

THIS DOCUMENT CONTAINS A SECURITY REQUIREMENT

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PART 1 - GENERAL INFORMATION

1. Introduction

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

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

The Annexes include the Statement of Work, the Basis of Payment, Minimum Hourly Wage Rates, Team Member Roles, the Security Requirements Checklist, and Non-Performance Credits.

2. Summary

- (i) Service Canada requires the services of a Contractor to provide and manage a completely self-contained and integrated team of fluently bilingual information centre specialists, which works within an infrastructure provided and managed by Service Canada to provide the following for current and future business needs:
 - (1) Professional, knowledgeable, and bilingual information officers to respond to enquiries for 1-800 O-Canada and to respond to calls and emails for project specific customized information solutions on behalf of other GC organizations and programs; and
 - (2) Information management specialists to manage and update knowledge repositories used by front line staff.
- (ii) The period of the contract is from November 30, 2013 to November 29, 2016 with the irrevocable option to extend the term of the Contract by up to three (3) additional one (1) year periods.
- (iii) There is a security requirement associated with this requirement. For additional information, consult Part 6 - Security, Financial and Other Requirements, and Part 7 - Resulting Contract Clauses. Bidders should consult the "*Security Requirements for PWGSC Bid Solicitations - Instructions for Bidders*" (<http://www.tpsgc-pwgsc.gc.ca/app->

[acq/lc-pl/lc-pl-eng.html#a31](#)) document on the Departmental Standard Procurement Documents Web site.”

- (iv) Pursuant to section 01 of Standard Instructions 2003, Bidders must submit a complete list of names of all individuals who are currently directors of the Bidder. Furthermore, as determined by the Special Investigations Directorate, Departmental Oversight Branch, each individual named on the list may be requested to complete a Consent to a Criminal Record Verification form.
- (v) The requirement is limited to Canadian goods and/or services.

3. Debriefings

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

PART 2 - BIDDER INSTRUCTIONS

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 (2012-11-19) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation

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

Delete: sixty (60) days

Insert: two hundred and seventy (270) days

1.1 Manual SACC Clauses

NUMBER	DESCRIPTION	DATE
A7035T	List of Proposed Subcontractors	2007-05-25

2. Submission of Bids

Bids must be submitted only to Public Works and Government Services Canada (PWGSC) Bid Receiving Unit by the date, time and place indicated on page 1 of the bid solicitation.

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

3. Enquiries - Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than fourteen (14) 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 questions or may request that the Bidder do so, so that the proprietary nature of the question is eliminated, and the enquiry can be answered with copies to all bidders. Enquiries not submitted in a form that can be distributed to all bidders may not be answered by Canada.

4. Applicable Laws

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

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

5. Bidders' Conference

A bidders' conference will be held at 47 Clarence Street, Ottawa ON on February 5, 2013. The conference will begin at 10:00am, on the third floor. Register at reception. The scope of the requirement outlined in the bid solicitation will be reviewed during the conference and questions will be answered. It is recommended that bidders who intend to submit a bid attend or send a representative. Bidders may also participate via teleconference. For teleconference details, contact the Contracting Authority at susan.westall@pwgsc.gc.ca.

Bidders are requested to communicate with the Contracting Authority before the conference to confirm attendance. Bidders should provide, in writing, to the Contracting Authority, the names of the person(s) who will be attending and a list of issues they wish to table at least two (2) working days before the scheduled conference.

Any clarifications or changes to the bid solicitation resulting from the bidders' conference will be included as an amendment to the bid solicitation. Bidders who do not attend will not be precluded from submitting a bid.

6. Optional Site Visit

It is recommended that the Bidder or a representative of the Bidder visit the work site. Arrangements have been made for a tour of the work site. The site visit will be held on February 5, 2013 at 10:00am at 47 Clarence Street, Ottawa ON. Bidders must communicate with the Contracting Authority no later than two (2) days before the scheduled visit to confirm attendance and provide the name(s) of the person(s) who will attend. Bidders who do not confirm attendance and provide the name(s) of the person(s) who will attend as required will not be allowed access to the site. Bidders will be requested to sign an attendance form. Bidders who do not attend or send a representative will not be given an alternative appointment but they will not be precluded from submitting a bid. Any clarifications or changes to the bid solicitation resulting from the site visit will be included as an amendment to the bid solicitation.

7. Basis for Canada's Ownership of Intellectual Property

Service Canada has determined that any intellectual property arising from the performance of the Work under the Contract will vest in Canada, on the following grounds: *the main purpose of the Contract, or of the deliverables contracted for, is to generate knowledge and information for public dissemination.*

The Intellectual Property Rights of any Work under the Contract involving the preparation of a database (including software) or other compilation, using information or data supplied by Canada, will belong to Canada.

PART 3 - BID PREPARATION INSTRUCTIONS

1. Bid Preparation Instructions

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

Section I: Technical Bid (6 hard copies)

Section II: Financial Bid (1 hard copy)

Section III: Certifications (1 hard copy)

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

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

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

In April 2006, Canada issued a policy directing federal departments and agencies to take the necessary steps to incorporate environmental considerations into the procurement process [Policy on Green Procurement](http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html) (<http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html>). To assist Canada in reaching its objectives, bidders are encouraged to :

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

Section I: Technical Bid

In their technical bid, bidders should demonstrate their understanding of the requirements contained in the bid solicitation and explain how they will meet these requirements. Bidders should demonstrate their capability and describe their approach in a thorough, concise and clear manner for carrying out the work.

The technical bid should address clearly and in sufficient depth the points that are subject to the evaluation criteria against which the bid will be evaluated. Simply repeating the statement contained in the bid solicitation is not sufficient. In order to facilitate the evaluation of the bid, Canada requests that bidders address and present topics in the order of the evaluation criteria under the same headings. To avoid duplication, bidders may refer to different sections of their bids by identifying the specific paragraph and page number where the subject topic has already been addressed.

Section II: Financial Bid

Bidders must submit their financial bid in accordance with Basis of Payment in Annex "B". The total amount of Goods and Services Tax or Harmonized Sales Tax must be shown separately, if applicable.

Solicitation No. - N° de l'invitation
G9420-120003/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur
cy007

Client Ref. No. - N° de réf. du client

File No. - N° du dossier
G9420-12-0003

CCC No./N° CCC - FMS No/ N° VME
cy007G9420-120003

Section III: Certifications

Bidders must submit the certifications required under Part 5.

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

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.

1.1 Technical Evaluation

1.1.1 Stage 1 - Mandatory Technical Criteria

Bidders must demonstrate in their proposals how they meet all the mandatory requirements. Proposals not meeting all of the mandatory requirements will be given no further consideration and will be declared non-responsive. Proposals meeting the mandatory requirements will go on to be evaluated for Point-Rated Technical Criteria.

M1 The Bidder **MUST** provide a corporate profile demonstrating their corporate knowledge and experience in the provision of contact centre services similar to those defined in the Statement of Work – Annex A. The Bidder must include the full legal name of the firm submitting the proposal, including all joint venture, consortia, partners or subcontractors, as applicable.

M2 Bidders **MUST** provide a statement in which they agree to establish (if one does not already exist), thirty days prior to the start of work under any resultant contract, a fully operational and functional office in the National Capital Region that will provide, at a minimum, the required recruitment and testing functions as described in the Statement of Work – Annex A.

M3 Bidders **MUST** demonstrate a minimum of four (4) consecutive years of experience within the last ten (10) years from the closing date of this RFP, in resourcing and managing contact centres of similar size or larger. "Similar size" contact centres for the purposes of this requirement is defined as contact centres for which the firm supplied and managed teams of no fewer than 75 individuals at one given point in time for a period of at least 6 months for inbound call enquiries.

M4 Bidders must be capable of operating in a dynamic, on demand environment, providing quick turnaround times to meet customized information solutions on short notice. To demonstrate that they are able to meet this requirement, Bidders must provide a sample project, completed or ongoing within the last five (5) years from the closing date of this RFP, where they have provided a minimum of fifteen (15) resources within five (5) working days of the resource request for a new or existing project. Bidders must provide the following details for the project provided:

- a) A brief description of the project;
- b) The number of resources provided; and
- c) The length of time it took to provide the required resources

1.1.2 Stage 2 - Point Rated Technical Criteria

Rated Criteria		Max Score	Pass Threshold
Bidder's Corporate Capability			
R1	Overall Presentation and Format of Proposal	4	-
R2	Corporate Commitment and Strategy Alignment	15	10
R3	Project Experiences	20	14
R4	Information Management Experience	15	7.5
R5	Risk Management	15	10
R6	Quality Assurance and Quality Control (QA/QC)	20	14
R7	Relationship Management	10	7
R8	Bidder's Understanding of Public Sector Contact Centres	10	5
Service Requirements			
R9	CEC Scenario	20	12
R10	Management Team	20	12
R11	Recruitment Methodology	20	14
R12	Training and Professional Development	15	10
R13	Team Member Retention Strategy	20	14
R14	Bidder's Automated Time Capture and Reporting System	10	5
R15	Innovation and Value-Added	6	-
R16	Additional Requirement for Contact Centre Resourcing Beyond NCR	10	5
Total Proposal Score and Threshold (based on 70% of maximum score)		230	161

R1 Overall Presentation and Format of Proposal (maximum points 4 - no pass threshold)

The overall format and presentation of the Proposal should provide thorough, concise and clear responses, and clear linkages to substantiating information. The Bidder should:

- Include a table of contents with associated page numbering;
- Be organized and follow the same order as the RFP and refer to the numbering used in the RFP; and
- Provide concise and direct answers to RFP requirements independent of generic promotional materials.

R2 Corporate Commitment and Strategy Alignment (maximum points 15, pass threshold 10)

The Bidder should describe its commitment to this requirement by providing the following:

1. Corporate Commitment:

The Bidder's potential corporate and administrative support for the requirement and the Operations Management Team (OMT) as demonstrated by:

- a. The lines of communication to designated individuals at the company's corporate office(s), their level of decision-making authority, and their level of involvement in this requirement;
- b. The size, skills, and experience of the Bidder's corporate team - with emphasis on financial management, reporting, recruitment and training; and
- c. The extent of the local functional office (and number of testing/screening workstations) that the Bidder currently has or will establish within thirty (30) days prior to the start of the work.

2. Corporate Strategy Alignment:

The degree to which the services outlined in the Bidder's Proposal are integral and strategic to its business objectives and its vision for the successful delivery of these services in its long term plans. The bid should include:

- a. The number of years in providing a team/or team support services to information services or contact centre businesses;
- b. The relationship of this requirement to the Bidder's core services; and
- c. The ongoing development plans for the provision of services similar to this requirement.

R3 Project Experiences (maximum points 20, pass threshold 14)

Bidders should provide details for two (2) previous projects. At minimum, one of the projects must be completed or ongoing within the last five (5) years of the closing date of this RFP; and one project must be completed or ongoing within the last eight (8) years of the closing date of this RFP. For each project identified, the Bidder must have managed a team of a minimum of seventy-five (75) individuals for a period of at least six (6) months for inbound call enquiries.

For each project, Bidders should provide:

1. Project Description

- a. Name and address of the client;
- b. A detailed description of the project including dates and duration, scale and scope, total dollar value, and categories and numbers of resources provided; and
- c. Name, title, role, and current telephone number of the primary client contact. This person may be contacted to verify details provided.

2. Services Provided

A description of the following:

- a. Bilingual services provided;
- b. Recruitment;
- c. Training programs;
- d. Strategy for long term retention of skilled and/or key team members;
- e. Inbound call enquiry services;
- f. Web / e-mail query services;
- g. Information dissemination services;
- h. Query research services; and
- i. Information-based content management services – updating agent reference information.

