the meal and private vehicle expenses provided in Appendices B, C and D of the National Joint Council Travel Directive; and with the other provisions of the directive referring to "travellers", rather than those referring to "employees".
- 9.2. The Contractor must arrange for the lodging and meals and transport of instructor(s)/lecturer(s) to and from the place of instruction.

10. LOCATION OF WORK

- 10.1. All instruction must be completed at DND facilities within the National Capital Region (NCR). For the purposes of live case study qualitative analysis, focus groups and interviews may be conducted at a third location within the NCR. Travel costs within the NCR will not be reimbursed.



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**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 CAF/DND	2. Branch or Directorate / Direction générale ou Direction ADM (PA)		
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 Target Audience Analysis Course to be conducted by a civilian provider to CAF/DND personnel			
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 checked="" type="checkbox"/> No / Non	<input 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	Foreign / Étranger	
7. b) Release restrictions / Restrictions relatives à la diffusion			
No release restrictions / Aucune restriction relative à la diffusion <input checked="" type="checkbox"/> Not releasable / À ne pas diffuser Restricted to: / Limité à : Specify country(ies): / Préciser le(s) pays :	All NATO countries / Tous les pays de l'OTAN Restricted to: / Limité à : Specify country(ies): / Préciser le(s) pays :	No release restrictions / Aucune restriction relative à la diffusion Restricted to: / Limité à : 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	PROTECTED A / PROTÉGÉ A <input type="checkbox"/>	
PROTECTED B / PROTÉGÉ B <input type="checkbox"/>	NATO RESTRICTED / NATO DIFFUSION RESTREINTE	PROTECTED B / PROTÉGÉ B <input type="checkbox"/>	
PROTECTED C / PROTÉGÉ C <input type="checkbox"/>	NATO CONFIDENTIAL / NATO CONFIDENTIEL	PROTECTED C / PROTÉGÉ C <input type="checkbox"/>	
CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>	NATO SECRET / NATO SECRET	CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>	
SECRET / SECRET <input type="checkbox"/>	COSMIC TOP SECRET / COSMIC TRÈS SECRET	SECRET / SECRET <input type="checkbox"/>	
TOP SECRET / TRÈS SECRET		TOP SECRET / TRÈS SECRET	
TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT)		TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT)	

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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? No / Non Yes / Oui

If Yes, indicate the level of sensitivity:
 Dans l'affirmative, indiquer le niveau de sensibilité :

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

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

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

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

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? No / Non Yes / Oui

If Yes, will unscreened personnel be escorted?
 Dans l'affirmative, le personnel en question sera-t-il escorté? No / Non Yes / Oui

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

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

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

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

PRODUCTION

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

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

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

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





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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?
 La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE? No Yes
Non Oui

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

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

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



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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
Douglas Allison	DG Public Affairs FD	

Telephone No. - N° de téléphone 613-944-3291	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel Douglas.Allison@forces.gc.ca	Date
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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 819-939-6645	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel Emilie.vezina2@forces.gc.ca	Date
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15. Are there additional instructions (e.g. Security Guide, Security Classification Guide) attached? Des instructions supplémentaires (p. ex. Guide de sécurité, Guide de classification de la sécurité) sont-elles jointes?	<input checked="" type="checkbox"/> No Non	<input type="checkbox"/> Yes Oui
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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
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17. Contracting Security Authority / Autorité contractante en matière de sécurité

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

Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date
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Instructions for completion of a Security Requirements Check List (SRCL)

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

GENERAL - PROCESSING THIS FORM

The project authority shall arrange to complete this form.

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

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

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

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

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

PART A - CONTRACT INFORMATION

Contract Number (top of the form)

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

1. Originating Government Department or Organization

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

2. Directorate / Branch

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

3. a) Subcontract Number

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

b) Name and Address of Subcontractor

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

4. Brief Description of Work

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

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

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

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

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

6. Indicate the type of access required

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

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

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

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

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

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

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

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

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

Departments must process SRCLs through PWGSC where:

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

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

Canadian government information and/or assets

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

NATO Information and/or assets

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

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

Foreign government information and/or assets

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

b) Release restrictions

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

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

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

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

c) Level of information

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

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

8. **Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets?**
 If Yes, the supplier personnel requiring access to COMSEC information or assets must receive a COMSEC briefing. The briefing will be given to the "holder" of the COMSEC information or assets. In the case of a "personnel assigned" type of contract, the customer department will give the briefing. When the supplier is required to receive and store COMSEC information or assets on the supplier's premises, the supplier's COMSEC Custodian will give the COMSEC briefings to the employees requiring access to COMSEC information or assets. If Yes, the Level of sensitivity must be indicated.
9. **Will the supplier require access to extremely sensitive INFOSEC information or assets?**
 If Yes, the supplier must provide the Short Title of the material and the Document Number. Access to extremely sensitive INFOSEC information or assets will require that the supplier undergo a Foreign Ownership Control or Influence (FOCI) evaluation by CIISD.

PART B - PERSONNEL (SUPPLIER)

10. a) **Personnel security screening level required**

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

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

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

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

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

Will unscreened personnel be escorted?

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

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

PART C - SAFEGUARDS (SUPPLIER)

11. **INFORMATION / ASSETS**

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

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

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

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

PRODUCTION

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

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

INFORMATION TECHNOLOGY (IT)

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

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

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

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

SUMMARY CHART

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

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

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

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

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

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

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

PART D - AUTHORIZATION

13. Organization Project Authority

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

14. Organization Security Authority

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

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

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

16. Procurement Officer

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

17. Contracting Security Authority

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

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

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

GÉNÉRALITÉS - TRAITEMENT DU PRÉSENT FORMULAIRE

Le responsable du projet doit faire remplir ce formulaire.

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

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

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

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

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

PARTIE A - INFORMATION CONTRACTUELLE

Numéro du contrat (au haut du formulaire)

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

1. **Ministère ou organisme gouvernemental d'origine**
Inscrire le nom du ministère ou de l'organisme client ou le nom de l'entrepreneur principal pour qui les travaux sont effectués.
2. **Direction générale ou Direction**
Cette case peut servir à fournir plus de détails quant à la section du ministère ou de l'organisme pour qui les travaux sont effectués.
3. **a) Numéro du contrat de sous-traitance**
S'il y a lieu, ce numéro correspond au numéro généré par l'entrepreneur principal pour gérer le travail avec son sous-traitant.
b) Nom et adresse du sous-traitant
Indiquer le nom et l'adresse au complet du sous-traitant, s'il y a lieu.
4. **Brève description du travail**
Donner un bref aperçu du besoin ou du travail à exécuter.
5. **a) Le fournisseur aura-t-il accès à des marchandises contrôlées?**
La *Loi sur la production de défense* (LPD) définit « marchandises contrôlées » comme désignant certains biens énumérés dans la Liste des marchandises d'exportation contrôlée, un règlement établi en vertu de la *Loi sur les licences d'exportation et d'importation* (LLEI). Les fournisseurs qui examinent, possèdent ou transfèrent des marchandises contrôlées à l'intérieur du Canada doivent s'inscrire à la Direction des marchandises contrôlées ou être exemptés de l'inscription. On trouvera plus d'information à l'adresse www.cgp.gc.ca.
b) Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques?
L'entrepreneur et tout sous-traitant doivent être accrédités en vertu du Programme mixte d'agrément Etats-Unis / Canada si le travail comporte l'accès à des données militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques. On trouvera plus d'information à l'adresse www.dlis.dla.mil/jcp/.

6. Indiquer le type d'accès requis

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

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

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

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

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

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

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

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

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

Les ministères doivent soumettre la LVERS à TPSGC lorsque:

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

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

Renseignements et/ou biens du gouvernement canadien

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

Renseignements et/ou biens de l'OTAN

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

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

Renseignements et/ou biens de gouvernements étrangers

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

b) Restrictions relatives à la diffusion

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

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

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

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

c) Niveau d'information

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

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

8. **Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS?**
 Si la réponse est Oui, les membres du personnel du fournisseur qui doivent avoir accès à des renseignements ou à des biens COMSEC doivent participer à une séance d'information COMSEC. Cette séance sera donnée au « détenteur autorisé » des renseignements ou des biens COMSEC. Dans le cas des contrats du type « personnel affecté », cette séance sera donnée par le ministère client. Lorsque le fournisseur doit recevoir et conserver, dans ses locaux, des renseignements ou des biens COMSEC, le responsable de la garde des renseignements ou des biens COMSEC de l'entreprise donnera la séance d'information COMSEC aux membres du personnel qui doivent avoir accès à des renseignements ou à des biens COMSEC.
9. **Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate?**
 Si la réponse est Oui, le fournisseur doit indiquer le titre abrégé du document, le numéro du document et le niveau de sensibilité. L'accès à des renseignements ou à des biens extrêmement délicats INFOSEC exigera que le fournisseur fasse l'objet d'une vérification Participation, contrôle et influence étrangers (PCIE) effectuée par la DSICI.

PARTIE B - PERSONNEL (FOURNISSEUR)

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

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

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

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

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

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

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

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

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

PARTIE C - MESURES DE PROTECTION (FOURNISSEUR)

11. RENSEIGNEMENTS / BIENS :

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

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

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

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

PRODUCTION

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

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

TECHNOLOGIE DE L'INFORMATION (TI)

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

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

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

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

TABLEAU RÉCAPITULATIF

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

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

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

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

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

sécurité » au haut et au bas du formulaire.

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

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

PARTIE D - AUTORISATION

13. Chargé de projet de l'organisme

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

14. Responsable de la sécurité de l'organisme

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

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

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

16. Agent d'approvisionnement

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

17. Autorité contractante en matière de sécurité

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

From: [+D Svcs C 4 Procurement - DC Svcs 4 Aquisitions@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:+D_Svcs_C_4_Procurement_-_DC_Svcs_4_Aquisitions@ADM(Mat)_D_Svcs_C@Ottawa-Hull)
Sent: July 26, 2018 12:01 PM
To: [Allison LCol.DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison_LCol.DE@ADM(PA)_DPAPO@Ottawa-Hull)
Subject: RE: Second of two e-mails

LCol Allison

Thanks for the docs and clarification.

Since there are definitely two companies (that are known) that can provide this training and they've both already provided documentation to you, I'll need to discuss the procurement strategy on my end. We may have to utilize the competitive process which means an RFP would be posted for 40 calendar days and companies, including the two already known, would have to submit proposal based on the RFP requirements.

We'll discuss here to determine the best way ahead and advise early next week.

Thanks

Kent

Kent Johnston

Agent supérieur d'approvisionnement, DC Svcs 4-3-2
Ministère de la Défense nationale / Gouvernement du Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

Senior Procurement Officer, D Svcs C 4-3-2
Department of National Defence / Government of Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: July-25-18 3:17 PM
To: +D Svcs C 4 Procurement - DC Svcs 4 Aquisitions@ADM(Mat) D Svcs C@Ottawa-Hull <P-OTG.DSvcsC4Proc@intern.mil.ca>
Subject: Second of two e-mails

Kent,

Second proposal attached.

D. Allison
LCol/Lcol
Director-General Military Strategic Communications FD/Directeur général – communications stratégiques militaires DF
Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et Forces armées canadiennes
Douglas.Allison@forces.gc.ca / Tel : 613-944-3291 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC : 944-3291

From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: July 27, 2018 9:38 AM
To: [Janzen BGen JH@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Janzen.BGen.JH@ADM(PA).DPAPO@Ottawa-Hull)
Subject: FW: TAA Requirement
Attachments: scan-20180725151106527.pdf; Eval Criteria Final.docx; 180710 Offer DND Canada 6 week course.pdf

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: July-25-18 3:16 PM
To: +D Svcs C 4 Procurement - DC Svcs 4 Aquisitions@ADM(Mat) D Svcs C@Ottawa-Hull <P-OTG.DSvcsC4Proc@intern.mil.ca>
Subject: RE: TAA Requirement

Kent,

First of two e-mails because of attachment sizes

I have updated the docs as requested, added some docs, and responded to your queries. I have also included copies of the two proposals. Please limit distribution as they contain some details on IP for the respective companies/entities.

WRT the SRCL, we responded Yes in section 10 b (below) because the contractors from both bidders are UK/European based and are unlikely to have the appropriate CAF screening. They will be accompanied at all times by CAF officers who will be supporting the course.

10. b) May unscreened personnel be used for portions of the work? Yes
Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail? Non Oui
If Yes, will unscreened personnel be escorted? Yes
Dans l'affirmative, le personnel en question sera-t-il escorté? C

For 11 e below, one of the requirements from the bidders is the ability to have students access the Internet. A Wi-fi hotspot is in place in the facility we intend to use. Though not directly connected to CAF systems, it is nonetheless paid for through CAF funding. I erred on the side of caution here, but if we can change to no happy to do so.

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

WRT EIR, only BGen Janzen has the designated financial authority to commit/expend funds from the financial coding, so I will have to have him sign the documents on his return 1 August.

Thanks

Doug

D. Allison
LCol/Lcol
Director-General Military Strategic Communications FD/Directeur général – communications
stratégiques militaires DF
Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et
Forces armées canadiennes

Douglas.Allison@forces.gc.ca / Tel : 613-944-3291 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC : 944-3291

From: +D Svcs C 4 Procurement - DC Svcs 4 Aquisitions@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: July-25-18 9:30 AM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>; +D Svcs C 4 Procurement - DC Svcs 4 Aquisitions@ADM(Mat) D Svcs C@Ottawa-Hull <P-OTG.DSvcsC4Proc@intern.mil.ca>; Peebles Maj M@ADM(PA) DGPA@Ottawa-Hull <MARK.PEEBLES@forces.gc.ca>
Cc: Porter DW@ADM(Mat) D Svcs C@Ottawa-Hull <DAVID.PORTER2@forces.gc.ca>; El-Zarka B@ADM(PA) COS(PA)@Ottawa-Hull <BERNADETTE.EL-ZARKA@forces.gc.ca>; Cosentino C (Contractor)@ADM(PA) DGPASP@Ottawa-Hull <CONNIE.COSENTINO@forces.gc.ca>; Janzen BGen JH@ADM(PA) DPAPO@Ottawa-Hull <JAY.JANZEN@forces.gc.ca>
Subject: RE: TAA Requirement

Good Morning LCol Allison

Thank you for the documentation.

I just have a some points that require clarification:

1. PRAT – Please have appropriate authority sign
 - a. Section #8 (Extent of Competition) – I believe this should be a score of “5”;
 - b. Section #11 (Intellectual Property) – If I recall correctly from the conversation, there’s a good chance that IP could be generated as a result of the work and Canada has to own any IP rights; if this is the case the score for this section should be “5”; and
 - c. Section #12 (Security) – TBD based on SRCL clarification
2. SRCL
 - a. In Sections 10 (b) and 11 (e) you indicated yes; If there is no security requirement, no boxes should be checked and only a signature is required in box 13. Can you please elaborate on sections 10(b) and 11(e) as this will help us determine if we need to re-consider the security aspect of the requirement.
3. EIR – Please have sections 8, 9 and 11 signed. Yes, if you will be the main POC for the requirement, you can sign-off as the Project Director/Lead.
 - a. Tax – Always included in the EIR for all requirements as we need to capture the total overall potential value including applicable taxes and option years. This is to ensure that the appropriate contracting authority signs-off on the requirement. That said, I don’t believe the tax comes out of your org’s budget.
4. In response to your sole source question:

“If we are sole-sourcing this, does an evaluation criteria template need to be submitted. Doesn’t sole-source, in this particular case, imply that the bidder is the only one capable of

delivering the product (as well as being the only legally licensed/authorized entity able to deliver the training)."

- a. If we knew for sure that there were absolutely no other companies that could provide this training, than no, evaluation criteria would not be required. But, it was mentioned that there was another company out there that could potentially provide training on an alternate methodology (other than BDI) and that this other company would be considered as a possible candidate. With that said, the sole source option can be pursued with an Advance Contracting Award Notification (ACAN) process. ACAN info and process can be found at section 3.6.4 and 3.6.4.1 at http://materiel.mil.ca/assets/MAT_Intranet/docs/en/business-functions-procurement-contracting/procurement-administration-manual.pdf). Additional info can be found here: <https://buyandsell.gc.ca/policy-and-guidelines/supply-manual/section/3/15#section-3.15.1>

To go the sole source route we will require:

- i. A sole source letter justifying the reason for sole source signed at the Director level or higher; and
- ii. Responses to the Treasury Board Questions for Sole Source located at the following link: <https://buyandsell.gc.ca/policy-and-guidelines/supply-manual/annex/3/1>

If you have any additional questions, please let me know and I'd be happy to clarify.

Thanks,

Kent

Kent Johnston

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From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull

Sent: July-23-18 12:59 PM

To: +D Svcs C 4 Procurement - DC Svcs 4 Aquisitions@ADM(Mat) D Svcs C@Ottawa-Hull <P-OTG.DSvcsC4Proc@intern.mil.ca>; Peebles Maj M@ADMPA) DGPA@Ottawa-Hull <MARK.PEEBLES@forces.gc.ca>

Cc: Porter DW@ADM(Mat) D Svcs C@Ottawa-Hull <DAVID.PORTER2@forces.gc.ca>; El-Zarka B@ADM(PA) COS(PA)@Ottawa-Hull <BERNADETTE.EL-ZARKA@forces.gc.ca>; Cosentino C (Contractor)@ADM(PA) DGPASP@Ottawa-Hull <CONNIE.COSENTINO@forces.gc.ca>; Janzen BGen JH@ADM(PA) DPAPO@Ottawa-Hull <JAY.JANZEN@forces.gc.ca>

Subject: RE: TAA Requirement

Kent,

I have attached the bulk of the paperwork here for a first steer from you folks. Can you advise whether I have made any glaring errors.

Of note, BGen Janzen will have to sign some of the docs due to sec 32 requirements. Am I OK to sign the others as the project director/lead?

From: +D Svcs C 4 Procurement - DC Svcs 4 Aquisitions@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: July-20-18 2:14 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>; Peebles Maj M@ADMPA DGPA@Ottawa-Hull <MARK.PEEBLES@forces.gc.ca>
Cc: +D Svcs C 4 Procurement - DC Svcs 4 Aquisitions@ADM(Mat) D Svcs C@Ottawa-Hull <P-OTG.DSvcsC4Proc@intern.mil.ca>; Porter DW@ADM(Mat) D Svcs C@Ottawa-Hull <DAVID.PORTER2@forces.gc.ca>; El-Zarka B@ADM(PA) COS(PA)@Ottawa-Hull <BERNADETTE.EL-ZARKA@forces.gc.ca>; Cosentino C (Contractor)@ADM(PA) DGPASP@Ottawa-Hull <CONNIE.COSENTINO@forces.gc.ca>; Janzen BGen JH@ADM(PA) DPAPO@Ottawa-Hull <JAY.JANZEN@forces.gc.ca>
Subject: TAA Requirement

Good Afternoon All

As discussed in yesterday's meeting, please see the following:

1. EIR and PRAT (completed and signed):
 - a. EIR Instructions found at below MMI1355 link; and
 - b. PRAT was completed but requires signature
2. SRCL – Since there is no security requirement, only box 13 of the SRCL needs to be signed by the appropriate authority. The SRCL can be found at: <http://collaboration-admpa.forces.mil.ca/sites/DI/SafetySecurity/vcds-srcl-writable-form.pdf> ;
3. Link to MMI 1355 - http://materiel.mil.ca/assets/MAT_Intranet/docs/en/business-functions-engineering-maintenance/mmi-1355-contracting-in-excess-of-25k.pdf ;
4. Contract Request Processing Time document (attached) – Please note the comments are for D Svcs C 4 purposes only. The estimated timelines indicated are accurate and will give you an idea of the process timeframe;
5. Procurement Schedule Tool (attached) – For your use as you see fit. What's useful in this doc is it identifies who's responsible for which activity;
6. Statement of Work (SOW) template and example (attached); and
7. Evaluation Criteria template and example (attached)

If you have any questions about any of the documentation, please don't hesitate to contact me.

Thanks and have a great weekend.

Kent

Kent Johnston

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From: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: July-12-18 9:39 AM
To: Peebles Maj M@ADMPA) DGPA@Ottawa-Hull <MARK.PEEBLES@forces.gc.ca>
Cc: +D Svcs C 4 Procurement - DC Svcs 4 Aquisitions@ADM(Mat) D Svcs C@Ottawa-Hull <P-OTG.DSvcsC4Proc@intern.mil.ca>; Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: BDI Methodology Requirement

Morning Mark

Sounds good; I'll pass up my chain for discussion.

Will advise soonest.

Thanks

Kent

Kent Johnston

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From: Peebles Maj M@ADMPA) DGPA@Ottawa-Hull
Sent: July-12-18 9:30 AM
To: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull <KENT.JOHNSTON@forces.gc.ca>
Cc: +D Svcs C 4 Procurement - DC Svcs 4 Aquisitions@ADM(Mat) D Svcs C@Ottawa-Hull <P-OTG.DSvcsC4Proc@intern.mil.ca>; Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: BDI Methodology Requirement

Morning Kent,

Attached are the EIR, PRAT, SRCL docs filled out, as well as a synopsis of our requirement for information. I looked at the TBIPS and TSPS sites and found nothing there that matched what we need. Let me know who the best person in your organization would be to discuss this requirement with regard to arcs of fire and guidance on process. My DG would like for this discussion to happen before next Friday, if possible. Do not hesitate to get in touch with me if you have any questions regarding what I've provided.

Regards,

Mark

Major Mark A. Peebles

Public Affairs Officer, ADM Public Affairs
Department of National Defence / Government of Canada
mark.peebles@forces.gc.ca / Tel: 613-992-4584

Officier d'affaires publiques, SMA Affaires publiques
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From: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: July-10-18 4:17 PM
To: Peebles Maj M@ADM(PA) DGPA@Ottawa-Hull <MARK.PEEBLES@forces.gc.ca>
Cc: +D Svcs C 4 Procurement - DC Svcs 4 Aquisitions@ADM(Mat) D Svcs C@Ottawa-Hull <P-OTG.DSvcsC4Proc@intern.mil.ca>
Subject: BDI Methodology Requirement

Hi Maj Peebles

As per our discussion, I've attached the documents required to initiate a requirement.

The type of resource(s) you're looking for may be available under the Task-Based Informatics Professional Services (TBIPS) or Task and Solutions Professional Services (TSPS) Methods of Supply. These are mandatory Methods of Supply put in place by PSPC. The links to the websites are below. In it are Workstreams and Categories (For TBIPS: <http://www.tpsgc-pwgsc.gc.ca/app-acq/sptb-tbps/categories-eng.html> ; For TSPS: <http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/spctsc-tspsc-eng.html>). If any fit under your requirement, we're obligated to use these methods. Note that there are links to pre-approved Security Requirements Check Lists (SRCLs) at this link: <http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/31-eng.html> . If your requirement does fit under TBIPS or TSPS, one of these SRCLs may be appropriate as well. If not, I've attached a blank SRCL that will need to be completed by you (or the Technical Authority if it is not you) – the contract number will need to be added to the top of the form.

TBIPS - <http://www.tpsgc-pwgsc.gc.ca/app-acq/sptb-tbps/index-eng.html>

TSPS - <http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/spctsc-tspsc-eng.html>

If there is any IM/IT related to this requirement, all IM/IT requirements must be approved though IM Group Procurement Alignment Review Validation at: +IM GP PROC Alignment Rev@ADM(IM) DIMCBM@Ottawa-Hull. Generally, you email your Statement of Work (SOW) to the +IM GP email address for their review. Once they have responded with an approval email, the approval should be forwarded to the D Svcs C positional mailbox CC'd above.

Lastly, Evaluation Criteria will be required for the resource(s) as well. However, since you're not at the stage yet, just provide the EIR and PRAT at this point. Once your requirement is assigned to one of our officers, they'll be in touch about the eval criteria, security and other procurement and contracting details.

Until your requirement is assigned to one of the officers, please send all correspondence to the +D Svcs C 4 Procurement email CC'd above.

Thanks

Kent

Kent Johnston

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s.20(1)(b)

s.20(1)(c)

s.21(1)(b)

1. MANDATORY EVALUATION CRITERIA

In their proposals, Bidders must demonstrate they meet the following mandatory criteria by providing complete details of the experience, including name and description of client organization, scope, timeframe (from-to dates month/year), and description of the roles and responsibilities.

Failure to meet any of the mandatory criteria will render the bid non-compliant and it will be given no further consideration.

<u>TSPS Reference No.</u>	<u>Mandatory Requirement</u>	<u>Met / Not Met</u>	<u>Supporting Detail or Cross Reference to Bidder's Proposal</u>
MT1	The bidder must demonstrate the ability to conduct a course teaching a Target Audience Analysis (TAA) methodology in Canada to CAF and DND personnel in order to create a core body of CAF and DND personnel who can apply the methodology in support of CAF operations.		
MT2	The bidder must provide the CAF with proprietary usage rights for the methodology itself as well as courseware in order to enable a sustained CAF capability using a TAA methodology.		
MT3	The Bidder must ensure they have the capacity to deliver training at DND facilities within the National Capital Region (NCR), primarily at the National Printing Bureau Building at 45 e Boulevard Sacre Coeur, Gatineau, Québec.		
MT4	The Bidder will design a detailed curriculum and lecture/activity schedule for a course of up to seven weeks, with examinations/assessments at the mid- and end-course points, and will provide sufficient books and reference documents (electronic or paper) for up to 24 students.		
MT5	The Contractor will design, conduct and assess written examinations, individual and syndicate presentations.		

s.20(1)(b)

s.20(1)(c)

s.21(1)(b)

2. POINT-RATED EVALUATION CRITERIA

In their proposals, Bidders should demonstrate they meet the following rated criteria by providing complete details of the experience, including name and description of client organization, scope, timeframe (from-to dates month/year), and description of the roles and responsibilities.

<u>TSPS Reference No.</u>	<u>Rated Requirement</u>	<u>Scoring</u>	<u>Supporting Detail or Cross Reference to Bidder's Proposal</u>
2.5 Business Process Consultant – Senior (Level 3)			
RT1	The Bidder should clearly demonstrate that its proposed resource has experience facilitating TAA methodology workshops/courses.	1 to 2 workshops/courses = 10pts 2 to 3 workshops/courses = 20pts 3+ workshops/courses = 30pts	
RT2	The bidder should construct a course that includes a blend of classroom lectures, syndicate work, student presentations and activities;	1 to 2 criteria = 10pts 2 to 3 criteria = 20pts 3+ criteria = 30pts	
TAA Methodology- Points Available:		60	
Minimum Points Required:		36 (60%)	

**Pages 187 to / à 188
are withheld pursuant to section
sont retenues en vertu de l'article**

20(1)(b)

**of the Access to Information Act
de la Loi sur l'accès à l'information**

From: Allison LCol DE@ADM(PA) DPAPQ@Ottawa-Hull
Sent: August 13, 2018 1:28 PM
To: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull; Janzen BGen JH@ADM(PA) DPAPQ@Ottawa-Hull; Peebles Maj M@JTF-Latvia HQ@Riga, LV
Subject: RE: SOW Update
Attachments: SOW ADM (PA) TAA.doc

Kent,

As requested see attached.

Thanks

Doug

D. Allison
LCol/Lcol
Director-General Military Strategic Communications FD/Directeur général – communications stratégiques militaires DF
Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et Forces armées canadiennes
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From: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: August-13-18 10:43 AM
To: Janzen BGen JH@ADM(PA) DPAPQ@Ottawa-Hull <JAY.JANZEN@forces.gc.ca>; Allison LCol DE@ADM(PA) DPAPQ@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>; Peebles Maj M@JTF-Latvia HQ@Riga, LV <MARK.PEEBLES@forces.gc.ca>
Subject: SOW Update

Good Morning Gents

I began reviewing the SOW this morning and noticed it's been written as if we were going to be sole sourcing to EMIC. Please review and update to remove any references to BDI methodology as we're now going the competitive route.

Thanks

Kent

Kent Johnston

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Ministère de la Défense nationale / Gouvernement du Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

Senior Procurement Officer, D Svcs C 4-3-2

ANNEX X - STATEMENT OF WORK

1. BACKGROUND

- 1.1. The Chief of Defence Staff directed the implementation of a Joint Targeting Capability which includes munitions- and non-munitions targeting. CAF targeting doctrine calls for Target Audience Analysis (TAA) as part of the targeting process. The CDS has directed that the Joint Targeting Capability reach interim operating capability by September of 2019. In *Strong, Secure, Engaged*, the Government committed to "...the development of military-specific information operations...", and ongoing efforts by Chief of Force Development aim to improve capabilities Information Operations-related capabilities – Public Affairs among them.
- 1.2. ADM (PA), as the Functional Authority for the Public Affairs Branch, is responsible for military public affairs and, thus, responsible for developing military public affairs capabilities to support CDS direction, Defence Policy and CAF Joint Doctrine. ADM (PA) has identified TAA as a capability it will acquire to support Joint Targeting, Information Operations and Strategic Communication as part of its initiative to operationalize the Public Affairs Branch.
- 1.3. As the ADM (PA) staff in charge of developing the operational capabilities of the Public Affairs Branch, this office's research has concluded that the CAF does not have a sufficient TAA methodology but has identified several methodologies that would be suitable for our requirements. There are no allied military training options that would provide training on the methodology in time for the CDS' September 2019 deadline. Thus, we must seek a civilian entity to train CAF personnel on this methodology in order to meet the requirement.

2. OBJECTIVE

Aim of the contract; what goal will be achieved; what is the required outcome.

- 2.1. The expected outcome of this contract is that the CAF will have trained a sufficient core of personnel trained in a TAA methodology to create a sustainable TAA capability that will support Joint Targeting, Information Operations and Strategic Communication. Further the outcome is expected to see the CAF retain proprietary usage of the methodology and courseware in order to enable future courses conducted in-house to create a sustained CAF capability in the long-term.

3. SCOPE

Briefly outline how the goal will be achieved and what systems are involved.

- 3.1. The contractor must conduct a course teaching a TAA methodology in Canada to CAF and DND personnel in order to create a core body of CAF and DND personnel who can apply the methodology in support of CAF operations. Further, the contractor must provide the CAF with proprietary usage rights for the methodology itself as well as courseware in order to enable a sustained CAF capability using the methodology.

4. APPLICABLE DOCUMENTS

This is a list of documents that may be consulted by the contractor to perform the tasks. The Project Authority may provide some or all of these documents to the contractor. The timing for the document access should be specified (as requested during the RFP phase, during the course of the Work, etc.)

Note: The Technical Authority must ensure that the Contractor holds the necessary security level when providing classified documents.

Delete if not applicable.

- 4.1. Documents that are available to the Contractor during the proposal preparation process (PRIOR to awarding the contract/task award).

- 4.2. The Technical Authority MUST confirm that all applicable documents are active documents and are available to the Contractor for the duration of the task/contract.
- 4.3. Must be relevant to the understanding of the requirement of the SOW.
- 4.4. Applicable documents that are required during the performance of the task must be detailed in the Tasks and/or Deliverables section of the Statement of Work.
- 4.5. Documents containing have standards, regulations, guidelines, policies, procedures, instructions or other requirements that must be adhered to in the performance of the work.

5. CONSTRAINTS

- 5.1. The course must be conducted with the following constraints:
 - (a) The course must be conducted in the National Capital Region of Canada;
 - (b) The course must be conducted at a DND facility;
 - (c) The course must not exceed seven weeks of training;
 - (d) Training must be carried out during weekdays, with no weekend training;
 - (e) Training must be carried out in one of Canada's official languages;
 - (f) The course must be completed before the end of the 18/19 Fiscal Year;
 - (g) The course must entail a live case study to assist in applying the methodology;
 - (h) The course must involve a blend of classroom lectures, syndicate work, student presentations and activities;
 - (i) Course material must be updated to reflect any developments in Target Audience Analysis and Strategic Communication over the past calendar year;
 - (j) The live case study must pertain to CAF/DND issues, with the resulting findings being practically applicable by CAF/DND;
 - (k) The live case study must be conducted in a manner consistent with accepted ethical norms pertaining to public opinion research;
 - (l) The live case study must be conducted using a target audience within the region between the Greater Toronto Area and the National Capital Region;
 - (m) The students must receive examinations consisting of written, individual and syndicate presentations; and
 - (n) The class composition must be made up solely of CAF and DND personnel;

6. TECHNICAL ENVIRONMENT

- 6.1. The course will be conducted using non-DWAN networks (ie-civilian internet) through Wi-Fi connectivity. Microsoft Office applications (Outlook, PowerPoint, Word, etc.) will be used.

7. TASKS AND DELIVERABLES

- 7.1. The Contractor will design and conduct a Target Audience Analysis course which ends no later than 31 March, 2019 will teach up to 24 students the methodology to a level where they can apply the methodology to conduct Target Audience Analysis.

- 7.2. The Contractor will provide sufficient instructors and lecturers to conduct the course.
- 7.3. The Contractor will arrange for the transport of instructors and lecturers to and from the place of instruction.
- 7.4. The Contractor will arrange for the lodging and meals of instructors and lecturers.
- 7.5. The Contractor will arrange and provide appropriate equipment for instruction (ie-instructor computers and pointers), minus those already provided by the place of instruction (ie-electronic projectors and flip charts).
- 7.6. The Contractor will provide sufficient books and reference documents (electronic or paper) for up to 24 students.
- 7.7. The Contractor will design a detailed curriculum and lecture/activity schedule for a course of up to seven weeks, with examinations/assessments at the mid- and end-course points.
- 7.8. The Contractor will liaise with Assistant Deputy Minister (Public Affairs) personnel to adapt course scheduling, provide additional tutoring as required, and consult on student performance and instructor-student relations.
- 7.9. The Contractor will with Assistant Deputy Minister (Public Affairs) personnel to facilitate transport of students and staff to and from third-location facilities (ie-focus group sessions held at public opinion firm offices).
- 7.10. The Contractor will develop, facilitate and arrange the logistics for an in-course live case study, to include conducting qualitative (ie-focus groups) and quantitative public opinion research.
- 7.11. The Contractor will refine the student findings from the live case study into a briefing document for consideration by the Department of National Defence no later than one month after the completion of training.
- 7.12. The Contractor will design, conduct and assess written examinations, individual and syndicate presentations.
- 7.13. The Contractor will provide the Canadian Armed Forces and Department of National Defence with the right to use the BDi methodology for operational purposes in perpetuity.
- 7.14. The Contractor will provide the Canadian Armed Forces and Department of National Defence with the right to use the methodology and associated courseware to conduct future BDi methodology courses for Canadian Armed Forces and Department of National Defence personnel, as well as allied military personnel.

8. REPORTING REQUIREMENTS

- 8.1. The Contractor must provide a financial status report at the mid- and end-course points which must contain, at a minimum, the following information:
 - (a) Reporting Start Date;
 - (b) Reporting End Date;
 - (c) Amount Spent on Services;
 - (d) Amount on Travel and Living;
 - (e) GST/HST; and

- (f) Total Spent;
- 8.2. A progress report must be completed by the Contractor for each resource and submitted to the Technical Authority at the quarter-, mid- and three-quarter marks of the course. At a minimum, each progress report must document the following information:
- (a) All significant activities performed in the period covered that may impact the conduct of the course;
 - (b) Status of any outstanding activities that may extend beyond normal timelines;
 - (c) Any training concerns regarding student performance;
 - (d) Any student concerns regarding course material or delivery;
 - (e) Description of any problems encountered which will require attention or escalation; and
 - (f) Any recommendations to update or change the course schedule.
- 8.3. All reports must be provided in one (1) hard copy and one (1) soft copy, in a format acceptable to the Technical Authority. The soft copy must be compatible with Microsoft Office 2003 or Adobe Reader.

9. LANGUAGE REQUIREMENTS

- 9.1. The resources must be fluent in the English language. Fluent means that the individuals must be able to communicate orally and in writing without any assistance and with minimal errors.

10. LOCATION OF WORK

- 10.1. All instruction must be completed at DND facilities within the National Capital Region (NCR), primarily at the National Printing Bureau Building at 45 e Boulevard Sacre Coeur, Gatineau, Québec. For the purposes of live case study qualitative analysis, focus groups and interviews may be conducted at a third location within the NCR. Travel costs within the NCR will not be reimbursed.

From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: August 17, 2018 10:18 AM
To: [Johnston KJ@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Subject: RE: W6369-19-X033 - SOW / Eval Criteria
Attachments: W6369-19-X033 - Eval Criteria v3 Allison comments.docx; W6369-19-X033 - SOW v2Allison comments.doc

Hi Kent,

See my comments in attached

From: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: August-16-18 10:34 AM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Cc: Janzen BGen JH@ADM(PA) DPAPO@Ottawa-Hull <JAY.JANZEN@forces.gc.ca>; Peebles Maj M@JTF-Latvia HQ@Riga, LV <MARK.PEEBLES@forces.gc.ca>
Subject: W6369-19-X033 - SOW / Eval Criteria

Good Morning LCol Allison

As per attached, I've made some comments / suggestions / questions.

Please let me know if you have any questions.

Thanks

Kent

Kent Johnston

Agent supérieur d'approvisionnement, DC Svcs 4-3-2
Ministère de la Défense nationale / Gouvernement du Canada
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From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
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Subject: RE: SOW Update

Kent,

As requested see attached.

Thanks

Doug

D. Allison
LCol/Lcol
Director-General Military Strategic Communications FD/Directeur général – communications
stratégiques militaires DF
Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et
Forces armées canadiennes
Douglas.Allison@forces.gc.ca / Tel : 613-944-3291 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC : 944-
3291

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1. MANDATORY EVALUATION CRITERIA

In their proposals, Bidders must demonstrate they meet the following mandatory criteria by providing complete details of the experience, including name and description of client organization, scope, timeframe (from-to dates month/year), and description of the roles and responsibilities.

Failure to meet any of the mandatory criteria will render the bid non-compliant and it will be given no further consideration.

	Mandatory Requirement	Met / Not Met	Supporting Detail or Cross Reference to Bidder's Proposal
MT1	<p>The bidder must demonstrate the ability to conduct a course teaching a Target Audience Analysis (TAA) methodology in Canada to CAF and DND personnel in order to create a core body of CAF and DND personnel who can apply the methodology in support of CAF operations.</p> <p>The bidder must clearly demonstrate it has <u>experience teaching a Target Audience Analysis (TAA) methodology in a group setting.</u></p>		<p><u>The Bidder should provide complete details as to where, when, month and year, the training experience was obtained.</u></p>
MT2	<p>The Bidder must clearly demonstrate that its <u>proposed *instructor has experience teaching Target Audience Analysis (TAA) methodology workshops/courses.</u></p>		<p><u>The Bidder should provide complete details as to where, when, month and year, the training experience was obtained.</u></p>
MT2	<p>The bidder must provide the CAF with <u>proprietary usage rights for the methodology itself as well as courseware (all in perpetuity) in order to enable a sustained CAF capability using a TAA methodology.</u></p>		
MT3	<p>The Bidder must <u>clearly demonstrate it has the ensure they have the capacity to deliver the TAA training at Department of National Defence (DND) facilities within the *National Capital Region (NCR). primarily at the National Printing Bureau Building at 45 Boulevard Sacré-Coeur, Gatineau, Québec</u></p>		

<p>MT4</p>	<p>The Bidder <u>must clearly demonstrate it has the capacity to will</u>;</p> <p>i. <u>design a detailed curriculum and lecture/activity schedule for a course of up to seven (7) weeks</u>;^{[J3][A4];7}</p> <p>ii. <u>conduct examinations/assessments at the mid- and end-course points</u>;^{[J5][A6];7} and;</p> <p>iii. <u>will provide qualified and experienced instructors, as well as the required sufficient learning materials, such as but not limited to, slide decks, handouts books and reference documents (electronic or paper) for up to 24 students.</u></p>		
<p>MT5</p>	<p>The Bidder <u>must clearly demonstrate that it has the capacity to Contractor will design, conduct and assess written examinations, as well as individual and syndicate presentations at the mid and end-course points.</u></p>		

2. POINT-RATED EVALUATION CRITERIA

In their proposals, Bidders should demonstrate they meet the following rated criteria by providing complete details of the experience, including name and description of client organization, scope, timeframe (from-to dates month/year), and description of the roles and responsibilities.

	<p>Rated Requirement</p>	<p>Scoring</p>	<p>Supporting Detail or Cross Reference to Bidder's Proposal</p>
<p>RT1</p>	<p>The bidder should clearly demonstrate it has experience teaching a Target Audience Analysis (TAA) methodology in a group setting.</p>	<p><u>1 to 2 workshops/courses = 10pts</u> <u>2 to 3 workshops/courses = 20pts</u> <u>3+ workshops/courses = 30pts</u></p>	
<p>RT2</p>	<p>The Bidder should clearly demonstrate that its proposed instructor has experience teaching TAA methodology workshops/courses.</p>	<p><u>1 to 2 workshops/courses = 10pts</u> <u>2 to 3 workshops/courses = 20pts</u></p>	

		3+ workshops/courses = 30pts	
RT2	The bidder should construct a course that includes a blend of classroom lectures, syndicate work, student presentations, practical case studies and activities. [J2][A8]	1 to 2 criteria = 10pts 2 to 3 criteria = 20pts 3 criteria and case study = 30pts	
RT3	The bidder should demonstrate compatibility of course content and methodology with that of NATO and NATO members. ; (Use of material/methodology by NATO itself = 30 points, Use of material/methodology by two or more Allies = additional 20 points, Use of material/methodology by one Ally = 10 points) <u>The Bidder should clearly demonstrate it has provided TAA methodology workshops/courses to NATO organizations and/or allies. [J9][A10]</u>	<u>Training provided to at least one NATO Ally = 10 pts</u>[J11][A12] <u>Training provided to NATO organization(s) but no ally(ies) = 20 pts</u> <u>Training provided to Use by NATO Organization(s) AND plus NATO Ally(ies) = 30 pts</u>	
RT4	The bidder should ensure a balance of course content between academic theory and practical, executable methodologies and skills applicable to a military environment. [J13]	Limited demonstrated balance between academic and practical content applicable to military environment = 10 points Significant demonstrated balance between academic and practical content applicable to military environment = 20 points	
RT4	<u>The bidder should clearly demonstrate it has provided *training in a military setting.</u> <u>*Not limited to TAA training [J14][A15]</u>	<u>1 to 2 workshops/courses = 10pts</u> <u>2 to 3 workshops/courses = 20pts</u> <u>3+ workshops/courses = 30pts</u>	
TAA Methodology- Points Available:			
Minimum Points Required:			(60%)

ANNEX A - STATEMENT OF WORK

1. BACKGROUND

- 1.1. The Chief of Defence Staff (CDS) directed the implementation of a Joint Targeting Capability which includes munitions- and non-munitions targeting. CAF targeting doctrine calls for Target Audience Analysis (TAA) as part of the targeting process. The CDS has directed that the Joint Targeting Capability reach interim operating capability by September of 2019. In *Strong, Secure, Engaged*, the Government committed to "...the development of military-specific information operations...", and ongoing efforts by Chief of Force Development aim to improve capabilities Information Operations-related capabilities – Public Affairs among them.
- 1.2. ADM (PA), as the Functional Authority for the Public Affairs Branch, is responsible for military public affairs and, thus, responsible for developing military public affairs capabilities to support CDS direction, Defence Policy and CAF Joint Doctrine. ADM (PA) has identified TAA as a capability it will acquire to support Joint Targeting, Information Operations and Strategic Communication as part of its initiative to operationalize the Public Affairs Branch.
- 1.3. As the ADM (PA) staff in charge of developing the operational capabilities of the Public Affairs Branch, this office's research has concluded that the CAF does not have a sufficient TAA methodology ~~and but has identified several methodologies that would be suitable for our requirements. There are no allied military training options that would provide training on the methodology in time for the CDS' September 2019 deadline. Thus, we must seek a civilian entity to train CAF personnel on this methodology in order to meet the requirement.~~

2. OBJECTIVE

~~Aim of the contract; what goal will be achieved; what is the required outcome.~~

- 2.1. The expected outcome of this contract is that the Contractor CAF will have trained a group sufficient core of DND/CAF personnel in its TAA methodology. ~~personnel~~ By retaining proprietary usage of the methodology and courseware, DND/CAF will then be able to provide in-house training to a sufficient core of personnel. This will contribute to trained in a TAA methodology to creating a sustainable TAA capability program that will support Joint Targeting, Information Operations and Strategic Communications in the long-term. ~~Further the outcome is expected to see the CAF retain proprietary usage of the methodology and courseware in order to enable future courses conducted in-house to create a sustained CAF capability in the long-term.~~

3. SCOPE

~~Briefly outline how the goal will be achieved and what systems are involved.~~

- 3.1. The contractor must conduct a course teaching a TAA methodology in Canada to CAF and DND personnel in order to create a core body of CAF and DND personnel who can apply the methodology in support of CAF operations. Further, the contractor must provide the CAF with proprietary usage rights for the methodology ~~itself~~ as well as the courseware in order to enable a sustained CAF capability using the methodology.

4. APPLICABLE DOCUMENTS [11]

~~This is a list of documents that may be consulted by the contractor to perform the tasks. The Project Authority may provide some or all of these documents to the contractor. The timing for the document access should be specified (as requested during the RFP phase, during the course of the Work, etc.)~~

~~Note: The Technical Authority must ensure that the Contractor holds the necessary security level when providing classified documents.~~

~~Delete if not applicable.~~

- 4.1. ~~Documents that are available to the Contractor during the proposal preparation process (PRIOR to awarding the contract/task award).~~
- 4.2. ~~The Technical Authority MUST confirm that all applicable documents are active documents and are available to the Contractor for the duration of the task/contract.~~
- 4.3. ~~Must be relevant to the understanding of the requirement of the SOW.~~
- 4.4. ~~Applicable documents that are required during the performance of the task must be detailed in the Tasks and/or Deliverables section of the Statement of Work.~~
- 4.5. ~~Documents containing have standards, regulations, guidelines, policies, procedures, instructions or other requirements that must be adhered to in the performance of the work.~~

5.4. CONSTRAINTS

5.4.4.1. The course must be conducted with the following constraints:

- (a) The course must be conducted in the National Capital Region of Canada;
- (b) The course must be conducted at a DND facility;
- (c) The course must not exceed ~~seven~~^{[J2][A3]} (7) weeks of training;
- (d) Training must be carried out during weekdays, with no weekend training;
- (e) Training must be carried out in ~~one of Canada's official languages~~^{[J4][A5]};
- (f) The course must be completed by 31 March 2019, ~~efore the end of the 18/19 Fiscal Year~~;
- (g) ~~The course must entail a live case study to assist in applying the methodology;~~
 - 4.1.g.1. The live case study must pertain to CAF/DND issues, with the resulting findings being practically applicable by CAF/DND;
 - 4.1.g.2. The live case study must be conducted in a manner consistent with accepted ethical norms pertaining to public opinion research;
 - 4.1.g.3. The live case study must be conducted using a target audience within the region between the Greater Toronto Area and the National Capital Region;
- (g)(h) ~~The course must involve a blend of classroom lectures, syndicate work, student presentations and activities;~~
- (h)(i) ~~Course material must be updated to reflect any developments in Target Audience Analysis and Strategic Communication over the past calendar year;~~
- (i) ~~The live case study must pertain to CAF/DND issues, with the resulting findings being practically applicable by CAF/DND;~~
- (j) ~~The live case study must be conducted in a manner consistent with accepted ethical norms pertaining to public opinion research;~~
- (k) ~~The live case study must be conducted using a target audience within the region between the Greater Toronto Area and the National Capital Region;~~
- (h)(j) ~~The students must receive examinations consisting of written, individual and syndicate presentations; and~~

~~(m) The class composition must be made up solely of CAF and DND personnel;~~

6.5. TECHNICAL ENVIRONMENT

~~6.4.5.1. The course will be conducted using non-departmental DWAN networks (ie-civilian internet) through Wi-Fi connectivity. Microsoft Office applications (Outlook, PowerPoint, Word, etc.) will be used.~~

6. TASKS AND DELIVERABLES

7. The Contractor must:

~~7.1.6.1. The Contractor will design and conduct a Target Audience Analysis course which ends no later than 31 March, 2019 that will teach up to 24 students the methodology to a level where they can apply the methodology to conduct Target Audience Analysis.~~

~~7.2. The Contractor will provide sufficient instructors and lecturers to conduct the course.~~

~~7.3. The Contractor will arrange for the transport of instructors and lecturers to and from the place of instruction.~~

~~7.4. The Contractor will arrange for the lodging and meals of instructors and lecturers.~~

~~7.5.6.2. The Contractor will arrange and provide appropriate equipment for instruction (ie-instructor computers and pointers), minus those already provided by the place of instruction (ie-electronic projectors and flip charts). [J6][A7]~~

~~7.6.6.3. The Contractor will provide sufficient all learning material, including but not limited to, books, slide decks and and-reference documents (electronic or paper) for up to 24 students.~~

~~7.7.6.4. The Contractor will design a detailed curriculum and lecture/activity schedule for a course of up to seven (7) weeks, with examinations/assessments at the mid- and end-course points.~~

~~7.8.6.5. The Contractor will liaise with Assistant Deputy Minister (Public Affairs) the Technical Authority personnel to adapt course scheduling, provide additional tutoring as required [J8][A9], and consult on student performance and instructor-student relations.~~

~~7.9.6.6. The Contractor will with Assistant Deputy Minister (Public Affairs) personnel to facilitate transport of students and staff to and from third-location facilities (ie-focus group sessions held at public opinion firm offices). [J10][A11]~~

~~7.10.6.7. The Contractor will develop, facilitate and arrange the logistics for an in-course live case study, to include conducting qualitative (ie-focus groups) and quantitative public opinion research. [J12][A13]~~

~~7.11.6.8. The Contractor will refine the student findings from the live case study into a briefing document for consideration by the Department of National Defence no later than one month after the completion of training.~~

~~7.12.6.9. The Contractor will design, conduct and assess written examinations, individual and syndicate presentations.~~

~~7.13. The Contractor will provide the Canadian Armed Forces and Department of National Defence with the right to use the BDi methodology for operational purposes in perpetuity.~~

~~7.14. The Contractor will provide the Canadian Armed Forces and Department of National Defence with the right to use the methodology and associated courseware to conduct future BDi~~

~~methodology courses for Canadian Armed Forces and Department of National Defence personnel, as well as allied military personnel.~~

8-7. REPORTING REQUIREMENTS

~~8-1-7.1.~~ The Contractor must provide a financial status report at the mid- and end-course points which must contain, at a minimum, the following information:

- (a) Reporting Start Date;
- (b) Reporting End Date;
- (c) Amount Spent on Services;
- (d) Amount on Travel and Living; [14][A15]
- (e) GST/HST; and
- (f) Total Spent;

~~8-2-7.2.~~ A progress report must be completed by the Contractor for each resource and submitted to the Technical Authority at the quarter-, mid- and three-quarter marks of the course. At a minimum, each progress report must document the following information:

- (a) All significant activities performed in the period covered that may impact the conduct of the course;
- (b) Status of any outstanding activities that may extend beyond normal timelines;
- (c) Any training concerns regarding student performance;
- (d) Any student concerns regarding course material or delivery;
- (e) Description of any problems encountered which will require attention or escalation; and
- (f) Any recommendations to update or change the course schedule.

~~8-3-7.3.~~ All reports must be provided in one (1) hard copy and one (1) soft copy, in a format acceptable to the Technical Authority. The soft copy must be compatible with Microsoft Office 2003 or Adobe Reader.

9-8. LANGUAGE REQUIREMENTS

~~8.1.~~ The instructor(s) resources must be fluent in the English language. Fluent means that the individuals must be able to communicate orally and in writing without any assistance and with minimal errors.

8.0. TRAVEL

~~8.1.~~ Although travel may be required by the Contractor, travel expenses will not be reimbursed and must be factored into the Contractor's overall cost.

~~8.2.~~ In addition, the Contractor must arrange for the lodging and meals and transport of instructor(s)/lecturer(s) to and from the place of instruction.

~~8-0-8.3.~~

9. LOCATION OF WORK

- 9.0. All instruction must be completed at DND facilities within the National Capital Region (NCR), primarily at the National Printing Bureau Building at 45 e Boulevard Sacre Coeur, Gatineau, Québec. For the purposes of live case study qualitative analysis, focus groups and interviews may be conducted at a third location within the NCR. Travel costs within the NCR will not be reimbursed.

From: [Johnston.KJ@ADM\(Mat\).D.Svcs.C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Sent: September 5, 2018 1:38 PM
To: [Allison.LCol.DE@ADM\(PA\).DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Subject: RE: W6369-19-X033 - SOW / Eval Criteria
Attachments: W6369-19-X033 - SOW v4.doc

Good Afternoon LCol Allison

I've gone over your comments and have a couple additional questions. Please see attached.

Thanks

Kent

Kent Johnston

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From: Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull
Sent: August-21-18 10:07 AM
To: Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull <KENT.JOHNSTON@forces.gc.ca>
Subject: FW: W6369-19-X033 - SOW / Eval Criteria

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ANNEX A - STATEMENT OF WORK

1. BACKGROUND

- 1.1. The Chief of Defence Staff (CDS) directed the implementation of a Joint Targeting Capability which includes munitions- and non-munitions targeting. CAF targeting doctrine calls for Target Audience Analysis (TAA) as part of the targeting process. The CDS has directed that the Joint Targeting Capability reach interim operating capability by September of 2019. In *Strong, Secure, Engaged*, the Government committed to "...the development of military-specific information operations...", and ongoing efforts by Chief of Force Development aim to improve capabilities Information Operations-related capabilities – Public Affairs among them.
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4. ~~APPLICABLE DOCUMENTS~~^[1]

~~This is a list of documents that may be consulted by the contractor to perform the tasks. The Project Authority may provide some or all of these documents to the contractor. The timing for the document access should be specified (as requested during the RFP phase, during the course of the Work, etc.)~~

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- 4.5. Documents containing have standards, regulations, guidelines, policies, procedures, instructions or other requirements that must be adhered to in the performance of the work.

5.4. CONSTRAINTS

5.4.4.1. The course must be conducted with the following constraints:

- (a) The course must be conducted in the National Capital Region of Canada;
- (b) The course must be conducted at a DND facility;
- (c) The course must not exceed seven^[J2]_[A3] (7) weeks of training;
- (d) Training must be carried out during weekdays, with no weekend training;
- (e) Training must be carried out in one of Canada's official languages^[J4]_[A5];
- (f) The course must be completed by 31 March 2019, efore the end of the 18/19 Fiscal Year;
- (g) The course must entail a live case study to assist in applying the methodology;
 - 4.1.g.1. The live case study must pertain to CAF/DND issues, with the resulting findings being practically applicable by CAF/DND;
 - 4.1.g.2. The live case study must be conducted in a manner consistent with accepted ethical norms pertaining to public opinion research;
 - 4.1.g.3. The live case study must be conducted using a target audience within the region between the Greater Toronto Area and the National Capital Region;
- (g)(h) The course must involve a blend of classroom lectures, syndicate work, student presentations and activities;
- (h)(i) Course material must be updated to reflect any developments in Target Audience Analysis and Strategic Communication over the past calendar year;
- (i) ~~The live case study must pertain to CAF/DND issues, with the resulting findings being practically applicable by CAF/DND;~~
- (j) ~~The live case study must be conducted in a manner consistent with accepted ethical norms pertaining to public opinion research;~~
- (k) ~~The live case study must be conducted using a target audience within the region between the Greater Toronto Area and the National Capital Region;~~
- (h)(j) The students must receive examinations consisting of written, individual and syndicate presentations; and

~~(m) The class composition must be made up solely of CAF and DND personnel;~~

6.5. TECHNICAL ENVIRONMENT

~~6.4.5.1. The course will be conducted using non-departmental DWAN networks (ie-civilian internet) through Wi-Fi connectivity. Microsoft Office applications (Outlook, PowerPoint, Word, etc.) will be used.~~

6. TASKS AND DELIVERABLES

7. The Contractor must:

~~7.1.6.1. The Contractor will design and conduct a Target Audience Analysis course which ends no later than 31 March, 2019 that will teach up to 24 students the methodology to a level where they can apply the methodology to conduct Target Audience Analysis.~~

~~7.2. The Contractor will provide sufficient instructors and lecturers to conduct the course.~~

~~7.3. The Contractor will arrange for the transport of instructors and lecturers to and from the place of instruction.~~

~~7.4. The Contractor will arrange for the lodging and meals of instructors and lecturers.~~

~~7.5.6.2. The Contractor will arrange and provide appropriate equipment for instruction (ie-instructor computers and pointers), minus those already provided by the place of instruction (ie-electronic projectors and flip charts). [J6][A7]~~

~~7.6.6.3. The Contractor will provide sufficient all learning material, including but not limited to, books, slide decks and and-reference documents (electronic or paper) for up to 24 students.~~

~~7.7.6.4. The Contractor will design a detailed curriculum and lecture/activity schedule for a course of up to seven (7) weeks, with examinations/assessments at the mid- and end-course points.~~

~~7.8.6.5. The Contractor will liaise with Assistant Deputy Minister (Public Affairs) the Technical Authority personnel to adapt course scheduling, provide additional tutoring as required [J8][A9], and consult on student performance and instructor-student relations.~~

~~7.9.6.6. The Contractor will with Assistant Deputy Minister (Public Affairs) personnel to facilitate transport of students and staff to and from third-location facilities (ie-focus group sessions held at public opinion firm offices). [J10][A11]~~

~~7.10.6.7. The Contractor will develop, facilitate and arrange the logistics for an in-course live case study, to include conducting qualitative (ie-focus groups) and quantitative public opinion research. [J12][A13]~~

~~7.11.6.8. The Contractor will refine the student findings from the live case study into a briefing document for consideration by the Department of National Defence no later than one month after the completion of training.~~

~~7.12.6.9. The Contractor will design, conduct and assess written examinations, individual and syndicate presentations.~~

~~7.13. The Contractor will provide the Canadian Armed Forces and Department of National Defence with the right to use the BDI methodology for operational purposes in perpetuity.~~

~~7.14. The Contractor will provide the Canadian Armed Forces and Department of National Defence with the right to use the methodology and associated courseware to conduct future BDI~~

~~methodology courses for Canadian Armed Forces and Department of National Defence personnel, as well as allied military personnel.~~

8.7. REPORTING REQUIREMENTS

~~8.1.7.1.~~ The Contractor must provide a financial status report at the mid- and end-course points which must contain, at a minimum, the following information:

- (a) Reporting Start Date;
- (b) Reporting End Date;
- (c) Amount Spent on Services;
- (d) Amount on Travel and Living; [U14][A15]
- (e) GST/HST; and
- (f) Total Spent;

~~8.2.7.2.~~ A progress report must be completed by the Contractor for each resource and submitted to the Technical Authority at the quarter-, mid- and three-quarter marks of the course. At a minimum, each progress report must document the following information:

- (a) All significant activities performed in the period covered that may impact the conduct of the course;
- (b) Status of any outstanding activities that may extend beyond normal timelines;
- (c) Any training concerns regarding student performance;
- (d) Any student concerns regarding course material or delivery;
- (e) Description of any problems encountered which will require attention or escalation; and
- (f) Any recommendations to update or change the course schedule.

~~8.3.7.3.~~ All reports must be provided in one (1) hard copy and one (1) soft copy, in a format acceptable to the Technical Authority. The soft copy must be compatible with Microsoft Office 2003 or Adobe Reader.

9.8. LANGUAGE REQUIREMENTS

~~8.1.~~ The instructor(s) resources must be fluent in the English language. Fluent means that the individuals must be able to communicate orally and in writing without any assistance and with minimal errors.

8.0. TRAVEL

~~8.1.~~ Although travel may be required by the Contractor, travel expenses will not be reimbursed and must be factored into the Contractor's overall cost.

~~8.2.~~ In addition, the Contractor must arrange for the lodging and meals and transport of instructor(s)/lecturer(s) to and from the place of instruction.

~~8.0.8.3.~~

9. LOCATION OF WORK

- 9.0. All instruction must be completed at DND facilities within the National Capital Region (NCR), primarily at the National Printing Bureau Building at 45 e Boulevard Sacre Coeur, Gatineau, Québec. For the purposes of live case study qualitative analysis, focus groups and interviews may be conducted at a third location within the NCR. Travel costs within the NCR will not be reimbursed.

From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: September 5, 2018 3:03 PM
To: [Johnston KJ@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Subject: RE: W6369-19-X033 - SOW / Eval Criteria
Attachments: 180710 Offer DND Canada 6 week course.pdf; W6369-19-X033 - SOW
v4 Allison comments.doc

Hi Kent,

See my comments in attachment. Also see the original proposal with wrap up of costs.

Cheers

Doug

From: [Johnston KJ@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Sent: September-05-18 1:38 PM
To: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull) <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: W6369-19-X033 - SOW / Eval Criteria

Good Afternoon LCol Allison

I've gone over your comments and have a couple additional questions. Please see attached.

Thanks

Kent

Kent Johnston

Agent supérieur d'approvisionnement, DC Svcs 4-3-2
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From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: August-21-18 10:07 AM
To: [Johnston KJ@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull) <KENT.JOHNSTON@forces.gc.ca>
Subject: FW: W6369-19-X033 - SOW / Eval Criteria

Kent,

I have updated the attached slightly.

From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: August-17-18 10:18 AM

To: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull <KENT.JOHNSTON@forces.gc.ca>
Subject: RE: W6369-19-X033 - SOW / Eval Criteria

Hi Kent,

See my comments in attached

From: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: August-16-18 10:34 AM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Cc: Janzen BGen JH@ADM(PA) DPAPO@Ottawa-Hull <JAY.JANZEN@forces.gc.ca>; Peebles Maj M@JTF-Latvia HQ@Riga, LV <MARK.PEEBLES@forces.gc.ca>
Subject: W6369-19-X033 - SOW / Eval Criteria

Good Morning LCol Allison

As per attached, I've made some comments / suggestions / questions.

Please let me know if you have any questions.

Thanks

Kent

Kent Johnston

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From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: August-13-18 1:28 PM
To: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull <KENT.JOHNSTON@forces.gc.ca>; Janzen BGen JH@ADM(PA) DPAPO@Ottawa-Hull <JAY.JANZEN@forces.gc.ca>; Peebles Maj M@JTF-Latvia HQ@Riga, LV <MARK.PEEBLES@forces.gc.ca>
Subject: RE: SOW Update

Kent,

As requested see attached.

Thanks

Doug

D. Allison
LCol/Lcol

Director-General Military Strategic Communications FD/Directeur général – communications
stratégiques militaires DF
Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et
Forces armées canadiennes
Douglas.Allison@forces.gc.ca / Tel : 613-944-3291 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC : 944-
3291

From: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: August-13-18 10:43 AM
To: Janzen BGen JH@ADM(PA) DPAP0@Ottawa-Hull <JAY.JANZEN@forces.gc.ca>; Allison LCol
DE@ADM(PA) DPAP0@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>; Peebles Maj M@JTF-
Latvia HQ@Riga, LV <MARK.PEEBLES@forces.gc.ca>
Subject: SOW Update

Good Morning Gents

I began reviewing the SOW this morning and noticed it's been written as if we were going to be
sole sourcing to EMIC. Please review and update to remove any references to BDI methodology as
we're now going the competitive route.

Thanks

Kent

Kent Johnston

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ANNEX A - STATEMENT OF WORK

1. BACKGROUND

- 1.1. The Chief of Defence Staff (CDS) directed the implementation of a Joint Targeting Capability which includes munitions- and non-munitions targeting. CAF targeting doctrine calls for Target Audience Analysis (TAA) as part of the targeting process. The CDS has directed that the Joint Targeting Capability reach interim operating capability by September of 2019. In *Strong, Secure, Engaged*, the Government committed to "...the development of military-specific information operations...", and ongoing efforts by Chief of Force Development aim to improve capabilities Information Operations-related capabilities – Public Affairs among them.
- 1.2. ADM (PA), as the Functional Authority for the Public Affairs Branch, is responsible for military public affairs and, thus, responsible for developing military public affairs capabilities to support CDS direction, Defence Policy and CAF Joint Doctrine. ADM (PA) has identified TAA as a capability it will acquire to support Joint Targeting, Information Operations and Strategic Communication as part of its initiative to operationalize the Public Affairs Branch.
- 1.3. As the ADM (PA) staff in charge of developing the operational capabilities of the Public Affairs Branch, this office's research has concluded that the CAF does not have a sufficient TAA methodology and must seek a civilian entity to train CAF personnel on this methodology in order to meet the requirement.

2. OBJECTIVE

- 2.1. The expected outcome of this contract is that the Contractor will have trained a group of DND/CAF personnel in its TAA methodology. By retaining proprietary usage of the methodology and courseware, DND/CAF will then be able to provide in-house training to a sufficient core of personnel. This will contribute to creating a sustainable TAA capability program that will support Joint Targeting, Information Operations and Strategic Communications in the long-term.

3. SCOPE

- 3.1. The contractor must conduct a course teaching a TAA methodology in Canada to CAF and DND personnel in order to create a core body of CAF and DND personnel who can apply the methodology in support of CAF operations. Further, the contractor must provide the CAF with proprietary usage rights for the methodology as well as the courseware in order to enable a sustained CAF capability using the methodology.

4. CONSTRAINTS

- 4.1. The course must be conducted with the following constraints:
 - (a) The course must be conducted in the National Capital Region of Canada;
 - (b) The course must be conducted at a DND facility;
 - (c) Training must be carried out during weekdays, with no weekend training;
 - (d) Training must be carried out in English;
 - (e) The course must be completed by 31 March 2019;
 - (f) The course must entail a live case study to assist in applying the methodology;
 - i. The live case study must pertain to CAF/DND issues, with the resulting findings being practically applicable to CAF/DND;

- ii. The live case study must be conducted in a manner consistent with accepted ethical norms pertaining to public opinion research;
- iii. The live case study must be conducted using a target audience within the region between the Greater Toronto Area and the National Capital Region;
- (g) The course must involve a blend of classroom lectures, syndicate work, student presentations and activities;
- (h) Course material must be updated to reflect any developments in Target Audience Analysis and Strategic Communication over the past calendar year; and
- (i) The students must receive examinations consisting of written, individual and syndicate presentations

5. TECHNICAL ENVIRONMENT

- 5.1. The course will be conducted using non-departmental networks (ie-civilian internet) through Wi-Fi connectivity. Microsoft Office applications (Outlook, PowerPoint, Word, etc.) will be used.

6. TASKS AND DELIVERABLES

The Contractor must:

- 6.1. design and conduct a Target Audience Analysis course which ends no later than 31 March, 2019 that will teach up to 24 students the methodology to a level where they can apply the methodology to conduct Target Audience Analysis;
- 6.2. arrange and provide appropriate equipment for instruction (ie-instructor computers and pointers), minus those already provided by the place of instruction (ie-electronic projectors and flip charts);
- 6.3. provide all learning material, including but not limited to, books, slide decks and reference documents (electronic or paper) for up to 24 students;
- 6.4. design a detailed curriculum and lecture/activity schedule with examinations/assessments at the mid- and end-course points;
- 6.5. develop, facilitate and arrange the logistics for an in-course live case study, to include conducting qualitative (ie-focus groups) and quantitative public opinion research. [J1][A2][J3]
- 6.6. The Contractor will refine the student findings from the live case study into a briefing document for consideration by the Department of National Defence no later than one month after the completion of training;
- 6.7. design, conduct and assess written examinations, individual and syndicate presentations.

7. REPORTING REQUIREMENTS

- 7.1. The Contractor must provide a financial status report at the mid- and end-course points which must contain, at a minimum, the following information:
 - (a) Reporting Start Date;
 - (b) Reporting End Date;
 - (c) Amount Spent on Services;
 - (d) Amount on Travel and Living; [J4][A5][J6]

- (e) GST/HST; and
- (f) Total Spent;

7.2. A progress report must be completed by the Contractor for each resource and submitted to the Technical Authority at the quarter-, mid- and three-quarter marks of the course. At a minimum, each progress report must document the following information:

- (a) All significant activities performed in the period covered that may impact the conduct of the course;
- (b) Status of any outstanding activities that may extend beyond normal timelines;
- (c) Any training concerns regarding student performance;
- (d) Any student concerns regarding course material or delivery;
- (e) Description of any problems encountered which will require attention or escalation; and
- (f) Any recommendations to update or change the course schedule.

7.3. All reports must be provided in one (1) hard copy and one (1) soft copy, in a format acceptable to the Technical Authority. The soft copy must be compatible with Microsoft Office 2003 or Adobe Reader.

8. LANGUAGE REQUIREMENTS

8.1. The instructor(s) must be fluent in the English language. Fluent means that the individuals must be able to communicate orally and in writing without any assistance and with minimal errors.

9. TRAVEL

9.1. Travel may be required by the Contractor. The Contractor will be paid for its authorized travel and living expenses reasonably and properly incurred in the performance of the Work performed, at cost, without any allowance for profit and administrative overhead, in accordance with the meal and private vehicle expenses provided in Appendices B, C and D of the National Joint Council Travel Directive; and with the other provisions of the directive referring to "travellers", rather than those referring to "employees".

9.2. The Contractor must arrange for the lodging and meals and transport of instructor(s)/lecturer(s) to and from the place of instruction.

10. LOCATION OF WORK

10.1. All instruction must be completed at DND facilities within the National Capital Region (NCR). For the purposes of live case study qualitative analysis, focus groups and interviews may be conducted at a third location within the NCR. Travel costs within the NCR will not be reimbursed.

From: [Johnston.KJ@ADM\(Mat\).D.Svcs.C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Sent: September 18, 2018 9:33 AM
To: [Allison.LCol.DE@ADM\(PA\).DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Subject: RE: Update

Good Morning LCol Allison

Sorry for the delay. Was out on Friday and yesterday we had to evac the building due to power loss.

I have a rough draft of the RFP done. I'm just ironing out the SOW and eval criteria. I'll have something for you by the end of the week.

Thanks,

Kent

Kent Johnston

Agent supérieur d'approvisionnement, DC Svcs 4-3-2
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From: Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull
Sent: September-14-18 10:20 AM
To: Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull <KENT.JOHNSTON@forces.gc.ca>
Subject: Update

Hi Kent,

Any update on our TAA project?

D. Allison
LCol/Lcol
Director-General Military Strategic Communications FD/Directeur général – communications
stratégiques militaires DF
Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et
Forces armées canadiennes
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3291

From: [Johnston.KJ@ADM\(Mat\).D.Svcs.C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Sent: September 21, 2018 3:07 PM
To: [Allison.LCol.DE@ADM\(PA\).DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Subject: RE: Update
Attachments: W6369-19-X033 - RFP (med comp).doc

Good Afternoon LCol Allison

Attached is a draft of the RFP. Have a look when you have a chance and let me know if you have any questions.

I'm meeting with my manager on Tuesday to discuss the SOW (need to verify some points on travel – whether or not contractor(s) can travel home on weekends during the course) and eval criteria (specifically MTs 4 and 5 – these are actually tasks so we may be able to take them out). We may need to make some changes.

I'll touch base with you next week after I meet with him.

Have a good weekend.

Kent Johnston

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Kent.Johnston@forces.gc.ca / 819-939-8836

From: Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull
Sent: September-14-18 10:20 AM
To: Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull <KENT.JOHNSTON@forces.gc.ca>
Subject: Update

Hi Kent,

Any update on our TAA project?

D. Allison
LCol/Lcol
Director-General Military Strategic Communications FD/Directeur général – communications
stratégiques militaires DF
Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et
Forces armées canadiennes
Douglas.Allison@forces.gc.ca / Tel : 613-944-3291 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC : 944-
3291



Défense nationale

National Defence Headquarters
 Ottawa, Ontario
 K1A 0K2

Quartier général de la Défense nationale
 Ottawa (Ontario)
 K1A 0K2

**REQUEST FOR PROPOSAL
 DEMANDE DE PROPOSITION**

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

National Defence Headquarters
 Director Services Contracting 4 (D Svcs C 4)
 Attention: Kent Johnston
 By e-mail to:
 DSvcsC4Contracting-
 DCSvcs4Contrats@forces.gc.ca

Proposal To: National Defence Canada

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

Proposition à : Défense nationale Canada

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

Comments – Commentaires

THIS DOCUMENT DOES NOT CONTAIN A SECURITY REQUIREMENT.

**Solicitation Closes –
 L'invitation prend fin**

At: – à :
 02:00 PM Eastern Daylight Time (EDT)

On: – le :

Title – Titre Target Audience Analysis Training	Solicitation No. – N° de l'invitation W6369-19-X033
Date of Solicitation – Date de l'invitation	
Address Enquiries to: – Adresser toutes questions à : Kent Johnston by e-mail to Kent.Johnston@forces.gc.ca	
Telephone No. – N° de téléphone	FAX No. – N° de fax
Destination See herein.	

Instructions: Municipal taxes are not applicable. Unless otherwise specified herein all prices quoted must include all applicable Canadian customs duties, GST/HST, excise taxes and are to be delivered Delivery Duty Paid including all delivery charges to destination(s) as indicated. The amount of the Goods and Services Tax/Harmonized Sales Tax is to be shown as a separate item.

Instructions : Les taxes municipales ne s'appliquent pas. Sauf indication contraire, les prix indiqués doivent comprendre les droits de douane canadiens, la TPS/TVH et la taxe d'accise. Les biens doivent être livrés « rendu droits acquittés », tous frais de livraison compris, à la ou aux destinations indiquées. Le montant de la taxe sur les produits et services/taxe de vente harmonisée doit être indiqué séparément.

Delivery Required – Livraison exigée	Delivery Offered – Livraison proposée
Vendor Name and Address – Raison sociale et adresse du fournisseur	
Name and title of person authorized to sign on behalf of vendor (type or print) Nom et titre de la personne autorisée à signer au nom du fournisseur (caractère d'imprimerie)	
Name – Nom _____	Title – Titre _____
Signature _____	Date _____



Solicitation No. - N° de l'invitation
 XXXXX-XXXXXX/X
 Client Ref. No. - N° de réf. du client
 XXXXX-XXXXXX

Amd. No. - N° de la modif.
 File No. - N° du dossier
 xxxxx.XXXXX-XXXXXX

Buyer ID - Id de l'acheteur
 XXXXX
 CCC No./N° CCC - FMS No./N° VME

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Solicitation No. - N° de l'invitation

XXXXX-XXXXXX/X

Client Ref. No. - N° de réf. du client

XXXXX-XXXXXX

Amd. No. - N° de la modif.

File No. - N° du dossier

XXXXX.XXXXX-XXXXXX

Buyer ID - Id de l'acheteur

XXXXX

CCC No./N° CCC - FMS No./N° VME

PART 1 - GENERAL INFORMATION

1.1 Security Requirements

There is no security requirement applicable to this contract.

1.2 Statement of Work

The contractor must perform the work in accordance with the Statement of Work at Annex "A".

1.3 Debriefings

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

1.4 Trade Agreements

The requirement is subject to the provisions of the World Trade Organization Agreement on Government Procurement (WTO-AGP), the North American Free Trade Agreement (NAFTA), the Canada-European Union Comprehensive Economic and Trade Agreement (CETA), and the Canadian Free Trade Agreement (CFTA).

PART 2 - BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

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

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

The 2003 (2018-05-22), Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

Subsection 4 of section 05, Submission of bids, is amended as follows:

Delete: 60 days

Insert: ninety (90) calendar days

Section 06, Late bids, is deleted in its entirety.

The text under section 07, Delayed bids, is deleted in its entirety and replaced with the following:

It is the Bidder's responsibility to ensure that the Contracting Authority has received the entire submission. Misrouting or other electronic delivery issues resulting in late submission of bids will not be accepted.

Subsection 1 of section 08, Transmission by facsimile, is deleted in its entirety.

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The text under section 13, Communications - solicitation period, is deleted in its entirety and replaced with the following:

To ensure the integrity of the competitive bid process, enquiries and other communications regarding the bid solicitation must be directed only as indicated on page 1 of the bid solicitation. Failure to comply with this requirement may result in the bid being declared non-responsive.

Canada will submit all significant enquiries received and their replies directly to invited Bidders by electronic mail. For further information, consult subsection 3 of the Submission of bids section.

Subsection 2 of section 20, Further information, is deleted in its entirety.

2.2 Submission of Bids

Unless otherwise specified in the bid solicitation or directed by the Contracting Authority, bids must be received by the Contracting Authority by electronic mail by the date and time indicated on page 1 of the bid solicitation.

Electronic Submissions: Individual e-mails that may include certain scripts, formats, embedded macros and/or links, or those that exceed five (5) megabytes may be rejected by Canada's e-mail system and/or firewall(s) without notice to the Bidder or Contracting Authority. Larger bids may be submitted through more than one e-mail. The Contracting Authority will confirm receipt of documents. It is the Bidder's responsibility to ensure that the Contracting Authority has received the entire submission. Bidders should not assume that all documents have been received unless the Contracting Authority confirms receipt of each document. In order to minimize the potential for technical issues, Bidders are requested to allow sufficient time before the closing date and time to confirm receipt. Technical and financial documents received after the closing date and time will not be accepted.

2.3 Former Public Servant

Contracts awarded to former public servants (FPS) in receipt of a pension or of a lump sum payment must bear the closest public scrutiny and reflect fairness in the spending of public funds. In order to comply with Treasury Board policies and directives on contracts awarded to FPS, bidders must provide in writing before contract award for each question below, the answer and, as applicable, the information required.

If the Contracting Authority has not received the answer to the question and, as applicable, the information required by the time the evaluation of bids is completed, Canada will inform the Bidder of a time frame within which to provide the answer and, as applicable, the information required. 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:

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

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

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

Former Public Servant in Receipt of a Pension

As per the above definitions, is the Bidder a FPS in receipt of a pension?

Yes () No ()

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

- (a) name of former public servant; and
- (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: 2012-2 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; and

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- (g) number and amount (professional fees) of other contracts subject to the restrictions of a work force reduction program.

For all contracts awarded during the lump sum payment period, the total amount of fees that may be paid to a FPS who received a lump sum payment is \$5,000, including Applicable Taxes.

2.4 Enquiries - Bid Solicitation

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

PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

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

Section I: Technical Bid – one (1) soft copy submitted by e-mail;

Section II: Financial Bid – one (1) soft copy submitted by e-mail;

Section III: Certifications – one (1) soft copy submitted by e-mail; and

Section IV: Additional Information – one (1) soft copy submitted by e-mail.

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

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

- (a) use 8.5 x 11 inch (216 mm x 279 mm) page size; and
- (b) use a numbering system that corresponds to the bid solicitation.

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In April 2006, Canada issued a policy directing federal departments and agencies to take the necessary steps to incorporate environmental considerations into the procurement process Policy on Green Procurement.

To assist Canada in reaching its objectives, bidders should use the environmentally-preferable format of black and white instead of colour.

Section I: Technical Bid

In their technical bid, Bidders should explain and demonstrate how they propose to meet the requirements and how they will carry out the Work.

Section II: Financial Bid

Bidders must submit their financial bid in accordance with the Basis of Payment.

3.1.1 Electronic Payment of Invoices – Bid

If you are willing to accept payment of invoices by Electronic Payment Instruments, complete Attachment 2 to Part 3, Electronic Payment Instruments, to identify which ones are accepted.

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

3.1.2 SACC Manual Clauses

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

Section III: Certifications

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

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ATTACHMENT 1 to PART 3 – PRICING SCHEDULE

May remove this completely and have Annex B only.