3. Monitoring and Control

A description of the following:

- a. How performance standards were monitored for quality and/or customer/caller satisfaction;
- b. How the Bidder worked with the client to meet their specific operational needs; and
- c. How the Bidder developed and implemented quality assurance and quality control (QA/QC) programs for the project.

R4 Information Management Experience (maximum points 15, pass threshold 7.5)

Bidders should be capable of maintaining content of information databases used by the call agents. To demonstrate this core capability, Bidders should provide one sample project, completed or ongoing within the last five (5) years from the closing date of this RFP, where they have provided dedicated resources to maintain the content of information databases utilized by a contact centre.

Bidders should provide the following:

- a. A brief description of the project, including the dates and duration of the project
- b. The number of editor and information management officers provided; and
- c. A description of the content being maintained, frequency of updates, and language of content.

R5 Risk Management (maximum points 15, pass threshold 10)

Effective risk management will reduce the impact of risks on the performance of the contract and increase the reliability of the service provided. Service Canada has identified eight (8) risks (listed below) related to this requirement. In addition, the Bidder should identify two additional risks.

For each risk, the Bidder should describe:

1. Their understanding of the risk, their assessment of its importance, impact and likelihood of occurrence ("low", "medium" and "high");
2. How they propose to monitor and control these risks; and
3. How they propose to mitigate these risks to reduce or eliminate them.

Risk 1 - Adaptability

Inability of the Bidder's proposed service delivery model to effectively respond to changes in size and scope, development timelines, technological change, and service complexity of evolving client needs.

Risk 2 - Ability to Attract Workforce

Inability to attract qualified team members due to lack of available qualified candidates within the geographic region or the target workforce's wage/benefits demands increasing beyond the Bidder's proposed wage/benefits package.

Risk 3 - Capacity

Inability of the Bidder to accommodate increased volumes due to growth (steady or sudden surges), which could significantly increase the demand for the size of the team.

Risk 4 - Retention

Inability to retain qualified team members to successfully sustain operational objectives (impacting costs of continuous recruitment, training and development).

Risk 5 - Attendance / Absenteeism

Impact on services due to uncontrolled and unanticipated absences.

Risk 6 - Firm's Corporate Focus

Change in Bidder's corporate and business focus and resultant diminished senior executive commitment to long-term objectives of the requirement.

Risk 7 - Security Risks

- breaches in access to, or unauthorized use of, confidential databases by the Contractor's team members;
- failure to protect the confidentiality of calls and callers; and
- inappropriate use of the Internet or electronic networks in a manner that could damage the reputation of the service, Service Canada or the Government of Canada.

Risk 8 - Issues Management – Staffing

Inability to avoid and resolve urgent staffing issues in a timely fashion.

Risk 9 – to be identified and described by the Bidder

Risk 10 – to be identified and described by the Bidder

R6 Quality Assurance and Quality Control (QA/QC) (maximum points 20, pass threshold 14)

The Bidder should describe its QA/QC program that ensures consistent service quality by providing:

1. An outline of the program including implementation and overview of the ongoing maintenance processes;
2. The method and frequency of QA/QC audits and how feedback information (e.g. operational reports, exit interviews, etc.) is used to implement changes and improve business processes; and,
3. How the program is linked to recruitment, screening, assessment, career development, training, and retention of team members.

The Bidder should identify two (2) lessons learned from its QA/QC process and describe how they led to improvements in client service.

R7 Relationship Management (maximum points 10, pass threshold 7)

The desired relationship includes a strong degree of interaction between the Bidder's OMT and Service Canada, a strong corporate commitment to Service Canada and a strong corporate and office support for its OMT. This relationship will provide clear channels for communicating issues, agreeing on resolutions and for updates on new services and technologies.

A. Relationship Management Strategy

The Bidder should provide its proposed strategy for building an effective and positive working relationship between the Bidder's team and Service Canada. The strategy should address the following:

1. Service Canada's authority for managing the CEC;
2. The Bidder's authority for managing its service team;
3. The Bidder's responsibility to Service Canada and to its own OMT to provide effective corporate support in the areas of recruitment, training, finance and service quality;
4. How consistency and effectiveness of communication between all aforementioned parties is ensured;
5. How interaction among team members in different functional activities is encouraged to develop innovative ideas and resolve problems; and
6. The processes and methods of interaction (email, written communication, meetings, information sessions, conflict resolution procedures, problem-solving mechanisms, etc.) between:
 - a. the Bidder and its own team members; and
 - b. the Bidder and Service Canada.

B. Account Management:

The Bidder should provide:

1. The name and brief profile of the executive directly responsible for the Service Canada account including their proposed roles and responsibilities;
2. The frequency with which the Bidder proposes that the executive identified above and Service Canada's senior executive will meet to review performance and other issues; and
3. An organization chart that shows the reporting structure of the executive, their account management team and their reporting line.

R8 Bidder's Understanding of Public Sector Contact Centres (maximum points 10, pass threshold 5)

Contact centres are an increasingly important primary interface in government service delivery to the public and relationship management with citizens. They are also adopting a wide range of contact media, as new technologies become available to provide service in new and innovative ways; however, government contact centres have significantly different operating environment than most commercial contact centres.

While commercial contact centres often focused on a narrowly defined purpose, government information centre often deal with a much broader range of queries in terms of subject matter, sensitivity and confidentiality. As a result, a significant proportion of these calls may not be predictable. Operational objectives must be undertaken within the context of public policy objectives, which remains paramount. Further, the databases and tools which provide the team with the information on which they base their responses must not only reflect thousands of programs and initiatives of hundreds of Government of Canada organizations but they must do so in an intuitive and efficiently navigable manner.

The CEC also provides services on behalf of various Government of Canada organizations on a variety of special project initiatives. This results in operational requirements for flexibility in resource sizing where services are required on short notice.

Bidders should present their understanding of public sector contact centres by providing the following:

1. Identification and description (max 2 pages) of the critical success factors, risks and challenges associated with the operation of public-sector contact centres;
2. A description (max 2 pages) of the Bidder's perspectives on the future direction (e.g. 5 years) of the information services industry including:
 - a. future directions of public sector information services;
 - b. integration of new access methods, processes and mechanisms; and
 - c. contact centre technology trends.
3. A description (max 2 pages) of the Bidder's approach to managing full-time and part-time staffing, shift preferences and scheduling processes within a dynamic and high resource fluctuating environment.

R9 CEC Scenario (maximum points 20, pass threshold 12)

To demonstrate its understanding of CEC operational requirements, the Bidder should provide a response to the following scenario:

In three weeks, CEC will launch a telephone information service on behalf of a Service Canada client department that requires twenty four (24) Information Officers to provide information service delivery to Canadian citizens. The client department's program will undergo changes that will affect benefits to some low-income earners. General information will be available through 1 800 O-Canada and requests for more detailed program enquiries will be transferred to the newly launched telephone information service, which will be established as a second tier project. It is not known what the call volume impacts will be on the 1 800 O-Canada service, which already has very little capacity for additional enquiries based on its current number of resources. In addition, because it is not clear how much time will be required to inform all program users who are affected by the announced changes, the length of the project duration is not known. It is anticipated that it will take 5 days to train agents on the Tier 2 project. The Information Management Centre will update and maintain the project databases (knowledge repository).

The Bidder's response should describe how it would:

- Fulfill the resource requirements within the appropriate response times;
- Update and maintain information;
- Interact with the Bidder's corporate office and Service Canada Project Authority;
- Interact with the management teams in Contact Centre Operations and the Information Management Centre;
- Address sensitivity of the Citizen's concerns, privacy and need for information;
- Complete required training;
- Identify opportunities and solutions that will enhance service delivery;
- Meet new requirements without jeopardizing ongoing commitments and deliverables;
- Address critical time sensitive human resource issues without jeopardizing ongoing commitments and deliverables; and
- Address financial implications if any, to Service Canada.

R10 Management Team (maximum points 20, pass threshold 12)

The Bidder's management team should consist of the following:

- an off-site management team (i.e. on the Bidder's premises) responsible for the recruitment, testing, training, and admin functions; and,
- an on-site Operations Management Team (OMT) (i.e. located with the CEC) responsible for the management of the Bidder's resources.

A. Off-Site Management Team

The Bidder should describe their proposed Off-Site Management team and their roles and responsibilities. At minimum the team should be comprised of:

- a. Two (2) Recruitment resources – recruits resource candidates based on the need as identified in the Resource Requests;
- b. Testing (such as language proficiency) resource(s);
- c. Orientation resource(s); and,
- d. Security clearance and other administrative resource(s).

The Bidder should describe how it will manage and communicate with team members potentially situated in various locations within the National Capital Region.

B. On-Site Operations Management Team (OMT)

The Bidder should describe their proposed OMT team and their roles and responsibilities. At minimum the team should be comprised of:

- a. One (1) Project Manager with a named Alternate;
- b. One (1) Administrative Support officer; and,
- c. Two (2) Resource Coordinators – manages the coordination of all on-site contractor personnel requirements.

The Bidder should provide the curriculum vitae and language capability of their proposed OMT resources named above. The OMT must be capable of providing bilingual service of equal quality at all times.

The Bidder should describe any circumstances where an increase in the size of the OMT would be required.

The Bidder should describe the means by which the OMT will:

- a. Ensure that the Project Authority can contact an OMT representative during hours of operation and all off-hours including weekends and holidays;
- b. Have authority to act on task, resource, and financial commitments and expense authorizations;
- c. React to potential changes in call volumes and service quality and provide Service Canada with timely and appropriate recommendations to address them without jeopardizing ongoing commitments and deliverables; and
- d. Resolve problems promptly and effectively.

R11 Recruitment Methodology (maximum points 20, pass threshold 14)

The Bidder should provide its proposed approach for the following:

1. Candidate inventory management – ensuring a sufficient number of people are pre-qualified and screened to respond to business activity fluctuations and special projects;

2. Inventory management system including:
 - a. electronic vs. manual support records system;
 - b. how the database / inventory of team members is monitored; and
 - c. the frequency of updates for maintaining the currency of information.
3. Proposed recruitment methods;
4. Quality control – ensuring the quality of recruits is consistent with the required service quality and language proficiency standards. The Bidder should provide its: language proficiency assessment methods; testing procedures and standards; and structured interview techniques and skills evaluation processes.
5. Effective and rapid turnaround for un-forecasted recruitment requirements;
6. Replacement of team members who do not meet required performance standards; and
7. Corporate support to the OMT for recruitment.

R12 Training and Professional Development (maximum points 15, pass threshold 10)

The Bidder should provide its proposed approach to training, orientation and professional development for new and existing team members. The approach should explain how the proposed methods will:

- Improve performance, service quality, and productivity;
- Provide a stable working environment;
- Provide higher retention rates; and
- Not interfere with ongoing business operations.

The approach should detail:

1. Different methods of training e.g. group versus individual custom training; and,
2. Training and professional development opportunities for team members:

R13 Team Member Retention Strategy (maximum points 20, pass threshold 14)

The Bidder should provide a Team Member Retention Strategy to ensure that the knowledge and experience of team members is retained. The Bidder's strategy should include details on how the Bidder proposes to retain team members through:

- a. Wages and benefits;
- b. The criteria governing how team members are placed and moved within all remuneration scales;
- c. Career planning and advancement;
- d. Performance and long-service incentives;
- e. Recognition and awards programs;
- f. Career counseling services;
- g. Team building activities;
- h. Internal communication programs; and
- i. Other benefits.