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ATTACHMENT 2 to PART 3 - ELECTRONIC PAYMENT INSTRUMENTS

ELECTRONIC PAYMENT INSTRUMENTS

As indicated in Part 3, clause 3.1.1, the Bidder must identify which electronic payment instruments they are willing to accept for payment of invoices.

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

- a. Visa Acquisition Card;
- b. MasterCard Acquisition Card;
- c. Direct Deposit (Domestic and International);
- d. Electronic Data Interchange (EDI);
- e. Wire Transfer (International Only);

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PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

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

4.1.1 Technical Evaluation

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 has not submitted 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:

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

that show in total 100 billable days.

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4.1.1.2 Mandatory Technical Criteria

Refer to Attachment 1 to Part 4

4.1.1.3 Point Rated Technical Criteria

Refer to Attachment 1 to Part 4

4.1.2 Financial Evaluation

4.1.2.1 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

SACC Manual Clause A0027T (2012-07-16), Basis of Selection - Highest Combined Rating of Technical Merit and Price.

1. To be declared responsive, a bid must:
 - a. comply with all the requirements of the bid solicitation; and
 - b. meet all mandatory criteria; and
 - c. obtain the required minimum of 66 points overall for the technical evaluation criteria which are subject to point rating.

The rating is performed on a scale of 110 points.
2. Bids not meeting (a) or (b) or (c) will be declared non-responsive.
3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 60% for the technical merit and 40% for the price.
4. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of 60%.
5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 40%.
6. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
7. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.

The table below illustrates an example where all three bids are responsive and the selection of the contractor is determined by a 60/40 ratio of technical merit and price, respectively. The total available points equals 135 and the lowest evaluated price is \$45,000

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Basis of Selection - Highest Combined Rating Technical Merit (60%) and Price (40%)

		Bidder 1	Bidder 2	Bidder 3
Overall Technical Score		115/135	89/135	92/135
Bid Evaluated Price		\$55,000.00	\$50,000.00	\$45,000.00
Calculations	Technical Merit Score	115/135 x 60 = 51.11	89/135 x 60 = 39.56	92/135 x 60 = 40.89
	Pricing Score	45/55 x 40 = 32.73	45/50 x 40 = 36.00	45/45 x 40 = 40.00
Combined Rating		83.84	75.56	80.89
Overall Rating		1st	3rd	2nd

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ATTACHMENT 1 TO PART 4 – EVALUATION CRITERIA

1. MANDATORY EVALUATION CRITERIA

In their proposals, Bidders must demonstrate they meet the following mandatory criteria by providing complete details of the experience, including name and description of client organization, scope, timeframe (from-to dates month/year), and description of the roles and responsibilities.

Failure to meet any of the mandatory criteria will render the bid non-compliant and it will be given no further consideration.

	Mandatory Requirement	Met / Not Met	Supporting Detail or Cross Reference to Bidder's Proposal
MT1	The bidder must clearly demonstrate it has experience teaching a Target Audience Analysis (TAA) methodology in a group setting.		
MT2	The Bidder must clearly demonstrate that its proposed instructor has experience teaching Target Audience Analysis (TAA) methodology workshops/courses.		
MT3	The Bidder must clearly demonstrate it has the capacity to deliver the TAA training at Department of National Defence (DND) facilities within the National Capital Region (NCR).		
MT4	The Bidder must clearly demonstrate it has the capacity to: <ul style="list-style-type: none"> i. design a detailed curriculum and lecture/activity schedule for the course; ii. conduct examinations/assessments at the mid and end-course points; and iii. provide the required learning materials, such as but not limited to, slide decks, handouts and reference documents (electronic or paper) for up to 24 students. 		
MT5	The Bidder must clearly demonstrate that it has the capacity to design, conduct and assess written examinations as well as individual and syndicate presentations at the mid and end-course points.		

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2. POINT-RATED EVALUATION CRITERIA

In their proposals, Bidders should demonstrate they meet the following rated criteria by providing complete details of the experience, including name and description of client organization, scope, timeframe (from-to dates month/year), and description of the roles and responsibilities.

	Rated Requirement	Scoring	Supporting Detail or Cross Reference to Bidder's Proposal
RT1	The bidder should clearly demonstrate it has experience teaching a Target Audience Analysis (TAA) methodology in a group setting.	1 to 2 workshops/courses = 10pts 2 to 3 workshops/courses = 20pts 3+ workshops/courses = 30pts	
RT2	The Bidder should clearly demonstrate that its proposed instructor has experience teaching TAA methodology workshops/courses.	1 to 2 workshops/courses = 10pts 2 to 3 workshops/courses = 20pts 3+ workshops/courses = 30pts	
RT3	The Bidder should clearly demonstrate it has provided TAA methodology workshops/courses to NATO organizations and/or allies.	Training provided to at least one NATO ally /organization = 10 pts Training provided to NATO ally(ies) AND NATO organization(s) = 20 pts	
RT4	The bidder should clearly demonstrate it has provided training in a military setting.	1 to 2 workshops/courses = 10pts 2 to 3 workshops/courses = 20pts 3+ workshops/courses = 30pts	
TAA Methodology- Points Available:			
Minimum Points Required:			66/110

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PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

Bidders must provide the required certifications and additional information to be awarded a contract.

The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Unless specified otherwise, Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.

The Contracting Authority will have the right to ask for additional information to verify the Bidder's certifications. Failure to comply and to cooperate with any request or requirement imposed by the Contracting Authority will render the bid non-responsive or constitute a default under the Contract.

5.1 Certifications Required with the Bid

Bidders must submit the following duly completed certifications as part of their bid.

5.1.1 Integrity Provisions - Declaration of Convicted Offences

In accordance with the Integrity Provisions of the Standard Instructions, all bidders must provide with their bid, **if applicable**, the declaration form available on the Forms for the Integrity Regime website (<http://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-eng.html>), to be given further consideration in the procurement process.

5.2 Certifications Precedent to Contract Award and Additional Information

The certifications and additional information listed below should be submitted with the bid, but may be submitted afterwards. If any of these required certifications or additional information is not completed and submitted as requested, the Contracting Authority will inform the Bidder of a time frame within which to provide the information. Failure to provide the certifications or the additional information listed below within the time frame provided 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>), the Bidder must provide the required documentation, as applicable, to be given further consideration in the procurement process.

5.2.2 Federal Contractors Program for Employment Equity - Bid Certification

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

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5.2.3 Additional Certifications Precedent to Contract Award

5.2.3.1 Status and Availability of Resources

SACC Manual clause A3005T (2010-08-16) Status and Availability of Resources

5.2.3.2 Education and Experience

SACC Manual clause A3010T (2010-08-16) Education and Experience

PART 6 - RESULTING CONTRACT CLAUSES

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

6.1 Security Requirements

There is no security requirement applicable to the Contract.

6.2 Statement of Work

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

6.3 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>) issued by Public Works and Government Services Canada.

6.3.1 General Conditions

2010B (2018-06-21), General conditions: Professional services (medium complexity) apply to and form part of the Contract.

6.3.2 Supplemental General Conditions

4007 (2010-08-19), Canada to Own Intellectual Property Rights in Foreground Information, apply to and form part of the Contract.

6.4 Term of Contract

6.4.1 Period of the Contract

This Work is to be performed during the period of 01-November-2018 to 31-October-2021
(estimated)

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6.5 Authorities

6.5.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: _____
Title: _____
Department of National Defence
Directorate: _____
Address: _____
Telephone: _____
Facsimile: _____
E-mail address: _____

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

6.5.2 Technical Authority

The Technical Authority for the Contract is:

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

The Technical 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 Technical Authority, however the Technical Authority has no authority to authorize changes to the scope of the Work. Changes to the scope of the Work can only be made through a contract amendment issued by the Contracting Authority.

6.5.3 Contractor's Representative

To be inserted at Contract award

6.6 Proactive Disclosure of Contracts with Former Public Servants

By providing information on its status, with respect to being a former public servant in receipt of a *Public Service Superannuation Act* (PSSA) (<http://laws-lois.justice.gc.ca/eng/acts/P-36/FullText.html>) 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: 2012-2* of the Treasury Board Secretariat of Canada (http://www.tbs-sct.gc.ca/pubs_pol/dccpubs/contpolnotices/siglist-eng.asp).

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6.7 Payment

6.7.1 Basis of Payment

For the Work described in Annex A, Statement of Work:

In consideration of the Contractor satisfactorily completing its obligations under the Contract, the Contractor will be paid a firm price, for a cost of \$ _____ (*insert the amount at contract award*). Customs duties are excluded and Applicable Taxes are extra.

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

6.7.2 Limitation of Price

SACC Manual clause C6000C (2017-08-17), Limitation of Price

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

6.7.3 Single Payment

Canada will pay the Contractor upon completion and delivery of the Work in accordance with the payment provisions of the Contract if:

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

6.7.4 Electronic Payment of Invoices – Contract

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

- a. VISA Acquisition Card;
- b. MasterCard Acquisition Card;
- c. Direct Deposit (Domestic and International);
- d. Electronic Data Interchange (EDI);
- e. Wire Transfer (International Only);

6.8 Invoicing Instructions

6.8.1 Invoicing Instructions

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

Each invoice must be supported by:

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XXXXX.XXXXX-XXXXXX

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-
- a. a copy of the release document and any other documents as specified in the Contract;
and
 - b. a copy of the invoices, receipts, vouchers for all direct expenses

Invoices must be distributed as follows:

- a. The original must be forwarded to the address shown on page 1 of the Contract for certification and payment.
- b. One (1) copy must be forwarded to the Contracting Authority identified under the section entitled "Authorities" of the Contract.

6.9 Certifications and Additional Information

6.9.1 Compliance

Unless specified otherwise, the continuous compliance with the certifications provided by the Contractor in its bid or precedent to contract award, and the ongoing cooperation in providing additional information are conditions of the Contract and failure to comply will constitute the Contractor in default. Certifications are subject to verification by Canada during the entire period of the Contract.

6.10 Applicable Laws

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

6.11 Priority of Documents

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

- (a) the Articles of Agreement;
- (b) supplemental general conditions 4007 (2010-08-16), Canada to Own Intellectual Property Rights in Foreground Information;
- (c) general conditions 2010B (2018-06-21), General conditions: Professional Services (medium complexity);
- (c) Annex A, Statement of Work
- (d) Annex B, Basis of Payment
- (e) the Contractor's bid dated _____ (insert date of bid)

6.12 SACC Manual Clauses

G1005C (2016-01-28), Insurance - No Specific Requirement
A9068C (2010-01-11), Government Site Regulations
A9117C (2007-11-30), T1204 - Direct Request by Customer Department
A2001C (2006-06-16), Foreign Nationals (Foreign Contractor)
or
A2000C (2006-06-16), Foreign Nationals (Canadian Contractor)

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ANNEX A - STATEMENT OF WORK

1. BACKGROUND

- 1.1. The Chief of Defence Staff (CDS) directed the implementation of a Joint Targeting Capability which includes munitions- and non-munitions targeting. CAF targeting doctrine calls for Target Audience Analysis (TAA) as part of the targeting process. The CDS has directed that the Joint Targeting Capability reach interim operating capability by September of 2019. In *Strong, Secure, Engaged*, the Government committed to "...the development of military-specific information operations...", and ongoing efforts by Chief of Force Development aim to improve capabilities Information Operations-related capabilities – Public Affairs among them.
- 1.2. ADM (PA), as the Functional Authority for the Public Affairs Branch, is responsible for military public affairs and, thus, responsible for developing military public affairs capabilities to support CDS direction, Defence Policy and CAF Joint Doctrine. ADM (PA) has identified TAA as a capability it will acquire to support Joint Targeting, Information Operations and Strategic Communication as part of its initiative to operationalize the Public Affairs Branch.
- 1.3. As the ADM (PA) staff in charge of developing the operational capabilities of the Public Affairs Branch, this office's research has concluded that the CAF does not have a sufficient TAA methodology and must seek a civilian entity to train CAF personnel on this methodology in order to meet the requirement.

2. OBJECTIVE

- 2.1. The expected outcome of this contract is that the Contractor will have trained a group of DND/CAF personnel in its TAA methodology. By retaining proprietary usage of the methodology and courseware, DND/CAF will then be able to provide in-house training to a sufficient core of personnel. This will contribute to creating a sustainable TAA capability program that will support Joint Targeting, Information Operations and Strategic Communications in the long-term.

3. SCOPE

- 3.1. The contractor must conduct a course teaching a TAA methodology in Canada to CAF and DND personnel in order to create a core body of CAF and DND personnel who can apply the methodology in support of CAF operations. Further, the contractor must provide the CAF with proprietary usage rights for the methodology as well as the courseware in order to enable a sustained CAF capability using the methodology.

4. CONSTRAINTS

- 4.1. The course must be conducted with the following constraints:
 - (a) The course must be conducted in the National Capital Region of Canada;
 - (b) The course must be conducted at a DND facility;
 - (c) Training must be carried out during weekdays, with no weekend training;
 - (d) Training must be carried out in English;
 - (e) The course must be completed by 31 March 2019;
 - (f) The course must entail a live case study to assist in applying the methodology;

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- i. The live case study must pertain to CAF/DND issues, with the resulting findings being practically applicable to CAF/DND;
- ii. The live case study must be conducted in a manner consistent with accepted ethical norms pertaining to public opinion research;
- iii. The live case study must be conducted using a target audience within the region between the Greater Toronto Area and the National Capital Region;
- (g) The course must involve a blend of classroom lectures, syndicate work, student presentations and activities;
- (h) Course material must be updated to reflect any developments in Target Audience Analysis and Strategic Communication over the past calendar year; and
- (i) The students must receive examinations consisting of written, individual and syndicate presentations

5. TECHNICAL ENVIRONMENT

- 5.1. The course will be conducted using non-departmental networks (ie-civilian internet) through Wi-Fi connectivity. Microsoft Office applications (Outlook, PowerPoint, Word, etc.) will be used.

6. TASKS AND DELIVERABLES

The Contractor must:

- 6.1. design and conduct a Target Audience Analysis course which ends no later than 31 March, 2019 that will teach up to 24 students the methodology to a level where they can apply the methodology to conduct Target Audience Analysis;
- 6.2. arrange and provide appropriate equipment for instruction (ie-instructor computers and pointers), minus those already provided by the place of instruction (ie-electronic projectors and flip charts);
- 6.3. provide all learning material, including but not limited to, books, slide decks and reference documents (electronic or paper) for up to 24 students;
- 6.4. design a detailed curriculum and lecture/activity schedule with examinations/assessments at the mid- and end-course points;
- 6.5. develop, facilitate and arrange the logistics for an in-course live case study, to include conducting qualitative (ie-focus groups) and quantitative public opinion research[A1].[J2][A3][J4]
- 6.6. The Contractor will refine the student findings from the live case study into a briefing document for consideration by the Department of National Defence no later than one month after the completion of training;
- 6.7. design, conduct and assess written examinations, individual and syndicate presentations.

7. REPORTING REQUIREMENTS

- 7.1. The Contractor must provide a financial status report at the mid- and end-course points which must contain, at a minimum, the following information:
 - (a) Reporting Start Date;
 - (b) Reporting End Date;

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-
- (c) Amount Spent on Services;
 - (d) Amount on Travel and Living; [J5][A6][J7][A8]
 - (e) GST/HST; and
 - (f) Total Spent;

7.2. A progress report must be completed by the Contractor for each resource and submitted to the Technical Authority at the quarter-, mid- and three-quarter marks of the course. At a minimum, each progress report must document the following information:

- (a) All significant activities performed in the period covered that may impact the conduct of the course;
- (b) Status of any outstanding activities that may extend beyond normal timelines;
- (c) Any training concerns regarding student performance;
- (d) Any student concerns regarding course material or delivery;
- (e) Description of any problems encountered which will require attention or escalation; and
- (f) Any recommendations to update or change the course schedule.

7.3. All reports must be provided in one (1) hard copy and one (1) soft copy, in a format acceptable to the Technical Authority. The soft copy must be compatible with Microsoft Office 2003 or Adobe Reader.

8. LANGUAGE REQUIREMENTS

8.1. The instructor(s) must be fluent in the English language. Fluent means that the individuals must be able to communicate orally and in writing without any assistance and with minimal errors.

9. TRAVEL

9.1. Travel may be required by the Contractor. The Contractor will be paid for its authorized travel and living expenses reasonably and properly incurred in the performance of the Work performed, at cost, without any allowance for profit and administrative overhead, in accordance with the meal and private vehicle expenses provided in Appendices B, C and D of the National Joint Council Travel Directive; and with the other provisions of the directive referring to "travellers", rather than those referring to "employees".

9.2. The Contractor must arrange for the lodging and meals and transport of instructor(s)/lecturer(s) to and from the place of instruction.

10. LOCATION OF WORK

10.1. All instruction must be completed at DND facilities within the National Capital Region (NCR). For the purposes of live case study qualitative analysis, focus groups and interviews may be conducted at a third location within the NCR. Travel costs within the NCR will not be reimbursed.

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ANNEX B – BASIS OF PAYMENT

Still working on how I want to organize the Basis of Payment table.

s.20(1)(c)

s.21(1)(b)

From: [Johnston.KJ@ADM\(Mat\).D.Svcs.C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Sent: September 28, 2018 1:21 PM
To: [Allison.LCol.DE@ADM\(PA\).DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Subject: RE: Update
Attachments: W6369-19-X033 - Eval Criteria v5.docx; W6369-19-X033 - SOW v5.doc

Good Afternoon LCol Allison

As mentioned, a couple changes may be required to the SOW and eval criteria. I've attached, what I feel, could be our final versions (depending on your response to the travel questions below).

1. For the SOW, you'll notice I highlighted the text that I've added. I just want to re-inforce the importance of the case study to potential bidders.
2. For the eval criteria, I deleted the previous MT3 which stated the following: "*The Bidder must clearly demonstrate it has the capacity to deliver the TAA training at Department of National Defence (DND) facilities within the National Capital Region (NCR).*" This criterion doesn't really add any value as the work has to be conducted in the NCR anyways.
3. Intellectual Property Rights:

Although you originally mentioned that Canada needs to retain the IP rights to the training, please review both IP clauses as Supplemental General Conditions 4006, Contractor to Own, does give us some ownership rights. Contractor to own is normally the default, but it may not be sufficient in this case.

Contractor to Own - SACC Clause 4006

<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual/4/4006/3#license-to-intellectual-property-rights-in-canada-s-information>

Canada to Own – SACC Clause 4007

<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual/4/4007/3>

4. Travel – WRT to the travel related to the contract; instead of reimbursing the contractor for their travel, would you have any objections with asking the bidder(s) to provide a price that includes their travel/hotel costs? Since we don't know exactly how many trainers a company will send, it puts the onus on the company to make sure their bid is as competitive as possible while including all applicable travel costs.

Or would you prefer to have travel separate and reimburse them based on submitted receipts? If yes, please provide a rough travel estimate.

5. Case Study –

Since we want the bidder (s) to incorporate all potential costs associated with the case study, I'll include items such as, transportation to and from the third party location in the NCR, health break including coffee/snacks, equipment required to conduct the case study, etc. Does this work for you?

We're getting there!

Thanks

Kent

Kent Johnston

Agent supérieur d'approvisionnement, DC Svcs 4-3-2
Ministère de la Défense nationale / Gouvernement du Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

Senior Procurement Officer, D Svcs C 4-3-2
Department of National Defence / Government of Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: September-14-18 10:20 AM
To: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull <KENT.JOHNSTON@forces.gc.ca>
Subject: Update

Hi Kent,

Any update on our TAA project?

D. Allison
LCol/Lcol
Director-General Military Strategic Communications FD/Directeur général – communications
stratégiques militaires DF
Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et
Forces armées canadiennes
Douglas.Allison@forces.gc.ca / Tel : 613-944-3291 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC : 944-
3291

1. MANDATORY EVALUATION CRITERIA

In their proposals, Bidders must demonstrate they meet the following mandatory criteria by providing complete details of the experience, including name and description of client organization, scope, timeframe (from-to dates month/year), and description of the roles and responsibilities.

Failure to meet any of the mandatory criteria will render the bid non-compliant and it will be given no further consideration.

	Mandatory Requirement	Met / Not Met	Supporting Detail or Cross Reference to Bidder's Proposal
MT1	The bidder must clearly demonstrate it has experience teaching a Target Audience Analysis (TAA) methodology in a group setting.		The Bidder should provide complete details as to where, when, month and year, the training experience was obtained.
MT2	The Bidder must clearly demonstrate that its proposed instructor has experience teaching Target Audience Analysis (TAA) methodology workshops/courses.		The Bidder should provide complete details as to where, when, month and year, the training experience was obtained.
MT3	The Bidder must clearly demonstrate it has the capacity to: <ul style="list-style-type: none"> i. design a detailed curriculum and lecture/activity schedule for the course; ii. conduct examinations/assessments at the mid and end-course points; and iii. provide the required learning materials, such as but not limited to, slide decks, handouts and reference documents (electronic or paper) for up to 24 students. 		The Bidder should provide details from previous courses delivered or examples of how they intend to meet the criterion.
MT4	The Bidder must clearly demonstrate that it has the capacity to design, conduct and assess written examinations as well as individual and syndicate presentations at the mid and end-course points.		The Bidder should provide details from previous courses delivered or examples of how they intend to meet the criterion.

2. POINT-RATED EVALUATION CRITERIA

In their proposals, Bidders should demonstrate they meet the following rated criteria by providing complete details of the experience, including name and description of client organization, scope, timeframe (from-to dates month/year), and description of the roles and responsibilities.

	Rated Requirement	Scoring	Supporting Detail or Cross Reference to Bidder's Proposal
RT1	The bidder should clearly demonstrate it has experience teaching a Target Audience Analysis (TAA) methodology in a group setting.	1 to 2 workshops/courses = 10pts 2 to 3 workshops/courses = 20pts 3+ workshops/courses = 30pts	The Bidder should provide complete details as to where, when, month and year, the training experience was obtained.
RT2	The Bidder should clearly demonstrate that its proposed instructor has experience teaching TAA methodology workshops/courses.	1 to 2 workshops/courses = 10pts 2 to 3 workshops/courses = 20pts 3+ workshops/courses = 30pts	The Bidder should provide complete details as to where, when, month and year, the training experience was obtained.
RT3	The Bidder should clearly demonstrate it has provided TAA methodology workshops/courses to NATO organizations and/or allies.	Training provided to at least one NATO ally /organization = 10 pts Training provided to NATO ally(ies) AND NATO organization(s) = 20 pts	The Bidder should provide complete details as to where, when, month and year, the training was completed.
RT4	The bidder should clearly demonstrate it has provided TAA training in a military setting.	1 to 2 workshops/courses = 10pts 2 to 3 workshops/courses = 20pts 3+ workshops/courses = 30pts	The Bidder should provide complete details as to where, when, month and year, the training was completed.
TAA Methodology- Points Available:			
Minimum Points Required:			(60%)

ANNEX A - STATEMENT OF WORK

1. BACKGROUND

- 1.1. The Chief of Defence Staff (CDS) directed the implementation of a Joint Targeting Capability and Canadian Armed Forces (CAF) targeting doctrine calls for Target Audience Analysis (TAA) as part of the targeting process. The CDS has directed that the Joint Targeting Capability reach interim operating capability by September of 2019. In *Strong, Secure, Engaged*, the Government committed to "...the development of military-specific information operations...", and ongoing efforts by Chief of Force Development aim to improve capabilities Information Operations-related capabilities – Public Affairs among them.
- 1.2. ADM (PA), as the Functional Authority for the Public Affairs Branch, is responsible for military public affairs and, thus, responsible for developing military public affairs capabilities to support CDS direction, Defence Policy and CAF Joint Doctrine. ADM (PA) has identified TAA as a capability it will acquire to support Joint Targeting, Information Operations and Strategic Communication as part of its initiative to operationalize the Public Affairs Branch.
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3. SCOPE

- 3.1. The contractor must conduct a course teaching a TAA methodology in Canada to CAF and DND personnel in order to create a core body of CAF and DND personnel who can apply the methodology in support of CAF operations. Further, the contractor must provide the CAF with proprietary usage rights for the methodology as well as the courseware in order to enable a sustained CAF capability using the methodology.

4. CONSTRAINTS

- 4.1. The course must be conducted with the following constraints:
 - (a) The course must be conducted in the National Capital Region of Canada;
 - (b) The course must be conducted at a DND facility;
 - (c) Training must be carried out during weekdays, with no weekend training;
 - (d) Training must be carried out in English;
 - (e) The course must be completed by 31 March 2019;
 - (f) The course must entail a live case study to assist in applying the methodology;
 - i. The live case study must pertain to CAF/DND issues, with the resulting findings being practically applicable to CAF/DND;

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- iii. The live case study must be conducted using a target audience within the region between the Greater Toronto Area and the National Capital Region;
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- 6.4. design a detailed curriculum and lecture/activity schedule with examinations/assessments at the mid- and end-course points;
- 6.5. develop, facilitate and arrange the logistics for an in-course live case study, to include conducting qualitative (i.e.-focus groups) and quantitative public opinion research.

The case study methodology training being conducted must be applicable in a DND/CAF environment using real-life scenarios as examples.

*The cost of the live case study must be included in the bidder's overall price.

- 6.6. The Contractor will refine the student findings from the live case study into a briefing document for consideration by the Department of National Defence no later than one month after the completion of training;
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7. REPORTING REQUIREMENTS

- 7.1. The Contractor must provide a financial status report at the mid- and end-course points which must contain, at a minimum, the following information:
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From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: October 1, 2018 2:20 PM
To: [Johnston KJ@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Subject: RE: Update

Kent Happy with the changes/additions.

For para 3...as long as we are able to use the methodology I don't care how it is defined/stipulated

For para 4 below, I am happy to have the price include travel.

Para 5....sounds good

From: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: September-28-18 1:21 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: Update

Good Afternoon LCol Allison

As mentioned, a couple changes may be required to the SOW and eval criteria. I've attached, what I feel, could be our final versions (depending on your response to the travel questions below).

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Contractor to Own - SACC Clause 4006

<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual/4/4006/3#license-to-intellectual-property-rights-in-canada-s-information>

Canada to Own – SACC Clause 4007

<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual/4/4007/3>

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s.20(1)(c)

s.21(1)(b)

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We're getting there!

Thanks

Kent

Kent Johnston

Agent supérieur d'approvisionnement, DC Svcs 4-3-2
Ministère de la Défense nationale / Gouvernement du Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

Senior Procurement Officer, D Svcs C 4-3-2
Department of National Defence / Government of Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: September-14-18 10:20 AM
To: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull <KENT.JOHNSTON@forces.gc.ca>
Subject: Update

Hi Kent,

Any update on our TAA project?

D. Allison
LCol/Lcol
Director-General Military Strategic Communications FD/Directeur général – communications
stratégiques militaires DF
Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et
Forces armées canadiennes
Douglas.Allison@forces.gc.ca / Tel : 613-944-3291 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC : 944-
3291

From: [Johnston.KJ@ADM\(Mat\).D.Svcs.C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Sent: October 2, 2018 9:02 AM
To: [Allison.LCol.DE@ADM\(PA\).DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Subject: RE: Update

Good Morning

No, there aren't any other showstoppers. I'll do my best to get this done this week but tomorrow is my last day until I return next Wednesday and I have another solicitation closing today.

If not this week it'll be next week for sure.

Kent Johnston

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From: Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull
Sent: October-02-18 7:03 AM
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Kent,

I think clause 4007 would apply in this case.

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From: Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull
Sent: September-28-18 1:21 PM
To: Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
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We're getting there!

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From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: October 18, 2018 1:10 PM
To: [Johnston KJ@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull); [Janzen BGen JH@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Janzen.BGen.JH@ADM(PA).DPAPO@Ottawa-Hull)
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Thx

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From: [Johnston KJ@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Sent: October-18-18 12:45 PM
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Sent: October-15-18 11:14 AM
To: [Johnston KJ@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull) <KENT.JOHNSTON@forces.gc.ca>
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Sent: October-12-18 11:38 AM

To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: Update

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3291

From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: October 25, 2018 10:46 AM
To: [Johnston KJ@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D Svcs C@Ottawa-Hull)
Subject: RE: Update

Thanks Kent. Sounds good. Please proceed

From: [Johnston KJ@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D Svcs C@Ottawa-Hull)
Sent: October-25-18 10:45 AM
To: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull) <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: Update

Good Morning LCol Allison

I've made the changes outlined below.

In addition, for MT1, I stated the bidder has to have experience teaching at least 2 course in TAA methodology. Even though there are limited companies in this field, we still want to ensure they have a couple course under their belt in this topic. If no objections, I'm staffing it up today. Please advise.

Thanks

Kent

Kent Johnston

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From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: October-24-18 9:52 AM
To: [Johnston KJ@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D Svcs C@Ottawa-Hull) <KENT.JOHNSTON@forces.gc.ca>
Cc: [Janzen BGen JH@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Janzen.BGen.JH@ADM(PA).DPAPO@Ottawa-Hull) <JAY.JANZEN@forces.gc.ca>
Subject: RE: Update

Sir,

For SA

Hi Kent,

Re below, following responses in red:

1. SOW – Para 1.1 – Can I remove para 1.1 and just start off the Background info with para 1.2? We don't normally go into that much in-depth detail. Paras 1.2 and 1.3 provide a good overview of what we're looking for and would be sufficient. Yes

2. SOW – Section 4 Constraints, para 4.1, sub paras (f) (iii), states the following: *The live case study must be conducted using a target audience within the region between the Greater Toronto Area and the National Capital Region;*

My interpretation of this is that you want the examples in the case study to contain a target audience from the GTA/NCR area? Is this correct? Yes I can see from a bidder's perspective how it could sound confusing. Is the purpose of this to use geographically relevant examples? Yes, we are going to do a real case study in support of Navy recruiting to try to determine why women 18 – 30 in the GTA are not interested in enrolling in Naval technical trades

3. Eval Criteria - MT1 – The way the criterion is worded currently, someone that taught any type of TAA course, whether it be for a day or a month would technically meet that criterion. If you agree I'll put in some stronger wording to ensure we get a bidder with some relatively extensive training experience. Please do

Once this is cleaned up and the RFP is approved (end of week), I'll send for translation (approx. 1 week) and then we can post for 40 calendar days for an approx. closing date of 15 Dec. Is the 40 days the minimum statutory requirement?

What is your Xmas leave schedule looking like this year just so I have an idea? I will have to be here to meet timings etc so X-Mas leave will be coordinated around this project

Thanks

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From: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: October-23-18 3:47 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: Update

Hi LCol Allison

I actually spoke to my manager about your file today at my bilat. A couple points were brought to my attention:

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Hi Kent,

Do you have a rough idea how long that process will take?

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Sent: October-18-18 12:45 PM
To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
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Sent: October 30, 2018 8:15 AM
To: [Johnston KJ@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Subject: RE: SOW/RFP

Thanks

From: [Johnston KJ@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Sent: October-29-18 3:42 PM
To: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull) <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: SOW/RFP

Good Afternoon,

Yes, the course completion date 31 March 2019 but the actual contract end date is 31 May 2019. This allows for the final reports, etc. to be submitted after the course is completed.

Kent

Kent Johnston

Agent supérieur d'approvisionnement, DC Svcs 4-3-2
Ministère de la Défense nationale / Gouvernement du Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

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From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: October-29-18 2:28 PM
To: [Johnston KJ@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull) <KENT.JOHNSTON@forces.gc.ca>
Subject: SOW/RFP

Kent,

Does the SOW/RFP include a statement that all work has to be done before end of FY?

D. Allison
LCol/Lcol
Director-General Military Strategic Communication FD/Directeur général – communication
stratégique militaire DF
Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et
Forces armées canadiennes
Douglas.Allison@forces.gc.ca / Tel : 613-944-3291 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC : 944-3291

From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: November 2, 2018 2:01 PM
To: [Johnston KJ@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull); [Janzen BGen JH@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Janzen.BGen.JH@ADM(PA).DPAPO@Ottawa-Hull)
Subject: RE: W6369-19-X033 - Translation

ACK. Kent. I appreciate all your help and patience on this as well.

From: [Johnston KJ@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Sent: November-02-18 11:43 AM
To: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull) <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: W6369-19-X033 - Translation

Good Morning LCol Allison

I just wanted to advise that the RFP has been posted. Unfortunately I didn't get the translated RFP back yesterday like I was told so since today's Friday and postings take overnight to load, the RFP will show up on Buyandsell on Monday. Assuming all goes well and we get no outlandish questions requiring changes to the RFP, the closing date will be 14 Dec.

Thanks for your patience on this. This is a unique requirement so I just wanted to make sure we had all of our t's crossed and i's dotted.

I'll touch base if/when we receive any technical questions.

Have a great weekend.

Kent

Kent Johnston

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From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: October-26-18 10:15 AM
To: [Johnston KJ@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull) <KENT.JOHNSTON@forces.gc.ca>
Subject: RE: W6369-19-X033 - Translation

Ack Kent. Thx

From: [Johnston KJ@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Sent: October-26-18 9:41 AM
To: [+DGProcSvcsTranslation-Traduction@ADM\(MAT\) DG Proc SVCS@Ottawa-Hull](mailto:+DGProcSvcsTranslation-Traduction@ADM(MAT).DG.Proc.SVCS@Ottawa-Hull) <P-OTG.DGProcSvcsTran@intern.mil.ca>
Cc: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull) <DOUGLAS.ALLISON@forces.gc.ca>
Subject: W6369-19-X033 - Translation

Good Morning Brenda

Please see the attached docs requiring translation:

1. W6369-19-X033 – Abstract Eng
2. W6369-19-X033 - RFP

Merci!

Kent

FYSA LCol Allison – RFP approved and sending for translation. Will advise when the RFP is posted (hopefully next Wednesday or Thursday).

Kent Johnston

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From: [Johnston.KJ@ADM\(Mat\).D.Svcs.C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Sent: November 29, 2018 2:18 PM
To: [Allison.LCol.DE@ADM\(PA\).DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Subject: RE: TAA RFP Question

Thanks!

Kent Johnston

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Kent.Johnston@forces.gc.ca / 819-939-8836

From: Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull
Sent: November-29-18 2:10 PM
To: Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull <KENT.JOHNSTON@forces.gc.ca>
Subject: RE: TAA RFP Question

Hi Kent,

Last option for course dates is preferable, but you are correct, they all could work.

Course will be held at NPB.

Cheers

From: Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull
Sent: November-29-18 12:57 PM
To: Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: TAA RFP Question
Importance: High

Good Afternoon LCol Allison

I received three questions from a company, one of which I can answer.

Can you please confirm if the following dates and scheduling format would work for you (only one of the below will be selected but they provided alternates for us):

Course Phase 1: Jan 21 to Feb 8
(Data collection: 5 weeks)
Course Phase 2: March 11 to March 29

Course Phase 1: Jan 28 to Feb 15
(Data collection: 4 weeks)
Course Phase 2: March 11 to March 29

Course Phase 1: Jan 28 to Feb 15
(Data collection: 3 weeks)
Course Phase 2: March 4 to March 22

My ideal response to the company would be, "any of the above dates would be sufficient"
assuming that works for you.

And secondly, the main part of the course will be held at NPB, correct?

Thanks

Kent

Kent Johnston

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From: [Johnston.KJ@ADM\(Mat\).D.Svcs.C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Sent: December 3, 2018 11:08 AM
To: [Allison.LCol.DE@ADM\(PA\).DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Subject: RE: RFP and next steps

No worries. My goal is to wrap this process up by the 21st so neither of us have to work on this over the holidays!!

Kent Johnston

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Department of National Defence / Government of Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

From: Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull
Sent: December-03-18 11:06 AM
To: Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull <KENT.JOHNSTON@forces.gc.ca>
Subject: RE: RFP and next steps

Thx Kent very helpful.

From: Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull
Sent: December-03-18 11:04 AM
To: Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>; James.LCdr.DM@ADM(PA).DGPASP@Ottawa-Hull <DESMOND.JAMES@forces.gc.ca>
Subject: RE: RFP and next steps

Good Morning Doug

I will prep all the evaluation documents and send everything over to you.

You'll need a team of three evaluators. I will send over conflict of interest forms that all three must sign and return to me as well as bid handling instructions; these will be sent in advance.

The bids can be evaluated as soon as the solicitation period closes. If all goes smoothly we could have a contract in place by December 21.

Once you and your evaluation team finish evaluating the technical bids, I will consolidate everything and determine who the winner is (including the financial evaluation), draft the contract and staff for approval. .

Once the contract has been sent out, you and winning bidder can start planning the course.

Kent

Kent Johnston

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Department of National Defence / Government of Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: December-03-18 10:47 AM
To: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull <KENT.JOHNSTON@forces.gc.ca>; James LCdr DM@ADM(PA) DGPASP@Ottawa-Hull <DESMOND.JAMES@forces.gc.ca>
Subject: RFP and next steps

Good morning Kent,

Hope you had a good weekend.

I would like to get some sense of how the next steps should unfold in the selection process, as we will be time constrained to put this in place.

Is there any sort of format that we must follow for the determination of the winning bid?

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How soon after we make a determination can the winning bidder be advised and the contract let?

Who does this notification?

Are there any other things that I can do now that will expedite the process after the mid-December closing date?

Thanks

Doug

D. Allison
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Director-General Military Strategic Communication FD/Directeur général – communication
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Sent: December 3, 2018 1:15 PM
To: [Allison.LCol.DE@ADM\(PA\).DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Subject: RE: RFP and next steps

Sorry I missed your calls.

No, you guys are fine. The form is to cover all basis because sometime evaluators can be contractor's. In that case we need to ensure the contractors are not affiliated with any company that could potentially win the contract.

That said, we have all 3 evaluators sign the form anyways.

Kent

Kent Johnston

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From: Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull
Sent: December-03-18 11:22 AM
To: Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull <KENT.JOHNSTON@forces.gc.ca>
Subject: RE: RFP and next steps

Kent,

Are the General or I (as end user) in any potential conflict of interest WRT sitting on the evaluation board? To the best of my knowledge we have no affiliations with any prospective/actual bidders. I am just thinking of whom the evaluator team can be composed of.

From: Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull
Sent: December-03-18 11:04 AM
To: Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>; James.LCdr.DM@ADM(PA).DGPASP@Ottawa-Hull <DESMOND.JAMES@forces.gc.ca>
Subject: RE: RFP and next steps

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Kent

Kent Johnston

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Senior Procurement Officer, D Svcs C 4-3-2
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Kent.Johnston@forces.gc.ca / 819-939-8836

From: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull
Sent: December-03-18 10:47 AM
To: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull <KENT.JOHNSTON@forces.gc.ca>; James LCdr DM@ADM(PA) DGPASP@Ottawa-Hull <DESMOND.JAMES@forces.gc.ca>
Subject: RFP and next steps

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Doug

D. Allison
LCol/Lcol
Director-General Military Strategic Communication FD/Directeur général – communication
stratégique militaire DF

Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et
Forces armées canadiennes

Douglas.Allison@forces.gc.ca / Tel : 613-944-3291 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC : 944-
3291

From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: December 3, 2018 6:18 PM
To: [Janzen BGen JH@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Janzen.BGen.JH@ADM(PA).DPAPO@Ottawa-Hull)
Subject: Re: RFP and next steps

Works for me. I will see if she is aval

Sent from my BlackBerry 10 smartphone on the Bell network.

From: Janzen BGen JH@ADM(PA) DPAPO@Ottawa-Hull
Sent: Monday, December 3, 2018 4:48 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Cc: James LCdr DM@ADM(PA) DGPASP@Ottawa-Hull
Subject: RE: RFP and next steps

Afternoon of 19 Dec is now blocked in my calendar to support this.

We don't need another DG-level person as the honest broker. I would suggest an IS05-06 with some awareness of our project. How about Meghan Marsaw?

Brigadier-General Jay H. Janzen

Director-General Military Strategic Communication
Assistant Deputy Minister (Public Affairs)
Department of National Defence / Government of Canada
Jay.Janzen@forces.gc.ca / Tel: 613-995-1497 / Mobile : 613-617-4585

Directeur général – communication stratégique militaire
Sous-ministre adjoint (Affaires publiques)
Ministère de la Défense nationale / Gouvernement du Canada
Jay.Janzen@forces.gc.ca / Tél.: 613-995-1497 / Mobile : 613-617-4585

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: December-03-18 11:18 AM
To: Janzen BGen JH@ADM(PA) DPAPO@Ottawa-Hull <JAY.JANZEN@forces.gc.ca>; James LCdr DM@ADM(PA) DGPASP@Ottawa-Hull <DESMOND.JAMES@forces.gc.ca>
Subject: FW: RFP and next steps

Sir,

Some info below as a follow up to an e-mail that I sent to Kent Johnston.

We will need three evaluators to assess the bids and make a determination. As previously discussed, we should have at least one honest broker on the panel. (Maybe Joe or Janice?) You may want to give thought to whom that should be soonest so that we can advise him/her and ensure they will be around in the period required.

We will have some of the other docs in advance as well, and I will have packages prepped to distribute to evaluators.

For your consideration, you have targeting trg on mornings of 17 and 18, and DWD in afternoon of 18. 19 Dec is relatively free, but leaves us little time to amass package and get it to Kent IOT get contract in place by 21 Dec. We need to block some time in your calendar soonest. Perhaps later in the day on the 17th will work.

From: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: December-03-18 11:04 AM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>; James LCol DM@ADM(PA) DGPASP@Ottawa-Hull <DESMOND.JAMES@forces.gc.ca>
Subject: RE: RFP and next steps

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Kent

Kent Johnston

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Ministère de la Défense nationale / Gouvernement du Canada
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Senior Procurement Officer, D Svcs C 4-3-2
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Kent.Johnston@forces.gc.ca / 819-939-8836

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: December-03-18 10:47 AM
To: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull <KENT.JOHNSTON@forces.gc.ca>; James LCol DM@ADM(PA) DGPASP@Ottawa-Hull <DESMOND.JAMES@forces.gc.ca>
Subject: RFP and next steps

Good morning Kent,

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Doug

D. Allison

LCol/Lcol

Director-General Military Strategic Communication FD/Directeur général – communication stratégique militaire DF

Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et Forces armées canadiennes

Douglas.Allison@forces.gc.ca / Tel : 613-944-3291 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC : 944-3291

s.19(1)

From: [James LCdr DM@ADM\(PA\).DGPASP@Ottawa-Hull](mailto:James.LCdr.DM@ADM(PA).DGPASP@Ottawa-Hull)
Sent: December 10, 2018 7:51 AM
To: [Allison LCol DE@ADM\(PA\).DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Cc: [Cosentino C.\(Contractor\)@ADM\(PA\).DGPASP@Ottawa-Hull](mailto:Cosentino.C.(Contractor)@ADM(PA).DGPASP@Ottawa-Hull)
Subject: FW: Target Audience Analysis Course
Attachments: Joining and Admin Instructions - SCEC 1801.pdf; Joining Instructions Draft - letterhead.docx

Sir,

Attached are the draft Joining Instructions in Word format in case they have to go out before I return from Leave (9 Jan). Connie can help format the doc as necessary. I have also included the DPALC SCEC ones as a ref. Once the course provider is selected, the rest of the areas in grey can be adjusted (they have the old info right now). Note: I think the parking info can stay as is given we are using DPALC. As well, I am not a fan of Ops dress in a classroom setting as a matter of routine. I would prefer either their Dress-of-the-Day as per their parent unit or Winter Dress. I intend to be in Winter Dress as we are sitting in a classroom/office environment.

A reminder that I intend to take leave

DMJ

LCdr Desmond James
Staff Officer
Directorate of Military Strategic Communications
Canadian Armed Forces
Desmond.James@forces.gc.ca / Tel: 613-992-4584

Capc Desmond James
officier d'état-major
Direction des communications stratégiques militaires
Forces armées canadiennes
Desmond.James@forces.gc.ca / tél: 613-992-4584

From: Allison LCol DE@ADM(PA).DPAPO@Ottawa-Hull
Sent: December-06-18 1:48 PM
To: James LCdr DM@ADM(PA).DGPASP@Ottawa-Hull <DESMOND.JAMES@forces.gc.ca>
Subject: FW: Target Audience Analysis Course

Des ,

For SA.

Please look at the attachment and modify it for use as a Joining Instruction for the course



**Centre d'apprentissage des Affaires publiques
de la Défense
Defence Public Affairs Learning Centre**



**National
Defence** **Défense
nationale**

**Joining and Administrative Instructions:
Strategic Communication Enabler Course (ALRB)
Serial 1801 – Gatineau, QC**

General

1. The Strategic Communication Enabler Course (SCEC) is an intensive training course delivered by the Defence Public Affairs Learning Centre (DPALC) in two phases. The first seven hours are to be completed online via the DLN Learning Portal. This is followed by a four-and-one-half-day intensive Face-to-Face (F2F) phase at the DPALC, located in the National Capital Region (NCR). This serial will be delivered in English.
2. Through a combination of course readings, interactive lectures, case studies and guided discussions, SCEC candidates will learn how to enable strategic communication (StratCom) at the strategic, operational and tactical levels through an enhanced understanding of concepts and policy, the need for consistent and credible communication using all means – lethal and non-lethal – through comprehensive coordination, as well as insight into the StratCom mindset required to operate effectively in today's information environment..
3. The DPALC is an internationally recognized training and development establishment serving the needs of the Canadian Armed Forces (CAF) and the Department of National Defence (DND). It is located in Gatineau, Quebec, adjacent to the capital city of Ottawa, Ontario. Regular and Reserve Force members of the CAF, government employees and international military personnel regularly attend the DPALC for training in the areas of military public affairs, social media, communication products, photojournalism, media relations, crisis communications and, now, StratCom.

Delivery

4. The distributed learning (DL) phase of the course will take place online via the DLN Learning Portal. The F2F phase of the course will take place at the DPALC in the National Printing Bureau (NPB) building located at 45 Boulevard Sacré-Coeur, Gatineau, QC.
<https://maps.google.ca/maps?hl=fr&q=45+boul+sacr%C3%A9-coeur,+gatineau&gbv=2&ie=UTF-8>

Reporting In

5. Course candidates are to log-in to the DLN Learning Portal six days prior to the beginning of the F2F phase. The DPALC will invite candidates into the course site NLT 26 November. The DL phase includes readings, self-study and discussion forum posts that must be completed prior to the F2F component.
6. For access to the NPB during the F2F phase, course candidates must report to the Commissionaire's desk located in the lobby at the **east entrance** with government-issued ID by 0720 hrs on Monday. Please be patient; this process may take some time. Candidates will be directed to DPALC's classroom on the third floor (E-3300).



Temporary Duty (TD)/Travel Costs

7. Candidates' home units or sponsoring or parent organizations are responsible for covering TD/travel costs for Regular and Reserve Force personnel and civilian employees participating in this training.
8. Parent units are responsible for travel claim preparation and all travel arrangements.
9. Reserve Force units are responsible for Reserve pay.
10. For civilian employees, parent units or sponsoring or parent organizations are responsible for travel costs, claim preparation, travel arrangements and any overtime pay.

Accommodation

11. All out-of-town candidates' home units or sponsoring or parent organizations are responsible for booking their accommodation. Arrangements can be made to store personal effects at the DPALC during the last day of the course.

Meals

12. Candidates are responsible for their own meals throughout the course. There is a cafeteria located on the first floor at the west end of the building and there are some private businesses within walking distance. A fridge and microwave are available to candidates for the duration of the course.

Transportation

13. Candidates are responsible for their own transportation to and from Ottawa and, while in the NCR, to and from the DPALC, hotel and airport or train station, as applicable.

Parking

14. For candidates who require parking, a weekly parking pass can be purchased from Vinci Parking. The Vinci Parking office is accessed through the doors to the left of the Commissionaires' desk at the west entrance to the NPB building. Alternatively, daily parking passes can be purchased through the machines located at the parking lot entrances.

Online Course Access and Communication

15. All candidates will access the SCEC via the DLN Learning Portal (note: this is not the same platform as the DLN LMS). This platform is accessible from any DWAN or Internet-accessible device. Any candidates that do not already have a DLN Learning Portal account must register for one as soon as possible via this link: <https://lp-pa.forces.gc.ca/portal/users#/register>. **Candidates will receive notification that they have been added to the course site no later than six days prior to the first day of F2F training.**



16. The DPALC requires your most readily accessible email address in order to facilitate timely communication before, during and after training. Send this information to Mr. Claudio Di Franco, Logistics Officer, at claudio.difranco@forces.gc.ca.

17. If candidates encounter technical issues during the DL phase, please contact Marc-André Clément at marc-andre.clement2@forces.gc.ca.

Class Schedule

18. The course starts with mandatory pre-reading and online activities through DL; these should take no more than seven hours in the week leading up to the F2F phase. The F2F phase starts at 0800 hrs on Monday, December 3, 2018, in the DPALC's third floor, east-wing classroom, E-3300, and finishes no later than 1230 hrs on Friday, December 7, 2018. Candidates shall not make any travel arrangements that will interfere with course timings.

19. Classes will normally be held from 0800 hours to 1700 hours, Monday to Thursday, with possible evening reading and group homework, and from 0800 hours to 1230 hours on Friday. The DPALC may adjust timings, as necessary, due to unforeseen circumstances. As the course requires syndicate-level work that may need to be completed after normal working hours, candidates should expect to contribute one or two additional hours to their learning each evening. Overtime costs will not be borne by the DPALC. Civilian personnel must arrange for overtime pay at their home locations in accordance with their collective agreements.

Computers

20. Each candidate requires a stand-alone laptop computer (not DWAN) for the duration of the course. The laptop must have Wi-Fi and basic word processing capability. Candidates are advised to source a suitable laptop (personal laptops are ideal). The DPALC retains a limited number of laptops for loan to candidates. If you require a laptop, please identify this requirement to Mr. Claudio Di Franco, as per para 27. Candidates will have access to printers and Wi-Fi.

Dress

21. Military dress of the day for the F2F phase is **Operational Dress**: CADPAT for Army personnel, naval combats for Navy personnel, and CADPAT or flight suit for Air Force personnel. Candidates are expected to maintain a high standard of dress and deportment at all times. Relaxed dress (no jeans) is recommended for civilian participants. Candidates shall wear their building passes (issued at the Commissionaire's desk upon arrival) and have identification with them at all times.

22. For wardrobe planning purposes, be advised that there are no planned social functions during this course.

Recreational Facilities

23. A gym is available to those who are interested.



Telephone Messages

24. For emergencies during the F2F phase, candidates can be reached through the Course Officer, Major Marshall Erickson, at marshall.erickson@forces.gc.ca or at 613-462-2036.

Mailing Address

25. Candidates should not make arrangements to receive conventional mail as the course is only one week in duration.

Course Reports

26. Successful candidates will sign and receive a copy of their course report on the last day of the course. The original document will be sent to the candidate's home unit through his/her chain of command.

Point of Contact

27. If you have any questions about the administration of the SCEC, please contact Mr. Claudio Di Franco, Logistics Officer, at claudio.difranco@forces.gc.ca or 819-997-4311. For emergencies, call 613-295-2254 or 613-462-2036.

//--- signed/signé ---//

Marshall Erickson
Major
Course Officer
Nov 2018

Director-General
Military Strategic Communication



Directeur général
communication stratégiques militaires

National Defence
Headquarters
Ottawa, Ontario
K1A 0K2

Quartier général de
la Défense nationale
Ottawa, Ontario
K1A 0K2

Joining and Administrative Instructions:

Target Audience Analysis Course (TAA)

Serial 1801 – Gatineau, QC

General

1. The Target Audience Analysis (TAA) Course is an intensive training course delivered by XXX at the Defence Public Affairs Learning (DPALC), located in the National Capital Region (NCR). This serial will be delivered in English.
2. Through a combination of course readings, interactive lectures, case studies and guided discussions, TAA candidates will first learn an internationally recognized TAA methodology and then apply the methodology to a real life case study, with results delivered to CAF leadership.
3. The DPALC is an internationally recognized training and development establishment serving the needs of the Canadian Armed Forces (CAF) and the Department of National Defence (DND). It is located in Gatineau, Quebec, adjacent to the capital city of Ottawa, Ontario. Regular and Reserve Force members of the CAF, government employees and international military personnel regularly attend the DPALC for training in the areas of military public affairs, social media, communication products, photojournalism, media relations, crisis communications and, now, StratCom.

Delivery

4. The course will take place at the DPALC in the National Printing Bureau (NPB) building located at 45 Boulevard Sacré-Coeur, Gatineau, QC.

Reporting In

5. Course candidates are to log-in to the DLN Learning Portal six days prior to the beginning of the F2F phase. The DPALC will invite candidates into the course site NLT 26 November. The DL phase includes readings, self-study and discussion forum posts that must be completed prior to the F2F component.
6. For access to the NPB during the F2F phase, course candidates must report to the Commissionaire's desk located in the lobby at the east entrance with government-issued ID by 0720 hrs on Monday. Please be patient; this process may take some time. Candidates will be directed to DPALC's classroom on the third floor (E-3300).

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Mailing Address

25. The DPALC mailing address is XXX. Or mail items to your accommodations if required.

Course Reports

26. Successful candidates will sign and receive a copy of their course report on the last day of the course. The original document will be sent to the candidate's home unit through his/her chain of command.

Point of Contact

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Desmond James
Lieutenant-Commander
Course Officer
XX Jan 2019

From: [Johnston KJ@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Sent: December 11, 2018 10:25 AM
To: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Subject: RE: RFP and next steps
Attachments: W6369-19-X033 - Conflict of Interest and Non-Disclosure Certification (for bid evaluation team members).pdf; W6369-19-X033 - Instructions_on_Bid_Handling_for_Evaluation_Teams.docx

Good Morning Doug

As discussed, please find attached the Conflict of Interest and Non-Disclosure Agreement form and the Bid Handling Instructions for your team's review.

As the solicitation closes on Friday, please have your bid eval team sign the COI & NDA form and return at your earliest convenience.

Thanks

Kent

Kent Johnston

Agent supérieur d'approvisionnement, DC Svcs 4-3-2
Ministère de la Défense nationale / Gouvernement du Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

Senior Procurement Officer, D Svcs C 4-3-2
Department of National Defence / Government of Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: December-03-18 11:22 AM
To: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull <KENT.JOHNSTON@forces.gc.ca>
Subject: RE: RFP and next steps

Kent,

Are the General or I (as end user) in any potential conflict of interest WRT sitting on the evaluation board? To the best of my knowledge we have no affiliations with any prospective/actual bidders. I am just thinking of whom the evaluator team can be composed of.

From: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: December-03-18 11:04 AM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>; James LCdr DM@ADM(PA) DGPASP@Ottawa-Hull <DESMOND.JAMES@forces.gc.ca>
Subject: RE: RFP and next steps

Good Morning Doug

I will prep all the evaluation documents and send everything over to you.

You'll need a team of three evaluators. I will send over conflict of interest forms that all three must sign and return to me as well as bid handling instructions; these will be sent in advance.

The bids can be evaluated as soon as the solicitation period closes. If all goes smoothly we could have a contract in place by December 21.

Once you and your evaluation team finish evaluating the technical bids, I will consolidate everything and determine who the winner is (including the financial evaluation), draft the contract and staff for approval.

Once the contract has been sent out, you and winning bidder can start planning the course.

Kent

Kent Johnston

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Ministère de la Défense nationale / Gouvernement du Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

Senior Procurement Officer, D Svcs C 4-3-2
Department of National Defence / Government of Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

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Subject: RFP and next steps

Good morning Kent,

Hope you had a good weekend.

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How soon after we make a determination can the winning bidder be advised and the contract let?

Who does this notification?

Are there any other things that I can do now that will expedite the process after the mid-December closing date?

Thanks

Doug

D. Allison

LCol/Lcol

Director-General Military Strategic Communication FD/Directeur général – communication
stratégique militaire DF

Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et
Forces armées canadiennes

Douglas.Allison@forces.gc.ca / Tel : 613-944-3291 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC : 944-
3291



This form is for bid evaluation team members

CONFLICT OF INTEREST AND NON-DISCLOSURE CERTIFICATION

Solicitation Number: W6369-19-X033 (insert contract number)

Title: Target Audience Analysis Methodology Training (insert procurement tool title)

I hereby certify that as a team member or team leader participating in the evaluation of the bids received in response to the above-noted solicitation:

- 1. I understand that bid information may only be divulged to and discussed with government officials authorized to participate in this solicitation. I agree that I will not divulge, discuss or otherwise disclose any of this bid information to any person other than the authorized government officials.*
- 2. I agree to maintain the strict confidentiality of all proposals, the status of the evaluation process and any individual proposal, the deliberations of the evaluation team, as well as the number and identity of bidders.*
- 3. In order to provide impartial and objective evaluation of the bids on behalf of Canada and to avoid any real or apparent conflict of interest, I represent and warrant that I am not in a situation of conflict of interest that would render me unable to provide impartial evaluation of the bids, or affect or otherwise impair my objectivity in performing the evaluation of the bids. In the event that I discover I have potential conflict of interest with any bidder, I will immediately inform the Contracting Authority and other member(s) of the team that I can no longer participate in the evaluation.*
- 4. I will not reveal my identity as an evaluator to any other than those involved with the evaluation of this solicitation prior to contract award.*
- 5. I have read, understand and agree to fully comply with the bid solicitation evaluation provisions of the Procurement Administration Manual.*

Evaluator signature

Date

Print evaluator full name

Title

Director Services Contracting 4 (D Svcs C 4)

A. INSTRUCTIONS TO EVALUATION TEAM MEMBERS ON BID HANDLING

Failure to follow these instructions can result in the evaluation process being terminated and the acquisition process being re-started.

- A1. Bid packages and the information contained in them are treated as “Commercial in Confidence”. This will entail:
 - i) Proper storage of the bids including physically securing bids when left unattended (key lock as a minimum);
 - ii) Not allowing bids to leave the building except in a controlled manner;
 - iii) Accurate tracking of the transfer of bid documents;
 - iv) Requiring persons who will have access to bids to sign the Conflict of Interest and Non-Disclosure certification; and
 - v) Not discussing details of bids in open areas.
- A2. Individuals must declare any real or perceived conflict of interest prior to commencing a bid evaluation.
- A3. All material, discussions and information associated with the evaluation process will be treated as “Commercial in Confidence”. Communications, oral or written, should refer bidders to their designated letter or number in-lieu of names.
- A4. Only the Procurement Authority and members of the Evaluation Team who have signed a Conflict of Interest and Non-Disclosure certification may review the bids.
- A5. Evaluation Team members may only discuss the bid and the evaluation with identified Team members and the Procurement/Contracting Authority.
- A6. The Records, Documents and Information Management System (RDIMS) is currently not equipped to store Protected B documents, therefore, RDIMS is not to be used to file bids.
- A7. Bid documents shall not be marked. Documents pertaining to the evaluation of bids must be retained and are subject to the Access to Information Act.

B. ADDITIONAL INSTRUCTIONS REGARDING COMMUNICATIONS AND CLARIFICATIONS.

- B1. The evaluation team is responsible for evaluating the technical proposals. The procurement officer is responsible for evaluating the financial proposals; financial information will not be provided to the evaluation team until all evaluations are complete, and a successful bidder is selected.
- B2. Each member of the evaluation team shall read each proposal in its entirety even though they may be tasked with evaluating assigned areas only.
- B3. Prior to meeting collectively for the purpose of evaluating proposals, team members are to evaluate the bids independently and document the evaluation in the Scoring Grid provided by the procurement officer.
- B4. Evaluators will participate in discussions/meeting to achieve consensus to arrive at a final determination/score. Consensus may be achieved through average or eliminating high and low scores or other reasonable means, provided that a consistent approach is taken for all bids being evaluated. Results of the final ranking are to be included in the Evaluation Summary Report, signed by all members of the evaluation team.

Director Services Contracting 4 (D Svcs C 4)

- B5. The evaluation team may submit any clarification questions to obtain further explanation of some existing aspect of the bid, provided that it does not amount to a revision or modification of the bid. Requests for clarifications are to be submitted to the procurement officer, who will determine whether clarifications should be sought. The procurement officer has responsibilities to ensure that this process does not give any bidder an unfair advantage over another.**
- B6. The evaluation team must not communicate directly with the bidders and must refer all enquiries pertaining to the requirement to the procurement officer.**
- B7. The evaluation team is to consult with the procurement officer if there are any concerns or issues regarding the evaluation process.**

Additional Information may be found in the PAM: 4.1 and 4.2 regarding Roles and Responsibilities in the evaluation process.

Last Update: 13 Jul 2016 by Luc Maillet, D Svcs C 4-2-5

From: [Johnston KJ@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Sent: December 11, 2018 11:09 AM
To: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Subject: RE: RFP and next steps

No problem; I send out the eval grids once I receive all the bids because I prepare a grid for each bidder so it reduces the amount of admin work on your end.

I'll send you everything on Friday afternoon.

Kent Johnston

Agent supérieur d'approvisionnement, DC Svcs 4-3-2
Ministère de la Défense nationale / Gouvernement du Canada
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From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: December-11-18 11:06 AM
To: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull <KENT.JOHNSTON@forces.gc.ca>
Subject: RE: RFP and next steps

Thanks for this Kent.

I will get the signed forms back to you soonest.

Will you be sending out a copy of the scoring grid as well?

Cheers

Doug

From: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: December-11-18 10:25 AM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
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From: [Allison LCol DE@ADM\(PA\).DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: December 14, 2018 11:59 AM
To: [Johnston.KJ@ADM\(Mat\).D.Svcs.C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Subject: Conflict of Interest Certification
Attachments: scan-20181214115259297.pdf

Hi Kent,

See docs at attachment

D. Allison
LCol/Lcol
Director-General Military Strategic Communication FD/Directeur général – communication
stratégique militaire DF
Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et
Forces armées canadiennes
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3291



National Défense
Defence nationale

This form is for bid evaluation team members

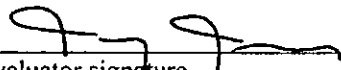
CONFLICT OF INTEREST AND NON-DISCLOSURE CERTIFICATION

Solicitation Number: W6369-19-X033 (insert contract number)

Title: Target Audience Analysis Methodology Training (insert procurement tool title)

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1. *I understand that bid information may only be divulged to and discussed with government officials authorized to participate in this solicitation. I agree that I will not divulge, discuss or otherwise disclose any of this bid information to any person other than the authorized government officials.*
2. *I agree to maintain the strict confidentiality of all proposals, the status of the evaluation process and any individual proposal, the deliberations of the evaluation team, as well as the number and identity of bidders.*
3. *In order to provide impartial and objective evaluation of the bids on behalf of Canada and to avoid any real or apparent conflict of interest, I represent and warrant that I am not in a situation of conflict of interest that would render me unable to provide impartial evaluation of the bids, or affect or otherwise impair my objectivity in performing the evaluation of the bids. In the event that I discover I have potential conflict of interest with any bidder, I will immediately inform the Contracting Authority and other member(s) of the team that I can no longer participate in the evaluation.*
4. *I will not reveal my identity as an evaluator to any other than those involved with the evaluation of this solicitation prior to contract award.*
5. *I have read, understand and agree to fully comply with the bid solicitation evaluation provisions of the Procurement Administration Manual.*


Evaluator signature

14 DEC 18
Date

Jay Janzen, BGen
Print evaluator full name

DGMSC
Title

Canada



National Défense
Defence nationale

This form is for bid evaluation team members

CONFLICT OF INTEREST AND NON-DISCLOSURE CERTIFICATION

Solicitation Number: W6369-19-X033 (insert contract number)

Title: Target Audience Analysis Methodology Training (insert procurement tool title)

I hereby certify that as a team member or team leader participating in the evaluation of the bids received in response to the above-noted solicitation:

1. *I understand that bid information may only be divulged to and discussed with government officials authorized to participate in this solicitation. I agree that I will not divulge, discuss or otherwise disclose any of this bid information to any person other than the authorized government officials.*
2. *I agree to maintain the strict confidentiality of all proposals, the status of the evaluation process and any individual proposal, the deliberations of the evaluation team, as well as the number and identity of bidders.*
3. *In order to provide impartial and objective evaluation of the bids on behalf of Canada and to avoid any real or apparent conflict of interest, I represent and warrant that I am not in a situation of conflict of interest that would render me unable to provide impartial evaluation of the bids, or affect or otherwise impair my objectivity in performing the evaluation of the bids. In the event that I discover I have potential conflict of interest with any bidder, I will immediately inform the Contracting Authority and other member(s) of the team that I can no longer participate in the evaluation.*
4. *I will not reveal my identity as an evaluator to any other than those involved with the evaluation of this solicitation prior to contract award.*
5. *I have read, understand and agree to fully comply with the bid solicitation evaluation provisions of the Procurement Administration Manual.*

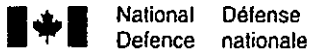
D. Allison
Evaluator signature

14 Dec 18
Date

D. Allison, LCol
Print evaluator full name

DGMSC FD
Title

Canada



This form is for bid evaluation team members

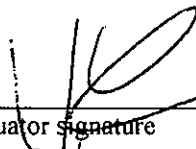
CONFLICT OF INTEREST AND NON-DISCLOSURE CERTIFICATION

Solicitation Number: W6369-19-X033 (insert contract number)

Title: Target Audience Analysis Methodology Training (insert procurement tool title)

I hereby certify that as a team member or team leader participating in the evaluation of the bids received in response to the above-noted solicitation:

1. *I understand that bid information may only be divulged to and discussed with government officials authorized to participate in this solicitation. I agree that I will not divulge, discuss or otherwise disclose any of this bid information to any person other than the authorized government officials.*
2. *I agree to maintain the strict confidentiality of all proposals, the status of the evaluation process and any individual proposal, the deliberations of the evaluation team, as well as the number and identity of bidders.*
3. *In order to provide impartial and objective evaluation of the bids on behalf of Canada and to avoid any real or apparent conflict of interest, I represent and warrant that I am not in a situation of conflict of interest that would render me unable to provide impartial evaluation of the bids, or affect or otherwise impair my objectivity in performing the evaluation of the bids. In the event that I discover I have potential conflict of interest with any bidder, I will immediately inform the Contracting Authority and other member(s) of the team that I can no longer participate in the evaluation.*
4. *I will not reveal my identity as an evaluator to any other than those involved with the evaluation of this solicitation prior to contract award.*
5. *I have read, understand and agree to fully comply with the bid solicitation evaluation provisions of the Procurement Administration Manual.*



Evaluator signature

11 Dec '19

Date

Meghan Marsaw

Print evaluator full name

DPAPO Coord

Title



s.20(1)(b)

s.20(1)(c)

From: [Johnston.KJ@ADM\(Mat\).D.Svcs.C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Sent: December 14, 2018 2:30 PM
To: [Allison.LCol.DE@ADM\(PA\).DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Subject: W6369-19-X033 - Bid Evaluation
Attachments: [REDACTED]

W6369-19-X033 - Consolidated Group Comments - Bidder
A.doc; W6369-19-X033 - Individual Tech Eval Grid - Bidder A.doc

Hi Doug

We received one bid from [REDACTED]

As previously discussed, [REDACTED] the evaluation grids
(individual response and consolidated group response).

Have a good weekend and touch base early next week if you have any questions.

Thanks

Kent

Kent Johnston

Agent supérieur d'approvisionnement, DC Svcs 4-3-2
Ministère de la Défense nationale / Gouvernement du Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

Senior Procurement Officer, D Svcs C 4-3-2
Department of National Defence / Government of Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

Page 302

**is withheld pursuant to sections
est retenue en vertu des articles**

19(1), 20(1)(b), 20(1)(c)

**of the Access to Information Act
de la Loi sur l'accès à l'information**

**Pages 303 to / à 317
are withheld pursuant to sections
sont retenues en vertu des articles**

20(1)(b), 20(1)(c)

**of the Access to Information Act
de la Loi sur l'accès à l'information**

**Pages 318 to / à 320
are withheld pursuant to sections
sont retenues en vertu des articles**

19(1), 20(1)(b), 20(1)(c)

**of the Access to Information Act
de la Loi sur l'accès à l'information**

Page 321

**is withheld pursuant to sections
est retenue en vertu des articles**

20(1)(b), 20(1)(c)

**of the Access to Information Act
de la Loi sur l'accès à l'information**

**Pages 322 to / à 323
are withheld pursuant to sections
sont retenues en vertu des articles**

19(1), 20(1)(b), 20(1)(c)

**of the Access to Information Act
de la Loi sur l'accès à l'information**

**Pages 324 to / à 329
are withheld pursuant to sections
sont retenues en vertu des articles**

20(1)(b), 20(1)(c)

**of the Access to Information Act
de la Loi sur l'accès à l'information**

Page 330

**is withheld pursuant to sections
est retenue en vertu des articles**

19(1), 20(1)(b), 20(1)(c)

**of the Access to Information Act
de la Loi sur l'accès à l'information**

Invited Vendor: W6369-19-X033 – Bidder A

Evaluation Team Member: Consolidated Group Comments

NOTE: All entries in this grid **MUST** be legible.

The Comments Sections must be used to indicate:

- i. **compliance** reference (section, page and/or paragraph number)
- ii. **non-compliance** through a lack of demonstrated evidence in the Technical Proposal
- iii. **non-compliance** indicated by information contradicting evidence contained in the Technical Proposal
- iv. other relevant proposal information, if necessary

NOTE: Many proposals contain a Compliance Grid, where the Bidder simply responds with a “Yes” or the grid simply refers to the page number in which the evidence appears. Unless substantiated, the Compliance Grid, by itself, **DOES NOT** necessarily demonstrate compliance. (e.g. Simply answering “Yes” without demonstrating the experience does not constitute compliance.) Supporting evidence demonstrating compliance with mandatory/rated criteria may appear in resumes, certificates or elsewhere in the proposal. Evaluators should record where the supporting evidence is located for each criterion in the Comments section below.

No personal opinions should be included in the Comments section (as these grids could form part of an Access To Information (ATI) or CITT document).

Proposal documents should not be marked or have comments written on them. Scratch pads or separate notes should be used instead. Temporary flags and post-it notes in proposal documents are allowed for reference only, but should be removed after evaluations are complete.

Evaluation Method: Individual

Invited Vendor: W6369-19-X033 – Bidder A

Evaluation Team Member: Consolidated Group Comments

MANDATORY CRITERIA

	REQUIREMENT	MET	NOT MET	COMMENTS (I.E. LOCATION IN PROPOSAL, CRITERIA NOT MET, ETC)
ONE (1) LIFE CYCLE MANAGEMENT SPECIALIST (INTERMEDIATE)				
MT1	The bidder must clearly demonstrate it has experience teaching a minimum of two (2) Target Audience Analysis (TAA) methodology courses/workshops in a group setting where the main topic of courses/workshops was the TAA methodology.			<u>Technical Proposal location:</u> Example: Evaluator #1: Met - indicated on pg. X of Technical Bid Evaluator #2: Met - indicated on pg. X of Technical Bid Evaluator #3: Met - indicated on pg. X of Technical Bid
MT2	The Bidder must clearly demonstrate that its proposed lead instructor(s) has/have experience teaching Target Audience Analysis (TAA) methodology workshops/courses.			<u>Technical Proposal location:</u>
MT3	The Bidder must clearly demonstrate it has the capacity to: <ul style="list-style-type: none"> i. design a detailed curriculum and lecture/activity schedule for the course; ii. conduct examinations/assessments/individual and syndicate presentations at the mid and end-course points; and iii. provide the required learning materials, such as but not limited to, slide decks, handouts and reference documents (electronic or paper) for up to 24 students. 			<u>Technical Proposal location:</u>

Invited Vendor: W6369-19-X033 – Bidder A

Evaluation Team Member: Consolidated Group Comments

	REQUIREMENT	MET	NOT MET	COMMENTS (I.E. LOCATION IN PROPOSAL, CRITERIA NOT MET, ETC)
	Compliant (Yes/No)?			

RATED CRITERIA

#	CRITERIA	SCORING GUIDELINES	MAX POINTS	SCORE	CROSS REFERENCE TO PROPOSAL (PAGE AND PARA)
TARGET AUDIENCE ANALYSIS TRAINING					
RT1	The bidder should clearly demonstrate it has experience teaching more than two (2) Target Audience Analysis (TAA) methodology courses/workshops in a group setting where the main topic of courses/workshops was the TAA methodology.	3 to 4 workshops/courses = 10pts 5 to 6 workshops/courses = 20pts 7 to 8 workshops/courses = 30pts 9+ workshops/courses = 40pts	40		<u>Technical Proposal location:</u>
RT2	The Bidder should clearly demonstrate that its proposed lead instructor(s) has/have experience teaching TAA methodology workshops/courses.	1 to 2 workshops/courses = 10pts 3 to 4 workshops/courses = 20pts 5 to 6 workshops/courses	40		<u>Technical Proposal location:</u>

Invited Vendor: W6369-19-X033 – Bidder A

Evaluation Team Member: Consolidated Group Comments

#	CRITERIA	SCORING GUIDELINES	MAX POINTS	SCORE	CROSS REFERENCE TO PROPOSAL (PAGE AND PARA)
		= 30pts 7+ workshops/courses = 40pts			
RT3	The Bidder should clearly demonstrate it has provided TAA methodology workshops/courses to NATO organizations and/or allies.	Training provided to at least one NATO ally /organization = 10 pts Training provided to NATO ally(ies) AND NATO organization(s) = 20 pts	20		<u>Technical Proposal location:</u>
RT4	The bidder should clearly demonstrate it has provided TAA training in a military setting.	1 to 2 workshops/courses = 10pts 3 to 4 workshops/courses = 20pts 5+ workshops/courses = 30pts	30		<u>Technical Proposal location:</u>
TOTAL OF POINT RATED TECHNICAL CRITERIA					
	Total:	Minimum Passing Score: 52 (40%)	Maximum Score: 130		

Invited Vendor: W6369-19-X033 – Bidder A

Evaluation Team Member: Consolidated Group Comments

Signature

Date

Signature

Date

Signature

Date

Invited Vendor: W6369-19-X033 – Bidder A

Evaluation Team Member: Insert Name Here

NOTE: All entries in this grid **MUST** be legible.

The Comments Sections must be used to indicate:

- i. **compliance** reference (section, page and/or paragraph number)
- ii. **non-compliance** through a lack of demonstrated evidence in the Technical Proposal
- iii. **non-compliance** indicated by information contradicting evidence contained in the Technical Proposal
- iv. other relevant proposal information, if necessary

NOTE: Many proposals contain a Compliance Grid, where the Bidder simply responds with a “Yes” or the grid simply refers to the page number in which the evidence appears. Unless substantiated, the Compliance Grid, by itself, **DOES NOT** necessarily demonstrate compliance. (e.g. Simply answering “Yes” without demonstrating the experience does not constitute compliance.) Supporting evidence demonstrating compliance with mandatory/rated criteria may appear in resumes, certificates or elsewhere in the proposal. Evaluators should record where the supporting evidence is located for each criterion in the Comments section below.

No personal opinions should be included in the Comments section (as these grids could form part of an Access To Information (ATI) or CITT document).

Proposal documents should not be marked or have comments written on them. Scratch pads or separate notes should be used instead. Temporary flags and post-it notes in proposal documents are allowed for reference only, but should be removed after evaluations are complete.

Evaluation Method: Individual

Invited Vendor: W6369-19-X033 – Bidder A

Evaluation Team Member: Insert Name Here

MANDATORY CRITERIA

	REQUIREMENT	MET	NOT MET	COMMENTS (I.E. LOCATION IN PROPOSAL, CRITERIA NOT MET, ETC)
ONE (1) LIFE CYCLE MANAGEMENT SPECIALIST (INTERMEDIATE)				
MT1	The bidder must clearly demonstrate it has experience teaching a minimum of two (2) Target Audience Analysis (TAA) methodology courses/workshops in a group setting where the main topic of courses/workshops was the TAA methodology.			<u>Technical Proposal location:</u> Example: Met - indicated on pg. X of Technical Bid
MT2	The Bidder must clearly demonstrate that its proposed lead instructor(s) has/have experience teaching Target Audience Analysis (TAA) methodology workshops/courses.			<u>Technical Proposal location:</u>
MT3	The Bidder must clearly demonstrate it has the capacity to: i. design a detailed curriculum and lecture/activity schedule for the course; ii. conduct examinations/assessments/individual and syndicate presentations at the mid and end-course points; and iii. provide the required learning materials, such as but not limited to, slide decks, handouts and reference documents (electronic or paper) for up to 24 students.			<u>Technical Proposal location:</u>
	Compliant (Yes/No)?			

Invited Vendor: W6369-19-X033 – Bidder A

Evaluation Team Member: Insert Name Here

RATED CRITERIA

#	CRITERIA	SCORING GUIDELINES	MAX POINTS	SCORE	CROSS REFERENCE TO PROPOSAL (PAGE AND PARA)
TARGET AUDIENCE ANALYSIS TRAINING					
RT1	The bidder should clearly demonstrate it has experience teaching more than two (2) Target Audience Analysis (TAA) methodology courses/workshops in a group setting where the main topic of courses/workshops was the TAA methodology.	3 to 4 workshops/courses = 10pts 5 to 6 workshops/courses = 20pts 7 to 8 workshops/courses = 30pts 9+ workshops/courses = 40pts	40		<u>Technical Proposal location:</u>
RT2	The Bidder should clearly demonstrate that its proposed lead instructor(s) has/have experience teaching TAA methodology workshops/courses.	1 to 2 workshops/courses = 10pts 3 to 4 workshops/courses = 20pts 5 to 6 workshops/courses = 30pts 7+ workshops/courses = 40pts	40		<u>Technical Proposal location:</u>

Invited Vendor: W6369-19-X033 – Bidder A

Evaluation Team Member: Insert Name Here

#	CRITERIA	SCORING GUIDELINES	MAX POINTS	SCORE	CROSS REFERENCE TO PROPOSAL (PAGE AND PARA)
RT3	The Bidder should clearly demonstrate it has provided TAA methodology workshops/courses to NATO organizations and/or allies.	Training provided to at least one NATO ally /organization = 10 pts Training provided to NATO ally(ies) AND NATO organization(s) = 20 pts	20		<u>Technical Proposal location:</u>
RT4	The bidder should clearly demonstrate it has provided TAA training in a military setting.	1 to 2 workshops/courses = 10pts 3 to 4 workshops/courses = 20pts 5+ workshops/courses = 30pts	30		<u>Technical Proposal location:</u>
TOTAL OF POINT RATED TECHNICAL CRITERIA					
	Total:	Minimum Passing Score: 52 (40%)	Maximum Score: 130		

Signature

Date

s.20(1)(b)

s.20(1)(c)

From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: December 14, 2018 3:38 PM
To: [Janzen BGen JH@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Janzen.BGen.JH@ADM(PA).DPAPO@Ottawa-Hull)
Subject: FW: W6369-19-X033 - Bid Evaluation
Attachments:

W6369-19-X033 - Consolidated Group Comments - Bidder
A.doc; W6369-19-X033 - Individual Tech Eval Grid - Bidder A.doc

Sir

Only one bid. Note

From: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: December-14-18 2:30 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: W6369-19-X033 - Bid Evaluation

Hi Doug

We received one bid from

As previously discussed, attached is the evaluation grids
(individual response and consolidated group response).

Have a good weekend and touch base early next week if you have any questions.