R14 Bidder's Automated Time Capture and Reporting System (maximum points 10, pass threshold 5)

The Bidder should provide a detailed description of its proposed automated time capture and reporting system. At a minimum The Bidder should provide:

1. A description of the system;
2. The reporting and control features of the system (with samples);
3. Procedures for completion and approval of the time sheets including the approval of overtime, leave and training; and
4. The methods used to ensure quality of invoices and supporting documentation (e.g. timesheets).

The Bidder should describe how their system can:

- Track cumulative totals by contract year, fiscal year and reporting periods (quarters, etc)
- Provide alerts for key deliverables (such due dates linked to performance reviews, security clearance validity periods, salary adjustments, etc)
- Track and report on activities including interviews, exits, resources requests, training, security clearances, salary adjustments, etc
- Produce daily operational information
- Produce weekly invoices and supporting documentation
- Provide sub-totals and totals by position, project, project grouping, group, work unit

R15 Innovation and Value-Added (maximum points 6, no pass threshold)

The Bidder should provide innovative ideas that could contribute to the overall quality of operations.

R16 Additional Requirement for Contact Centre Resourcing Beyond NCR (maximum points 10, pass threshold 5)

The Bidder should describe how they would establish and sustain resourcing for an additional contact centre located outside of the National Capital Region by responding to the following scenario:

Service Canada wishes to establish a contact centre in another province and will provide accommodation and the technology as per the Ottawa CEC. Service Canada will also provide accommodation for on-site management of recruitment, testing, training, and administration functions, along with the Contractor's OMT and Operations Support Unit as needed. The service will be for the 1 800 O-Canada services. The contact centre is expected to contain the following bilingual resources:

- Two (2) Team Leader
- Seven (7) Supervisors
- Ninety-two (92) Information Officers
- Eight (8) Senior Information Officers
- Two (2) Administration Support
- One (1) Training Coordinator
- One (1) Training Facilitator

The Bidder's response should include the following:

- Approach to staffing and sustaining the resources;
- How it will interface with the Bidder's NCR office;
- How it will leverage the Bidder's existing OMT, Operations Support Unit (OSU), management team, procedures, and systems; and

- Estimated resource allocation and monthly cost for the additional OMT, OSU, and management as required.

1.2 Stage 3 - Financial Evaluation

Bidders must provide, as part of their Financial Proposal, a detailed description of the pricing methodology that they commit to employ for the duration of the contract which will cover all categories of current or future resources, whether the Bidder will deliver them directly or through a subcontractor.

The bidder must include the following information and pricing information:

- A. A firm, all inclusive, monthly management fee for the period from November 30, 2013 to November 29, 2016:
1. The bidder must provide a full description of the monthly management fee and the manner by which it was calculated.
 2. The monthly fee is to cover all costs required to deliver the service outlined in this document (other than the team member billing rates detailed in the Bidder's proposal) - including the Bidder's senior representatives assigned to this account, the Bidder's OMT and all management support systems, methods, procedures and mechanism that will be used to facilitate the functioning of this requirement.
- B. Firm Hourly Billing rates for each team member category for the period from November 30, 2013 to November 29, 2016, including:
1. Up to five (5) progressive rates (or levels) for each team member based on a minimum and a maximum level and one (1) to three (3) intermediate levels. In the team Member Billing Rates - Table 1 in Annex "B" (to be completed by Bidder), the billing rates for the team members increase from level "A" (the minimum) to level "E" (the maximum).
 2. The criteria (such as length of service experience, superior performance, etc.) which the Bidder will apply for determining team members' progression within these levels (Note: all of the following - where they have a financial implication to Canada - require the prior written authority of the Project Authority: additions or substitutions of new team members; promotion of existing team members within a category; or transfers of team members between categories).
 3. The criteria which the Bidder will apply for determining any progression of team members from one team category to another.
 4. An explanation of how the rates were calculated for the service bid together with the completed team Member Wage Rate - Table 2 in Annex "B". Note: these rates will be the minimum wages with which the Bidder can remunerate its team member (for their category and level) without advance, expressed and detailed written agreement from Canada. These wage rates in Annex "B", for level "A", must be equal to or greater than the rates listed in Annex "C".
 5. Provisions for ongoing increases or decreases within the current team member configuration and/or the addition of altogether new categories of team members - including reference rates and percentage or amount or margins for any new team member categories that may need to be created (Note: as new business needs arise or change over the life of the contract, or as the service itself and the technologies mature, Canada and the Contractor may jointly assess the need to add or substitute new categories of team members to the Contractor's team. No new categories will be added without the expressed advance and written approval of the Contracting Authority.)

The above fees and billing rates reflect the possibilities of change on both the operating hours and the size of the team. In other words, these rates will not be changed, regardless of such operational changes, such as, but not limited to:

1. Long-term growth or seasonal fluctuations in enquiry volumes, which could expand enquiry volume and team member size to several times current levels.
2. Decline in demand for special projects that reduces the size of the Bidder's team below current levels.
3. Changes to the hours of access for the majority of service including but not limited to the following:
 - a) Expanding access into evenings, Saturdays, weekends and/or holidays; and
 - b) Expanding access to longer days (such as 24/7).Expanded hours are currently in use, on demand, for existing and new special projects.

1.3 Stage 4 - Calculation of Financial Proposal

Step 1: Total Evaluated Price (TEP)

The Contracting Authority will evaluate the financial proposal using the information supplied by the bidder in Annex "B" and by adding the following: Annual Management Fee and the total of the Annual Team Member Billing Rates.

A. Annual Management Fee

For evaluation purposes only, the annual management fee will be calculated by multiplying the monthly management fee supplied in Annex "B" by 12.

B. Total of the Annual Team Member Billing Rates

1. Determine the average team member billing rate for each team member category. This will be calculated as the simple average of all billing rates quoted by the Bidder within the range for each team member category (i.e. The average of classification levels A through E in Annex "B" - Table 1.)
2. Calculate the annual billing for each team member by multiplying the average team member billing rate by the "Typical Annual Hours Used" as appears in "Table: Typical Annual Hours Used and Annual Billing Calculation" below.
3. Add together all team member annual billing amounts. This is the total of the Annual Team Member Billing Rates for the purposes of evaluation.

Table: Typical Annual Hours Used and Annual Billing Calculation

Team Member Category	Typical Annual Hours Used	Average Team Member Hourly Billing Rate	Annual Billing
Team Leader - Contact Centre Operations	9,375		
Team Leader - Information Management	5,625		
Team Leader - Editing and Linguistic Services	1,875		
Team Leader - Operations Support	1,875		
Supervisor	46,875		
Information Officer	478,125		
Senior Information Officer	37,500		
Information Management Officer	37,500		
Senior Information Management Officer	5,625		
Editor	11,250		
Senior Editor	9,375		
Research Officer	22,500		
Coordinator	7,500		
Reporting Officer	7,500		
Training Coordinator	1,875		
Training Facilitator	1,875		
Administrative Support / Receptionist	3,750		
Reporting / Database Expert	3,750		
Web Content Creation Specialist	5,625		
User Experience and Interface Design Specialist	1,875		
Business Analyst	1,875		
Project Manager	1,875		
Quality Control Specialist	1,875		
Total	706,875		

Standard Annual Hours: 1,875 based on 250 days x 7.5 hours

The amounts given for the table above are for evaluation purposes only. While every attempt has been made to make these amounts as representative as possible to current team member strength, they do not necessarily reflect the total amount of team services required. Further, no commitment is implied by these numbers as to the dollar magnitude of this requirement.

Step 2: Calculation of Total Aggregate Price

The Contracting Authority will calculate the Total Aggregate Price (TAP) by adding the Annual Management Fee (as calculated in A of Step 1) and the total of the Annual Team Member Billing Rates (as calculated in B of Step 1).

1. Basis of Selection

1. To be declared responsive, a bid must:
 - a. comply with all the requirements of the bid solicitation;
 - b. meet all mandatory criteria;
 - c. obtain the required pass threshold points specified for each criteria for the technical evaluation; and
 - d. obtain the required pass threshold of 161 points overall for the technical evaluation criteria which are subject to point rating. The rating is performed on a scale of 230 points.
2. Bids not meeting (a) or (b) or (c) and (d) 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 55% for the technical merit and 45% 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 55%.
5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 45%.
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 55/45 ratio of technical merit and price, respectively. The total available points equals 135 and the lowest evaluated price is \$45,000 (45).

Basis of Selection - Highest Combined Rating Technical Merit (55%) and Price (45%)

		Bidder 1	Bidder 2	Bidder 3
Overall Technical Score		212/230	162/230	175/230
Bid Evaluated Price		\$55,000.00	\$50,000.00	\$45,000.00
Calculations	Technical Merit Score	212/230 x 55 = 50.70	162/230 x 55 = 38.74	175/230 x 55 = 41.85
	Pricing Score	45/55 x 45 = 36.82	45/50 x 45 = 40.5	45/45 x 45 = 45
Combined Rating		87.52	79.24	86.85
Overall Rating		1st	3rd	2nd

2. Tiebreaker Determination

In the event that more than one (1) proposal has an equal combined score of technical merit and price following the technical and financial evaluation, the proposal with the lowest evaluated annual management fee will be recommended for contract award. In the event that the lowest evaluated annual management fee is equal, then the proposal with the lowest evaluated total annual team member billing amount will be recommended for contract award.

3. Conditions Precedent to Contract Award

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

(a) Within ten (10) business days of request, the Bidder must provide a draft Transition Plan in accordance with Section 11.0 of the Statement of Work.

PART 5 - CERTIFICATIONS

Bidders must provide the required certifications to be awarded a contract. Canada will declare a bid non-responsive if the required certifications are not completed and submitted as requested.

Compliance with the certifications bidders provide to Canada is subject to verification by Canada during the bid evaluation period (before award of a contract) and after award of a contract. The Contracting Authority will have the right to ask for additional information to verify bidders' compliance with the certifications before award of a contract. The bid will be declared non-responsive if any certification made by the Bidder is untrue, whether made knowingly or unknowingly. Failure to comply with the certifications or to comply with the request of the Contracting Authority for additional information will also render the bid non-responsive.

1. Mandatory Certifications Required Precedent to Contract Award

1.1 Code of Conduct and Certifications - Related documentation

- 1.1.1** By submitting a bid, the Bidder certifies, for himself and his affiliates, to be in compliance with the Code of Conduct and Certifications clause of the Standard instructions. The related documentation hereinafter mentioned will help Canada in confirming that the certifications are true. By submitting a bid, the Bidder certifies that it is aware, and that its affiliates are aware, that Canada may request additional information, certifications, consent forms and other evidentiary elements proving identity or eligibility. Canada may also verify the information provided by the Bidder, including the information relating to the acts or convictions specified herein, through independent research, use of any government resources or by contacting third parties. Canada will declare non-responsive any bid in respect of which the information requested is missing or inaccurate, or in respect of which the information contained in the certifications is found to be untrue, in any respect, by Canada. The Bidder and any of the Bidder's affiliates, will also be required to remain free and clear of any acts or convictions specified herein during the period of any contract arising from this bid solicitation.

Bidders who are incorporated, including those bidding as a joint venture, must provide with their bid or promptly thereafter a complete list of names of all individuals who are currently directors of the Bidder. Bidders bidding as sole proprietorship, including those bidding as a joint venture, must provide the name of the owner with their bid or promptly thereafter. Bidders bidding as societies, firms, partnerships or associations of persons do not need to provide lists of names. If the required names have not been received by the time the evaluation of bids is completed, Canada will inform the Bidder of a time frame within which to provide the information. Failure to comply will render the bid non-responsive. Providing the required names is a mandatory requirement for contract award.

Canada may, at any time, request that a Bidder provide properly completed and Signed Consent Forms ([Consent to a Criminal Record Verification form- PWGSC-TPSGC 229](http://www.tpsgc-pwgsc.gc.ca/app-acq/forms/formulaires-forms-eng.html)) (<http://www.tpsgc-pwgsc.gc.ca/app-acq/forms/formulaires-forms-eng.html>) for any or all individuals aforementioned within the time specified. Failure to provide such Consent Forms within the time period provided will result in the bid being declared non-responsive.

2. Certifications Precedent to Contract Award and Certifications Required with the Bid

Bidders must submit the certifications as provided below:

2.1 Certifications Precedent to Contract Award

The certifications listed below should be completed and submitted with the bid but may be submitted afterwards. If any of these required certifications is not completed and submitted as requested, the Contracting Authority will so inform the Bidder and provide the Bidder with a time frame within which to meet the requirement. Failure to comply with the request of the Contracting Authority and meet the requirement within that time period will render the bid-non responsive.

2.1.1 Federal Contractors Program - Certification

The Federal Contractors Program (FCP) requires that some suppliers, including a supplier who is a member of a joint venture, bidding for federal government contracts, valued at \$200,000 or more (including all applicable taxes), make a formal commitment to implement employment equity. This is a condition precedent to contract award. If the Bidder, or, if the Bidder is a joint venture and if any member of the joint venture, is subject to the FCP, evidence of its commitment must be provided before the award of the Contract.

Suppliers who have been declared ineligible contractors by Human Resources and Skills Development Canada (HRSDC) are no longer eligible to receive government contracts over the threshold for solicitation of bids as set out in the *Government Contracts Regulations*. Suppliers may be declared ineligible contractors either as a result of a finding of non-compliance by HRSDC, or following their voluntary withdrawal from the FCP for a reason other than the reduction of their workforce to less than one hundred (100) employees. Any bids from ineligible contractors, including a bid from a joint venture that has a member who is an ineligible contractor, will be declared non-responsive.

If the Bidder does not fall within the exceptions enumerated in 3.(a) or (b) below, or does not have a valid certificate number confirming its adherence to the FCP, the Bidder must fax (819-953-8768) a copy of the signed form LAB 1168, Certificate of Commitment to Implement Employment Equity, to the Labour Branch of HRSDC.

The Bidder, or, if the Bidder is a joint venture the member of the joint venture, certifies its status with the FCP, as follows:

The Bidder or the member of the joint venture

- () is not subject to the FCP, having a workforce of less than 100 full-time or part-time permanent employees, and/or temporary employees having worked 12 weeks or more in Canada;
- () is not subject to the FCP, being a regulated employer under the Employment Equity Act, S.C. 1995, c. 44;
- () is subject to the requirements of the FCP, having a workforce of 100 or more full-time or part-time permanent employees, and/or temporary employees having worked 12 weeks or more in Canada, but has not previously obtained a certificate number from HRSDC (having not bid on requirements of \$200,000 or more), in which case a duly signed certificate of commitment is attached;
- () is subject to the FCP, and has a valid certificate number as follows: _____ (e.g. has not been declared an ineligible contractor by HRSDC).

Further information on the FCP is available on the HRSDC Web site.

2.1.2 Former Public Servant Certification

Contracts with 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 with FPS, bidders must provide the information required below.

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;
- 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 Reduction Program

Is the Bidder a FPS who received a lump sum payment pursuant to the terms of a work force reduction program? **Yes () No ()**

If so, the Bidder must provide the following information:

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

2.1.2.1 SACC Manual clause A3025C (2012-11-19) Proactive Disclosure of Contracts with Former Public Servants

2.1.3 Status and Availability of Resources

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

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

2.1.4 Education and Experience

2.1.4.1 SACC Manual clause A3010T (2010-08-16) Education and Experience

2.2 Certifications Required with the Bid

Bidders must submit the following duly completed certifications with their bid.

2.2.1 Canadian Content Certification

This procurement is limited to Canadian services.

The Bidder certifies that:

() the services offered are Canadian services as defined in paragraph 4 of clause A3050T.

For more information on how to determine the Canadian content for a mix of goods, a mix of services or a mix of goods and services, consult Annex 3.6.(9), Example 2, of the Supply Manual.

2.2.1.1 SACC Manual clause A3050T (2010-01-11) Canadian Content Definition

PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS

1. Security Requirement

1. Before start of contract, the following conditions must be met:
 - (a) the Bidder must hold a valid organization security clearance as indicated in Part 7-Resulting Contract Clauses;
 - (b) the Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work site(s) must meet the security requirement as indicated in Part 7- Resulting Contract Clauses;
 - (c) the Bidder must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites.
2. Bidders are reminded to obtain the required security clearance promptly. Any delay in the award of a contract to allow the successful bidder to obtain the required clearance will be at the entire discretion of the Contracting Authority.
3. For additional information on security requirements, bidders should consult the "Security Requirements for PWGSC Bid Solicitations - Instructions for Bidders" (<http://www.tpsgc-pwgsc.gc.ca/app-acq/lc-pl/lc-pl-eng.html#a31>) document on the Departmental Standard Procurement Documents Web site.

For additional information, bidders can consult the PWGSC industrial security manual as follows:
<http://ssi-iss.tpsgc-pwgsc.gc.ca/msi-ism/msi-ism-eng.html>

2. Financial Capability

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

PART 7 - RESULTING CONTRACT CLAUSES

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

1. Statement of Work

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

2. Standard Clauses and Conditions

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

2.1 General Conditions

2035 (2012-11-19), General Conditions - Higher Complexity - Services, apply to and form part of the Contract.

2.2 SACC Manual Clauses

NUMBER	DESCRIPTION	DATE
A9113C	Handling of Personal Information	2008-12-12

2.2.1 Personal Information

SOURCE: SACC 4008

1. In the Contract, unless the context otherwise requires,

"General Conditions" means the general conditions that form part of the Contract;

"Personal Information" means:

- a. information about an individual, including the types of information specifically described in the *Privacy Act*, R.S. 1985, c. P-21; and,
- b. "information" as defined under the *Department of Human Resources and Skills Development Act*;

"Record" means any hard copy document or any data in a machine-readable format containing Personal Information;

2. Words and expressions defined in the General Conditions and used in these supplemental general conditions have the meanings given to them in the General Conditions.
3. If there is any inconsistency between the General Conditions and these supplemental general conditions, the applicable provisions of these supplemental general conditions prevail.

4008 02 (2008-05-12) Ownership of Personal Information and Records

To perform the Work, the Contractor will be provided with and/or will be collecting Personal Information from third parties. The Contractor acknowledges that it has no rights in the Personal Information or the Records and that Canada owns the Records. On request, the Contractor must make all the Personal Information and Records available to Canada immediately in a format acceptable to Canada.

4008 03 (2008-05-12) Use of Personal Information

The Contractor agrees to create, collect, receive, manage, access, use, retain, and dispose of the Personal Information and the Records only to perform the Work in accordance with the Contract.

4008 04 (2008-05-12) Collection of Personal Information

1. If the Contractor must collect Personal Information from a third party to perform the Work, the Contractor must only collect Personal Information that is required to perform the Work. The Contractor must collect the Personal Information from the individual to whom it relates and the Contractor must inform that individual (at or before the time when it collects the Personal Information) of the following:
 - a. that the Personal Information is being collected on behalf of, and will be provided to, Canada;
 - b. the ways the Personal Information will be used;
 - c. that the disclosure of the Personal Information is voluntary or, if there is a legal requirement to disclose the Personal Information, the basis of that legal requirement;
 - d. the consequences, if any, of refusing to provide the information;
 - e. that the individual has a right to access and correct his or her own Personal Information; and
 - f. that the Personal Information will form part of a specific personal information bank (within the meaning of the *Privacy Act*), and also provide the individual with information about which government institution controls that personal information bank, if the Contracting Authority has provided this information to the Contractor.
2. The Contractor, its subcontractors, and their respective employees must identify themselves to the individuals from whom they are collecting Personal Information and must provide those individuals with a way to verify that they are authorized to collect the Personal Information under a Contract with Canada.
3. If requested by the Contracting Authority, the Contractor must develop a request for consent form to be used when collecting Personal Information, or a script for collecting the Personal Information by telephone. The Contractor must not begin using a form or script unless the Contracting Authority first approves it in writing. The Contractor must also obtain the Contracting Authority's approval before making any changes to a form or script.
4. At the time it requests Personal Information from any individual, if the Contractor doubts that the individual has the capacity to provide consent to the disclosure and use of his or

her Personal Information, the Contractor must ask the Contracting Authority for instructions.

4008 05 (2008-05-12) Maintaining the Accuracy, Privacy and Integrity of Personal Information

The Contractor must ensure that the Personal Information is as accurate, complete, and up to date as possible. The Contractor must protect the privacy of the Personal Information. To do so, at a minimum, the Contractor must:

- a. not use any personal identifiers (e.g., social insurance number) to link multiple databases containing Personal Information;
- b. segregate all Records from the Contractor's own information and records;
- c. restrict access to the Personal Information and the Records to people who require access to perform the Work (for example, by using passwords or biometric access controls);
- d. provide training to anyone to whom the Contractor will provide access to the Personal Information regarding the obligation to keep it confidential and use it only to perform the Work. The Contractor must provide this training before giving an individual access to any Personal Information and the Contractor must keep a record of the training and make it available to the Contracting Authority if requested;
- e. if requested by the Contracting Authority, before providing anyone with access to the Personal Information, require anyone to whom the Contractor provides access to the Personal Information to acknowledge in writing (in a form approved by the Contracting Authority) their responsibilities to maintain the privacy of the Personal Information;
- f. keep a record of all requests made by an individual to review his or her Personal Information, and any requests to correct errors or omissions in the Personal Information (whether those requests are made directly by an individual or by Canada on behalf of an individual);
- g. include a notation on any Record(s) that an individual has requested be corrected if the Contractor has decided not to make the correction for any reason. Whenever this occurs, the Contractor must immediately advise the Contracting Authority of the details of the requested correction and the reasons for the Contractor's decision not to make it. If directed by the Contracting Authority to make the correction, the Contractor must do so;
- h. keep a record of the date and source of the last update to each Record;
- i. maintain an audit log that electronically records all instances of and attempts to access Records stored electronically. The audit log must be in a format that can be reviewed by the Contractor and Canada at any time; and
- j. secure and control access to any hard copy Records.

4008 06 (2008-05-12) Safeguarding Personal Information

The Contractor must safeguard the Personal Information at all times by taking all measures reasonably necessary to secure it and protect its integrity and confidentiality. To do so, at a minimum, the Contractor must:

- a. store the Personal Information electronically so that a password (or a similar access control mechanism, such as biometric access) is required to access the system or database in which the Personal Information is stored;
- b. ensure that passwords or other access controls are provided only to individuals who require access to the Personal Information to perform the Work;
- c. not outsource the electronic storage of Personal Information to a third party (including an affiliate) unless the Contracting Authority has first consented in writing;
- d. safeguard any database or computer system on which the Personal Information is stored from external access using methods that are generally used, from time to time, by prudent public and private sector organizations in Canada in order to protect highly secure or sensitive information;
- e. implement any reasonable security or protection measures requested by Canada from time to time; and
- f. notify the Contracting Authority immediately of any security breaches; for example, any time an unauthorized individual accesses any Personal Information.