Thanks

Kent

Kent Johnston

Agent supérieur d'approvisionnement, DC Svcs 4-3-2
Ministère de la Défense nationale / Gouvernement du Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

Senior Procurement Officer, D Svcs C 4-3-2
Department of National Defence / Government of Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

s.20(1)(b)

s.20(1)(c)

From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: December 17, 2018 2:34 PM
To: [Marsaw MB@ADM\(PA\) DGPASP@Ottawa-Hull](mailto:Marsaw.MB@ADM(PA).DGPASP@Ottawa-Hull)
Subject: Fw: W6369-19-X033 - Bid Evaluation
Attachments:

W6369-19-X033 - Consolidated Group Comments - Bidder
A.doc; W6369-19-X033 - Individual Tech Eval Grid - Bidder A.doc

Meghan,

Bid for individuals assessment

Sent from my BlackBerry 10 smartphone on the Bell network.

From: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull <KENT.JOHNSTON@forces.gc.ca>
Sent: Friday, December 14, 2018 2:29 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Subject: W6369-19-X033 - Bid Evaluation

Hi Doug

We received one bid from

As previously discussed, attached is the evaluation grids
(individual response and consolidated group response).

Have a good weekend and touch base early next week if you have any questions.

Thanks

Kent

Kent Johnston

Agent supérieur d'approvisionnement, DC Svcs 4-3-2
Ministère de la Défense nationale / Gouvernement du Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

Senior Procurement Officer, D Svcs C 4-3-2
Department of National Defence / Government of Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

s.20(1)(b)

s.20(1)(c)

From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: December 18, 2018 8:44 AM
To: [Marsaw MB@ADM\(PA\) DGPASP@Ottawa-Hull](mailto:Marsaw.MB@ADM(PA).DGPASP@Ottawa-Hull)
Subject: Re: W6369-19-X033 - Bid Evaluation

No

Sent from my BlackBerry 10 smartphone on the Bell network.

From: Marsaw MB@ADM(PA) DGPASP@Ottawa-Hull
Sent: Monday, December 17, 2018 2:36 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Subject: RE: W6369-19-X033 - Bid Evaluation

Thanks. Are we expecting more?

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: December-17-18 2:34 PM
To: Marsaw MB@ADM(PA) DGPASP@Ottawa-Hull <MEGHAN.MARSAW@forces.gc.ca>
Subject: Fw: W6369-19-X033 - Bid Evaluation

Meghan,

Bid for individuals assessment

Sent from my BlackBerry 10 smartphone on the Bell network.

From: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull <KENT.JOHNSTON@forces.gc.ca>
Sent: Friday, December 14, 2018 2:29 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Subject: W6369-19-X033 - Bid Evaluation

Hi Doug

We received one bid from

As previously discussed, attached is the evaluation grids
(individual response and consolidated group response).

Have a good weekend and touch base early next week if you have any questions.

Thanks

Kent

Kent Johnston

Agent supérieur d'approvisionnement, DC Svcs 4-3-2
Ministère de la Défense nationale / Gouvernement du Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

Senior Procurement Officer, D Svcs C 4-3-2
Department of National Defence / Government of Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

From: [Johnston KJ@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Sent: December 19, 2018 10:15 AM
To: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Subject: RE: W6369-19-X033 - Bid Evaluation

Excellent, thank you!

Kent Johnston

Agent supérieur d'approvisionnement, DC Svcs 4-3-2
Ministère de la Défense nationale / Gouvernement du Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

Senior Procurement Officer, D Svcs C 4-3-2
Department of National Defence / Government of Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: December-19-18 10:12 AM
To: [Johnston KJ@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull) <KENT.JOHNSTON@forces.gc.ca>
Subject: RE: W6369-19-X033 - Bid Evaluation

Hi Kent,

We are doing the group eval this afternoon, and I will ship you the paperwork when completed.

Cheers

From: [Johnston KJ@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Sent: December-19-18 9:59 AM
To: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull) <DOUGLAS.ALLISON@forces.gc.ca>
Subject: FW: W6369-19-X033 - Bid Evaluation

Good Morning Doug

Just thought I'd see how you're making out with the evaluation?

It would be ideal to have everything wrapped up this week if we can.

Thanks

Kent

Kent Johnston

Agent supérieur d'approvisionnement, DC Svcs 4-3-2
Ministère de la Défense nationale / Gouvernement du Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

Senior Procurement Officer, D Svcs C 4-3-2
Department of National Defence / Government of Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

s.20(1)(b)

s.20(1)(c)

From: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: December-14-18 2:30 PM
To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: W6369-19-X033 - Bid Evaluation

Hi Doug

We received one bid from

As previously discussed, attached is the evaluation grids
(individual response and consolidated group response).

Have a good weekend and touch base early next week if you have any questions.

Thanks

Kent

Kent Johnston

Agent supérieur d'approvisionnement, DC Svcs 4-3-2
Ministère de la Défense nationale / Gouvernement du Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

Senior Procurement Officer, D Svcs C 4-3-2
Department of National Defence / Government of Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

From: [Allison LCol DE@ADM\(PA\).DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: December 19, 2018 3:05 PM
To: [Johnston KJ@ADM\(Mat\).D.Svcs.C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull); [Janzen BGen JH@ADM\(PA\).DPAPO@Ottawa-Hull](mailto:Janzen.BGen.JH@ADM(PA).DPAPO@Ottawa-Hull); [Marsaw MB@ADM\(PA\).DGPASP@Ottawa-Hull](mailto:Marsaw.MB@ADM(PA).DGPASP@Ottawa-Hull)
Subject: Evaluation paperwork
Attachments: scan-20181219145837694.pdf

Kent,

See attached with indiv and consolidated evaluations. Please advise if you need anything else.

I would appreciate a quick synopsis of next steps if you could provide.

Thanks again for all of your help with this

D. Allison
LCol/Lcol
Director-General Military Strategic Communication FD/Directeur général – communication
stratégique militaire DF
Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et
Forces armées canadiennes
Douglas.Allison@forces.gc.ca / Tel : 613-944-3291 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC : 944-
3291

s.20(1)(b)
 s.20(1)(c)
 s.21(1)(b)

Invited Vendor: W6369-19-X033 – Bidder A

Evaluation Team Member: BGen J.H. Janzen

MANDATORY CRITERIA

	REQUIREMENT	MET	NOT MET	COMMENTS (I.E. LOCATION IN PROPOSAL, CRITERIA NOT MET, ETC)
ONE (1) LIFE CYCLE MANAGEMENT SPECIALIST (INTERMEDIATE)				
MT1	The bidder must clearly demonstrate it has experience teaching a minimum of two (2) Target Audience Analysis (TAA) methodology courses/workshops in a group setting where the main topic of courses/workshops was the TAA methodology.			
MT2	The Bidder must clearly demonstrate that its proposed lead instructor(s) has/have experience teaching Target Audience Analysis (TAA) methodology workshops/courses.			
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	Compliant (Yes/No)?			

s.20(1)(b)
 s.20(1)(c)
 s.21(1)(b)

Invited Vendor: W6369-19-X033 – Bidder A

Evaluation Team Member: BGen J.H. Janzen

RATED CRITERIA

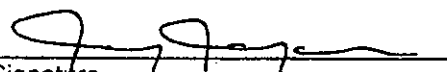
#	CRITERIA	SCORING GUIDELINES	MAX POINTS	SCORE	CROSS REFERENCE TO PROPOSAL (PAGE AND PARA)
TARGET AUDIENCE ANALYSIS TRAINING					
RT1	The bidder should clearly demonstrate it has experience teaching more than two (2) Target Audience Analysis (TAA) methodology courses/workshops in a group setting where the main topic of courses/workshops was the TAA methodology.	3 to 4 workshops/courses = 10pts 5 to 6 workshops/courses = 20pts 7 to 8 workshops/courses = 30pts 9+ workshops/courses = 40pts	40		
RT2	The Bidder should clearly demonstrate that its proposed lead instructor(s) has/have experience teaching TAA methodology workshops/courses.	1 to 2 workshops/courses = 10pts 3 to 4 workshops/courses = 20pts 5 to 6 workshops/courses = 30pts 7+ workshops/courses = 40pts	40		

s.20(1)(b)
 s.20(1)(c)
 s.21(1)(b)

Invited Vendor: W6369-19-X033 - Bidder A

Evaluation Team Member: BGen J.H. Janzen

#	CRITERIA	SCORING GUIDELINES	MAX POINTS	SCORE	CROSS REFERENCE TO PROPOSAL (PAGE AND PARA)
RT3	The Bidder should clearly demonstrate it has provided TAA methodology workshops/courses to NATO organizations and/or allies.	Training provided to at least one NATO ally /organization = 10 pts Training provided to NATO ally(ies) AND NATO organization(s) = 20 pts	20		
RT4	The bidder should clearly demonstrate it has provided TAA training in a military setting.	1 to 2 workshops/courses = 10pts 3 to 4 workshops/courses = 20pts 5+ workshops/courses = 30pts	30		
TOTAL OF POINT RATED TECHNICAL CRITERIA					
	Total:	Minimum Passing Score: 52 (40%)	Maximum Score: 130		


 Signature

19 DEC 2018
 Date

BGEN JAY H. JANZEN
 DG STRATCOM

s.20(1)(b)
 s.20(1)(c)
 s.21(1)(b)

Invited Vendor: W6369-19-X033 – Bidder A

Evaluation Team Member: LCol D. Allison

MANDATORY CRITERIA

	REQUIREMENT	MET	NOT MET	COMMENTS (I.E. LOCATION IN PROPOSAL, CRITERIA NOT MET, ETC)
ONE (1) LIFE CYCLE MANAGEMENT SPECIALIST (INTERMEDIATE)				
MT1	The bidder must clearly demonstrate it has experience teaching a minimum of two (2) Target Audience Analysis (TAA) methodology courses/workshops in a group setting where the main topic of courses/workshops was the TAA methodology.			
MT2	The Bidder must clearly demonstrate that its proposed lead instructor(s) has/have experience teaching Target Audience Analysis (TAA) methodology workshops/courses.			
MT3	The Bidder must clearly demonstrate it has the capacity to: <ul style="list-style-type: none"> i. design a detailed curriculum and lecture/activity schedule for the course; ii. conduct examinations/assessments/individual and syndicate presentations at the mid and end-course points; and iii. provide the required learning materials, such as but not limited to, slide decks, handouts and reference documents (electronic or paper) for up to 24 students. 			
	Compliant (Yes/No)?			

s.20(1)(b)
 s.20(1)(c)
 s.21(1)(b)

Invited Vendor: W6369-19-X033 – Bidder A

Evaluation Team Member: LCol D. Allison

RATED CRITERIA

#	CRITERIA	SCORING GUIDELINES	MAX POINTS	SCORE	CROSS-REFERENCE TO PROPOSAL (PAGE AND PARA)
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s.20(1)(b)
 s.20(1)(c)
 s.21(1)(b)

Invited Vendor: W6369-19-X033 - Bidder A

Evaluation Team Member: LCol D. Allison

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TOTAL OF POINT RATED TECHNICAL CRITERIA					
	Total:	Minimum Passing Score: 52 (40%)	Maximum Score: 130		

D. Allison
 Signature

18 Dec 2018
 Date

s.20(1)(b)
 s.20(1)(c)
 s.21(1)(b)

Invited Vendor: W6369-19-X033 – Bidder A

Evaluation Team Member: Meghan Marsaw

MANDATORY CRITERIA

	REQUIREMENT	MET	NOT MET	COMMENTS (I.E. LOCATION IN PROPOSAL, CRITERIA NOT MET, ETC)
ONE (1) LIFE CYCLE MANAGEMENT SPECIALIST (INTERMEDIATE)				
MT1	The bidder must clearly demonstrate it has experience teaching a minimum of two (2) Target Audience Analysis (TAA) methodology courses/workshops in a group setting where the main topic of courses/workshops was the TAA methodology.			
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	Compliant (Yes/No)?			

s.20(1)(b)
 s.20(1)(c)
 s.21(1)(b)

Invited Vendor: W6369-19-X033 – Bidder A

Evaluation Team Member: Meghan Marsaw

RATED CRITERIA

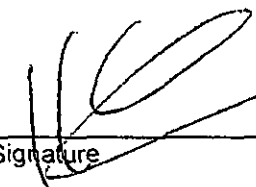
#	CRITERIA	SCORING GUIDELINES	MAX POINTS	SCORE	CROSS REFERENCE TO PROPOSAL (PAGE AND PARA)
TARGET AUDIENCE ANALYSIS TRAINING					
RT1	The bidder should clearly demonstrate it has experience teaching more than two (2) Target Audience Analysis (TAA) methodology courses/workshops in a group setting where the main topic of courses/workshops was the TAA methodology.	3 to 4 workshops/courses = 10pts 5 to 6 workshops/courses = 20pts 7 to 8 workshops/courses = 30pts 9+ workshops/courses = 40pts	40		
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s.20(1)(b)
 s.20(1)(c)
 s.21(1)(b)

Invited Vendor: W6369-19-X033 - Bidder A

Evaluation Team Member: Meghan Marsaw

#	CRITERIA	SCORING GUIDELINES	MAX POINTS	SCORE	CROSS REFERENCE TO PROPOSAL (PAGE AND PARA)
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RT4	The bidder should clearly demonstrate it has provided TAA training in a military setting.	1 to 2 workshops/courses = 10pts 3 to 4 workshops/courses = 20pts 5+ workshops/courses = 30pts	30		
TOTAL OF POINT RATED TECHNICAL CRITERIA					
	Total:	Minimum Passing Score: 52 (40%)	Maximum Score: 130		



 Signature

18 Dec 18

 Date

s.20(1)(b)
 s.20(1)(c)
 s.21(1)(b)

Invited Vendor: W6369-19-X033 – Bidder A

Evaluation Team Member: Consolidated Group Comments

MANDATORY CRITERIA

	REQUIREMENT	MET	NOT MET	COMMENTS (I.E. LOCATION IN PROPOSAL, CRITERIA NOT MET, ETC)
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MT1	The bidder must clearly demonstrate it has experience teaching a minimum of two (2) Target Audience Analysis (TAA) methodology courses/workshops in a group setting where the main topic of courses/workshops was the TAA methodology.			
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s.20(1)(b)
 s.20(1)(c)
 s.21(1)(b)

Invited Vendor: W6369-19-X033 – Bidder A

Evaluation Team Member: Consolidated Group Comments

REQUIREMENT	MET	NOT MET	COMMENTS (I.E. LOCATION IN PROPOSAL, CRITERIA NOT MET, ETC.)
and reference documents (electronic or paper) for up to 24 students.			
Compliant (Yes/No)?			

RATED CRITERIA

#	CRITERIA	SCORING GUIDELINES	MAX POINTS	SCORE	CROSS REFERENCE TO PROPOSAL (PAGE AND PARA)
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s.20(1)(b)
 s.20(1)(c)
 s.21(1)(b)

Invited Vendor: W6369-19-X033 - Bidder A


Evaluation Team Member: Consolidated Group Comments

#	CRITERIA	SCORING GUIDELINES	MAX POINTS	SCORE	CROSS REFERENCE TO PROPOSAL (PAGE AND PARA)
		5 to 6 workshops/courses = 30pts 7+ workshops/courses = 40pts			
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TOTAL OF POINT RATED TECHNICAL CRITERIA					
	Total:	Minimum Passing Score: 52 (40%)	Maximum Score:		
			130		


Invited Vendor: W6369-19-X033 – Bidder A

Evaluation Team Member: Consolidated Group Comments

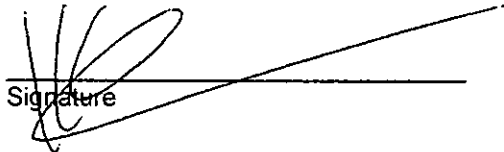
#	CRITERIA	SCORING GUIDELINES	MAX POINTS	SCORE	CROSS-REFERENCE TO PROPOSAL (PAGE AND PARA)


 Signature **BGEN JAY H. JANZEN**
 DG STRATCOM

19 DEC 2018
 Date


 Signature

19 Dec 2018
 Date


 Signature

19 Dec 2018
 Date

s.20(1)(b)

s.20(1)(c)

s.21(1)(b)

From: [Johnston KJ@ADM\(Mat\).D.Svcs.C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Sent: December 19, 2018 3:27 PM
To: [Allison LCol DE@ADM\(PA\).DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull); [Janzen BGen JH@ADM\(PA\).DPAPO@Ottawa-Hull](mailto:Janzen.BGen.JH@ADM(PA).DPAPO@Ottawa-Hull); [Marsaw MB@ADM\(PA\).DGPASP@Ottawa-Hull](mailto:Marsaw.MB@ADM(PA).DGPASP@Ottawa-Hull)
Subject: RE: Evaluation paperwork
Attachments: DND W6369-19-X033 Section 2 Financial Bid.pdf

Thank you!

Next step revolves around the financials.

The financial bid came in at

This includes the following

Normally we don't provide you with the financial bid, but since we only received one bid there's no harm. Please see attached.

MTF.

Thanks

Kent

Kent Johnston

Agent supérieur d'approvisionnement, DC Svcs 4-3-2
Ministère de la Défense nationale / Gouvernement du Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

Senior Procurement Officer, D Svcs C 4-3-2
Department of National Defence / Government of Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

From: Allison LCol DE@ADM(PA).DPAPO@Ottawa-Hull
Sent: December-19-18 3:05 PM
To: Johnston KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull <KENT.JOHNSTON@forces.gc.ca>; Janzen BGen JH@ADM(PA).DPAPO@Ottawa-Hull <JAY.JANZEN@forces.gc.ca>; Marsaw MB@ADM(PA).DGPASP@Ottawa-Hull <MEGHAN.MARSAW@forces.gc.ca>
Subject: Evaluation paperwork

Kent,

See attached with indiv and consolidated evaluations. Please advise if you need anything else.

I would appreciate a quick synopsis of next steps if you could provide.

Thanks again for all of your help with this

D. Allison

LCol/Lcol

Director-General Military Strategic Communication FD/Directeur général – communication
stratégique militaire DF

Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et
Forces armées canadiennes

Douglas.Allison@forces.gc.ca / Tel : 613-944-3291 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC : 944-
3291

Page 361

**is withheld pursuant to sections
est retenue en vertu des articles**

19(1), 20(1)(b), 20(1)(c)

**of the Access to Information Act
de la Loi sur l'accès à l'information**

**Pages 362 to / à 364
are withheld pursuant to sections
sont retenues en vertu des articles**

20(1)(b), 20(1)(c)

**of the Access to Information Act
de la Loi sur l'accès à l'information**

s.20(1)(c)

s.21(1)(b)

From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: December 20, 2018 8:40 AM
To: [Johnston KJ@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Subject: RE: Evaluation paperwork

Thanks

From: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: December-20-18 8:39 AM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: Evaluation paperwork

Morning Doug

I won't award any contract yet. There are a couple steps I still need to complete....security verification, integrity check, etc.

I'll wait to hear from you.

Kent

Kent Johnston

Agent supérieur d'approvisionnement, DC Svcs 4-3-2
Ministère de la Défense nationale / Gouvernement du Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

Senior Procurement Officer, D Svcs C 4-3-2
Department of National Defence / Government of Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: December-20-18 8:38 AM
To: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull <KENT.JOHNSTON@forces.gc.ca>
Subject: RE: Evaluation paperwork

Kent,

I am working
interim, please do not award any contract.

In the

Thanks

Doug

From: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: December-19-18 3:27 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>; Janzen BGen JH@ADM(PA) DPAPO@Ottawa-Hull <JAY.JANZEN@forces.gc.ca>; Marsaw MB@ADM(PA) DGPASP@Ottawa-Hull <MEGHAN.MARSAW@forces.gc.ca>
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s.20(1)(b)

s.20(1)(c)

s.21(1)(b)

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To: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull <KENT.JOHNSTON@forces.gc.ca>; Janzen BGen JH@ADM(PA) DPAP@Ottawa-Hull <JAY.JANZEN@forces.gc.ca>; Marsaw MB@ADM(PA) DGPASP@Ottawa-Hull <MEGHAN.MARSAW@forces.gc.ca>
Subject: Evaluation paperwork

Kent,

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Thanks again for all of your help with this

D. Allison
LCol/Lcol
Director-General Military Strategic Communication FD/Directeur général – communication
stratégique militaire DF

Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et
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Douglas.Allison@forces.gc.ca / Tel : 613-944-3291 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC : 944-
3291

s.20(1)(b)

s.20(1)(c)

From: [Johnston KJ@ADM\(Mat\).D.Svcs.C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Sent: December 20, 2018 3:10 PM
To: [Allison LCol DE@ADM\(PA\).DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Subject: RE: Staff check re availability of funds

Ack, thanks.

Kent Johnston

Agent supérieur d'approvisionnement, DC Svcs 4-3-2
Ministère de la Défense nationale / Gouvernement du Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

Senior Procurement Officer, D Svcs C 4-3-2
Department of National Defence / Government of Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

From: Allison LCol DE@ADM(PA).DPAPO@Ottawa-Hull
Sent: December-20-18 2:22 PM
To: Srour A@ADM(PA).Comp@Ottawa-Hull <ABIR.SROUR@forces.gc.ca>; Johnston KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull <KENT.JOHNSTON@forces.gc.ca>
Cc: Janzen BGen JH@ADM(PA).DPAPO@Ottawa-Hull <JAY.JANZEN@forces.gc.ca>; Villeneuve DT@ADM(PA).Comp@Ottawa-Hull <DIANE.VILLENEUVE@forces.gc.ca>
Subject: Re: Staff check re availability of funds

Abir,

Thank you for the clarification on this, it was most helpful.

Kent,

Should be able to give you an update soon on this. For your SA above.

Sent from my BlackBerry 10 smartphone on the Bell network.

From: Srour A@ADM(PA).Comp@Ottawa-Hull
Sent: Thursday, December 20, 2018 1:42 PM
To: Allison LCol DE@ADM(PA).DPAPO@Ottawa-Hull
Cc: Janzen BGen JH@ADM(PA).DPAPO@Ottawa-Hull; Villeneuve DT@ADM(PA).Comp@Ottawa-Hull
Subject: RE: Staff check re availability of funds

Hello LCol Allison,

Please note that taxes are charged to a corporate account (DND account). When submitting the invoices to accounts payables, the processing team only charges the amount before taxes to ADM(PA). It's the amount you usually set in a commitment. The addition of taxes should not stop you from going ahead with your request as long as you are within your allocation before taxes. The amount of taxes has to be part of the contract, but when the payment comes it will not hit ADM(PA).

Thanks,

s.20(1)(b)

s.20(1)(c)

Abir Srour, CPA, CGA

Contrôleur, Bureau du contrôleur / Sous ministre adjoint (Affaires publiques)
Ministère de la Défense nationale / Gouvernement du Canada
Abir.Srour@forces.gc.ca Tél : 819-939-6545

Comptroller, Comptroller office / Assistant Deputy Minister (Public Affairs)
Department of National Defence / Government of Canada
Abir.Srour@forces.gc.ca Tel : 819-939-6545

From: Villeneuve DT@ADM(PA) Comp@Ottawa-Hull
Sent: December-20-18 11:44 AM
To: Srour A@ADM(PA) Comp@Ottawa-Hull <ABIR.SROUR@forces.gc.ca>
Cc: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>; Janzen BGen JH@ADM(PA) DPAPO@Ottawa-Hull <JAY.JANZEN@forces.gc.ca>
Subject: RE: Staff check re availability of funds

Abir

Can you review and answer LCol Allison

Merci

Diane Villeneuve

Chef des Opérations comptables, Bureau du contrôleur / Sous ministre adjoint (Affaires publiques)
Ministère de la Défense nationale / Gouvernement du Canada
Diane.Villeneuve@forces.gc.ca / Téléphone : (819) 939-9504

Chief Accounting Operations, Comptroller office / Assistant Deputy Minister (Public Affairs)
Department of National Defence / Government of Canada
Diane.Villeneuve@forces.gc.ca / Telephone : (819) 939-9504

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: December-20-18 11:05 AM
To: Villeneuve DT@ADM(PA) Comp@Ottawa-Hull <DIANE.VILLENEUVE@forces.gc.ca>; Janzen BGen JH@ADM(PA) DPAPO@Ottawa-Hull <JAY.JANZEN@forces.gc.ca>
Subject: Staff check re availability of funds

Hi Diane,

We are looking at running a TAA course within the branch to be completed within this fiscal year. As part of the RFP bidding process, _____ has submitted a bid that includes the course delivery cost plus taxes. We have enough within our 0161 allocation to cover the initial costs of the course, but the addition of the taxes _____ would be beyond our current fiscal envelope/ability to cover.

Is there any flexibility with the ADM(PA) allocation to cover this? If so, DGMSC would follow up with ADM(PA) and include in the Q3 submission early in the new year.

Appreciate your feedback on this matter please.

Thx

Doug

D. Allison

LCol/Lcol

Director-General Military Strategic Communication FD/Directeur général – communication
stratégique militaire DF

Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et
Forces armées canadiennes

Douglas.Allison@forces.gc.ca / Tel : 613-944-3291 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC : 944-
3291

s.21(1)(b)

s.23

From: [Johnston.KJ@ADM\(Mat\).D.Svcs.C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Sent: December 27, 2018 2:13 PM
To: [Allison.LCol.DE@ADM\(PA\).DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Subject: RE: I

Good Afternoon Doug

Have you heard anything further on your end?

I did some of my own research and

I'm not in the office tomorrow but am working from home if there's anything you need to discuss. I'm off next week but will check my email periodically. If anything urgent arises, you can call my cell at 613-447-4995.

Otherwise, we'll re-convene on the 7th of Jan and we'll go from there.

Hope you had a good Xmas!

Kent

Kent Johnston

Agent supérieur d'approvisionnement, DC Svcs 4-3-2
Ministère de la Défense nationale / Gouvernement du Canada
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Senior Procurement Officer, D Svcs C 4-3-2
Department of National Defence / Government of Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

From: Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull
Sent: December-24-18 2:50 PM
To: Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull <KENT.JOHNSTON@forces.gc.ca>
Subject: Re:

Thx Kent. U as well

Sent from my BlackBerry 10 smartphone on the Bell network.

From: Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull
Sent: Monday, December 24, 2018 11:44 AM
To: Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull
Subject:

Good Morning Doug

I'm back in the office on Thursday so we'll

touch base then .

Have a great xmas!

Kent

Kent Johnston

Agent supérieur d'approvisionnement, DC Svcs 4-3-2
Ministère de la Défense nationale / Gouvernement du Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

Senior Procurement Officer, D Svcs C 4-3-2
Department of National Defence / Government of Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

s.21(1)(b)

s.23

From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: January 4, 2019 9:38 AM
To: [Janzen BGen JH@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Janzen.BGen.JH@ADM(PA).DPAPO@Ottawa-Hull)
Subject: Fw:

Sir,

Some follow up from Kent below. I will touch base with him first thing Monday.

Sent from my BlackBerry 10 smartphone on the Bell network.

From: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull <KENT.JOHNSTON@forces.gc.ca>
Sent: Thursday, January 3, 2019 8:34 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Subject: RE:

Happy New Year Doug

I'll need to check on a couple things next week.

I'll touch base on Monday. Have a good weekend.

Kent

Kent Johnston

Agent supérieur d'approvisionnement, DC Svcs 4-3-2
Ministère de la Défense nationale / Gouvernement du Canada
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Senior Procurement Officer, D Svcs C 4-3-2
Department of National Defence / Government of Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: January-03-19 2:35 PM
To: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull <KENT.JOHNSTON@forces.gc.ca>
Subject: Fw:

Kent,

See questions below from my boss.

Sent from my BlackBerry 10 smartphone on the Bell network.

From: Janzen BGen JH@ADM(PA) DPAPO@Ottawa-Hull <JAY.JANZEN@forces.gc.ca>
Sent: Thursday, January 3, 2019 10:19 AM

s.21(1)(b)

s.23

To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Subject: Re:

Hi Doug,

So can you get Kent to clarify what are options are?

Thanks.

Jay

Jay H. Janzen
Brigadier-General / Brigadier-général
Director General Military Strategic Communications
DG des communications stratégiques militaires
613.617.4585 (mobile)

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: Friday, December 28, 2018 8:06 PM
To: Janzen BGen JH@ADM(PA) DPAPO@Ottawa-Hull
Subject: Fw:

Sir,

See below.

Sent from my BlackBerry 10 smartphone on the Bell network.

From: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull <KENT.JOHNSTON@forces.gc.ca>
Sent: Friday, December 28, 2018 3:35 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Cc: Richardson T@ADM(Mat) D Svcs C@Ottawa-Hull
Subject: FW:

Hi Doug

Ted - FYSA

Kent

Agent supérieur d'approvisionnement, DC Svcs 4-3-2
Ministère de la Défense nationale / Gouvernement du Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

Senior Procurement Officer, D Svcs C 4-3-2
Department of National Defence / Government of Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

s.23

From: Roy S@DND/CF LA MERP@Ottawa-Hull
Sent: December-28-18 3:25 PM
To: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull <KENT.JOHNSTON@forces.gc.ca>
Subject: RE:

Hello Kent,

Please feel free to call me if you have any questions. I will be away the week of December 31st, 2018, but will try to monitor my emails throughout the week.

Kind regards,
Stéphanie

Stéphanie Roy

Counsel | Avocate
Department of Justice | Ministère de la justice
DND/CF Legal Advisor | Bureau du conseiller Juridique – MDN/FC
Parks Building
101 Colonel By Dr.
Ottawa (Ontario) K1A 0K2
Tel : 613-996-0167 | stephanie.roy@forces.gc.ca

Protégé - Secret professionnel de l'avocat - Ce message est confidentiel et est réservé à l'usage exclusif de la personne à laquelle il est destiné.
Protected - Solicitor-Client Privilege - This message is confidential and is intended for the exclusive use of the intended recipient.

From: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: December-27-18 2:47 PM
To: Roy S@DND/CF LA MERP@Ottawa-Hull <STEPHANIE.ROY@forces.gc.ca>
Subject: RE:

Hi Stéphanie

Merci

Kent

Kent Johnston

Agent supérieur d'approvisionnement, DC Svcs 4-3-2
Ministère de la Défense nationale / Gouvernement du Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

s.23.

Senior Procurement Officer, D Svcs C 4-3-2
Department of National Defence / Government of Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

From: Roy S@DND/CF LA MERP@Ottawa-Hull
Sent: December-27-18 2:45 PM
To: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull <KENT.JOHNSTON@forces.gc.ca>
Subject: FW:

Hello Kent,

Regards,
Stéphanie

Stéphanie Roy

Counsel | Avocate
Department of Justice | Ministère de la justice
DND/CF Legal Advisor | Bureau du conseiller Juridique – MDN/FC
Pears Building
101 Colonel By Dr.
Ottawa (Ontario) K1A 0K2
Tel : 613-996-0167 | stephanie.roy@forces.gc.ca

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Protected - Solicitor-Client Privilege - This message is confidential and is intended for the exclusive use of the intended recipient.

From: Houde J@DND/CF LA MERP@Ottawa-Hull
Sent: December-27-18 2:22 PM
To: Roy S@DND/CF LA MERP@Ottawa-Hull <STEPHANIE.ROY@forces.gc.ca>
Cc: Patraboys LC@DND/CF LA MERP@Ottawa-Hull <LINDA.PATRABOY@forces.gc.ca>
Subject: RE:

Salut Stéphanie,

Merci

Josiane

From: ++CLAS Requests - SCDC Demandes@DND/CF LA CIO@Ottawa-Hull
Sent: December-27-18 2:18 PM
To: Houde J@DND/CF LA MERP@Ottawa-Hull <JOSIANE.HOUE@forces.gc.ca>
Cc: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull <KENT.JOHNSTON@forces.gc.ca>
Subject: FW:
Importance: High

A0447626_5-000377

s.23

Good Afternoon Josiane,

Thank you,

Linda Patraboy

Administrative Assistant
DND/CF Legal Advisors ~ (MERP)
Department of National Defence / Government of Canada
Linda.Patraboy@forces.gc.ca / Telephone: 613-996-0191 / Fax: 613-995-2242

Adjointe administrative, CJ MDN/FC ~ (DMEI)
Ministère de la Défense nationale / Gouvernement du Canada
Linda.Patraboy@forces.gc.ca / Téléphone: 613-996-0191 / Fax: 613-995-2242

From: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: December-27-18 1:47 PM
To: ++CLAS Requests - SCDC Demandes@DND/CF LA CIO@Ottawa-Hull
<CLASRequests.SCDCDemandes@forces.gc.ca>
Subject:
Importance: High

Good Afternoon

I'm a procurement officer with DG Proc Services in ADM (MAT).

Regards

Kent Johnston

Agent supérieur d'approvisionnement, DC Svcs 4-3-2
Ministère de la Défense nationale / Gouvernement du Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

A0447626_6-000378

Senior Procurement Officer, D Svcs C 4-3-2
Department of National Defence / Government of Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

s.19(1)

From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: January 8, 2019 10:59 AM
To: [Johnston KJ@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Subject: RE: Conference call this afternoon

Hi Kent,

Will speak with you at 1300.

From: [Johnston KJ@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Sent: January-08-19 9:15 AM
To: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull) <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: Conference call this afternoon

Hi Doug

Sorry I didn't back to you yesterday.

Let me know if you want to discuss today.

Kent

Kent Johnston

Agent supérieur d'approvisionnement, DC Svcs 4-3-2
Ministère de la Défense nationale / Gouvernement du Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

Senior Procurement Officer, D Svcs C 4-3-2
Department of National Defence / Government of Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: January-07-19 12:44 PM
To: [Johnston KJ@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull) <KENT.JOHNSTON@forces.gc.ca>
Subject: Conference call this afternoon

Hi Kent,

Any chance you could call into the BGen's office this afternoon at 1400. He has some questions re the way forward.

Thanks

Doug

D. Allison
LCol/Lcol
Director-General Military Strategic Communication FD/Directeur général – communication
stratégique militaire DF
Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et
Forces armées canadiennes

A0447627_1-000380

Douglas.Allison@forces.gc.ca / Tel : 613-944-3291 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC : 944-3291

From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: January 11, 2019 9:30 AM
To: [Janzen BGen JH@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Janzen.BGen.JH@ADM(PA).DPAPO@Ottawa-Hull)
Subject: FW: Update on Contract

Sir,

See below.

From Kent:

Looks like we have to repost the RFP for 24 days. No other way around it. If we direct the contract its considered sole source and we would then have to send it to PSPC because its above DND authority. We want to avoid that if we can.

Quick time appreciation if we go the RFP way.

24 day posting period, if done today, would see period close on Sun 3 Feb. With bid evaluation, awarding of contract, and contractor prep likely earliest course start date is 18 Feb.

Nine weeks from there brings us to course end 26 April.

Spoke to Kent about the sole source option. His opinion is that it would likely be about 30 days or so until a decision was rendered, so time frame for course would likely stretch into May.

From: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: January-11-19 8:36 AM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: Update on Contract

Morning Doug

Good timing...was going to give you a shout this morning.

Looks like we have to repost the RFP for 24 days. No other way around it. If we direct the contract its considered sole source and we would then have to send it to PSPC because its above DND authority. We want to avoid that if we can.

WRT to the timeline, let me know how far to the right we can push it and I'll get it posted today.

Kent

Kent Johnston

Agent supérieur d'approvisionnement, DC Svcs 4-3-2
Ministère de la Défense nationale / Gouvernement du Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

Senior Procurement Officer, D Svcs C 4-3-2
Department of National Defence / Government of Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: January-11-19 8:32 AM
To: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull <KENT.JOHNSTON@forces.gc.ca>
Subject: Update on Contract

Hi Kent,

Anything heard re this from a legal perspective?

D. Allison
LCol/Lcol
Director-General Military Strategic Communication FD/Directeur général – communication
stratégique militaire DF
Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et
Forces armées canadiennes
Douglas.Allison@forces.gc.ca / Tel : 613-944-3291 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC : 944-
3291

From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: January 11, 2019 11:58 AM
To: [Johnston KJ@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Subject: RE: Update on Contract

Kent,

Please re-post RFP for 24 days ASAP.

Thanks

D. Allison
LCol/Lcol
Director-General Military Strategic Communication FD/Directeur général – communication
stratégique militaire DF
Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et
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Douglas.Allison@forces.gc.ca / Tel : 613-944-3291 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC : 944-
3291

From: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: January-11-19 8:36 AM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: Update on Contract

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its considered sole source and we would then have to send it to PSPC because its above DND
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WRT to the timeline, let me know how far to the right we can push it and I'll get it posted today.

Kent

Kent Johnston

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Ministère de la Défense nationale / Gouvernement du Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

Senior Procurement Officer, D Svcs C 4-3-2
Department of National Defence / Government of Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: January-11-19 8:32 AM

To: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull <KENT.JOHNSTON@forces.gc.ca>
Subject: Update on Contract

Hi Kent,

Anything heard re this from a legal perspective?

D. Allison

LCol/Lcol

Director-General Military Strategic Communication FD/Directeur général – communication
stratégique militaire DF

Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et
Forces armées canadiennes

Douglas.Allison@forces.gc.ca / Tel : 613-944-3291 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC : 944-
3291

From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: January 11, 2019 2:35 PM
To: [Johnston KJ@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull); [Janzen BGen JH@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Janzen.BGen.JH@ADM(PA).DPAPO@Ottawa-Hull)
Subject: RE: Update on Contract
Attachments: Copy of EIR TAA 2019.xlsx

We would want to start things so that it does not extend into May. I understand that there are some timing issues but we would be looking to get this done ASAP.

I have attached an updated EIR which I will have BGen Janzen sign.

From: [Johnston KJ@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Sent: January-11-19 2:31 PM
To: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull) <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: Update on Contract

Oh ok...to be safe should we allow until May 31 to have the course completed then? That's an additional month from what we discussed with the BGen.

Best case scenario we have a contract in place by 13 Feb. Let's say 15 Feb. This allows for evaluation, contract approval and contract issuance.

You'll need a week or two to discuss things with the company which takes us to the end of Feb. Best case the course actually starts in March. 9 weeks takes us to mid-May.

Kent

Kent Johnston

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Ministère de la Défense nationale / Gouvernement du Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

Senior Procurement Officer, D Svcs C 4-3-2
Department of National Defence / Government of Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: January-11-19 2:21 PM
To: [Johnston KJ@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull) <KENT.JOHNSTON@forces.gc.ca>
Subject: RE: Update on Contract

Kent,

They actually need 9 weeks, 3 weeks to teach the process, 3 weeks to collect data, then 3 weeks to plug that data into the process and churn out a result.

From: [Johnston KJ@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Sent: January-11-19 12:04 PM
To: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull) <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: Update on Contract

Doug

In addition, I just need confirmation of the course finishing time....they need 6 weeks to complete the course and case study.

I think we need to amend the course completion date to 30 April to ensure enough time....

Kent

Kent Johnston

Agent supérieur d'approvisionnement, DC Svcs 4-3-2
Ministère de la Défense nationale / Gouvernement du Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

Senior Procurement Officer, D Svcs C 4-3-2
Department of National Defence / Government of Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: January-11-19 11:58 AM
To: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull <KENT.JOHNSTON@forces.gc.ca>
Subject: RE: Update on Contract

Kent,

Please re-post RFP for 24 days ASAP.

Thanks

D. Allison
LCol/Lcol
Director-General Military Strategic Communication FD/Directeur général – communication
stratégique militaire DF
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Douglas.Allison@forces.gc.ca / Tel : 613-944-3291 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC : 944-
3291

From: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: January-11-19 8:36 AM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: Update on Contract

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authority. We want to avoid that if we can.

WRT to the timeline, let me know how far to the right we can push it and I'll get it posted today.

Kent

Kent Johnston

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Ministère de la Défense nationale / Gouvernement du Canada
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Senior Procurement Officer, D Svcs C 4-3-2
Department of National Defence / Government of Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

From: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull
Sent: January-11-19 8:32 AM
To: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull <KENT.JOHNSTON@forces.gc.ca>
Subject: Update on Contract

Hi Kent,

Anything heard re this from a legal perspective?