4008 07 (2008-05-12) Appointment of Privacy Officer

The Contractor must appoint someone to be its privacy officer and to act as its representative for all matters related to the Personal Information and the Records. The Contractor must provide that person's name to the Contracting Authority within ten (10) days of the award of the Contract.

4008 08 (2008-05-12) Quarterly Reporting Obligations

Within thirty (30) calendar days of the end of each quarter (January-March; April-June; July-September; October-December), the Contractor must submit the following to the Contracting Authority:

- a. a description of any new measures taken by the Contractor to protect the Personal Information (for example, new software or access controls being used by the Contractor);
- b. a list of any corrections made to Personal Information at the request of an individual (including the name of the individual, the date of the request, and the correction made);
- c. details of any complaints received from individuals about the way in which their Personal Information is being collected or handled by the Contractor; and
- d. a complete copy (in an electronic format agreed to by the Contracting Authority and the Contractor) of all the Personal Information stored electronically by the Contractor.

4008 09 (2008-05-12) Threat and Risk Assessment

Within ninety (90) calendar days of the start of the Contract and, if the Contract lasts longer than one year, within thirty (30) calendar days of each anniversary start of the Contract, the Contractor must submit to the Contracting Authority a threat and risk assessment, which must include:

- a. a copy of the current version of any request for consent form or script being used by the Contractor to collect Personal Information;

- b. a list of the types of Personal Information used by the Contractor in connection with the Work;
- c. a list of all locations where hard copies of Personal Information are stored;
- d. a list of all locations where Personal Information in machine-readable format is stored (for example, the location where any server housing a database including any Personal Information is located), including back-ups;
- e. a list of every person to whom the Contractor has granted access to the Personal Information or the Records;
- f. a list of all measures being taken by the Contractor to protect the Personal Information and the Records;
- g. a detailed explanation of any potential or actual threats to the Personal Information or any Record, together with an assessment of the risks created by these threats and the adequacy of existing safeguards to prevent these risks; and
- h. an explanation of any new measures the Contractor intends to implement to safeguard the Personal Information and the Records.

4008 10 (2008-05-12) Audit

Canada may audit the Contractor's compliance with these supplemental general conditions at any time. If requested by the Contracting Authority, the Contractor must provide Canada (or Canada's authorized representative) with access to its premises and to the Personal Information and Records at all reasonable times. If Canada identifies any deficiencies during an audit, the Contractor must immediately correct the deficiencies at its own expense.

4008 11 (2008-05-12) Statutory Obligations

1. The Contractor acknowledges that Canada is required to handle the Personal Information and the Records in accordance with the provisions of Canada's *Department of Human Resources and Skills Development Act*, *Privacy Act*, *Access to Information Act*, R.S. 1985, c. A-1, and *Library and Archives of Canada Act*, S.C. 2004, c. 11. The Contractor agrees to comply with any requirement established by the Contracting Authority that is reasonably required to ensure that Canada meets its obligations under these acts and any other legislation in effect from time to time.
2. The Contractor acknowledges that its obligations under the Contract are in addition to any obligations it has under the *Personal Information Protection and Electronic Documents Act*, S.C. 2000, c. 5, or similar legislation in effect from time to time in any province or territory of Canada. If the Contractor believes that any obligations in the Contract prevent it from meeting its obligations under any of these laws, the Contractor must immediately notify the Contracting Authority of the specific provision of the Contract and the specific obligation under the law with which the Contractor believes it conflicts.

4008 12 (2008-05-12) Disposing of Records and Returning Records to Canada

The Contractor must not dispose of any Record, except as instructed by the Contracting Authority. On request by the Contracting Authority, or once the Work involving the Personal Information is complete, the Contract is complete, or the Contract is terminated, whichever of these comes first, the Contractor must return all Records (including all copies) to the Contracting Authority.

4008 13 (2008-05-12) Legal Requirement to Disclose Personal Information

Before disclosing any of the Personal Information pursuant to any applicable legislation, regulation, or an order of any court, tribunal or administrative body with jurisdiction, the Contractor must immediately notify the Contracting Authority, in order to provide the Contracting Authority with an opportunity to participate in any relevant proceedings.

4008 14 (2008-05-12) Complaints

Canada and the Contractor each agree to notify the other immediately if a complaint is received under the *Department of Human Resources and Skills Development Act*, *Access to Information Act* or the *Privacy Act* or other relevant legislation regarding the Personal Information. Each Party agrees to provide any necessary information to the other to assist in responding to the complaint and to inform the other immediately of the outcome of that complaint.

4008 15 (2008-05-12) Exception

The obligations set out in these supplemental general conditions do not apply to any Personal Information that is already in the public domain, as long as it did not become part of the public domain as a result of any act or omission of the Contractor or any of its subcontractors, agents, or representatives, or any of their employees.

4008 16 Security and Protection of Personal Information

The Contractor agrees to comply with the policies, protocols and directives of the Technical Authority relating to the security and protection of Personal Information, including the requirement to notify the Technical Authority immediately in the event of a security incident involving Personal Information or a privacy breach.

2.2.2 Protection and Security of Data Stored in Databases

1. The Contractor must ensure that all the databases containing any information related to the Work are located in Canada.

The Contractor shall segregate all records (hard copy or electronic format) related to the work separate from its other records, and keep all databases in which such records are to be maintained physically independent from all other database, directly or indirectly, which are located outside of Canada.

2. The Contractor must control access to all databases on which any data relating to the Contract is stored so that only individuals with the appropriate security clearance are able to access the database, either by using a password or other form of access control (such as biometric controls).
3. The Contractor must ensure that all data relating to the Contract is processed only in Canada. The Contractor must ensure that all domestic network traffic (meaning traffic or transmissions initiated in one part of Canada to a destination or individual located in another part of Canada) is routed exclusively through Canada. Despite any section of the General Conditions relating to subcontracting, the Contractor must not subcontract (including to an affiliate) any function that involves providing a subcontractor with access to any data relating to the Contract unless there is a written agreement between the

Contractor and the third party, imposing upon the third party obligations that are the same as those that are imposed upon the Contractor under this contract with respect of the protection of this information and approval has been obtained by the Contracting Authority in writing.

4. Despite any section of the General Conditions relating to subcontracting, the Contractor must not subcontract (including to an affiliate) any function that involves providing a subcontractor with access to any data relating to the Contract unless the Contracting Authority first consents in writing.

3. Security Requirement

1. The Contractor/Offeror must, at all times during the performance of the Contract/Standing Offer, hold a valid Designated Organization Screening (DOS), issued by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC).
2. The Contractor/Offeror personnel requiring access to PROTECTED information, assets or sensitive work site(s) must EACH hold a valid RELIABILITY STATUS, granted or approved by CISD/PWGSC.
3. The Contractor/Offeror MUST NOT remove any PROTECTED information or assets from the identified work site(s), and the Contractor/Offeror must ensure that its personnel are made aware of and comply with this restriction.
4. Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of CISD/PWGSC.
5. The Contractor/Offeror must comply with the provisions of the:
 - (a) Security Requirements Check List and security guide (if applicable), attached at Annex E;
 - (b) Industrial Security Manual (Latest Edition).

4. Term of Contract

4.1 Period of the Contract

The period of the Contract is from November 30, 2013 to November 29, 2016 inclusive.

4.2 Option to Extend the Contract

The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to three (3) additional one (1) year periods under the same conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions as set out in the Basis of Payment.

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

5. Authorities

5.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: Susan Westall (*or authorized representative*)
Title: Supply Specialist
Public Works and Government Services Canada
Acquisitions Branch
Directorate: Communications Procurement
Address: 350 Albert Street, 12th Floor, Ottawa ON K1R 7X7

Telephone: 613-949-8350
Facsimile: 613-993-2581
E-mail address: susan.westall@pwgsc.gc.ca

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

5.2 Project Authority

The Project Authority will be specified in the resulting contract.

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

5.3 Contractor's Representative

Company:
Name:
Title:
Address:

Telephone:
Facsimile:
E-mail address:

6. Payment

6.1 Basis of Payment

The contractor will be paid according to the Basis of Payment as detailed at Annex "B".

6.2 Limitation of Expenditure

Canada's total liability to the Contractor under the Contract must not exceed \$ _____. Goods and Services Tax or Harmonized Sales Tax is extra, if applicable.

No increase in the total liability of Canada or in the price of the Work resulting from any design changes, modifications or interpretations of the Work, will be authorized or paid to the Contractor unless these design changes, modifications or interpretations have been approved, in writing, by the Contracting Authority before their incorporation into the Work. The Contractor must not perform any work or provide any service that would result in Canada's total liability being exceeded before obtaining the written approval of the Contracting Authority. The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:

when it is seventy-five (75) percent committed, or

four (4) months before the contract expiry date, or

as soon as the Contractor considers that the contract funds provided are inadequate for the completion of the Work,

whichever comes first.

If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority a written estimate for the additional funds required. Provision of such information by the Contractor does not increase Canada's liability.

6.3 Payment

6.3.1 Firm Monthly Management Fee

SACC Manual clause H1008C (2008-05-12) Monthly Payment

6.3.1 Hourly Billing Rates

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

- (1) 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;
- (2) all such documents have been verified by Canada; and
- (3) the Work performed has been accepted by Canada.

6.4 SACC Manual Clauses

NUMBER	DESCRIPTION	DATE
A9117C	T1204 - Direct Request by Customer Department	2007-11-30
A3060C	Canadian Content Certification	2008-05-12
C0306C	Precontractual Cost	2007-05-25

6.5 Time Verification

SACC Manual Clause C0711C (2008-05-12)

7. Invoicing Instructions

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

7.1 Invoicing Process

The Contractor must submit invoices in accordance with the section entitled "10.1 Invoicing Process" of the Statement of Work at Annex "A".

8. Certifications

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

9. Transition Period

The Contractor acknowledges that the nature of the services provided under the Contract requires continuity and that a transition period may be required at the end of the Contract. The Contractor agrees that Canada may, at its discretion, extend the Contract by a period of sixty (60) days under the same conditions to ensure the required transition. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions as set out in the Basis of Payment.

The Contracting Authority will advise the Contractor of the extension by sending a written notice to the Contractor at least 30 calendar days before the contract expiry date. The extension will be evidenced for administrative purposes only, through a contract amendment.

10. Applicable Laws

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

11. Priority of Documents

- (a) the Articles of Agreement;
- (b) the general conditions 2035 (2012-11-19), General Conditions - Higher Complexity - Services;
- (c) Annex A, Statement of Work;
- (d) Annex B, Basis of Payment;
- (e) Annex E, Security Requirements Check List;
- (f) Annex F, Non-Performance Credits;
- (f) the Contractor's bid dated _____ .

Solicitation No. - N° de l'invitation
G9420-120003/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur
cy007

Client Ref. No. - N° de réf. du client

File No. - N° du dossier
G9420-12-0003

CCC No./N° CCC - FMS No/ N° VME
cy007G9420-120003

12. Foreign Nationals (Canadian Contractor)

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

13. Insurance

SACC Manual clause G1005C (2008-05-12) Insurance

ANNEX A

STATEMENT OF WORK

Definitions

The following acronyms are used throughout this Statement of Work, in alphabetical order:

ACD	Automated Call Distributor
ACG	Apprenticeship Completion Grant
AIG	Apprenticeship Incentive Grant
CA	Contracting Authority
CCMIS	Call Centre Management Information System
CEC	Canada Enquiry Centre
CIS	Customized Information Services
CPI	Consumer Price Index
CPP	Canada Pension Plan
CSB	Citizen Service Branch
EI	Employment Insurance
ELS	Editing and Linguistic Services
EMS	Electronic Monitoring System
FTE	Full Time Equivalent
GC	Government of Canada
HR	Human Resources
ICMD	Integrated Channel Management Directorate
ICTR	Information and Communications Technology Renewal
IM	Information Management
IMC	Information Management Centre
IMO	Information Management Officer
IMPACT	Information Management Program Activities Transaction
IMS	Information Management System
IO	Information Officer
IVR	Interactive Voice Response
MIS	Management Information System
NCR	National Capital Region
OAS	Old Age Security
OMT	Operations Management Team
OSU	Operations Support Unit
PA	Project Authority
PWGSC	Public Works and Government Services Canada
QA	Quality Assurance
RC	Responsibility Code
RFP	Request for Proposal
RR	Resource Request
SC	Service Canada
SIMO	Senior Information Management Officer
SIN	Social Insurance Number
SIO	Senior Information Officer
SOW	Statement of Work
SPOT	Standardized Phrasing and Organizational Terminology
TA	Task Authorization
TTY	Teletype Writer
VAC	Veteran Affairs Canada
VOIP	Voice over Internet Protocol
WEPP	Wage Earner Protection Program
WMS	Workforce Management System

Preamble

Service Canada requires the services of a Contractor to provide and manage a completely self-contained and integrated team of fluently bilingual information centre specialists, which works within an infrastructure provided and managed by Service Canada to provide the following for current and future business needs:

1. Professional, knowledgeable, and bilingual information officers to respond to enquiries for 1-800 O-Canada and to calls and emails for project specific customized information solutions on behalf of other GC organizations and programs; and
2. Information management specialists to manage and update knowledge repositories used by front line staff.

1.0 Background

1.1 History

Service Canada is the delivery agent of the Government of Canada (GC) in support of citizen-centred services. The Citizen Service Branch (CSB) of Service Canada achieves this mandate by providing seamless, secure, knowledgeable services to Canadians. CSB provides leadership in achieving service excellence through a citizen-centred business model. CSB is responsible for determining "what" services citizens can expect and "how" these services are delivered and marketed to Canadians through an integrated multi-channel delivery network. This involves working with federal partners to ensure Canadians have access to all programs and services to which they are entitled. It also involves leveraging opportunities with other departments to offer citizens a fuller spectrum of government services and information.

CSB plays an important role in translating government policy into quality, comprehensive service offerings and in developing integrated, seamless service delivery approaches. We deliver "Tier 1" service (general program/service information and self-service options) across a multi-channel network of over 600 Offices and Outreach locations (in-person points of service), 1 800 O-Canada Contact Centres, and the Internet. CSB also provides more in-depth service for a range of other offerings. CSB's main objectives include providing services and disseminating Government of Canada information; managing and analyzing client feedback; embarking upon partnerships; building service strategies to assist Service Canada in achieving seamless citizen-centred service; and marketing CSB services to Canadians in a manner that is consistent with established client segment strategies.

The Integrated Channel Management Directorate (ICMD) within CSB is the Service Delivery Network for "Tier 1" services to citizens. The Directorate ensures service excellence through high quality service delivered consistently through the three channels (Web, Telephone and In-person).

ICMD is guided by an Integrated Service Experience Model and a Tiered Service Delivery Strategy incorporating a "**Click, Call or Visit**" experience for citizens. This Directorate promotes continuous improvement by supporting service improvements for citizens in the Web, Telephone and In-person service channels.

ICMD also works in partnership with the regions and departmental stakeholders by providing leadership, functional direction, operational support and tools to optimize service excellence across all channels.

Click! The Web service channel includes a suite of web sites and tools (canada.gc.ca, servicecanada.gc.ca, news.gc.ca, publiservice and others) that support the internet as a service counter for citizens.

Call! The Telephone service channel includes the 1 800 O-Canada Enquiry Centre (CEC) which responds to general telephone enquiries from citizens, answers GC communication activities (especially in crisis situations, e.g. H1N1) and provides specialized enquiries for various departments (e.g. Department of Fisheries and Oceans Canada).

Visit! The In-person service channel provides citizen services across Canada through the Points of Service Strategy. In-person services are delivered through various points of presence across Canada including Service Canada Centres, Scheduled and Mobile Outreach services and Service Canada Community Offices.

This Statement of Work (SOW) describes the work that the Contractor must perform for the ICMD.

1.2 Current Services

CEC is responsible for the delivery of the following public facing services:

- 1 800 O-Canada
- Customized Information Services (CIS)

These services are supported by the following enabling teams:

- Information Management Centre (IMC)
 - Information Management (IM)
 - Editing and Linguistic Services (ELS)

1.2.1 1 800 O-Canada

The 1 800 O-Canada toll-free information service is an ongoing fully bilingual program which acts as the first point of contact for information on Government of Canada (GC) programs, services and initiatives. In addition the service supports key GC advertising, communication activities, and supports GC communication needs in crisis situations as well as delivers general enquiry services on behalf of other GC organizations. The service handles more than 2 million calls per year with a service level of 85% of calls answered within 18 seconds. The service provides:

1. An initial needs assessment to identify the client's requirements.
2. Information on GC programs and services.
3. The ability to order common GC publications.
4. An action plan to pursue the client's request.
5. Guidance and direction to access and interact with other GC programs and services.
6. Response to information and navigational enquiries related to the GC web site (www.canada.gc.ca), a variety of clusters located on the Canada site and other GC internet sites, delivered through the telephone, e-mail, fax and regular mail channels.

Key features of the service include:

- Direct access to professional, knowledgeable, and bilingual information officers
- Hours of operation of 8 am to 8 pm across Canada (the hours of service are 6:30 am to 11:00 pm Eastern) Monday to Friday. During exceptional circumstances (such as GC

announcements or crisis situations) these hours may be extended and the service may also be open on the weekend

- Toll-free accessibility from Canada, the United States and more than 60 other countries across the globe
- Toll-free access for the hearing and speech impaired (TTY/TDD) at 1 800 926-9105
- An accurate and comprehensive knowledge repository of more than 4,500 programs and services from more than 150 GC organizations, providing the information officers with the latest government information
- Support of over 30 GC communication initiatives per year, such as:
 - Jobs and Growth
 - Elder Abuse
 - Food Safety

Emerging contact centre services may include:

1. E-service assistance and support involving web navigation and self-serve, utilizing multiple media capabilities to handle multiple queues, such as conducting live web chats while taking calls.
2. Basic transaction services involving basic personal information.

These emerging services may require additional professional services to assist in evolving the business delivery model and further integrate contact centre information across delivery channels.

1 800 O-Canada Statistics:

	2008-2009	2009-2010	2010-2011	2011-2012
Total Call Volume (Accepted)	1,842,802	1,947,914	1,913,194	2,437,849
Abandoned Calls	39,342 (2%)	26,839 (1%)	41,096 (2%)	119,365 (4.9%)
Answered By Agents (Information Officers)	1,803,460 (98%)	1,921,711 (99%)	1,872,098 (98%)	2,318,484

Calls "accepted" is the number of calls received during hours of operations. The accessibility service standard is responding to 85% of the calls within 18 seconds.

1.2.2 Customized Information Services (CIS)

In addition to 1 800 O-Canada service, the CEC delivers project specific customized information solutions on behalf of other GC organizations and programs. This is done through the Customized Information Services (CIS) Team. Currently, the services include responding to calls and emails, but in future could include emerging response capabilities as identified in Section 1.2.1 1 800 O-Canada above.

The CIS Team provides turnkey cost-recovery communication services and solutions (telephone, e-mail, fax and regular mail) in support of GC communication strategies including:

1. Long-term services (including general enquiry services for different departments).
2. Implementation of information changes to existing government services.
3. Targeted campaigns (to support advertising or peak call volume periods).
4. Crisis situations and urgent communication needs.

5. The introduction of new service offerings (customized initiatives).

The CIS Team operates in a dynamic, on-demand environment that includes the following situations:

1. Quick turnaround times to meet tight timelines: in some cases projects must be set-up with less than 24 hours notice.
2. Flexible service delivery: each service or solution is customized to meet the unique needs of each client department. This includes applying CEC knowledge and expertise in service delivery to the development of the initial service and to the implementation of enhancements that will improve the service.
3. Rapid response times to modify the service: in many cases the project will introduce new information, procedures and/or other client requirements over the life cycle of the project that must be implemented.
4. Scalability of the information officer complement: many projects have significant shifts in call volume and resource requirements over the course of the project.

During the 2011-2012 fiscal year, CIS supported over 40 projects, such as:

- Canadian Air Transport Security Authority – General Enquiries
- Fisheries and Oceans – General Enquiries
- Health Canada – Vermiculite Insulation
- Canadian Food Inspection Agency – General Enquiries

CIS Statistics:

	2008-2009	2009-2010	2010-2011	2011-2012
Total Call Volume (Accepted)	746,732	617,006	580,733	1,060,420
Abandoned Calls	16,340 (2%)	19,882 (3%)	21,019 (4%)	81,313 (8%)
Answered By Agents (Information Officers)	730,392 (98%)	594,262 (97%)	559,714 (96%)	906,719 (92%)
Emails	41,778	45,488	48,010	20,440

1.2.3 Information Management Centre (IMC)

The IMC is responsible for maintaining the large information holdings that support the 1 800 O-Canada and CIS services and increasingly the in-person and web channels. IMC activities are a key enabler of service delivery: the updating, structuring, and constant updating and improvement of the knowledge repositories used by front line staff in interaction with the public can be directly correlated to the high level of satisfaction of the public regarding the level of knowledge displayed by front line staff and the high level of service adaptability and responsiveness to new government developments and changes.

Content created by the IMC team is validated by departmental subject matter experts, with the IMC having overall control and oversight of all information layout, architecture and content published. All content is simultaneously created and managed in French and English.

Hours of operations for the IMC are 7:00 a.m. to 18:00 p.m. EST, Monday to Friday. Occasional work is required on evenings and weekends.

The IMC consists of two units: the Information Management (IM) unit and the Editing and Linguistic Services (ELS) unit. As well, a Distribution Coordinator manages information related to publications for order and coordinates distribution order fulfillment with the Service Canada distribution house.

1.2.3.1 Information Management (IM) Unit

The IM Unit consists of information management specialists that have subject matter expertise in the field of service delivery and experience with the 1 800 O-Canada service.

The IM unit performs the following functions:

- Information collection, research and writing
- Updating and ongoing maintenance of knowledge repositories (content and service delivery mechanisms contact information)
- Content validation with subject matter experts and departmental contacts
- Media, events, topics monitoring
- Handles feedback and call backs related to content holdings

The IM unit works closely with departmental contacts to ensure that the vast information holdings used by the CEC Information Officers and in-person front line staff are accurate and up-to-date. It collaborates with the departments to determine what information should be included in the database and defines how this information should be structured for quick retrieval by the Information Officers. In addition, the IM unit monitors news events and topics that may generate call spikes and may affect the content of the information database.