D. Allison
LCol/Lcol
Director-General Military Strategic Communication FD/Directeur général – communication
stratégique militaire DF
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Douglas.Allison@forces.gc.ca / Tel : 613-944-3291 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC : 944-
3291

EXPENDITURE INITIATION REQUEST (EIR) FORM

REQUIREMENT TITLE / REFERENCE:															
ORIGINAL			MODIFICATION & NO.			DATE (11/Jan/2019)									
1) Project Manager (PM) or Technical Authority (TA)															
Name:		Doug Allison													
Title:		DG Public Affairs FD													
Designation:															
Organization:		ADM (PA)													
Address:		101 Col By Drive, Ottawa, ON													
Telephone Number:		613-944-3291													
Facsimile (optional):															
Email:		Douglas.Allison@forces.gc.ca													
2) Requirement - MANDATORY															
Summary of the Requirement															
Target Audience Analysis (TAA) is a required capability to support joint targeting, information operations and strategic communication. Joint targeting and information operations are SSC-related initiatives which have, or will have, CDS initiating directives for implementation. ADM (PA) plans to provide a TAA capability that will support these initiatives in FY 18/19. This will require the training of CAF and DND personnel on a suitable TAA methodology, which does not currently exist in the CAF nor DND. There are no suitable foreign military options which could deliver in time. It is therefore necessary to engage an entity to provide training on a methodology suitable for the CAF's needs. The Behavioral Dynamics Institute methodology endorsed by NATO and is being used by the Dutch military already.															
Basis of Payment															
Recurring Requirement															
3) Description of Goods and/or Services															
<input checked="" type="checkbox"/> List of Deliverables, Statement of Work/Requirement or Quote is attached															
<input type="checkbox"/> Line Item Details attached															
<input type="checkbox"/> Hazardous Material															
<input type="checkbox"/> Controlled Goods															
<input type="checkbox"/> Quality Assurance (QA)															
<input type="checkbox"/> Technical Data Package (TDP)															
4) Technical Evaluation - MANDATORY except for Sole Source Requirements. Select one of the following:															
Selection Methodology - Select one of the following															
<input checked="" type="checkbox"/> Lowest-Priced Responsive Proposal (Evaluation based on Mandatory criteria only)															
<input type="checkbox"/> Lowest-Priced Responsive Proposal (Evaluation based on a combination of Mandatory and Point-Rated criteria)															
<input type="checkbox"/> Lowest Responsive Cost-per-Point Proposal															
<input type="checkbox"/> Highest Responsive Combined Rating of Technical Merit and Price (e.g. 60/40 or 70/30)															
<input type="checkbox"/> Highest-Rated Responsive Proposal within a Specified Maximum Budget															
<input type="checkbox"/> See attached Mandatory Technical Evaluation Criteria (for simple goods or services)															
<input type="checkbox"/> See attached Evaluation Plan (for complex goods or services)															
5) Security Requirements - MANDATORY															
<input checked="" type="checkbox"/> Completed Security Requirements Check List (SRCL) form attached															
6) Procurement Strategy Considerations - MANDATORY (select one)															
<input type="checkbox"/> Competitive Requirement															
<input checked="" type="checkbox"/> Sole Source Requirement															
<input type="checkbox"/> Sole Source Requirement and exception 6 (d) of the GCRs applies.															
<input type="checkbox"/> Internal DND (QETE, NETE, AETE, FMF, 202WD, etc.) Source															
<input type="checkbox"/> Other Government Department (OGD) Source - specify:															
<input type="checkbox"/> National Security Exception-see attached substantiation															
<input type="checkbox"/> No Substitute Requirement - see attached substantiation															
<input type="checkbox"/> Other Source Considerations - specify:															
7) Funding - REQUIRED (See section 10 below for multi-year funding requirement information).															
Provide the estimated FUNDED value of the requirement (taxes excluded). Financial coding information is provided in section 10 below.										Funded AMOUNT:		\$620,000.00			
8) Expenditure Initiation Authority.															
"I confirm this is a valid and approved requirement. I also certify that I have the required designated financial authority to proceed with this authorization."										// Signature //					
										Date (DD/MMM/YYYY)		Name: BGen J. Janzen		Designation: DGMSC	
9) FAA Section 32 - Approval for TOTAL amount required.															
"I certify that funding is available in accordance with Section 32 of the Financial Administration Act (FAA) in the amount specified above. I also certify that I have the required designated financial authority to proceed with this authorization."										// Signature //					
										Date (DD/MMM/YYYY)		Name: BGen J. Janzen		Designation: DGMSC	
10) Total requirement value CASH FLOW Information - For each Fiscal Year and/or Financial Coding. Include the funded and unfunded requirement, including all option years.															
	Serial	FY	Amount	Fund	FC	CC or WBS	GL	IO	Source of funding	Funded or Unfunded	Remarks				
	1	18/19	\$370,000.00												
	2	19/20	\$250,000.00												
	3		\$0.00												
	4		\$0.00												
	5		\$0.00												
	6		\$0.00												
	7		\$0.00												
	8		\$0.00												
	9		\$0.00												
	10		\$0.00												
11) Procurement Initiation Authority (PIA). ** For requirements outside of ADM(Mat) **															
Identify and provide the total estimated value of the requirement. The amount indicated herein is the amount of the FUNDED and UNFUNDED portion of the requirement (all taxes included).										Total Tax		13%		\$80,600.00	
										TOTAL AMOUNT (Taxes Included):				\$700,600.00	
Recommended by (optional) - applicable authority recommends the approval of the requirement identified.										// Signature //					
										Date (DD/MMM/YYYY)		Name:		Designation:	
Approval - The applicable authority approves this requirement, certifies that the necessary approvals have been obtained and requests that the goods and/or services described herein be acquired and provided.										// Signature //					
										Date (DD/MMM/YYYY)		Name:		Designation:	

s.19(1)

From: [Allison LCol DE@ADM\(PA\).DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: January 14, 2019 1:15 PM
To: [Johnston KJ@ADM\(Mat\).D.Svcs.C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Subject: Fw:

Kent,

See below

Sent from my BlackBerry 10 smartphone on the Bell network.

From: Janzen BGen JH@ADM(PA).DPAPO@Ottawa-Hull <JAY.JANZEN@forces.gc.ca>
Sent: Monday, January 14, 2019 10:48 AM
To: Allison LCol DE@ADM(PA).DPAPO@Ottawa-Hull
Subject: RE:

Roger Doug.

Can you get a hold of Kent today and find out whether we can scale down the requirements that will be listed in the RFP in an effort to get more bidders. I am not talking about changing any of the requirements, just shifting the number ranges. So previously we were looking for X number of courses delivered to Military Allies as a minimum, and Y as the max to get full points. Perhaps we can lower the minimum to 1 military course, and lower the max points accordingly. That may give us more options to choose from.

In my mind this seems like a simple change that should not delay our timelines. Can you confirm this is the case, and let me know of any pitfalls this could cause?

Thanks!

Jay

Brigadier-General Jay H. Janzen

Director-General Military Strategic Communication
Assistant Deputy Minister (Public Affairs)
Department of National Defence / Government of Canada
Jay.Janzen@forces.gc.ca / Tel: 613-995-1497 / Mobile : 613-617-4585

Directeur général – communication stratégique militaire
Sous-ministre adjoint (Affaires publiques)
Ministère de la Défense nationale / Gouvernement du Canada
Jay.Janzen@forces.gc.ca / Tél.: 613-995-1497 / Mobile : 613-617-4585

From: Allison LCol DE@ADM(PA).DPAPO@Ottawa-Hull
Sent: January-14-19 6:28 AM
To: Janzen BGen JH@ADM(PA).DPAPO@Ottawa-Hull <JAY.JANZEN@forces.gc.ca>
Subject:

Sir,

will monitor my BlackBerry for any required activities.

Sent from my BlackBerry 10 smartphone on the Bell network.

From: [Johnston.KJ@ADM\(Mat\).D Svcs.C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D Svcs.C@Ottawa-Hull)
Sent: January 22, 2019 2:00 PM
To: [Allison.LCol.DE@ADM\(PA\).DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Subject: W6369-19-X033 - TAA Training Requirement - Way Forward
Attachments: W6369-19-X033-A - RFP.doc

Hi Doug

I got your vm. No worries on delaying the RFP process.

I've attached the word version of the RFP. Feel free to make any changes that you want and then I can review and firm everything up. Please used tracked changes.

If you have any specific questions about the SOW, evaluation criteria or the process itself, let me know and I'll give you a call.

Thanks

Kent

Kent Johnston

Agent supérieur d'approvisionnement, DC Svcs 4-3-2
Ministère de la Défense nationale / Gouvernement du Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

Senior Procurement Officer, D Svcs C 4-3-2
Department of National Defence / Government of Canada
Kent.Johnston@forces.gc.ca / 819-939-8836



Défense nationale

National Defence Headquarters
 Ottawa, Ontario
 K1A 0K2

Quartier général de la Défense nationale
 Ottawa (Ontario)
 K1A 0K2

**REQUEST FOR PROPOSAL
 DEMANDE DE PROPOSITION**

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

National Defence Headquarters
 Director Services Contracting 4 (D Svcs C 4)
 Attention: Kent Johnston
 By e-mail to:
 DSvcsC4Contracting-
 DCSvcs4Contrats@forces.gc.ca

Proposal To: National Defence Canada

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

Proposition à : Défense nationale Canada

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

Comments – Commentaires

**THIS DOCUMENT DOES NOT CONTAIN A
 SECURITY REQUIREMENT.**

**Solicitation Closes –
 L'invitation prend fin**

At: – à :
 02:00 PM Eastern Standard Time (EDT)

On: – le :
 7 February 2019

Title – Titre Target Audience Analysis Training	Solicitation No. – N° de l'invitation W6369-19-X033/A
Date of Solicitation – Date de l'invitation 15 January 2019	
Address Enquiries to: – Adresser toutes questions à : Kent Johnston by e-mail to Kent.Johnston@forces.gc.ca	
Telephone No. – N° de téléphone	FAX No. – N° de fax
Destination See herein.	

Instructions: Municipal taxes are not applicable. Unless otherwise specified herein all prices quoted must include all applicable Canadian customs duties, GST/HST, excise taxes and are to be delivered Delivery Duty Paid including all delivery charges to destination(s) as indicated. The amount of the Goods and Services Tax/Harmonized Sales Tax is to be shown as a separate item.

Instructions : Les taxes municipales ne s'appliquent pas. Sauf indication contraire, les prix indiqués doivent comprendre les droits de douane canadiens, la TPS/TVH et la taxe d'accise. Les biens doivent être livrés « rendu droits acquittés », tous frais de livraison compris, à la ou aux destinations indiquées. Le montant de la taxe sur les produits et services/taxe de vente harmonisée doit être indiqué séparément.

Delivery Required – Livraison exigée	Delivery Offered – Livraison proposée
Vendor Name and Address – Raison sociale et adresse du fournisseur	
Name and title of person authorized to sign on behalf of vendor (type or print) Nom et titre de la personne autorisée à signer au nom du fournisseur (caractère d'imprimerie)	
Name – Nom _____	Title – Titre _____
Signature _____	Date _____



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PART 1 - GENERAL INFORMATION

1.1 Security Requirements

There is no security requirement applicable to this contract.

1.2 Statement of Work

The contractor must perform the work in accordance with the Statement of Work at Annex "A".

1.3 Debriefings

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

1.4 Trade Agreements

The requirement is subject to the provisions of the World Trade Organization Agreement on Government Procurement (WTO-AGP), the North American Free Trade Agreement (NAFTA), the Canada-European Union Comprehensive Economic and Trade Agreement (CETA), and the Canadian Free Trade Agreement (CFTA).

PART 2 - BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

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

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

The 2003 (2018-05-22), Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

Subsection 4 of section 05, Submission of bids, is amended as follows:

Delete: 60 days

Insert: ninety (90) calendar days

Section 06, Late bids, is deleted in its entirety.

The text under section 07, Delayed bids, is deleted in its entirety and replaced with the following:

It is the Bidder's responsibility to ensure that the Contracting Authority has received the entire submission. Misrouting or other electronic delivery issues resulting in late submission of bids will not be accepted.

Subsection 1 of section 08, Transmission by facsimile, is deleted in its entirety.

The text under section 13, Communications - solicitation period, is deleted in its entirety and replaced with the following:

To ensure the integrity of the competitive bid process, enquiries and other communications regarding the bid solicitation must be directed only as indicated on page 1 of the bid solicitation. Failure to comply with this requirement may result in the bid being declared non-responsive.

Canada will submit all significant enquiries received and their replies directly to invited Bidders by electronic mail. For further information, consult subsection 3 of the Submission of bids section.

Subsection 2 of section 20, Further information, is deleted in its entirety.

2.2 Submission of Bids

Unless otherwise specified in the bid solicitation or directed by the Contracting Authority, bids must be received by the Contracting Authority by electronic mail by the date and time indicated on page 1 of the bid solicitation.

Electronic Submissions: Individual e-mails that may include certain scripts, formats, embedded macros and/or links, or those that exceed five (5) megabytes may be rejected by Canada's e-mail system and/or firewall(s) without notice to the Bidder or Contracting Authority. Larger bids may be submitted through more than one e-mail. The Contracting Authority will confirm receipt of documents. It is the Bidder's responsibility to ensure that the Contracting Authority has received the entire submission. Bidders should not assume that all documents have been received unless the Contracting Authority confirms receipt of each document. In order to minimize the potential for technical issues, Bidders are requested to allow sufficient time before the closing date and time to confirm receipt. Technical and financial documents received after the closing date and time will not be accepted.

2.3 Former Public Servant

Contracts awarded to former public servants (FPS) in receipt of a pension or of a lump sum payment must bear the closest public scrutiny and reflect fairness in the spending of public funds. In order to comply with Treasury Board policies and directives on contracts awarded to FPS, bidders must provide in writing before contract award for each question below, the answer and, as applicable, the information required.

If the Contracting Authority has not received the answer to the question and, as applicable, the information required by the time the evaluation of bids is completed, Canada will inform the Bidder of a time frame within which to provide the answer and, as applicable, the information required. 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 FPS in receipt of a pension, as applicable:

- (a) name of former public servant; and
- (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: 2012-2 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; and
- (g) number and amount (professional fees) of other contracts subject to the restrictions of a work force reduction program.

For all contracts awarded during the lump sum payment period, the total amount of fees that may be paid to a FPS who received a lump sum payment is \$5,000, including Applicable Taxes.

2.4 Enquiries - Bid Solicitation

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

PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

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

Section I: Technical Bid – one (1) soft copy submitted by e-mail;
Section II: Financial Bid – one (1) soft copy submitted by e-mail;
Section III: Certifications – one (1) soft copy submitted by e-mail; and
Section IV: Additional Information – one (1) soft copy submitted by e-mail.

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

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

- (a) use 8.5 x 11 inch (216 mm x 279 mm) page size; and
- (b) use a numbering system that corresponds to the bid solicitation.

In April 2006, Canada issued a policy directing federal departments and agencies to take the necessary steps to incorporate environmental considerations into the procurement process Policy on Green Procurement.

To assist Canada in reaching its objectives, bidders should use the environmentally-preferable format of black and white instead of colour.

Section I: Technical Bid

In their technical bid, Bidders should explain and demonstrate how they propose to meet the requirements and how they will carry out the Work.

Section II: Financial Bid

Bidders must submit their financial bid in accordance with the Basis of Payment.

3.1.1 Electronic Payment of Invoices – Bid

If you are willing to accept payment of invoices by Electronic Payment Instruments, complete Attachment 1 to Part 3, Electronic Payment Instruments, to identify which ones are accepted.

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

3.1.2 SACC Manual Clauses

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

Section III: Certifications

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

Solicitation No.
W6369-19-X033/A

ATTACHMENT 1 to PART 3 - ELECTRONIC PAYMENT INSTRUMENTS

ELECTRONIC PAYMENT INSTRUMENTS

As indicated in Part 3, clause 3.1.1, the Bidder must identify which electronic payment instruments they are willing to accept for payment of invoices.

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

- a. Visa Acquisition Card;
- b. MasterCard Acquisition Card;
- c. Direct Deposit (Domestic and International);
- d. Electronic Data Interchange (EDI);
- e. Wire Transfer (International Only);

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 has not submitted 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:

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

that show in total 100 billable days.

4.1.1.2 Mandatory Technical Criteria

Refer to Attachment 1 to Part 4

4.1.1.3 Point Rated Technical Criteria

Refer to Attachment 1 to Part 4

4.1.2 Financial Evaluation

4.1.2.1 For bid evaluation and Contractor selection purposes only, the evaluated price of a bid will be determined in accordance with the Basis of Payment detailed in Annex B.

4.2 Basis of Selection

SACC Manual Clause A0035T (2005-05-25), Basis of Selection – Lowest Price per Point.

1. To be declared responsive, a bid must:
 - a. comply with all the requirements of the bid solicitation;
 - b. meet all mandatory technical evaluation criteria; and
 - c. Obtain the required minimum of **52 points** overall for the technical evaluation criteria which are subject to point rating. The rating is performed on a scale of 130 points.
2. Bids not meeting (a) or (b) or (c) will be declared non-responsive. Neither the responsive bid that receives the highest number of points nor the one that proposed the lowest price will necessarily be accepted. The responsive bid with the lowest evaluated price per point will be recommended for award of a contract.

ATTACHMENT 1 TO PART 4 – EVALUATION CRITERIA

1. MANDATORY EVALUATION CRITERIA

In their proposals, Bidders must demonstrate they meet the following mandatory criteria by providing complete details of the experience, including name and description of client organization, scope, timeframe (from-to dates month/year), and description of the roles and responsibilities.

Failure to meet any of the mandatory criteria will render the bid non-compliant and it will be given no further consideration.

	Mandatory Requirement	Met / Not Met	Supporting Detail or Cross Reference to Bidder's Proposal
MT1	The bidder must clearly demonstrate it has experience teaching a minimum of two (2) Target Audience Analysis (TAA) methodology courses/workshops in a group setting where the main topic of courses/workshops was the TAA methodology.		The Bidder should provide complete details as to where, when, month and year, the training experience was obtained.
MT2	The Bidder must clearly demonstrate that its proposed lead instructor(s) has/have experience teaching Target Audience Analysis (TAA) methodology workshops/courses.		The Bidder should provide complete details as to where, when, month and year, the training experience was obtained.
MT3	The Bidder must clearly demonstrate it has the capacity to: <ul style="list-style-type: none"> i. design a detailed curriculum and lecture/activity schedule for the course; ii. conduct examinations/assessments/individual and syndicate presentations at the mid and end-course points; and iii. provide the required learning materials, such as but not limited to, slide decks, handouts and reference documents (electronic or paper) for up to 24 students. 		The Bidder should provide details from previous courses delivered or examples of how they intend to meet the criterion.

2. POINT-RATED EVALUATION CRITERIA

In their proposals, Bidders should demonstrate they meet the following rated criteria by providing complete details of the experience, including name and description of client organization, scope, timeframe (from-to dates month/year), and description of the roles and responsibilities.

	Rated Requirement	Scoring	Supporting Detail or Cross Reference to Bidder's Proposal
RT1	The bidder should clearly demonstrate it has experience teaching more than two (2) Target Audience Analysis (TAA) methodology courses/workshops in a group setting where the main topic of courses/workshops was the TAA methodology.	3 to 4 workshops/courses = 10pts 5 to 6 workshops/courses = 20pts 7 to 8 workshops/courses = 30pts 9+ workshops/courses = 40pts	The Bidder should provide complete details as to where, when, month and year, the training experience was obtained.
RT2	The Bidder should clearly demonstrate that its proposed lead instructor(s) has/have experience teaching TAA methodology workshops/courses.	1 to 2 workshops/courses = 10pts 3 to 4 workshops/courses = 20pts 5 to 6 workshops/courses = 30pts 7+ workshops/courses = 40pts	The Bidder should provide complete details as to where, when, month and year, the training experience was obtained.
RT3	The Bidder should clearly demonstrate it has provided TAA methodology workshops/courses to NATO organizations and/or allies.	Training provided to at least one NATO ally /organization = 10 pts Training provided to NATO ally(ies) AND NATO organization(s) = 20 pts	The Bidder should provide complete details as to where, when, month and year, the training was completed.
RT4	The bidder should clearly demonstrate it has provided TAA training in a military setting.	1 to 2 workshops/courses = 10pts 3 to 4 workshops/courses = 20pts 5+ workshops/courses = 30pts	The Bidder should provide complete details as to where, when, month and year, the training was completed.
TAA Methodology- Points Available:			
Minimum Points Required:		52 points (40%)	
Total Points Available:		130 points	

PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

Bidders must provide the required certifications and additional information to be awarded a contract.

The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Unless specified otherwise, Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.

The Contracting Authority will have the right to ask for additional information to verify the Bidder's certifications. Failure to comply and to cooperate with any request or requirement imposed by the Contracting Authority will render the bid non-responsive or constitute a default under the Contract.

5.1 Certifications Required with the Bid

Bidders must submit the following duly completed certifications as part of their bid.

5.1.1 Integrity Provisions - Declaration of Convicted Offences

In accordance with the Integrity Provisions of the Standard Instructions, all bidders must provide with their bid, **if applicable**, the declaration form available on the Forms for the Integrity Regime website (<http://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-eng.html>), to be given further consideration in the procurement process.

5.2 Certifications Precedent to Contract Award and Additional Information

The certifications and additional information listed below should be submitted with the bid, but may be submitted afterwards. If any of these required certifications or additional information is not completed and submitted as requested, the Contracting Authority will inform the Bidder of a time frame within which to provide the information. Failure to provide the certifications or the additional information listed below within the time frame provided 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>), the Bidder must provide the required documentation, as applicable, to be given further consideration in the procurement process.

5.2.2 Federal Contractors Program for Employment Equity - Bid Certification

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

5.2.3.1 Status and Availability of Resources

SACC Manual clause A3005T (2010-08-16) Status and Availability of Resources

5.2.3.2 Education and Experience

SACC Manual clause A3010T (2010-08-16) Education and Experience

PART 6 - RESULTING CONTRACT CLAUSES

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

6.1 Security Requirements

There is no security requirement applicable to the Contract.

6.2 Statement of Work

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

6.3 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>) issued by Public Works and Government Services Canada.

6.3.1 General Conditions

2010B (2018-06-21), General conditions: Professional services (medium complexity) apply to and form part of the Contract.

6.3.2 Supplemental General Conditions

4007 (2010-08-19), Canada to Own Intellectual Property Rights in Foreground Information, apply to and form part of the Contract.

6.4 Term of Contract

6.4.1 Period of the Contract

This Work is to be performed from date of contract award to 30 Jun 2019 (estimated)

6.5 Authorities

6.5.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: _____
Title: _____
Department of National Defence
Directorate: _____
Address: _____
Telephone: _____
Facsimile: _____
E-mail address: _____

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

6.5.2 Technical Authority

The Technical Authority for the Contract is:

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

The Technical 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 Technical Authority, however the Technical Authority has no authority to authorize changes to the scope of the Work. Changes to the scope of the Work can only be made through a contract amendment issued by the Contracting Authority.

6.5.3 Contractor's Representative

To be inserted at Contract award

6.6 Proactive Disclosure of Contracts with Former Public Servants

By providing information on its status, with respect to being a former public servant in receipt of a *Public Service Superannuation Act* (PSSA) (<http://laws-lois.justice.gc.ca/eng/acts/P-36/FullText.html>) 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: 2012-2 of the Treasury Board Secretariat of Canada (http://www.tbs-sct.gc.ca/pubs_pol/dccpubs/contpolnotices/siglist-eng.asp).

6.7 Payment

6.7.1 Basis of Payment

For the Work described in Annex A, Statement of Work:

In consideration of the Contractor satisfactorily completing its obligations under the Contract, the Contractor will be paid a firm price, for a cost of \$_____ (*insert the amount at contract award*). Customs duties are excluded and Applicable Taxes are extra.

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

6.7.2 Limitation of Price

SACC Manual clause C6000C (2017-08-17), Limitation of Price

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

6.7.3 Milestone Payments

H3010C (2016-01-28), Milestone Payments - Not subject to holdback

Canada will make milestone payments in accordance with the Schedule of Milestones detailed in the Contract and the payment provisions of the Contract if:

- a. an accurate and complete claim for payment using PWGSC-TPSGC 1111, Claim for Progress Payment, and any other document required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- b. all the certificates appearing on form PWGSC-TPSGC 1111 have been signed by the respective authorized representatives;
- c. all work associated with the milestone and as applicable any deliverable required has been completed and accepted by Canada.

H4012C (2010-01-11), Schedule of Milestones

The schedule of milestones for which payments will be made in accordance with the Contract is as follows:

Milestone No.	Description or "Deliverable"	Firm Amount	Due Date or "Delivery Date"
1	<ul style="list-style-type: none"> i. Course planning and preparation activities. ii. Third-Party location / Flight / Hotel bookings. 	20% of firm lot price, period of the contract.	<ul style="list-style-type: none"> i. Within the 1st month of the contract upon receipt of applicable invoices.
2	<ul style="list-style-type: none"> i. Completion 	40% of firm lot	<ul style="list-style-type: none"> ii. Upon

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		of training for 1 st half of course.	price, period of the contract.	completion of 1 st half of course (upon receipt of invoice).
3	i.	Completion of training for 2 nd half of course.	40% of firm lot price, period of the contract	i. Upon completion of 2 st half of course (upon receipt of invoice).

6.7.4 Electronic Payment of Invoices – Contract

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

- a. VISA Acquisition Card;
- b. MasterCard Acquisition Card;
- c. Direct Deposit (Domestic and International);
- d. Electronic Data Interchange (EDI);
- e. Wire Transfer (International Only);

6.8 Invoicing Instructions

6.8.1 Invoicing Instructions

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

Each invoice must be supported by:

- a. a copy of the release document and any other documents as specified in the Contract; and
- b. a copy of the invoices, receipts, vouchers for all direct expenses

Invoices must be distributed as follows:

- a. The original must be forwarded to the address shown on page 1 of the Contract for certification and payment.
- b. One (1) copy must be forwarded to the Contracting Authority identified under the section entitled "Authorities" of the Contract.

6.9 Certifications and Additional Information

6.9.1 Compliance

Unless specified otherwise, the continuous compliance with the certifications provided by the Contractor in its bid or precedent to contract award, and the ongoing cooperation in providing additional information

are conditions of the Contract and failure to comply will constitute the Contractor in default. Certifications are subject to verification by Canada during the entire period of the Contract.

6.10 Applicable Laws

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

6.11 Priority of Documents

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

- (a) the Articles of Agreement;
- (b) supplemental general conditions 4007 (2010-08-16), Canada to Own Intellectual Property Rights in Foreground Information;
- (c) general conditions 2010B (2018-06-21), General conditions: Professional Services (medium complexity);
- (c) Annex A, Statement of Work
- (d) Annex B, Basis of Payment
- (e) Annex C, Non-Disclosure Agreement;
- (f) the Contractor's bid dated _____ (*insert date of bid*)

6.12 SACC Manual Clauses

G1005C (2016-01-28), Insurance - No Specific Requirement
A9068C (2010-01-11), Government Site Regulations
A9117C (2007-11-30), T1204 - Direct Request by Customer Department
A2001C (2006-06-16), Foreign Nationals (Foreign Contractor)
or
A2000C (2006-06-16), Foreign Nationals (Canadian Contractor)

ANNEX A - STATEMENT OF WORK

1. BACKGROUND

- 1.1. ADM (PA), as the Functional Authority for the Public Affairs Branch, is responsible for military public affairs and, thus, responsible for developing military public affairs capabilities to support the Chief of Defence Staff (CDS) direction, Defence Policy and CAF Joint Doctrine. ADM (PA) has identified Target Audience Analysis (TAA) as a capability it will acquire to support Joint Targeting, Information Operations and Strategic Communication as part of its initiative to operationalize the Public Affairs Branch.
- 1.2. As the ADM (PA) staff in charge of developing the operational capabilities of the Public Affairs Branch, this office's research has concluded that the CAF does not have a sufficient TAA methodology and must seek a civilian entity to train CAF personnel on this methodology in order to meet the requirement.

2. OBJECTIVE

- 2.1. The expected outcome of this contract is that the Contractor will have trained a group of DND/CAF personnel in its TAA methodology. By retaining proprietary usage of the methodology and courseware, DND/CAF will then be able to provide in-house training to a sufficient core of personnel. This will contribute to creating a sustainable TAA capability program that will support Joint Targeting, Information Operations and Strategic Communications in the long-term.

3. SCOPE

- 3.1. The contractor must conduct a tailored course teaching a TAA methodology in Canada to CAF and DND personnel in order to create a core body of CAF and DND personnel who can apply the methodology in support of CAF operations. Further, the contractor must provide the CAF with proprietary usage rights for the methodology as well as the courseware in order to enable a sustained CAF capability using the methodology.

4. CONSTRAINTS

- 4.1. The course must be conducted with the following constraints:
 - (a) The course must be conducted in the National Capital Region of Canada;
 - (b) The course must be conducted at a DND facility;
 - (c) Training must be carried out during weekdays, with no weekend training;
 - (d) Training must be carried out in English;
 - (e) **The course must be completed by 30 April 2019;**
 - (f) The course must entail a live case study to assist in applying the methodology;
 - i. The live case study must pertain to CAF/DND issues with the resulting findings being practically applicable to CAF/DND;
 - 4.1.f.i.1. The case study will focus on determining why women between the ages of 18-30 in the Greater Toronto Area (GTA) are not interested in enrolling in Naval technical trades;

- ii. The live case study must be conducted in a manner consistent with accepted ethical norms pertaining to public opinion research;
- (g) The course must involve a blend of classroom lectures, syndicate work, student presentations and activities;
- (h) Course material must be current and reflect any recent developments in Target Audience Analysis and Strategic Communication over the past calendar year; and
- (i) The students must receive examinations consisting of written, individual and syndicate presentations

5. TECHNICAL ENVIRONMENT

- 5.1. The course will be conducted using non-departmental networks (ie-civilian internet) through Wi-Fi connectivity. Microsoft Office applications (Outlook, PowerPoint, Word, etc.) will be used.

6. TASKS AND DELIVERABLES

The Contractor must:

- 6.1. design and conduct a Target Audience Analysis course which ends no later than 31 March, 2019 that will teach up to 24 students the methodology to a level where they can apply the methodology to conduct Target Audience Analysis;
- 6.2. arrange and provide appropriate equipment for instruction (ie-instructor computers and pointers), excluding those already provided by the place of instruction (ie-electronic projectors and flip charts);
- 6.3. provide all learning material, including but not limited to, books, slide decks and reference documents (electronic or paper) for up to 24 students;
- 6.4. design a detailed curriculum and lecture/activity schedule with examinations/assessments at the mid- and end-course points;
- 6.5. develop, facilitate and arrange the logistics for an in-course live case study, to include conducting qualitative (ie-focus groups) and quantitative public opinion research.
- 6.6. The Contractor will refine the student findings from the live case study into a briefing document for consideration by the Department of National Defence no later than one month after the completion of training;
- 6.7. design, conduct and assess written examinations, individual and syndicate presentations; and
- 6.8. provide course certificates of completion to each student at the end of the course.

7. REPORTING REQUIREMENTS

- 7.1. A progress report must be completed by the Contractor for each resource and submitted to the Technical Authority at the quarter-, mid- and three-quarter marks of the course. At a minimum, each progress report must document the following information:
 - (a) All significant activities performed in the period covered that may impact the conduct of the course;
 - (b) Status of any outstanding activities that may extend beyond normal timelines;

- (c) Any training concerns regarding student performance;
- (d) Any student concerns regarding course material or delivery;
- (e) Description of any problems encountered which will require attention or escalation; and
- (f) Any recommendations to update or change the course schedule.

7.2. All reports must be provided in one (1) hard copy and one (1) soft copy, in a format acceptable to the Technical Authority. The soft copy must be compatible with Microsoft Office 2003 or Adobe Reader.

8. LANGUAGE REQUIREMENTS

8.1. The instructor(s) must be fluent in the English language. Fluent means that the individuals must be able to communicate orally and in writing without any assistance and with minimal errors.

9. TRAVEL

- 9.1. Travel will be required in this contract. Travel will not be reimbursed separately. As such, it is the responsibility of the contractor to factor in any travel related costs when submitting their bid.
- 9.2. The Contractor must arrange for the lodging and meals and transport of instructor(s)/lecturer(s) to and from the place of instruction, including the live case study.

10. LOCATION OF WORK

10.1. All instruction must be completed at DND facilities within the National Capital Region (NCR). For the purposes of live case study qualitative analysis, focus groups and interviews may be conducted at a third location within the NCR. Travel costs within the NCR will not be reimbursed.

ANNEX B – BASIS OF PAYMENT

1. Contract Period (From Contract Award to 30 Jun 2019)

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

1.1 Schedule of Milestones

A. The schedule of milestones for which payments will be made in accordance with the Contract is as follows:

Milestone No.	Description or "Deliverable"	Firm Amount
1	i. Course planning and preparation activities. ii. Third-Party location / Flight / Hotel bookings. (20% of overall price)	<u>[\$amount to be specified in the resulting Contract]</u>
2	i. Completion of training for 1 st half of course. (40% of overall price)	<u>[\$amount to be specified in the resulting Contract]</u>
3	i. Completion of training for 2 nd half of course. (40% of overall price)	<u>[\$amount to be specified in the resulting Contract]</u>

NOTE: The above milestones MUST include any travel & living expenses for all contracted personnel and live case study instructors.

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ANNEX C - NON-DISCLOSURE AGREEMENT

(This annex is to be completed after contract award and is not required in the bid.)

I, _____, 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. W6369-19-X033/A between Her Majesty the Queen in right of Canada, represented by the Department of National Defence and _____, 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.: _____ (insert number).

Signature

Date

From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: January 28, 2019 11:18 AM
To: [Johnston KJ@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Subject: FW: Revised RFP
Attachments: W6369-19-X033-A - RFP Revised Allison 25 jan.docx

Kent,

Please find attached revised RFP for posting. I have amended the criteria slightly so that we can potentially have a wider group of companies who would qualify/be considered. In addition, I have revised dates to reflect our new timeframe. Please advise if this meets the criteria, and if so, repost.

Thanks

D. Allison
LCol/Lcol
Director-General Military Strategic Communication FD/Directeur général – communication
stratégique militaire DF
Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et
Forces armées canadiennes
Douglas.Allison@forces.gc.ca / Tel : 613-944-3291 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC : 944-
3291

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: January-25-19 10:02 AM
To: Janzen BGen JH@ADM(PA) DPAPO@Ottawa-Hull <JAY.JANZEN@forces.gc.ca>
Subject: Revised RFP

Sir,

See attached with track changes updated RFP for the TAA. I have changed the criteria for number of courses conducted, and points awarded as well as timings for contract completion. If you are happy, we can forward to Kent who will do a final check and then re-post.

D. Allison
LCol/Lcol
Director-General Military Strategic Communication FD/Directeur général – communication
stratégique militaire DF
Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et
Forces armées canadiennes
Douglas.Allison@forces.gc.ca / Tel : 613-944-3291 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC : 944-
3291

Subject: FW: LCol Allison - discussion about TAA
Location: BGen Janzen's office

Start: Tue 2019-01-08 1:00 PM
End: Tue 2019-01-08 2:00 PM
Show Time As: Tentative

Recurrence: (none)

Meeting Status: Not yet responded

Organizer: Cosentino C (Contractor)@ADM(PA) DGPASP@Ottawa-Hull

Hi Kent,

Can you call the BGen's office at 1300? His number is 995-1497.

-----Original Appointment-----

From: Cosentino C (Contractor)@ADM(PA) DGPASP@Ottawa-Hull
Sent: January-08-19 9:17 AM
To: Cosentino C (Contractor)@ADM(PA) DGPASP@Ottawa-Hull; Allison LCol DE@ADM(PA) DPAP@Ottawa-Hull; Janzen BGen JH@ADM(PA) DPAP@Ottawa-Hull
Subject: LCol Allison - discussion about TAA
When: January-08-19 1:00 PM-2:00 PM (UTC-05:00) Eastern Time (US & Canada).
Where: BGen Janzen's office



National Defence

Défense nationale

National Defence Headquarters
 Ottawa, Ontario
 K1A 0K2

Quartier général de la Défense nationale
 Ottawa (Ontario)
 K1A 0K2

**REQUEST FOR PROPOSAL
 DEMANDE DE PROPOSITION**

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

National Defence Headquarters
 Director Services Contracting 4 (D Svcs C 4)
 Attention: Kent Johnston
 By e-mail to:
 DSvcsC4Contracting-DCSvcs4Contrats@forces.gc.ca

Proposal To: National Defence Canada

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

Proposition à : Défense nationale Canada

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

Comments – Commentaires

THIS DOCUMENT DOES NOT CONTAIN A SECURITY REQUIREMENT.

**Solicitation Closes –
 L'invitation prend fin**

At: – à :
 02:00 PM Eastern Standard Time (EDT)
 On: – le :
 7 February 2019

Title – Titre Target Audience Analysis Training	Solicitation No. – N° de l'invitation W6369-19-X033/A
Date of Solicitation – Date de l'invitation 15 January 2019	
Address Enquiries to: – Adresser toutes questions à : Kent Johnston by e-mail to Kent.Johnston@forces.gc.ca	
Telephone No. – N° de téléphone	FAX No. – N° de fax
Destination See herein.	

Instructions: Municipal taxes are not applicable. Unless otherwise specified herein all prices quoted must include all applicable Canadian customs duties, GST/HST, excise taxes and are to be delivered Delivery Duty Paid including all delivery charges to destination(s) as indicated. The amount of the Goods and Services Tax/Harmonized Sales Tax is to be shown as a separate item.

Instructions : Les taxes municipales ne s'appliquent pas. Sauf indication contraire, les prix indiqués doivent comprendre les droits de douane canadiens, la TPS/TVH et la taxe d'accise. Les biens doivent être livrés « rendu droits acquittés », tous frais de livraison compris, à la ou aux destinations indiquées. Le montant de la taxe sur les produits et services/taxe de vente harmonisée doit être indiqué séparément.

Delivery Required – Livraison exigée	Delivery Offered – Livraison proposée
Vendor Name and Address – Raison sociale et adresse du fournisseur	
Name and title of person authorized to sign on behalf of vendor (type or print) Nom et titre de la personne autorisée à signer au nom du fournisseur (caractère d'imprimerie)	
Name – Nom _____	Title – Titre _____
Signature _____	Date _____



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PART 1 - GENERAL INFORMATION

1.1 Security Requirements

There is no security requirement applicable to this contract.

1.2 Statement of Work

The contractor must perform the work in accordance with the Statement of Work at Annex "A".

1.3 Debriefings

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

1.4 Trade Agreements

The requirement is subject to the provisions of the World Trade Organization Agreement on Government Procurement (WTO-AGP), the North American Free Trade Agreement (NAFTA), the Canada-European Union Comprehensive Economic and Trade Agreement (CETA), and the Canadian Free Trade Agreement (CFTA).

PART 2 - BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

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

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

The 2003 (2018-05-22), Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

Subsection 4 of section 05, Submission of bids, is amended as follows:

Delete: 60 days

Insert: ninety (90) calendar days

Section 06, Late bids, is deleted in its entirety.

The text under section 07, Delayed bids, is deleted in its entirety and replaced with the following:

It is the Bidder's responsibility to ensure that the Contracting Authority has received the entire submission. Misrouting or other electronic delivery issues resulting in late submission of bids will not be accepted.

Subsection 1 of section 08, Transmission by facsimile, is deleted in its entirety.

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The text under section 13, Communications - solicitation period, is deleted in its entirety and replaced with the following:

To ensure the integrity of the competitive bid process, enquiries and other communications regarding the bid solicitation must be directed only as indicated on page 1 of the bid solicitation. Failure to comply with this requirement may result in the bid being declared non-responsive.