The information holdings are developed and maintained based on the following best practices:

1. Daily media scanning and monitoring of events and topics for pertinent news items that affect the information holdings and/or that may generate enquiries.
2. Daily review and actioning of Information Officer feedback on potential content changes or enhancements.
3. "The Daily": new information/program developments (GC announcements, developments) are communicated to front line staff within one hour of occurring. This new information is highlighted for a few days (for awareness purposes) and then integrated into the regular holdings or deleted as required.
4. A comprehensive schedule and systematic annual updating strategy of all information holdings that accounts for seasonality of enquiries; this update is formally scheduled and tracked.
5. Direct and regular contact with a network of pan-government contacts across the country for updates on programs and to validate the information holdings.
6. Content holdings are re-used and adjusted as required for various repositories.
7. A formal editing process that ensures all content is available in both official languages and has been reviewed by a team of Editors to ensure the quality of the language.
8. Clear and documented information management guidelines that dictate how the information is processed.
9. Systematic QA of all content produced for consistency and compliance to guidelines.
10. Ongoing review and improvement of IM procedures and processes by a committee to ensure that the best practices for supporting the delivery of information are adopted.
11. Utilizing specific tools designed for data management and not restricted by the viewing requirements of the front line staff.

Key features of the information holdings include:

1. Standardized format of information.

2. Common language without promotional spin or jargon.
3. "Bite-sized" packaging of information: content reduced to manageable concepts and relationships that can be conveyed to clients.
4. All content is indexed and accessible through a keyword strategy that focuses on the nature of the services offered.

1.2.3.2 Editing and Linguistic Services (ELS) Unit:

The ELS Unit is comprised of linguistic specialists. The primary role of the ELS Unit is to ensure the linguistic quality of material produced by the IMC and of e-mail responses produced by Information Officers handling email services. The ELS unit also manages a keyword index for the 1 800 O-Canada information database, establishes language and terminology standards, and develops and maintains linguistic tools and resources. In addition, Editors provide editing and translation services to other internal clients within CEC and throughout CSB / ICMD.

The ELS Unit performs the following functions:

- Establishes linguistic standards for writers and coach them as required
- Edits and proofreads knowledge repositories holdings before publication and ensures that content is clear and equivalent in both official languages
- Edits and proofreads template email answers used to support email services
- Standardises terminology and phrasing
- Manages keywords/metadata for easy retrieval of content from the repositories
- Edits and translates documents for corporate clients outside of the IMC

1.2.3.3 Knowledge Repositories

The primary bilingual database managed by IMC supports the 1 800 O-Canada service. It contains information on more than 4,000 programs, services and initiatives from more than 200 GC organizations. The information contained includes:

- Brief organizational descriptions
- Detailed program descriptions with application procedures
- National, regional and local service delivery points and contacts
- Current events, new initiatives, important program developments
- Documents and other supporting material (e.g. publications, applications, Canadian facts / information, contextual information, procedural instructions for information officers)
- Overviews and descriptions of programs and key activities
- Information on members of Parliament
- Information on Canadian embassies and consulates around the world
- Information on foreign representatives in Canada
- Key provincial points of service
- Information on key non-governmental organizations
- More than 15,000 English and 15,000 French keywords that are used to index the information for the purposes of easy retrieval

In addition to this database, the IMC also manages a variety of knowledge repositories to support Service Canada in-person agents as well as to support Service Canada new service offerings enquiry lines that are introduced as Service Canada increases the scope of services it delivers.

The information contained includes:

- Detailed program descriptions
- Service Canada in depth program/service information including program procedures, regulations, quick reference material, forms, etc. (for core service offerings such as EI, CPP/OAS, SIN, Passport or New Service Offerings such as VAC, WEPP, AIG/ACG)

- Regionally specific information including contacts, referrals, etc.
- National, regional and local service delivery points and contacts
- A notices area outlining current events, new initiatives and new developments
- Documents and other supporting material (e.g. publications, applications, contextual information, procedural instructions for information officers, emergency procedures)

IMC also manages other smaller databases that vary in size and scope of content to support various Customized Information Services (CIS).

2.0 Responsibilities of Service Canada and the Contractor

Working together, Service Canada and the Contractor must continue to enable a world-class contact centre in support of citizen-centred services.

2.1 Working Relationship Guiding Principles

The guiding principles of the working relationship consist of the following:

1. The over-arching focus is on service delivery in achieving the performance objectives (outcomes) as described in Section 8.0 Performance Objectives.
2. Respect for each team's (Service Canada and Contractor) value that they bring to the CSB / ICMD mandate.
3. Demonstrated professionalism in attitude and attire as required of people who are the front line contact with the public.
4. Demonstrated leadership by:
 - Proactive willingness to continue to improve processes and performance, bringing innovated ideas to the table for joint discussion and implementation
 - Carrying a sense of urgency in resolving issues in a timely fashion

2.2 Service Canada / Canada Enquiry Centre Responsibilities

Service Canada is responsible and accountable for delivering the services provided by the CEC. The CEC establishes all service, organizational, and operational targets and strategies, particularly as they relate to the nature, scope and quality of the service.

The CEC team will consist of the following staff:

- Project Authority (PA)
- Directors, Managers, and Heads providing functional direction to the Contractor
- Contract liaison officer

Functional direction includes:

- Strategies and direction for the services
- Objectives and deliverables
- Standards and performance measurements / metrics to attain
- Organizational priorities
- Resource requirements
- Quality of services and information holdings

Service Canada is responsible for technology services and accommodation.

2.2.1 Accommodation

Service Canada will provide a primary working site for the Contractor's service and support teams at 47 Clarence Street in Ottawa, Ontario. The primary site includes fully equipped contact centre

workstations and network access, training space, and administrative space sufficient to accommodate the team size required to fulfill the Contractor's duties and will be made available to the Contractor at no direct cost for the duration of the Contract. Fully equipped and functional secondary sites have been established in the National Capital Region (NCR) to provide swing space and business continuity.

Service Canada will provide accommodation, furniture, microcomputers, non-dedicated access to fax and telephones for up to five workstations for non-direct operational needs of the Contractor's Operations Management Team (as described in Section 4.1.5 The Contractor's Operations Management Team (OMT) Staffing Requirements).

Ongoing progressive growth and demand may require additional service locations to be established, including beyond the NCR and perhaps across the country.

2.2.2 Technology Infrastructure and Tools

Service Canada maintains the technology and communications infrastructure in support of the dynamic and time-sensitive nature of the services. The telephone network utilizes the Government's Centrex network. As well, Teletype Writer (TTY) services are provided live, using Nxi's NTS networked TTY solution which allows TTY calls to be distributed to the Contractor's pool of specially trained Information Officers.

2.2.2.1 Monitoring Tools

To manage the Automated Call Distributor (ACD) groups, the CEC currently utilizes Nortel's Call Centre Management Information System (CCMIS v. 6.0). The server is connected directly into the Telco switch, from which it receives live and historical call progress and agent activity information. The live data is displayed on Supervisors MIS stations screens, so that they may have a snapshot of the current situation in the contact centre, and that they may better manage their teams (service level, calls answered, calls currently waiting, the number of agents logged in and currently handling calls). Historical data is also available for reports and it is used to update the Workforce Management system. Finally, the CCMIS allows for modifications to be made to any of the parameters of the ACD groups.

The CEC remotely monitors calls so that Supervisors and Senior Information Officers can provide feedback to agents regarding call performance. The call evaluation and feedback is collected in the Electronic Monitoring System (EMS). Agents are evaluated on elements related to Foundation Skills (basic skills that IOs are expected to demonstrate during every interaction with a caller), Finesse Skills (defined by the interaction between the agent and the caller; typically referred to as "soft skills") and Information Accuracy (the provision of all information relevant to the selected service or action).

2.2.2.2 Work Force Management (WFM) Tools

Verint's WFM V11 is a forecasting and scheduling application, used by the contact centre to schedule Information Officers based on many parameters, such as work rules, forecast information based on past business trends or individual agent skills. Vacations, absences and other exceptions are also factored in. Call statistics data is collected from the CCMIS tool and imported for use in the Verint WFM Workforce Optimization Suite.

The Verint WFM solution is designed to help the call center do the following:

- Meet service requirements by optimizing work schedules, meetings and training sessions
- Prepare complex schedules for multiple projects in a fraction of the time that more traditional methods would take

- Allow for efficient scheduling of information officers across a variety of projects to ensure the highest level of call handling capability
- Provides information officers with easy access to schedules and tools to submit shift changes and time off requests
- Manage agents scheduling preferences
- Schedule agents according to the skills and work rules
- Forecast volumes, identify staffing requirements and optimize scheduling for future periods
- Work out “what if” staffing and call demand scenarios
- Provides a variety of real time and historical reporting options to assist in the day to day management of the contact centre

The Contractor's Agents and Supervisors access the application using a web interface.

2.2.2.3 Information Retrieval Tools

The primary information retrieval tool used by the CEC and In-Person services is an in-house developed application named IMPACT, which draws from the information holdings maintained by the IMC. IMPACT provides the ability to:

- Search the IMC's information holdings in order to provide information on and contacts for government programs and services across Canada
- Record call handling activity statistics
- Collect client demographic statistics
- Accept and process orders for publications
- Record comments (internal & external)
- Collect client information (address, phone number etc.)
- Record and process callback requirements
- Conduct client surveys
- Report on call activity and client requests, and
- Collect several other client specific customized requirements.
- Record and process content feedback from agents answered by the IMC
- View real time update on critical program developments (“the Daily tab”)

2.2.2.4 Information Management System (IMS) Tools

The IMS is an in-house developed application used by the IMC to manage the knowledge repositories that support the ICMD service delivery. IMS provides the ability to:

- Meet the specific needs and business processes of the IM specialists that are separate and distinct from the needs of the users of this info
- Allow effective management of complex relationships between the pieces of information
- Ensure that all information is ‘normalized’ thus eliminating any duplication of information and allowing the creation and modification of information to be maintained in one place and only once
- Provide the ability to customize and re-use information based upon the requirements of various projects
- Provide the ability to extract or assemble the information in various formats for ad hoc requests and reports
- Provide the ability to manage keywords and metadata associated with content
- Supports the workflow of a large team of IM specialists and editors and simplifies many extensive and complex data management tasks (in particular information publication at a click of a button)
- It leverages standard office Microsoft products (MS Access, MS Word, MS Excel)

2.2.2.5 Telecommunications Network Improvements

Service Canada's telecommunications infrastructure and services provide an essential foundation for the organization's delivery of the multi-channel services to Canadians. A major initiative is underway to renew the current telecommunications network (Information and Communications Technology Renewal [ICTR] Project) providing enhanced capabilities (such as VOIP) that will enable continued growth of delivery of services to Canadians. The ICTR Project is managed by Public Works and Government Services (PWGSC) and currently is targeted to be implemented in support of ICMD operations.

2.3 Contractor Responsibilities

2.3.1 Staffing / Work Force Management

The Contractor is responsible to recruit, train, and direct its team to deliver the service that achieves the service and operational targets established by Service Canada.

The Contractor team must consist of the following staff:

- Front line staff (Information Officers and Research Officers)
- Information management staff (Information Management Officers, Editors)
- Team Leaders, Supervisors for staff
- Training facilitators
- Project managers, HR specialists, administrative assistants
- Reporting officers, database experts
- Web content and interface designers
- Business analysts
- Quality control - testers

The Contractor is responsible for all human resource issues associated with their staff for the duration of the contract, including, but not limited to:

- Invoicing Service Canada
- Pay and benefits
- Attendance and performance development
- Employee satisfaction
- Work place environment
- Termination and severance

The Contractor must provide Service Canada with a completely self-contained and managed team of information centre specialists and other resources, as identified in Section 4 Service Staffing Requirements. The Contractor must work closely with the ICMD to ensure that its team is appropriately resourced, structured, motivated and oriented to meet both present and upcoming priorities. Service Canada will have no supervisory role with regards to any member of the Contractor's team.