Canada will submit all significant enquiries received and their replies directly to invited Bidders by electronic mail. For further information, consult subsection 3 of the Submission of bids section.

Subsection 2 of section 20, Further information, is deleted in its entirety.

2.2 Submission of Bids

Unless otherwise specified in the bid solicitation or directed by the Contracting Authority, bids must be received by the Contracting Authority by electronic mail by the date and time indicated on page 1 of the bid solicitation.

Electronic Submissions: Individual e-mails that may include certain scripts, formats, embedded macros and/or links, or those that exceed five (5) megabytes may be rejected by Canada's e-mail system and/or firewall(s) without notice to the Bidder or Contracting Authority. Larger bids may be submitted through more than one e-mail. The Contracting Authority will confirm receipt of documents. It is the Bidder's responsibility to ensure that the Contracting Authority has received the entire submission. Bidders should not assume that all documents have been received unless the Contracting Authority confirms receipt of each document. In order to minimize the potential for technical issues, Bidders are requested to allow sufficient time before the closing date and time to confirm receipt. Technical and financial documents received after the closing date and time will not be accepted.

2.3 Former Public Servant

Contracts awarded to former public servants (FPS) in receipt of a pension or of a lump sum payment must bear the closest public scrutiny and reflect fairness in the spending of public funds. In order to comply with Treasury Board policies and directives on contracts awarded to FPS, bidders must provide in writing before contract award for each question below, the answer and, as applicable, the information required.

If the Contracting Authority has not received the answer to the question and, as applicable, the information required by the time the evaluation of bids is completed, Canada will inform the Bidder of a time frame within which to provide the answer and, as applicable, the information required. 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:

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

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

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

Former Public Servant in Receipt of a Pension

As per the above definitions, is the Bidder a FPS in receipt of a pension?

Yes () No ()

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

- (a) name of former public servant; and
- (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: 2012-2 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; and
- (g) number and amount (professional fees) of other contracts subject to the restrictions of a work force reduction program.

For all contracts awarded during the lump sum payment period, the total amount of fees that may be paid to a FPS who received a lump sum payment is \$5,000, including Applicable Taxes.

2.4 Enquiries - Bid Solicitation

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

PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

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

Section I: Technical Bid – one (1) soft copy submitted by e-mail;
Section II: Financial Bid – one (1) soft copy submitted by e-mail;
Section III: Certifications – one (1) soft copy submitted by e-mail; and
Section IV: Additional Information – one (1) soft copy submitted by e-mail.

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

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

- (a) use 8.5 x 11 inch (216 mm x 279 mm) page size; and
- (b) use a numbering system that corresponds to the bid solicitation.

In April 2006, Canada issued a policy directing federal departments and agencies to take the necessary steps to incorporate environmental considerations into the procurement process Policy on Green Procurement.

To assist Canada in reaching its objectives, bidders should use the environmentally-preferable format of black and white instead of colour.

Section I: Technical Bid

In their technical bid, Bidders should explain and demonstrate how they propose to meet the requirements and how they will carry out the Work.

Section II: Financial Bid

Bidders must submit their financial bid in accordance with the Basis of Payment.

3.1.1 Electronic Payment of Invoices – Bid

If you are willing to accept payment of invoices by Electronic Payment Instruments, complete Attachment 1 to Part 3, Electronic Payment Instruments, to identify which ones are accepted.

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

3.1.2 SACC Manual Clauses

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

Section III: Certifications

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

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ATTACHMENT 1 to PART 3 - ELECTRONIC PAYMENT INSTRUMENTS

ELECTRONIC PAYMENT INSTRUMENTS

As indicated in Part 3, clause 3.1.1, the Bidder must identify which electronic payment instruments they are willing to accept for payment of invoices.

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

- a. Visa Acquisition Card;
- b. MasterCard Acquisition Card;
- c. Direct Deposit (Domestic and International);
- d. Electronic Data Interchange (EDI);
- e. Wire Transfer (International Only);

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 has not submitted 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:

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

that show in total 100 billable days.

4.1.1.2 Mandatory Technical Criteria

Refer to Attachment 1 to Part 4

4.1.1.3 Point Rated Technical Criteria

Refer to Attachment 1 to Part 4

4.1.2 Financial Evaluation

4.1.2.1 For bid evaluation and Contractor selection purposes only, the evaluated price of a bid will be determined in accordance with the Basis of Payment detailed in Annex B.

4.2 Basis of Selection

SACC Manual Clause A0035T (2005-05-25), Basis of Selection – Lowest Price per Point.

1. To be declared responsive, a bid must:
 - a. comply with all the requirements of the bid solicitation;
 - b. meet all mandatory technical evaluation criteria; and
 - c. Obtain the required minimum of **52 points** overall for the technical evaluation criteria which are subject to point rating. The rating is performed on a scale of 130 points.
2. Bids not meeting (a) or (b) or (c) will be declared non-responsive. Neither the responsive bid that receives the highest number of points nor the one that proposed the lowest price will necessarily be accepted. The responsive bid with the lowest evaluated price per point will be recommended for award of a contract.

ATTACHMENT 1 TO PART 4 – EVALUATION CRITERIA

1. MANDATORY EVALUATION CRITERIA

In their proposals, Bidders must demonstrate they meet the following mandatory criteria by providing complete details of the experience, including name and description of client organization, scope, timeframe (from-to dates month/year), and description of the roles and responsibilities.

Failure to meet any of the mandatory criteria will render the bid non-compliant and it will be given no further consideration.

	Mandatory Requirement	Met / Not Met	Supporting Detail or Cross Reference to Bidder's Proposal
MT1	The bidder must clearly demonstrate it has experience teaching a minimum of two (2) Target Audience Analysis (TAA) methodology courses/workshops in a group setting where the main topic of courses/workshops was the TAA methodology.		The Bidder should provide complete details as to where, when, month and year, the training experience was obtained.
MT2	The Bidder must clearly demonstrate that its proposed lead instructor(s) has/have experience teaching Target Audience Analysis (TAA) methodology workshops/courses.		The Bidder should provide complete details as to where, when, month and year, the training experience was obtained.
MT3	The Bidder must clearly demonstrate it has the capacity to: <ul style="list-style-type: none"> i. design a detailed curriculum and lecture/activity schedule for the course; ii. conduct examinations/assessments/individual and syndicate presentations at the mid and end-course points; and iii. provide the required learning materials, such as but not limited to, slide decks, handouts and reference documents (electronic or paper) for up to 24 students. 		The Bidder should provide details from previous courses delivered or examples of how they intend to meet the criterion.

2. POINT-RATED EVALUATION CRITERIA

In their proposals, Bidders should demonstrate they meet the following rated criteria by providing complete details of the experience, including name and description of client organization, scope, timeframe (from-to dates month/year), and description of the roles and responsibilities.

	Rated Requirement	Scoring	Supporting Detail or Cross Reference to Bidder's Proposal
RT1	The bidder should clearly demonstrate it has experience teaching more than two (2) Target Audience Analysis (TAA) methodology courses/workshops in a group setting where the main topic of courses/workshops was the TAA methodology.	1 to 23 4 workshops/courses = 10pts 35 to 46 workshops/courses = 20pts 57 to 68 workshops/courses = 30pts 79+ workshops/courses = 40pts	The Bidder should provide complete details as to where, when, month and year, the training experience was obtained.
RT2	The Bidder should clearly demonstrate that its proposed lead instructor(s) has/have experience teaching TAA methodology workshops/courses.	1 to 2 workshops/courses = 10pts 3 to 4 workshops/courses = 20pts 5 to 6 workshops/courses = 30pts 7+ workshops/courses = 40pts	The Bidder should provide complete details as to where, when, month and year, the training experience was obtained.
RT3	The Bidder should clearly demonstrate it has provided TAA methodology workshops/courses to NATO organizations and/or allies.	Training provided to at least one NATO ally /organization = 10 pts Training provided to NATO ally(ies) AND NATO organization(s) = 20 pts	The Bidder should provide complete details as to where, when, month and year, the training was completed.
RT4	The bidder should clearly demonstrate it has provided TAA training in a military setting.	1 to 2 workshops/courses = 10pts 3 to 4 workshops/courses = 20pts 5+ workshops/courses = 30pts	The Bidder should provide complete details as to where, when, month and year, the training was completed.
TAA Methodology- Points Available:			
Minimum Points Required:		52 points	
Total Points Available:		130 points	

PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

Bidders must provide the required certifications and additional information to be awarded a contract.

The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Unless specified otherwise, Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.

The Contracting Authority will have the right to ask for additional information to verify the Bidder's certifications. Failure to comply and to cooperate with any request or requirement imposed by the Contracting Authority will render the bid non-responsive or constitute a default under the Contract.

5.1 Certifications Required with the Bid

Bidders must submit the following duly completed certifications as part of their bid.

5.1.1 Integrity Provisions - Declaration of Convicted Offences

In accordance with the Integrity Provisions of the Standard Instructions, all bidders must provide with their bid, **if applicable**, the declaration form available on the Forms for the Integrity Regime website (<http://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-eng.html>), to be given further consideration in the procurement process.

5.2 Certifications Precedent to Contract Award and Additional Information

The certifications and additional information listed below should be submitted with the bid, but may be submitted afterwards. If any of these required certifications or additional information is not completed and submitted as requested, the Contracting Authority will inform the Bidder of a time frame within which to provide the information. Failure to provide the certifications or the additional information listed below within the time frame provided 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>), the Bidder must provide the required documentation, as applicable, to be given further consideration in the procurement process.

5.2.2 Federal Contractors Program for Employment Equity - Bid Certification

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

5.2.3.1 Status and Availability of Resources

SACC Manual clause A3005T (2010-08-16) Status and Availability of Resources

5.2.3.2 Education and Experience

SACC Manual clause A3010T (2010-08-16) Education and Experience

PART 6 - RESULTING CONTRACT CLAUSES

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

6.1 Security Requirements

There is no security requirement applicable to the Contract.

6.2 Statement of Work

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

6.3 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>) issued by Public Works and Government Services Canada.

6.3.1 General Conditions

2010B (2018-06-21), General conditions: Professional services (medium complexity) apply to and form part of the Contract.

6.3.2 Supplemental General Conditions

4007 (2010-08-19), Canada to Own Intellectual Property Rights in Foreground Information, apply to and form part of the Contract.

6.4 Term of Contract

6.4.1 Period of the Contract

This Work is to be performed from date of contract award to 15 Nov~~30 Jun~~ 2019 (estimated)

6.5 Authorities

6.5.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: _____
Title: _____
Department of National Defence
Directorate: _____
Address: _____
Telephone: _____
Facsimile: _____
E-mail address: _____

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

6.5.2 Technical Authority

The Technical Authority for the Contract is:

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

The Technical 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 Technical Authority, however the Technical Authority has no authority to authorize changes to the scope of the Work. Changes to the scope of the Work can only be made through a contract amendment issued by the Contracting Authority.

6.5.3 Contractor's Representative

To be inserted at Contract award

6.6 Proactive Disclosure of Contracts with Former Public Servants

By providing information on its status, with respect to being a former public servant in receipt of a *Public Service Superannuation Act* (PSSA) (<http://laws-lois.justice.gc.ca/eng/acts/P-36/FullText.html>) 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: 2012-2* of the Treasury Board Secretariat of Canada (http://www.tbs-sct.gc.ca/pubs_pol/dccpubs/contpolnotices/siglist-eng.asp).

6.7 Payment

6.7.1 Basis of Payment

For the Work described in Annex A, Statement of Work:

In consideration of the Contractor satisfactorily completing its obligations under the Contract, the Contractor will be paid a firm price, for a cost of \$_____ (*insert the amount at contract award*). Customs duties are excluded and Applicable Taxes are extra.

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

6.7.2 Limitation of Price

SACC Manual clause C6000C (2017-08-17), Limitation of Price

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

6.7.3 Milestone Payments

H3010C (2016-01-28), Milestone Payments - Not subject to holdback

Canada will make milestone payments in accordance with the Schedule of Milestones detailed in the Contract and the payment provisions of the Contract if:

- a. an accurate and complete claim for payment using PWGSC-TPSGC 1111, Claim for Progress Payment, and any other document required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- b. all the certificates appearing on form PWGSC-TPSGC 1111 have been signed by the respective authorized representatives;
- c. all work associated with the milestone and as applicable any deliverable required has been completed and accepted by Canada.

H4012C (2010-01-11), Schedule of Milestones

The schedule of milestones for which payments will be made in accordance with the Contract is as follows:

Milestone No.	Description or "Deliverable"	Firm Amount	Due Date or "Delivery Date"
1	i. Course planning and preparation activities. ii. Third-Party location / Flight / Hotel bookings.	20% of firm lot price, period of the contract.	i. Within the 1st month of the contract upon receipt of applicable invoices.

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2	i. Completion of training for 1 st half of course.	40% of firm lot price, period of the contract.	ii. Upon completion of 1 st half of course (upon receipt of invoice).
3	i. Completion of training for 2 nd half of course.	40% of firm lot price, period of the contract	i. Upon completion of 2 st half of course (upon receipt of invoice).

6.7.4 Electronic Payment of Invoices – Contract

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

- a. () VISA Acquisition Card;
- b. () MasterCard Acquisition Card;
- c. () Direct Deposit (Domestic and International);
- d. () Electronic Data Interchange (EDI);
- e. () Wire Transfer (International Only);

6.8 Invoicing Instructions

6.8.1 Invoicing Instructions

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

Each invoice must be supported by:

- a. a copy of the release document and any other documents as specified in the Contract; and
- b. a copy of the invoices, receipts, vouchers for all direct expenses

Invoices must be distributed as follows:

- a. The original must be forwarded to the address shown on page 1 of the Contract for certification and payment.
- b. One (1) copy must be forwarded to the Contracting Authority identified under the section entitled "Authorities" of the Contract.

6.9 Certifications and Additional Information

6.9.1 Compliance

Unless specified otherwise, the continuous compliance with the certifications provided by the Contractor in its bid or precedent to contract award, and the ongoing cooperation in providing additional information are conditions of the Contract and failure to comply will constitute the Contractor in default. Certifications are subject to verification by Canada during the entire period of the Contract.

6.10 Applicable Laws

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

6.11 Priority of Documents

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

- (a) the Articles of Agreement;
- (b) supplemental general conditions 4007 (2010-08-16), Canada to Own Intellectual Property Rights in Foreground Information;
- (c) general conditions 2010B (2018-06-21), General conditions: Professional Services (medium complexity);
- (c) Annex A, Statement of Work
- (d) Annex B, Basis of Payment
- (e) Annex C, Non-Disclosure Agreement;
- (f) the Contractor's bid dated _____ (*insert date of bid*)

6.12 SACC Manual Clauses

G1005C (2016-01-28), Insurance - No Specific Requirement
A9068C (2010-01-11), Government Site Regulations
A9117C (2007-11-30), T1204 - Direct Request by Customer Department
A2001C (2006-06-16), Foreign Nationals (Foreign Contractor)
or
A2000C (2006-06-16), Foreign Nationals (Canadian Contractor)

ANNEX A - STATEMENT OF WORK

1. BACKGROUND

- 1.1. ADM (PA), as the Functional Authority for the Public Affairs Branch, is responsible for military public affairs and, thus, responsible for developing military public affairs capabilities to support the Chief of Defence Staff (CDS) direction, Defence Policy and CAF Joint Doctrine. ADM (PA) has identified Target Audience Analysis (TAA) as a capability it will acquire to support Joint Targeting, Information Operations and Strategic Communication as part of its initiative to operationalize the Public Affairs Branch.
- 1.2. As the ADM (PA) staff in charge of developing the operational capabilities of the Public Affairs Branch, this office's research has concluded that the CAF does not have a sufficient TAA methodology and must seek a civilian entity to train CAF personnel on this methodology in order to meet the requirement.

2. OBJECTIVE

- 2.1. The expected outcome of this contract is that the Contractor will have trained a group of DND/CAF personnel in its TAA methodology. By retaining proprietary usage of the methodology and courseware, DND/CAF will then be able to provide in-house training to a sufficient core of personnel. This will contribute to creating a sustainable TAA capability program that will support Joint Targeting, Information Operations and Strategic Communications in the long-term.

3. SCOPE

- 3.1. The contractor must conduct a tailored course teaching a TAA methodology in Canada to CAF and DND personnel in order to create a core body of CAF and DND personnel who can apply the methodology in support of CAF operations. Further, the contractor must provide the CAF with proprietary usage rights for the methodology as well as the courseware in order to enable a sustained CAF capability using the methodology.

4. CONSTRAINTS

- 4.1. The course must be conducted with the following constraints:
 - (a) The course must be conducted in the National Capital Region of Canada;
 - (b) The course must be conducted at a DND facility;
 - (c) Training must be carried out during weekdays, with no weekend training;
 - (d) Training must be carried out in English;
 - (e) **The course must be completed by 30 Nov~~April~~ 2019;**
 - (f) The course must entail a live case study to assist in applying the methodology;
 - i. The live case study must pertain to CAF/DND issues with the resulting findings being practically applicable to CAF/DND;
 - 4.1.f.i.1. The case study will focus on determining why women between the ages of 18-30 in the Greater Toronto Area (GTA) are not interested in enrolling in Naval technical trades;
 - ii. The live case study must be conducted in a manner consistent with accepted ethical norms pertaining to public opinion research;

- (g) The course must involve a blend of classroom lectures, syndicate work, student presentations and activities;
- (h) Course material must be current and reflect any recent developments in Target Audience Analysis and Strategic Communication over the past calendar year; and
- (i) The students must receive examinations consisting of written, individual and syndicate presentations

5. TECHNICAL ENVIRONMENT

- 5.1. The course will be conducted using non-departmental networks (ie-civilian internet) through Wi-Fi connectivity. Microsoft Office applications (Outlook, PowerPoint, Word, etc.) will be used.

6. TASKS AND DELIVERABLES

The Contractor must:

- 6.1. design and conduct a Target Audience Analysis course which ends no later than 304 ~~November~~ ~~March~~, 2019 that will teach up to 24 students the methodology to a level where they can apply the methodology to conduct Target Audience Analysis;
- 6.2. arrange and provide appropriate equipment for instruction (ie-instructor computers and pointers), excluding those already provided by the place of instruction (ie-electronic projectors and flip charts);
- 6.3. provide all learning material, including but not limited to, books, slide decks and reference documents (electronic or paper) for up to 24 students;
- 6.4. design a detailed curriculum and lecture/activity schedule with examinations/assessments at the mid- and end-course points;
- 6.5. develop, facilitate and arrange the logistics for an in-course live case study, to include conducting qualitative (ie-focus groups) and quantitative public opinion research.
- 6.6. The Contractor will refine the student findings from the live case study into a briefing document for consideration by the Department of National Defence no later than one month after the completion of training;
- 6.7. design, conduct and assess written examinations, individual and syndicate presentations; and
- 6.8. provide course certificates of completion to each student at the end of the course.

7. REPORTING REQUIREMENTS

- 7.1. A progress report must be completed by the Contractor for each resource and submitted to the Technical Authority at the quarter-, mid- and three-quarter marks of the course. At a minimum, each progress report must document the following information:
 - (a) All significant activities performed in the period covered that may impact the conduct of the course;
 - (b) Status of any outstanding activities that may extend beyond normal timelines;
 - (c) Any training concerns regarding student performance;

- (d) Any student concerns regarding course material or delivery;
 - (e) Description of any problems encountered which will require attention or escalation; and
 - (f) Any recommendations to update or change the course schedule.
- 7.2. All reports must be provided in one (1) hard copy and one (1) soft copy, in a format acceptable to the Technical Authority. The soft copy must be compatible with Microsoft Office 2003 or Adobe Reader.
- 8. LANGUAGE REQUIREMENTS**
- 8.1. The instructor(s) must be fluent in the English language. Fluent means that the individuals must be able to communicate orally and in writing without any assistance and with minimal errors.
- 9. TRAVEL**
- 9.1. Travel will be required in this contract. Travel will not be reimbursed separately. As such, it is the responsibility of the contractor to factor in any travel related costs when submitting their bid.
- 9.2. The Contractor must arrange for the lodging and meals and transport of instructor(s)/lecturer(s) to and from the place of instruction, including the live case study.
- 10. LOCATION OF WORK**
- 10.1. All instruction must be completed at DND facilities within the National Capital Region (NCR). For the purposes of live case study qualitative analysis, focus groups and interviews may be conducted at a third location within the NCR. Travel costs within the NCR will not be reimbursed.

ANNEX B – BASIS OF PAYMENT

1. Contract Period (From Contract Award to 30 NovJun 2019)

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

1.1 Schedule of Milestones

A. The schedule of milestones for which payments will be made in accordance with the Contract is as follows:

Milestone No.	Description or "Deliverable"	Firm Amount
1	i. Course planning and preparation activities. ii. Third-Party location / Flight / Hotel bookings. (20% of overall price)	\$[amount to be specified in the resulting Contract]
2	i. Completion of training for 1 st half of course. (40% of overall price)	\$[amount to be specified in the resulting Contract]
3	i. Completion of training for 2 nd half of course. (40% of overall price)	\$[amount to be specified in the resulting Contract]

NOTE: The above milestones MUST include any travel & living expenses for all contracted personnel and live case study instructors.

Solicitation No.
W6369-19-X033/A

ANNEX C - NON-DISCLOSURE AGREEMENT

(This annex is to be completed after contract award and is not required in the bid.)

I, _____, 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. W6369-19-X033/A between Her Majesty the Queen in right of Canada, represented by the Department of National Defence and _____, 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.: _____ (insert number).

Signature

Date

From: Allison LCol DE@ADM(PA) DPAPQ@Ottawa-Hull
Sent: February 1, 2019 10:30 AM
To: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull; Janzen BGen JH@ADM(PA) DPAPQ@Ottawa-Hull
Subject: RE: Revised RFP

Hi Kent,

Those discussions already took place and BGen Janzen is comfortable with re-posting at this time.

Cheers

From: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: February-01-19 10:28 AM
To: Allison LCol DE@ADM(PA) DPAPQ@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: Revised RFP

Good Morning Doug

Thanks. I'll have look at the changes and advise.

The last time I spoke to the BGen, he said that he was getting the impression from the higher-ups again that there was still some uncertainty about the political aspect of the requirement. Can you have a discussion with him to confirm this please? Until they're absolutely certain about proceeding, we should not be re-posting the requirement.

Thanks

Kent

Kent Johnston

Agent supérieur d'approvisionnement, DC Svcs 4-3-2
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Senior Procurement Officer, D Svcs C 4-3-2
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From: Allison LCol DE@ADM(PA) DPAPQ@Ottawa-Hull
Sent: January-28-19 11:18 AM
To: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull <KENT.JOHNSTON@forces.gc.ca>
Subject: FW: Revised RFP

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Please find attached revised RFP for posting. I have amended the criteria slightly so that we can potentially have a wider group of companies who would qualify/be considered. In addition, I have revised dates to reflect our new timeframe. Please advise if this meets the criteria, and if so, repost.

Thanks

D. Allison

LCol/Lcol

Director-General Military Strategic Communication FD/Directeur général – communication
stratégique militaire DF

Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et
Forces armées canadiennes

Douglas.Allison@forces.gc.ca / Tel : 613-944-3291 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC : 944-
3291

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull

Sent: January-25-19 10:02 AM

To: Janzen BGen JH@ADM(PA) DPAPO@Ottawa-Hull <JAY.JANZEN@forces.gc.ca>

Subject: Revised RFP

Sir,

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D. Allison

LCol/Lcol

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3291

From: [Johnston KJ@ADM\(Mat\).D.Svcs.C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Sent: March 14, 2019 2:17 PM
To: [Allison LCol DE@ADM\(PA\).DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Subject: W6369-19-X033/A - Revised RFP
Attachments: W6369-19-X033 - EIR signed.pdf

Good Afternoon Doug

I just realized I'll also need a new signed EIR since the contract will now take place in FY 19/20. I've attached the old EIR for your reference.

Please note that, because this is a re-solicitation, the contract number will **W6369-19-X033/A**.

Thanks

Kent

Kent Johnston

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From: Allison LCol DE@ADM(PA).DPAPO@Ottawa-Hull
Sent: March-11-19 3:04 PM
To: Johnston KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull <KENT.JOHNSTON@forces.gc.ca>
Subject: RE: Revised RFP

Ack. Thx

From: Johnston KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull
Sent: March-11-19 11:00 AM
To: Allison LCol DE@ADM(PA).DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: Revised RFP

Morning Doug

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From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: March-11-19 10:10 AM
To: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull <KENT.JOHNSTON@forces.gc.ca>
Subject: FW: Revised RFP

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To: Janzen BGen JH@ADM(PA) DPAPO@Ottawa-Hull <JAY.JANZEN@forces.gc.ca>
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See attached with track changes updated RFP for the TAA. I have changed the criteria for number of courses conducted, and points awarded as well as timings for contract completion. If you are happy, we can forward to Kent who will do a final check and then re-post.

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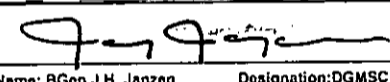
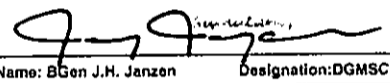
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EXPENDITURE INITIATION REQUEST (EIR) FORM

REQUIREMENT TITLE / REFERENCE:											
ORIGINAL	MODIFICATION & NO.				DATE (11/Jul/2018)						
1) Project Manager (PM) or Technical Authority (TA)											
Name:		Doug Allison									
Title:		DG Public Affairs FD									
Designation:											
Organization:		ADM (PA)									
Address:		101 Col By Drive, Ottawa, ON									
Telephone Number:		613-944-3291									
Facsimile (optional):											
Email:		Douglas.Allison@forces.gc.ca									
2) Requirement - MANDATORY											
Summary of the Requirement											
Target Audience Analysis (TAA) is a required capability to support Joint Targeting, Information Operations and Strategic Communication. Joint Targeting and Information Operations are SSE-related initiatives which have, or will have, CDS initiating directives for implementation. ADM (PA) plans to provide a TAA capability that will support these initiatives in FY 18/19. This will require the training of CAF and DND personnel on a suitable TAA methodology which does not currently exist in the CAF nor DND. There are no suitable foreign military options which could deliver in time. It is therefore necessary to engage on Basis of Payment.											
Recurring Requirement											
3) Description of Goods and/or Services											
<input checked="" type="checkbox"/> List of Deliverables, Statement of Work/Requirement or Quote is attached											
<input type="checkbox"/> Line Item Details attached											
<input type="checkbox"/> Hazardous Material											
<input type="checkbox"/> Controlled Goods											
<input type="checkbox"/> Quality Assurance (QA)											
<input type="checkbox"/> Technical Data Package (TDP)											
4) Technical Evaluation - MANDATORY except for Sole Source Requirements. Select one of the following:											
Selection Methodology - Select one of the following											
<input type="checkbox"/> Lowest-Priced Responsive Proposal (Evaluation based on Mandatory criteria only)											
<input type="checkbox"/> Lowest-Priced Responsive Proposal (Evaluation based on a combination of Mandatory and Point-Rated criteria)											
<input type="checkbox"/> Lowest Responsive Cost-per-Point Proposal											
<input checked="" type="checkbox"/> Highest Responsive Combined Rating of Technical Merit and Price (e.g. 60/40 or 70/30)											
<input type="checkbox"/> Highest-Rated Responsive Proposal within a Specified Maximum Budget											
<input type="checkbox"/> See attached Mandatory Technical Evaluation Criteria (for simple goods or services)											
<input type="checkbox"/> See attached Evaluation Plan (for complex goods or services)											
5) Security Requirements - MANDATORY											
<input checked="" type="checkbox"/> Completed Security Requirements Check List (SRCL) form attached											
6) Procurement Strategy Considerations - MANDATORY (select one)											
<input checked="" type="checkbox"/> Competitive Requirement											
<input type="checkbox"/> Sole Source Requirement											
<input type="checkbox"/> Sole Source Requirement and exception 6 (d) of the GCRs applies.											
<input type="checkbox"/> Internal DND (QETE, NETE, AETE, FMF, 202WD, etc.) Source											
<input type="checkbox"/> Other Government Department (OGD) Source - specify:											
<input type="checkbox"/> National Security Exception-see attached substantiation											
<input type="checkbox"/> No Substitute Requirement - see attached substantiation											
<input type="checkbox"/> Other Source Considerations - specify:											
7) Funding - REQUIRED (See section 10 below for multi-year funding requirement information).											
Provide the estimated FUNDED value of the requirement (taxes excluded). Financial coding information is provided in section 10 below.					Funded AMOUNT:		\$520,000.00				
8) Expenditure Initiation Authority.											
"I confirm this is a valid and approved requirement. I also certify that I have the required designated financial authority to proceed with this authorization."					8 AUG 2018						
					Date (DD/MMM/YYYY)		Name: BGen J.H. Janzen		Designation: DGMSC		
9) FAA Section 32 - Approval for TOTAL amount required.											
"I certify that funding is available in accordance with Section 32 of the Financial Administration Act (FAA) in the amount specified above. I also certify that I have the required designated financial authority to proceed with this authorization."					8 AUG 2018						
					Date (DD/MMM/YYYY)		Name: BGen J.H. Janzen		Designation: DGMSC		
10) Total requirement value CASH FLOW Information - For each Fiscal Year and/or Financial Coding. Include the funded and unfunded requirement, including all option years.											
Serial	FY	Amount	Fund	FC	CC or WBS	GL	IO	Source of funding	Funded or Unfunded	Remarks	
1	18/19	\$520,000.00	L101	0161ZM	01B1PP	4927	2504B17	Vote 1 O&M	\$520,000		
2		\$0.00									
3		\$0.00									
4		\$0.00									
5		\$0.00									
6		\$0.00									
7		\$0.00									
8		\$0.00									
9		\$0.00									
10		\$0.00									
11) Procurement Initiation Authority (PIA). ** For requirements outside of ADM (Main)											
					Total Tax		13%		\$67,600.00		
Identify and provide the total estimated value of the requirement. The amount indicated herein is the amount of the FUNDED and UNFUNDED portion of the requirement (all taxes included).					TOTAL AMOUNT (Taxes Included):		\$587,600.00				
Recommended by (optional) - applicable authority recommends the approval of the requirement identified.											
					Date (DD/MMM/YYYY)		Name:		Designation:		
Approval - The applicable authority approves this requirement, certifies that the necessary approvals have been obtained and requests that the goods and/or services described herein be acquired and provided.											
					Date (DD/MMM/YYYY)		Name: BGen J.H. Janzen		Designation: DGMSC		

From: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: March 22, 2019 9:51 AM
To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull
Subject: RE: Revised RFP
Attachments: W6369-19-X033-A - RFP.doc

Morning Doug

The manager that will be taking over your file provided some additional suggested changes in Attachment 1 to part 4 Evaluation Criteria. They are minor....mainly just to tighten up some of the wording. Also, you'll notice I reduced the top end of the scoring bracket to 6+ courses in the point rated area. Any company with experience teaching 6+ courses would be more than sufficient.

Please have a look and let me know if we can proceed with posting the RFP.

Thanks

Kent

Kent Johnston

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From: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: March-11-19 11:00 AM
To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: Revised RFP

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From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: March-11-19 10:10 AM
To: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull <KENT.JOHNSTON@forces.gc.ca>
Subject: FW: Revised RFP

Hi Kent,

Has this been re-posted?

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: January-28-19 11:18 AM
To: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull <KENT.JOHNSTON@forces.gc.ca>
Subject: FW: Revised RFP

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3291

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Sent: January-25-19 10:02 AM
To: Janzen BGen JH@ADM(PA) DPAPO@Ottawa-Hull <JAY.JANZEN@forces.gc.ca>
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3291

From: [Johnston KJ@ADM\(Mat\).D.Svcs.C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Sent: March 27, 2019 10:25 AM
To: [Allison LCol DE@ADM\(PA\).DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Cc: [Brousseau HA@ADM\(Mat\).D.Svcs.C@Ottawa-Hull](mailto:Brousseau.HA@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Subject: RE: Revised RFP
Attachments: W6369-19-X033-A - RFP.doc

Morning Doug

Just wanted to touch base to see if you've had a chance to review the changes in Attachment 1 to Part 4 of the RFP.

Friday is my last day with the D Svcs C so Holly Brousseau will be taking over your requirement.

All the best!

Kent

Kent Johnston

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From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: March-11-19 10:10 AM
To: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull <KENT.JOHNSTON@forces.gc.ca>
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From: [Johnston KJ@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Sent: March 29, 2019 11:38 AM
To: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Cc: [Brousseau HA@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Brousseau.HA@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Subject: RE: Revised RFP

Thanks Doug, much appreciated!

Kent Johnston

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Senior Procurement Officer, D Svcs C 4-3-2
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From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: March-29-19 7:36 AM
To: [Johnston KJ@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull) <KENT.JOHNSTON@forces.gc.ca>
Cc: [Brousseau HA@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Brousseau.HA@ADM(Mat).D.Svcs.C@Ottawa-Hull) <HOLLY.BROUSSEAU@forces.gc.ca>
Subject: RE: Revised RFP

Kent,

Thank you very much for all your help with this project. I wish you the best in your new endeavours ☺

Holly,

Will touch base with you early next week. Looking forward to working with you.

Cheers

D. Allison
LCol/Lcol
Director-General Military Strategic Communication FD/Directeur général - communication
stratégique militaire DF
Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et
Forces armées canadiennes
Douglas.Allison@forces.gc.ca / Tel : 613-944-3291 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC : 944-
3291

From: [Johnston KJ@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Johnston.KJ@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Sent: March-27-19 10:25 AM
To: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull) <DOUGLAS.ALLISON@forces.gc.ca>

Cc: Brousseau HA@ADM(Mat) D Svcs C@Ottawa-Hull <HOLLY.BROUSSEAU@forces.gc.ca>
Subject: RE: Revised RFP

Morning Doug

Just wanted to touch base to see if you've had a chance to review the changes in Attachment 1 to Part 4 of the RFP.

Friday is my last day with the D Svcs C so Holly Brousseau will be taking over your requirement.

All the best!

Kent

Kent Johnston

Agent supérieur d'approvisionnement, DC Svcs 4-3-2
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Sent: March-11-19 11:00 AM
To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
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Subject: FW: Revised RFP

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To: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull <KENT.JOHNSTON@forces.gc.ca>
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Sent: January-25-19 10:02 AM
To: Janzen BGen JH@ADM(PA) DPAPO@Ottawa-Hull <JAY.JANZEN@forces.gc.ca>
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Sir,

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Sent: April 11, 2019 2:35 PM
To: [Brousseau HA@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Brousseau.HA@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Subject: RE: Revised RFP
Attachments: Copy of EIR TAA 19-20.xlsx

Hi Holly,

I have reviewed the proposed amendments and concur with them.

In preparation for posting the revised RFP, I attach the draft EIR for your review. If there are any concerns please advise. If not, I will have BGen Janzen sign next week and return.

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EXPENDITURE INITIATION REQUEST (EIR) FORM

REQUIREMENT TITLE / REFERENCE:											
<input type="checkbox"/>	ORIGINAL	<input type="checkbox"/>	MODIFICATION & NO.	<input type="checkbox"/>	DATE (15 April 2019)						
1) Project Manager (PM) or Technical Authority (TA)											
Name:		Doug Allison									
Title:		DG Public Affairs FD									
Designation:											
Organization:		ADM (PA)									
Address:		101 Col By Drive, Ottawa, ON									
Telephone Number:		613-944-3291									
Facsimile (optional):											
Email:		Douglas.Allison@forces.gc.ca									
2) Requirement - MANDATORY											
Summary of the Requirement:											
Target Audience Analysis (TAA) is a required capability to support Joint Targeting, Information Operations and Strategic Communication. Joint Targeting and Information Operations are SSC-related initiatives which have, or will have, CDS initiating directives for implementation. ADM (PA) plans to provide a TAA capability that will support these initiatives in FY 19/20. This will require the training of CAF and DND personnel on a suitable TAA methodology, which does not currently exist in the CAF nor DND. There are no suitable foreign military options which could deliver in time. It is therefore necessary to engage an entity to provide training on a methodology suitable for the CAF's needs.											
Basis of Payment:											
<input type="checkbox"/> Recurring Requirement											
3) Description of Goods and/or Services											
<input checked="" type="checkbox"/> List of Deliverables, Statement of Work/Requirement or Quote is attached											
<input type="checkbox"/> Line Item Details attached											
<input type="checkbox"/> Hazardous Material											
<input type="checkbox"/> Controlled Goods											
<input type="checkbox"/> Quality Assurance (QA)											
<input type="checkbox"/> Technical Data Package (TDP)											
4) Technical Evaluation - MANDATORY except for Sole Source Requirements. Select one of the following:											
Selection Methodology - Select one of the following											
<input checked="" type="checkbox"/> Lowest-Priced Responsive Proposal (Evaluation based on <i>Mandatory</i> criteria only)											
<input type="checkbox"/> Lowest-Priced Responsive Proposal (Evaluation based on a combination of <i>Mandatory and Point-Rated</i> criteria)											
<input type="checkbox"/> Lowest Responsive <i>Cost-per-Point</i> Proposal											
<input type="checkbox"/> Highest Responsive Combined Rating of <i>Technical Merit and Price</i> (e.g. 60/40 or 70/30)											
<input type="checkbox"/> Highest-Rated Responsive Proposal within a Specified <i>Maximum Budget</i>											
<input type="checkbox"/> See attached <i>Mandatory Technical Evaluation Criteria</i> (for simple goods or services)											
<input type="checkbox"/> See attached <i>Evaluation Plan</i> (for complex goods or services)											
5) Security Requirements - MANDATORY											
<input checked="" type="checkbox"/> Completed Security Requirements Check List (SRCL) form attached											
6) Procurement Strategy Considerations - MANDATORY (select one)											
<input checked="" type="checkbox"/> Competitive Requirement											
<input type="checkbox"/> Sole Source Requirement											
<input type="checkbox"/> Sole Source Requirement and exception 6 (d) of the GCRs applies.											
<input type="checkbox"/> Internal DND (QETE, NETE, AETE, FMF, 202WD, etc.) Source											
<input type="checkbox"/> Other Government Department (OGD) Source - specify:											
<input type="checkbox"/> National Security Exception-see attached substantiation											
<input type="checkbox"/> No Substitute Requirement - see attached substantiation											
<input type="checkbox"/> Other Source Considerations - specify:											
7) Funding - REQUIRED (See section 10 below for multi-year funding requirement information).											
Provide the estimated FUNDED value of the requirement (taxes excluded). Financial coding information is provided in section 10 below.										Funded AMOUNT:	
										\$625,000.00	
8) Expenditure Initiation Authority.											
"I confirm this is a valid and approved requirement. I also certify that I have the required designated financial authority to proceed with this authorization."										// Signature //	
										Date (DD/MMM/YYYY) Name: BGen J. Janzen Designation: DGMSC	
9) FAA Section 32 - Approval for TOTAL amount required.											
"I certify that funding is available in accordance with Section 32 of the Financial Administration Act (FAA) in the amount specified above. I also certify that I have the required designated financial authority to proceed with this authorization."										// Signature //	
										Date (DD/MMM/YYYY) Name: BGen J. Janzen Designation: DGMSC	
10) Total requirement value CASH FLOW Information - For each Fiscal Year and/or Financial Coding. Include the funded and unfunded requirement, including all option years.											
	Serial	FY	Amount	Fund	FC	CC or WBS	GL	IO	Source of funding	Funded or Unfunded	Remarks
	1	19/20	\$625,000.00	L101	0161XX	0161SC	4927	2505009			
	2		\$0.00								
	3		\$0.00								
	4		\$0.00								
	5		\$0.00								
	6		\$0.00								
	7		\$0.00								
	8		\$0.00								
	9		\$0.00								
	10		\$0.00								
11) Procurement Initiation Authority (PIA). ** For requirements outside of ADM(Mat) **											
										Total Tax	
										13%	
										\$81,250.00	
Identify and provide the total estimated value of the requirement. The amount indicated herein is the amount of the FUNDED and UNFUNDED portion of the requirement (all taxes included).										TOTAL AMOUNT (Taxes Included):	
										\$706,250.00	
Recommended by (optional) - applicable authority recommends the approval of the requirement identified.										// Signature //	
										Date (DD/MMM/YYYY) Name: Designation:	
Approval - The applicable authority approves this requirement, certifies that the necessary approvals have been obtained and requests that the goods and/or services described herein be acquired and provided.										// Signature //	
										Date (DD/MMM/YYYY) Name: Designation:	

From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: April 23, 2019 9:43 AM
To: [Brousseau HA@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Brousseau.HA@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Subject: RE: Revised RFP
Attachments: doc20190423094139.pdf

Hi Holly,

Hope you had a great weekend.

See attached the signed EIR for the RFP.

Is there any other thing necessary before we post this. I would like to have this happen as soon as we can.

Thx

Doug

D. Allison
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From: [Brousseau HA@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Brousseau.HA@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Sent: April-15-19 12:19 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: Revised RFP

Hi LCol Allison,

Great, that's what I thought. Smart. And of course, we will try to get you the best value possible for this requirement ☺

Holly

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: April 15, 2019 12:18 PM
To: [Brousseau HA@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Brousseau.HA@ADM(Mat).D.Svcs.C@Ottawa-Hull) <HOLLY.BROUSSEAU@forces.gc.ca>
Subject: RE: Revised RFP

Hi Holly,

I am indeed trying to build some flex in on the contract in case it comes in higher, but would be happy to pay less if possible.

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Sent: April-15-19 12:13 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: Revised RFP

Hello LCol Allison,

As I stated, your EIR looks good, however, I noticed that the value on the EIR is \$706,250 (including tax) and the procurement plan has \$565,000 (including tax). Is there a reason for the difference between the two figures? I believe Kent would have taken the procurement plan figure from his discussions with you. He could not think of why there was a difference between the 2 figures.

Are you simply wanting to add money in case the contract comes in at a higher value, or to account for a possible exchange rate issue?

Again, the value is fine, I was just wondering if I needed to be aware of anything or adjust anything.

You are good to have the EIR signed off.

Thank you
Holly

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: April 11, 2019 7:35 PM
To: Brousseau HA@ADM(Mat) D Svcs C@Ottawa-Hull <HOLLY.BROUSSEAU@forces.gc.ca>
Subject: Re: Revised RFP

Ack.

Thx Holly

Sent from my BlackBerry 10 smartphone on the Bell network.

From: Brousseau HA@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: Thursday, April 11, 2019 5:44 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Subject: RE: Revised RFP

Hello LCol Allison,

Thank you for the message.

The EIR looks good, but I will get back to you Monday morning with a confirmation. I just need to verify one point.

Regards,
Holly

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
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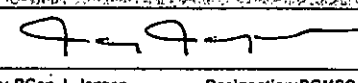
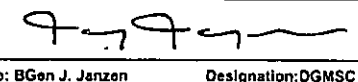
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EXPENDITURE INITIATION REQUEST (EIR) FORM

REQUIREMENT TITLE / REFERENCE										
ORIGINAL	MODIFICATION & NO.									
DATE (15 April 2019)										
1) Project Manager (PM) or Technical Authority (TA)										
Name:	Doug Allison									
Title:	DG Public Affairs FD									
Designation:										
Organization:	ADM (PA)									
Address:	101 Colby Drive, Ottawa, ON									
Telephone Number:	613 944-3291									
Facsimile (optional):										
Email:	Douglas.Allison@forces.gc.ca									
2) Requirement - MANDATORY										
Summary of the Requirement										
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Recurring Requirement										
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<input type="checkbox"/> Quality Assurance (QA)										
<input type="checkbox"/> Technical Data Package (TOP)										
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Selection Methodology - Select one of the following										
<input checked="" type="checkbox"/> Lowest-Priced Responsive Proposal (Evaluation based on Mandatory criteria only)										
<input type="checkbox"/> Lowest-Priced Responsive Proposal (Evaluation based on a combination of Mandatory and Point-Rated criteria)										
<input type="checkbox"/> Lowest Responsive Cost-per-Point Proposal										
<input type="checkbox"/> Highest Responsive Combined Rating of Technical Merit and Price (e.g. 60/40 or 70/30)										
<input type="checkbox"/> Highest-Rated Responsive Proposal within a Specified Maximum Budget										
<input type="checkbox"/> See attached Mandatory Technical Evaluation Criteria (for simple goods or services)										
<input type="checkbox"/> See attached Evaluation Plan (for complex goods or services)										
5) Security Requirements - MANDATORY										
<input checked="" type="checkbox"/> Completed Security Requirements Check List (SRCL) form attached										
6) Procurement Strategy Considerations - MANDATORY (select one)										
<input type="checkbox"/> Competitive Requirement										
<input type="checkbox"/> Sole Source Requirement										
<input type="checkbox"/> Sole Source Requirement and exception B (d) of the GCRs applies.										
<input type="checkbox"/> Internal DND (QETE, NETE, AETE, FMF, 202WD, etc.) Source										
<input type="checkbox"/> Other Government Department (OGD) Source - specify:										
National Security Exception-see attached substantiation										
<input type="checkbox"/> No Substitute Requirement - see attached substantiation										
<input type="checkbox"/> Other Source Considerations - specify:										
7) Funding - REQUIRED (See section 10 below for multi-year funding requirement information).										
Provide the estimated FUNDED value of the requirement (taxes excluded). Financial coding information is provided in section 10 below.	Funded AMOUNT:	\$625,000.00								
8) Expenditure Initiation Authority										
"I confirm this is a valid and approved requirement. I also certify that I have the required designated financial authority to proceed with this authorization."	17 Apr 19									
	Date (DD/MMM/YYYY)	Name: BGen J. Janzen Designation: DGMSC								
9) FAA Section 32 - Approval for TOTAL amount required.										
"I certify that funding is available in accordance with Section 32 of the Financial Administration Act (FAA) in the amount specified above. I also certify that I have the required designated financial authority to proceed with this authorization."	17 Apr 19									
	Date (DD/MMM/YYYY)	Name: BGen J. Janzen Designation: DGMSC								
10) Total requirement value CASH FLOW Information: For each Fiscal Year and/or Financial Coding. Include the funded and unfunded requirement, including all option years.										
Serial	FY	Amount	Fund	FC	CC or WBS	GL	IO	Source of funding	Funded or Unfunded	Remarks
1	19/20	\$625,000.00	L101	5161XX	0161SC	4927	2505009			
2		\$0.00								
3		\$0.00								
4		\$0.00								
5		\$0.00								
6		\$0.00								
7		\$0.00								
8		\$0.00								
9		\$0.00								
10		\$0.00								
11) Procurement Initiation Authority (PIA): For requirements outside of ADM(Mat)										
Identify and provide the total estimated value of the requirement. The amount indicated herein is the amount of the FUNDED and UNFUNDED portion of the requirement (all taxes included).	Total Tax	13%								
	TOTAL AMOUNT (Taxes Included):	\$705,250.00								
Recommended by (optional) - applicable authority recommends the approval of the requirement identified.	Date (DD/MMM/YYYY)	Name: Designation:								
Approval - The applicable authority approves this requirement, certifies that the necessary approvals have been obtained and requests that the goods and/or services described herein be acquired and provided.	Date (DD/MMM/YYYY)	Name: Designation:								

From: [Allison LCol DE@ADM\(PA\).DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: April 23, 2019 4:00 PM
To: [Brousseau.HA@ADM\(Mat\).D.Svcs.C@Ottawa-Hull](mailto:Brousseau.HA@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Subject: Re: Revised RFP

Super:)

Plse advise when it has been posted.

Thx Holly

Sent from my BlackBerry 10 smartphone on the Bell network.

From: Brousseau.HA@ADM(Mat).D.Svcs.C@Ottawa-Hull
Sent: Tuesday, April 23, 2019 3:46 PM
To: Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull
Subject: RE: Revised RFP

Hi Doug,

Just confirmed that the RFP will only be posted for 25 days.

Holly

From: Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull
Sent: April 23, 2019 1:05 PM
To: Brousseau.HA@ADM(Mat).D.Svcs.C@Ottawa-Hull <HOLLY.BROUSSEAU@forces.gc.ca>
Subject: RE: Revised RFP

Holly, 4 months is too long. Why the original period would be extended for 80 days is beyond me. Please confirm.

From: Brousseau.HA@ADM(Mat).D.Svcs.C@Ottawa-Hull
Sent: April-23-19 1:04 PM
To: Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: Revised RFP

Hi Doug,

I sent the documents to the manager to review and I asked the question on how many days this needs to be posted.

I read in the notes that 25 days was suggested for the re-posting period as well. However, when I did a preliminary review with the manager, she stated that we would be re-posting for 120 days. I am confirming and will advise you.

Regards,
Holly

From: Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull
Sent: April 23, 2019 12:58 PM

To: Brousseau HA@ADM(Mat) D Svcs C@Ottawa-Hull <HOLLY.BROUSSEAU@forces.gc.ca>
Subject: RE: Revised RFP

I thought the posting period was 25 days, vice the 40 days the first time around.

From: Brousseau HA@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: April-23-19 10:52 AM
To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: Revised RFP

Hello Doug,

Thank you for the signed EIR form.

How long do you anticipate the work will take? I need to enter a date in the RFP. Currently, the RFP states that the work will end 29 November 2019. I could have the work end 13 or 20 December 2019, or sometime in January, if you think this is a more reasonable amount of time. The contract ends 30 January 2020 which allows time for any unforeseen issues. I can also change this time to correspond with any change to when the work must be completed.

I am finishing all of the necessary documents. Once I post the RFP, I will advise you. The posting period will be 120 calendar days.

Thank you
Holly

From: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull
Sent: April 23, 2019 9:43 AM
To: Brousseau HA@ADM(Mat) D Svcs C@Ottawa-Hull <HOLLY.BROUSSEAU@forces.gc.ca>
Subject: RE: Revised RFP

Hi Holly,

Hope you had a great weekend.

See attached the signed EIR for the RFP.

Is there any other thing necessary before we post this. I would like to have this happen as soon as we can.

Thx

Doug

D. Allison
LCol/Lcol
Director-General Military Strategic Communication FD/Directeur général – communication
stratégique militaire DF
Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et
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Douglas.Allison@forces.gc.ca / Tel : 613-944-3291 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC : 944-3291

From: Brousseau HA@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: April-15-19 12:19 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: Revised RFP

Hi LCol Allison,

Great, that's what I thought. Smart. And of course, we will try to get you the best value possible for this requirement ☺

Holly

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: April 15, 2019 12:18 PM
To: Brousseau HA@ADM(Mat) D Svcs C@Ottawa-Hull <HOLLY.BROUSSEAU@forces.gc.ca>
Subject: RE: Revised RFP

Hi Holly,

I am indeed trying to build some flex in on the contract in case it comes in higher, but would be happy to pay less if possible.

D. Allison
LCol/Lcol
Director-General Military Strategic Communication FD/Directeur général – communication
stratégique militaire DF
Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et
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From: Brousseau HA@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: April-15-19 12:13 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: Revised RFP

Hello LCol Allison,

As I stated, your EIR looks good, however, I noticed that the value on the EIR is \$706,250 (including tax) and the procurement plan has \$565,000 (including tax). Is there a reason for the difference between the two figures? I believe Kent would have taken the procurement plan figure from his discussions with you. He could not think of why there was a difference between the 2 figures.

Are you simply wanting to add money in case the contract comes in at a higher value, or to account for a possible exchange rate issue?

Again, the value is fine, I was just wondering if I needed to be aware of anything or adjust anything.

You are good to have the EIR signed off.

Thank you
Holly

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: April 11, 2019 7:35 PM
To: Brousseau HA@ADM(Mat) D Svcs C@Ottawa-Hull <HOLLY.BROUSSEAU@forces.gc.ca>
Subject: Re: Revised RFP

Ack.

Thx Holly

Sent from my BlackBerry 10 smartphone on the Bell network.

From: Brousseau HA@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: Thursday, April 11, 2019 5:44 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Subject: RE: Revised RFP

Hello LCol Allison,

Thank you for the message.

The EIR looks good, but I will get back to you Monday morning with a confirmation. I just need to verify one point.

Regards,
Holly

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: April 11, 2019 2:35 PM
To: Brousseau HA@ADM(Mat) D Svcs C@Ottawa-Hull <HOLLY.BROUSSEAU@forces.gc.ca>
Subject: RE: Revised RFP

Hi Holly,

I have reviewed the proposed amendments and concur with them.

In preparation for posting the revised RFP, I attach the draft EIR for your review. If there are any concerns please advise. If not, I will have BGen Janzen sign next week and return.

Thanks

Doug

D. Allison
LCol/Lcol

Director-General Military Strategic Communication FD/Directeur général – communication
stratégique militaire DF
Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et
Forces armées canadiennes
Douglas.Allison@forces.gc.ca / Tel : 613-944-3291 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC : 944-
3291

From: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: March-27-19 10:25 AM
To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Cc: Brousseau HA@ADM(Mat) D Svcs C@Ottawa-Hull <HOLLY.BROUSSEAU@forces.gc.ca>
Subject: RE: Revised RFP

Morning Doug

Just wanted to touch base to see if you've had a chance to review the changes in Attachment 1 to
Part 4 of the RFP.

Friday is my last day with the D Svcs C so Holly Brousseau will be taking over your requirement.

All the best!

Kent

Kent Johnston

Agent supérieur d'approvisionnement, DC Svcs 4-3-2
Ministère de la Défense nationale / Gouvernement du Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

Senior Procurement Officer, D Svcs C 4-3-2
Department of National Defence / Government of Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

From: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: March-11-19 11:00 AM
To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: RE: Revised RFP

Morning Doug

Not yet. Since we're able to post for a shorter period of time (25 days vs 40 days) I didn't want to
post too early. That said, I'm posting it this month before I leave. I'm starting a new job in April
and am working with my manager to ensure she's up-to-speed on the file.

Kent

Kent Johnston

Agent supérieur d'approvisionnement, DC Svcs 4-3-2

Ministère de la Défense nationale / Gouvernement du Canada
Kent.Johnston@forces.gc.ca / 819-939-8836

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Kent.Johnston@forces.gc.ca / 819-939-8836

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: March-11-19 10:10 AM
To: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull <KENT.JOHNSTON@forces.gc.ca>
Subject: FW: Revised RFP

Hi Kent,

Has this been re-posted?

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: January-28-19 11:18 AM
To: Johnston KJ@ADM(Mat) D Svcs C@Ottawa-Hull <KENT.JOHNSTON@forces.gc.ca>
Subject: FW: Revised RFP

Kent,

Please find attached revised RFP for posting. I have amended the criteria slightly so that we can potentially have a wider group of companies who would qualify/be considered. In addition, I have revised dates to reflect our new timeframe. Please advise if this meets the criteria, and if so, repost.

Thanks

D. Allison
LCol/Lcol
Director-General Military Strategic Communication FD/Directeur général – communication
stratégique militaire DF
Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et
Forces armées canadiennes
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3291

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: January-25-19 10:02 AM
To: Janzen BGen JH@ADM(PA) DPAPO@Ottawa-Hull <JAY.JANZEN@forces.gc.ca>
Subject: Revised RFP

Sir,

See attached with track changes updated RFP for the TAA. I have changed the criteria for number of courses conducted, and points awarded as well as timings for contract completion. If you are

happy, we can forward to Kent who will do a final check and then re-post.

D. Allison

LCol/Lcol

Director-General Military Strategic Communication FD/Directeur général – communication
stratégique militaire DF

Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et
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3291

From: Brousseau HA@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: April 24, 2019 3:22 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Subject: W6369-19-X033

Hello Doug,

I have prepared the package of procurement documents for my managers to review. I will advise you once I have the approved procurement package back.

Regards,

Holly Brousseau

Agent supérieur d'approvisionnement, Direction – Contracts de services, D C Svcs 4-2-5
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s.19(1)

From: [Allison LCol DE@ADM\(PA\).DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: April 30, 2019 2:56 PM
To: Holly
Subject: RE: W6369-19-X033/A - TAA requirement

Hi Holly,

Happy to tell the bidders that it will be a "live" case study

From: Holly [mailto:Holly]
Sent: April-30-19 2:31 PM
To: Allison LCol DE@ADM(PA).DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: W6369-19-X033/A - TAA requirement

Hello Doug,

I am working from home today and I cannot connect to my work through my laptop so I am using my personal computer. I am not in the office tomorrow and I did not want this to wait until Thursday.

My manager is reviewing the RFP and had a concern regarding the wording of the case provided in the statement of work (4.1.f.i.1). She is concerned that stating "women are interested in Naval trades" might not be a good sound bite. Can we leave it at 4.1.f.i and simply tell the Bidders that they will have to work with a live case study? Or do you think the Bidders will need the specifics in order to prepare a proper bid?

Thanks
Holly Brousseau

s.19(1)

From: [Allison LCol DE@ADM\(PA\).DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: May 1, 2019 8:10 AM
To: Holly
Subject: RE: W6369-19-X033/A

Thanks Holly.

From: Holly [mailto:Holly]
Sent: April-30-19 3:08 PM
To: Allison LCol DE@ADM(PA).DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: Re: W6369-19-X033/A

Hi Doug,

It should be. However, in the milestone one, travel is separated out. As well, in the statement of work under the Travel section it states that travel is required for this Contract. Then it states that all work will be done in the NCR area.

We should remove the reference to travel in milestone one, and in the basis of payment chart. In the Travel section of the SOW, we will simply state that there is no travel requirement for this Contract and that travel in the NCR will not be reimbursed. You are correct, the Bidder will have to assume that if they are not in the NCR area that their travel will have to be included in their cost of doing business with us.

I will make the changes and again, you will be reviewing the RFP before it is posted.

Thank you
Holly

On Tuesday, April 30, 2019, 2:57:09 p.m. EDT, <DOUGLAS.ALLISON@forces.gc.ca> wrote:

Wouldn't this be wrapped up in the bidders offer?

From: Holly [mailto:Holly]
Sent: April-30-19 2:45 PM
To: Allison LCol DE@ADM(PA).DPAPO@Ottawa-Hull
<DOUGLAS.ALLISON@forces.gc.ca>; Brousseau HA@ADM(Mat).D Svcs C@Ottawa-Hull <HOLLY.BROUSSEAU@forces.gc.ca>
Subject: W6369-19-X033/A

Hello Doug,

One more point to ask about; travel. Does this contract have a travel requirement or not. If there is no travel requirement, then we need to remove reference to travel in the RFP and Contract. For example, milestone one below, will need to be have the reference to travel removed.

Milestone No.	Description of Deliverable	Firm Amount	Delivery Date
1	i. Course planning and preparation activities. ii. Third-Party location / Flight / Hotel bookings.	20% of firm lot price, period of the contract.	i. Within the 1st month of the contract upon receipt of applicable invoices.

If the work is being done in the NCR region, then there should be no travel associated with this contract. If the Contractor must go elsewhere to do some of the work, then there will be travel in the Contract.

We can discuss Thursday, or you can reply and I will start working with your responses on Thursday morning. Sorry if you had these discussions with Kent already. I'll try to make this quick.

Thank you

Holly

s.19(1)

From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: May 6, 2019 9:56 AM
To: [Brousseau HA@ADM\(Mat\) D Svcs C@Ottawa-Hull](mailto:Brousseau.HA@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Subject: Re: Posting timelines

Thx Holly,

We want to get this out soonest

Sent from my BlackBerry 10 smartphone on the Bell network.

From: Brousseau HA@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: Monday, May 6, 2019 8:52 AM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Subject: RE: Posting timelines

Hi Doug,

I was out of the office last week and although I brought my laptop home with me, I was not able to connect to the system, so I am just reading your message now. I did work on your RFP last Tuesday and I will be having a meeting with my manager tomorrow as she is out of the office today. She feels we are very close to having the documents ready.

I will contact you tomorrow after I meet with my manager to discuss your RFP.

Regards,
Holly

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: May 3, 2019 10:05 AM
To: Brousseau HA@ADM(Mat) D Svcs C@Ottawa-Hull <HOLLY.BROUSSEAU@forces.gc.ca>
Subject: Posting timelines

Good morning Holly,

Any updates on expected posting date?

Thanks

Doug

From: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Sent: May 10, 2019 7:09 AM
To: Brousseau HA@ADM(Mat) D Svcs C@Ottawa-Hull
Subject: Re: W6369-19-X033 - TAA

Holly,

We could go with either interpretation. The main point is to be able to use the course content/methodology in the future, so that we can adopt a Train the trainer approach for this course, and significantly reduce costs for future iterations.

IP language removal is fine

Sent from my BlackBerry 10 smartphone on the Bell network.

From: Brousseau HA@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: Thursday, May 9, 2019 5:26 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Cc: Wintle SM@ADM(Mat) D Svcs C@Ottawa-Hull
Subject: RE: W6369-19-X033 - TAA

Good Afternoon Doug,

Sorry for any frustration that this has caused. I did discuss your requirement with my supervisor before sending my previous message which is where the questions and the way forward came from.

I just want to ensure that your expectations are fully met within the RFP. When I read in the scope of the SOW, "Further, the contractor must provide the CAF with proprietary usage rights for the methodology as well as the courseware in order to enable a sustained CAF capability using the methodology." I was concerned that we had not fully addressed all of the deliverables that you were expecting to receive at the end of the contract.

My understanding of your requirement is that you want the Contractor to take their course, modify it for your live case study, and then you wanted to use the Contractor's unmodified course for future use.

However, after a conversation with Kent, it seems that you want the Contractor to take their course, modify it for your live case study, and then you want to use the modified course for future use.

If my understanding is correct then, we have not addressed that deliverable in the RFP. If Kent's understanding is correct, then we have addressed those issues.

If you would please confirm which interpretation above best describes your requirement, then I can proceed.

As well, I learned from our IP expert that we are not allowed to reference IP in our SOW, so I have removed the references in the Objective and Scope of the SOW. As well, we were using the wrong IP clause in the RFP. This has also been changed.

Thank you and again, sorry for any issues this verification has caused.

Regards,
Holly

From: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull
Sent: May 8, 2019 4:24 PM
To: Brousseau HA@ADM(Mat) D Svcs C@Ottawa-Hull <HOLLY.BROUSSEAU@forces.gc.ca>
Subject: Re: W6369-19-X033 - TAA

Holly,

Why am I getting these questions this late in the process? We want to post the RFP.

If you have questions/concerns send them. It seems like we are ready then there is a whole new set of questions.

Please advise your supervisor of my concerns.

If you have an array of questions then send them. Otherwise let's get on with the process

Sent from my BlackBerry 10 smartphone on the Bell network.

From: Brousseau HA@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: Tuesday, May 7, 2019 3:33 PM
To: Allison LCol DE@ADM(PA) DPAP0@Ottawa-Hull
Subject: W6369-19-X033 - TAA

Hello Doug,

After reviewing the RFP and some of the emails on the file we are just verifying a few points.

1. We want to remove the direct reference to travel in the RFP (travel was mentioned in the 1st milestone and in the section titled "Travel" in the SOW). We want to find wording that will inform the Bidders that they need to give us a price that is inclusive of everything they need to perform the work including overhead, general and administrative, and travel and living.
2. In the SOW in the Objective and Scope you mention that you want to have proprietary use of the courseware. I need to check that we have the proper IP clauses in the RFP to cover this. As well, I think we should have this as a deliverable. I want to make sure the Bidders understand what we expect to receive at the end of the contract. I also read an email on file that spoke of licensing fees. I just do not want any unpleasant surprises at the end of this contract. I have sent this RFP to our IP expert.
3. What was the name of the last Bidder? I could not find the bid on file or in our database.
4. I just want to confirm that there is no security requirement for this contract. Usually if a Contractor is working onsite, they need Reliability at a minimum.

Thank you.

Holly Brousseau

Agent supérieur d'approvisionnement, Direction – Contracts de services, D C Svcs 4-2-5
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National Defence / Government of Canada
Holly.brousseau@forces.gc.ca/ Tél. : 819-939-8478 / RCCC : 939-8478 / ATS : 1-800-467-9877

From: [Allison LCol DE@ADM\(PA\).DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: May 17, 2019 2:22 PM
To: [+D Svcs C 4 Procurement - DC Svcs 4 Acquisitions@ADM\(Mat\).D Svcs C@Ottawa-Hull](mailto:+D.Svcs.C.4.Procurement-DC.Svcs.4.Acquisitions@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Subject: RE: RFP Process

Thanks. Have a good weekend.

From: +D Svcs C 4 Procurement - DC Svcs 4 Acquisitions@ADM(Mat).D Svcs C@Ottawa-Hull
Sent: May-17-19 12:56 PM
To: Allison LCol DE@ADM(PA).DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Cc: Brousseau HA@ADM(Mat).D Svcs C@Ottawa-Hull <HOLLY.BROUSSEAU@forces.gc.ca>
Subject: RE: RFP Process

Reviewing the file now. The RFP is likely to be posted early next week.

S.M. Wintle
Senior Contracting Manager
Director Services Contracting 4-2

From: Allison LCol DE@ADM(PA).DPAPO@Ottawa-Hull
Sent: May-17-19 8:17 AM
To: Brousseau HA@ADM(Mat).D Svcs C@Ottawa-Hull <HOLLY.BROUSSEAU@forces.gc.ca>; +D Svcs C 4 Procurement - DC Svcs 4 Acquisitions@ADM(Mat).D Svcs C@Ottawa-Hull <[P-OTG.DSvcsC4Proc@intern.mil.ca](mailto:OTG.DSvcsC4Proc@intern.mil.ca)>
Subject: RFP Process

In the absence of Holly, as noted in her e-mail, can anyone give me a status update WRT when our RFP will be posted?

D. Allison
LCol/Lcol
Director-General Military Strategic Communication FD/Directeur général – communication
stratégique militaire DF
Department of National Defence & Canadian Armed Forces/ Ministère de la Défense nationale et
Forces armées canadiennes
Douglas.Allison@forces.gc.ca / Tel : 613-944-3291 / Cel/Tel. Cell : 613-219-2361 / CSN/RCCC : 944-3291

From: [Allison LCol DE@ADM\(PA\).DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: May 24, 2019 7:14 AM
To: [Janzen BGen JH@ADM\(PA\).DPAPO@Ottawa-Hull](mailto:Janzen.BGen.JH@ADM(PA).DPAPO@Ottawa-Hull)
Subject: Fw: W6369-19-X033/A - re-solicitation

Sir,

For SA

Sent from my BlackBerry 10 smartphone on the Bell network.

From: Brousseau HA@ADM(Mat) D Svcs C@Ottawa-Hull <HOLLY.BROUSSEAU@forces.gc.ca>
Sent: Thursday, May 23, 2019 5:20 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Subject: W6369-19-X033/A - re-solicitation

Hello Doug,

I have finalized the RFP and have obtained the necessary approvals. I will be posting the RFP tomorrow. Once it is posted, I will notify you.

Regards,

Holly Brousseau

Agent supérieur d'approvisionnement, Direction – Contracts de services, D C Svcs 4-2-5
Défense nationale/Gouvernement du Canada
Holly.brousseau@forces.gc.ca / Tél. : 819-939-8478 / RCCC : 939-8478 / ATS : 1-800-467-9877

Senior Procurement Officer, Director Services Contracting, D Svcs C 4-2-5
National Defence / Government of Canada
Holly.brousseau@forces.gc.ca / Tél. : 819-939-8478 / RCCC : 939-8478 / ATS : 1-800-467-9877

From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: May 24, 2019 2:59 PM
To: [Janzen BGen JH@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Janzen.BGen.JH@ADM(PA).DPAPO@Ottawa-Hull)
Subject: FW: W6369-19-X033/A - re-solicitation

Sir,

La voila!

From: Brousseau HA@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: May-24-19 2:06 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: FW: W6369-19-X033/A - re-solicitation

Hello Doug,

I just posted the re-solicitation now. I will send you the link to the posted RFP on Monday once is it published as it 24 hours (or in this case the weekend) to be published.

Regards,
Holly

From: Brousseau HA@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: May 23, 2019 5:21 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: W6369-19-X033/A - re-solicitation

Hello Doug,

I have finalized the RFP and have obtained the necessary approvals. I will be posting the RFP tomorrow. Once it is posted, I will notify you.

Regards,

Holly Brousseau

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From: [Brousseau HA@ADM\(Mat\).D.Svcs.C@Ottawa-Hull](mailto:Brousseau.HA@ADM(Mat).D.Svcs.C@Ottawa-Hull)
Sent: May 28, 2019 2:43 PM
To: [Allison LCol.DE@ADM\(PA\).DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Subject: RE: W6369-19-X033A - RFP link

Hi Doug,

Please try this link:

<https://buyandsell.gc.ca/procurement-data/tender-notice/PW-19-00876027>

You should not have to log in to Buy and Sell to see the RFP.

Regards,
Holly

From: Allison LCol.DE@ADM(PA).DPAPO@Ottawa-Hull
Sent: May 27, 2019 6:12 PM
To: Brousseau HA@ADM(Mat).D.Svcs.C@Ottawa-Hull <HOLLY.BROUSSEAU@forces.gc.ca>
Subject: Re: W6369-19-X033A - RFP link

Holly, this requires a sign in to access. Am I able to do that?

Sent from my BlackBerry 10 smartphone on the Bell network.

From: Brousseau HA@ADM(Mat).D.Svcs.C@Ottawa-Hull
Sent: Monday, May 27, 2019 3:56 PM
To: Allison LCol.DE@ADM(PA).DPAPO@Ottawa-Hull
Subject: W6369-19-X033A - RFP link

Hello Doug,

Here is the link to the above RFP. This is for your reference only.

<https://buyandsell.gc.ca/tma/node/876027>

Regards,

Holly Brousseau

Agent supérieur d'approvisionnement, Direction – Contracts de services, D C Svcs 4-2-5
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From: [Brousseau HA@ADM\(Mat\)_D Svcs C@Ottawa-Hull](mailto:Brousseau_HA@ADM(Mat)_D_Svcs_C@Ottawa-Hull)
Sent: June 18, 2019 3:26 PM
To: [Allison LCol DE@ADM\(PA\)_DPAPO@Ottawa-Hull](mailto:Allison_LCol_DE@ADM(PA)_DPAPO@Ottawa-Hull)
Subject: W6369-19-X033/A
Attachments: DND W6369-19-X033_A Section 1 Technical Bid.pdf; W6369-19-X033-A - Technical Evaluation Grid.doc; W6369-19-X033- A - Consensus Grid.doc

Hello Doug,

The above solicitation period has closed and I received one bid. I am sending you the technical proposal for you and 2 other to evaluate. I am also attaching the evaluation grid and the consensus grid. I will need each evaluator to put their name on the top of their evaluation grid and to sign it. All evaluators will also need to sign the consensus grid which I am also attaching.

Please let me know if you have any questions.

Thank you,

Holly Brousseau

Agent supérieur d'approvisionnement, Direction – Contracts de services, D C Svcs 4-2-5
Défense nationale/Gouvernement du Canada
Holly.brousseau@forces.gc.ca / Tél. : 819-939-8478 / RCCC : 939-8478 / ATS : 1-800-467-9877

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Solicitation No.: W6369-19-X033/A Supplier: Emic Consulting Ltd.

Evaluation Team Member: [Insert Name or _____ (print full name)] (DO NOT SAVE EVALUATION IN RDIMS)

- I have read, understood, completed and signed a *CONFLICT OF INTEREST AND NON-DISCLOSURE CERTIFICATION* form: Yes ___ No ___
- I have read and understood the *INSTRUCTIONS TO EVALUATION TEAM MEMBERS ON BID HANDLING* document: Yes ___ No ___
- I have read and understood the *TECHNICAL EVALUATION – INSTRUCTIONS AND INFORMATION* document: Yes ___ No ___

Signature

Date

Solicitation No.: W6369-19-X033/A Supplier: Emic Consulting Ltd.

Evaluation Team Member: [Insert Name or _____ (print full name)] (DO NOT SAVE EVALUATION IN RDIMS)

TECHNICAL EVALUATION GRID – MANDATORY CRITERIA

In their proposals, Bidders must demonstrate they meet the following mandatory criteria by providing complete details of the experience, including name and description of client organization, scope, timeframe (from-to dates month/year), and description of the roles and responsibilities.

Failure to meet any of the mandatory criteria will render the bid non-compliant and it will be given no further consideration.

NO.	MANDATORY CRITERION	BID PREPARATION INSTRUCTIONS (IF ANY)	MET	NOT MET	NOTES (MANDATORY & MUST BE LEGIBLE): 1. Cross-reference to proposal (page, section, para); AND; 2. If applicable, calculation of months/years; AND 3. If not met, detailed explanation.
MT1	The bidder must demonstrate it has experience delivering a minimum of one (1) Target Audience Analysis (TAA) methodology courses/workshops in a group setting where the main topic of courses/workshops was the TAA methodology.	The Bidder must show where in their proposal this criterion is demonstrated as per the instructions above.			
MT2	The Bidder must demonstrate that its proposed lead instructor(s) has/have experience teaching a minimum of one (1) Target Audience Analysis (TAA) methodology workshops/courses.	The Bidder must show where in their proposal this criterion is demonstrated as per the instructions above.			

Solicitation No.: W6369-19-X033/A Supplier: Emic Consulting Ltd.

Evaluation Team Member: [Insert Name or _____ (print full name)]

(DO NOT SAVE EVALUATION IN RDIMS)

NO.	MANDATORY CRITERION	BID PREPARATION INSTRUCTIONS (IF ANY)	MET	NOT MET	NOTES (MANDATORY & MUST BE LEGIBLE): 1. Cross-reference to proposal (page, section, para); <u>AND</u> ; 2. If applicable, calculation of months/years; <u>AND</u> 3. If not met, detailed explanation.
MT3	The Bidder must demonstrate it has the capacity to: <ul style="list-style-type: none"> i. design a detailed curriculum and lecture/activity schedule for the course; ii. conduct examinations/assessments/individual and syndicate presentations at the mid and end-course points; and iii. provide the required learning materials, such as but not limited to, slide decks, handouts and reference documents (electronic or paper) for up to 24 students. 	The Bidder must provide details from previous courses delivered or examples of how they intend to meet the criterion.			
Compliant? (Yes/No)					

Solicitation No.: W6369-19-X033/A Supplier: Emic Consulting Ltd.

Evaluation Team Member: [Insert Name or _____ (print full name)] (DO NOT SAVE EVALUATION IN RDIMS)

TECHNICAL EVALUATION GRID – RATED CRITERIA

In their proposals, Bidders should demonstrate they meet the following rated criteria by providing complete details of the experience, including name and description of client organization, scope, timeframe (from-to dates month/year), and description of the roles and responsibilities.

NO.	RATED CRITERION	BID PREPARATION INSTRUCTIONS (IF ANY) & WEIGHTING (POINTS) / SCORING GUIDELINES	POINTS	SCORE	NOTES (MANDATORY & MUST BE LEGIBLE): 1. Cross-reference to proposal (page, section, para); <u>AND</u> 2. If applicable, calculation of months/years; <u>AND</u> 3. If applicable, calculation of points; <u>AND</u> 4. If score given differs from proposal, detailed explanation.
			Scoring		
RT1	The bidder should demonstrate it has experience teaching more than one (1) Target Audience Analysis (TAA) methodology courses/workshops in a group setting where the main topic of courses/workshops was the TAA methodology.	The Bidder must show where in their proposal this criterion is demonstrated as per the instructions above.	2 to 3 workshops/courses = 10pts 4 to 5 workshops/courses = 20pts 6 + workshops/courses = 30pts		
RT2	The Bidder should demonstrate that its proposed lead instructor(s) has/have experience teaching TAA methodology workshops/courses.	The Bidder must show where in their proposal this criterion is demonstrated as per the instructions above.	2 to 3 workshops/courses = 10pts 4 to 5 workshops/courses = 20pts 6 + workshops/courses = 30pts		

Solicitation No.: W6369-19-X033/A Supplier: Emic Consulting Ltd.

Evaluation Team Member: [Insert Name or _____ (print full name)]

(DO NOT SAVE EVALUATION IN RDIMS)

NO.	RATED CRITERION	BID PREPARATION INSTRUCTIONS (IF ANY) & WEIGHTING (POINTS) / SCORING GUIDELINES	POINTS	SCORE	NOTES (MANDATORY & MUST BE LEGIBLE): 1. Cross-reference to proposal (page, section, para); <u>AND</u> 2. If applicable, calculation of months/years; <u>AND</u> 3. If applicable, calculation of points; <u>AND</u> 4. If score given differs from proposal, detailed explanation.
			Scoring		
RT3	The Bidder should demonstrate it has provided TAA methodology workshops/courses to NATO organizations and/or allies.	The Bidder must show where in their proposal this criterion is demonstrated as per the instructions above.	Training provided to at least one NATO ally /organization = 10 pts Training provided to NATO ally(ies) AND NATO organization(s) = 20 pts		
RT4	The bidder should demonstrate it has provided TAA training to a military audience.	The Bidder must show where in their proposal this criterion is demonstrated as per the instructions above.	1 to 2 workshops/courses = 10pts 3 to 4 workshops/courses = 20pts 5+ workshops/courses = 30pts		
POINTS MIN = Overall Pass Mark – 44 points POINTS MAX = Total Possible Score – 110 SCORE = Total Actual Score					

Signature _____

Date _____

From: [Allison LCol DE@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Allison.LCol.DE@ADM(PA).DPAPO@Ottawa-Hull)
Sent: June 20, 2019 7:09 AM
To: [Janzen BGen JH@ADM\(PA\) DPAPO@Ottawa-Hull](mailto:Janzen.BGen.JH@ADM(PA).DPAPO@Ottawa-Hull); [Marsaw MB@ADM\(PA\) DGPASP@Ottawa-Hull](mailto:Marsaw.MB@ADM(PA).DGPASP@Ottawa-Hull); [Grover Cdr DH@ADM\(PA\) DPALC@Ottawa-Hull](mailto:Grover.Cdr.DH@ADM(PA).DPALC@Ottawa-Hull)
Subject: Fw: W6369-19-X033/A
Attachments: W6369-19-X033-A - Assumptions from financial proposal.docx

Sir,

Attached is the lone submission for the RFP. We must evaluate it IAW the attached forms.

Meghan,

Could I ask that you act as an evaluator for this?

Diane,

Heads up for planning purposes. Note suggested dates for different options

Sent from my BlackBerry 10 smartphone on the Bell network.

From: Brousseau HA@ADM(Mat) D Svcs C@Ottawa-Hull <HOLLY.BROUSSEAU@forces.gc.ca>
Sent: Wednesday, June 19, 2019 11:46 AM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull
Subject: FW: W6369-19-X033/A

Hello Doug,

Further to Emic's proposal, here is a list of assumptions from their financial proposal.

Regards,
Holly

From: Brousseau HA@ADM(Mat) D Svcs C@Ottawa-Hull
Sent: June 18, 2019 3:26 PM
To: Allison LCol DE@ADM(PA) DPAPO@Ottawa-Hull <DOUGLAS.ALLISON@forces.gc.ca>
Subject: W6369-19-X033/A

Hello Doug,

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Please let me know if you have any questions.

Thank you,

Holly Brousseau

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Page 492

**is withheld pursuant to sections
est retenue en vertu des articles**

19(1), 20(1)(b), 20(1)(c)

**of the Access to Information Act
de la Loi sur l'accès à l'information**

**Pages 493 to / à 500
are withheld pursuant to sections
sont retenues en vertu des articles**

20(1)(b), 20(1)(c)

**of the Access to Information Act
de la Loi sur l'accès à l'information**