The Contractor will use existing Service Canada software tools, as described in Section 2.2.2 Technology Infrastructure and Tools, to assist in conducting work force management, such as:

- The day-to-day scheduling of resources
- The intraday adjustment of resource requirements
- The modeling of resourcing requirements for new projects
- The planning of upcoming resource requirements to meet our service objectives
- The forecasting of call volumes and calling patterns

Additional or alternative software tools may be necessary for future management support.

2.3.2 Updating and Standardization of Information Databases

The Contractor must contribute to the development and maintenance of the content of all the Service Canada's knowledge repositories managed by the IMC using the provided processes and tools. These databases comprise the foundational information holdings to meet the ever-changing service delivery requirements of the telephone and in-person ICMD services. As described in Section 1 Background, the content evolves rapidly.

2.3.3 Provisions for Ongoing Operational Needs

The Contractor must provide for all material (including office supplies) required to meet ongoing operational needs and for any other resources not specifically identified herein as being provided by Service Canada.

2.3.4 Provisions for Non-Operational Needs

The Contractor must provide for all material required to meet ongoing non-operational needs and for any other resources not specifically identified herein as being provided by Service Canada.

The Contractor must provide any other necessary equipment and/or materials for their on-site Operations Management Team. The Contractor must provide the Operations Management Team with their own office supplies, proprietary software (if required), dedicated printer, and any mobile communications apparatus to ensure the accessibility of designated Operations Management Team members during off-hours or when off-site.

2.3.5 Quality Control and Monitoring

The Contractor is responsible for the quality control of all information produced or modified by their team and for the continuous monitoring of all services and activities provided by their team. All information, services and activities provided by the Contractor under the Contract are subject to inspection and approval by the CEC PA. The Contractor must ensure that the quality control or performance standards set by the CEC PA for each service requirement are achieved by their team. These performance standards must be established as part of the service's initial planning.

Service Canada retains the right to monitor and evaluate the services provided by the Contractor on an ad hoc basis. Any service failing to achieve the performance standards as identified in Section 8 Performance Objectives may be subject to the non-performance credits as identified in Annex "F" – Non-Performance Credits.

2.3.6 Verbal and Writing Proficiency

The Contractor must provide all services delivered under the contract to members of the public and available in either official language (English and French) in accordance with the applicable provisions of the *Official Languages Act*, including but not limited to the requirement that the services in either official language be of equal quality.

The Contractor must ensure that all personnel provided by them under the Contract meet Service Canada's requirements for fluency in both English and French, as required for that team member role and services being provided. The Contractor's verbal and writing proficiency testing procedures and standards must ensure that their team members' proficiency in English and French, as required, is of equal quality in both French and English and of a high level for the service being delivered - i.e. fluent delivery, virtually flawless grammar, full understanding of the

database, and the appropriate vocabulary and writing skills for providing a high quality professional information service to the public and development of bilingual content for the information databases.

2.3.7 Security Requirements

The Contractor must meet the security requirements as identified in Part 6 of this RFP, Section 1, Security Requirement.

The Contractor is responsible for protecting sensitive information and assets under their control. Attention is therefore directed to article 22 of General Conditions 2035 (2012-11-19) entitled "Confidentiality". The Contractor is responsible for having all of its team members assigned to this work appropriately security screened.

Every Contractor team member must have the appropriate security screening level prior to having access to Canada's facilities, equipment, and databases. A Criminal Record Check is sufficient for the Contractor's team member to commence with on-site training. The Contractor team member must hold a valid security screening level of "Reliability Status" prior to commencing the work.

The Contractor must immediately notify Service Canada of any change in team member security status and/or termination. Upon request, or change in personal security status, the Contractor must provide a report of security status by team member.

2.3.8 Non-Disclosure, Confidentiality and Conflict of Interest

The Contractor's team members must complete confidentiality, non-disclosure and conflict of interest documents as administered by the Contractor once the team member is on-site at the Service Canada's facilities.

2.4 Communications Between Contractor and Service Canada

The intent is to foster an effective working relationship between the Contractor and Service Canada so that together the CEC delivers world-class information services to the Canadian public. To this end, strong communications must be established between the Contractor and Service Canada to ensure responsibilities are conducted accordingly, issues are dealt with effectively, and that all service delivery targets, project / resource requirements, and reporting deliverables are met.

The Contractor's Project Manager and Service Canada's PA, Directors, Managers, and Contract Liaison, must meet weekly or as required, to discuss daily, short and long term priorities and work plans.

The Contractor must produce minutes, records of decisions, and action log of these meetings prior to the next weekly meeting which will detail any actions/solutions proposed by the Contractor and the CEC PA's approval of same. The minutes/records of decision and action log must be provided to the Project Authority within two (2) working days following each meeting.

Where applicable, the Contractor must detail financial, resource or time implications of the actions it is proposing to take. The PA will reply indicating or confirming his/her approval of the Contractor's actions/solutions where such approval is required (such as where there is a financial or service standard implication for Service Canada).

The Contractor must work closely with the Service Canada Operations and Information Management management teams to ensure a good working environment and high morale is maintained.

The Contractor's account representative and corporate executive must attend a review meeting twice annually with the Service Canada senior management team (and possibly other senior representatives from other interested Government of Canada parties).

2.5 Resource Requests (RR)

At the beginning of each fiscal year, the PA will provide the Contractor with written authorization to proceed with the work and may be amended within the period. Service requirements may be adjusted to accommodate call usage volume levels or operational requirements (such as new or modified resource request for a CIS project). A Resource Request (RR) will be initiated by the PA for a service requirement resource change within the fiscal year and/or contract year. All of the services provided are subject to inspection and should meet the service requirements to the satisfaction of the PA.

2.5.1 Resource Request (RR) Process

The RR process is as follows:

1. Services to be provided will be described to the Contractor by the PA in writing by means of a RR, which includes: Request number; Amendment number; Year; Contract number; Supplier name; Address; Supplier code; Financial code; RC code; Project name; Project number; Start date; End date; Value; Project description; Requested positions; Security level required (if different from normal security).
2. The Contractor must provide to the PA within two (2) hours of receiving the RR a written confirmation that they can fulfil the RR request within the time frame allotted.
3. Upon approval, the PA will provide the Contractor with a signed copy of the estimate. This signed copy of the estimate by the PA will constitute the RR.
4. The PA will request amendments to the Contractor any amendments to the RR, for a revised estimate and approval, when applicable. Amendments to the RR will be requested by the PA on an as required basis.
5. If the task is to be cancelled, the PA will notify the contractor in writing. The Contractor is responsible for any termination impact on their resources according to the provincial laws where the work is being conducted.
6. A report of RRs must be provided by the Contractor on a monthly basis. Controls by the contractors are to be established to be able to provide information on resources provided against what was required for each service. As each service has limited value the Contractor must report on balance when the total value of the RRs over the course of the year is within 75% of the value authorized at the beginning of the fiscal year. Once a service is completed or terminated, the Contractor must report on each service success including resources, financial status/details, dates/duration, and amendments.

3.0 Requirement Overview

Service Canada's ICMD requires the Contractor to provide on-going staffing for a completely self-contained and integrated team of fluently bilingual contact centre specialists who work within an infrastructure, priorities and direction provided and managed by Service Canada, conforming to an organization structure defined herein. The Contractor's team must provide these services in close cooperation with Service Canada's ICMD management team. The two teams must work together to establish daily, weekly, monthly and quarterly priorities and work plans.

The key priority for these two-teams is to consistently deliver a “World-Class” contact centre service through:

1. The development of a professional, trained pool of contact centre resources that meet the dynamic requirements of all of the CEC's services.
2. The continued focus on customer centric service delivery strategies.
3. The implementation of effective and efficient business processes that support the dynamic business needs of the CEC.
4. The implementation of staffing processes that provide for the flexibility and scalability of the contact centre resources to support the dynamic resource requirements that are the result of delivering more than 30 distinct business lines concurrently.
5. The ongoing maintenance and development of Service Canada databases to support the information needs of more than 30 distinct services concurrently.

4.0 Service Staffing Requirements

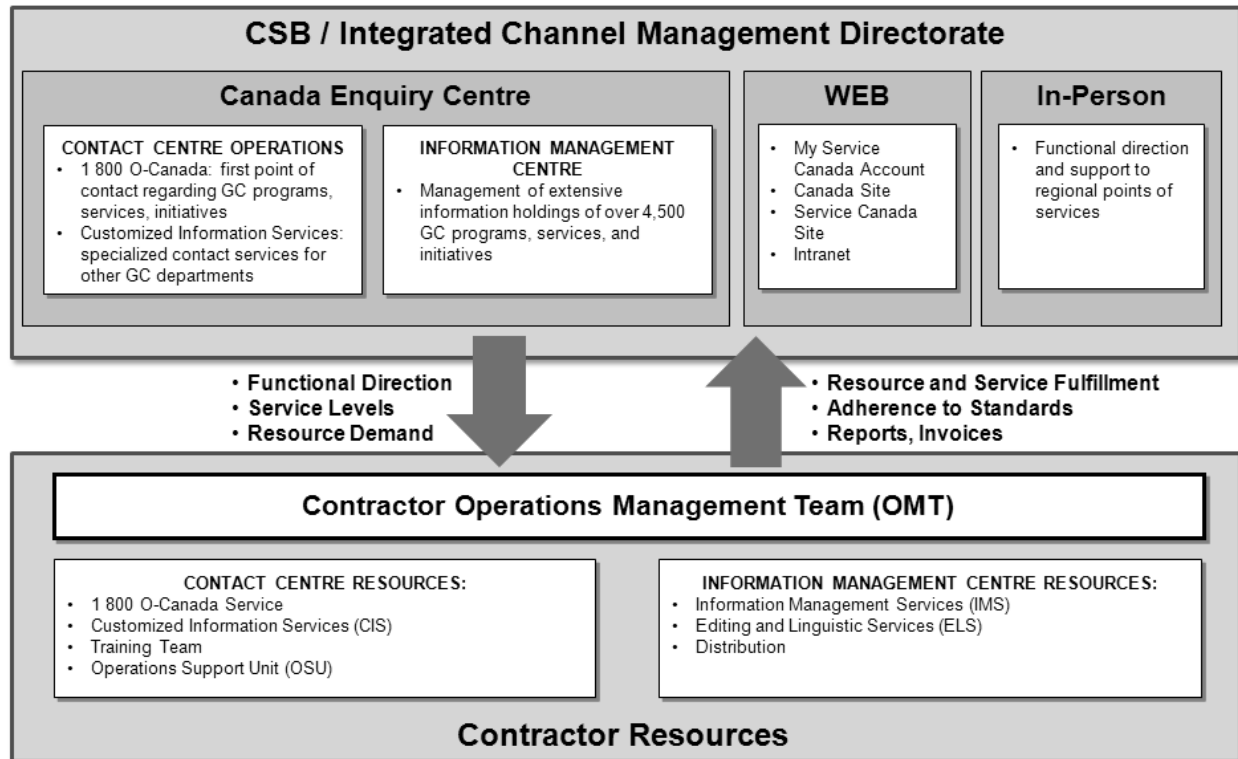
4.1 Areas of Personnel Staffing Requirements

The Contractor must utilize processes for the recruitment and training of personnel resources sufficient to meet the needs of the CEC over the term of the Contract. From the time of Contract award, the Contractor's processes must meet the CEC's requirements for staffing flexibility and scalability for the activities described below over the term of the Contract.

In order to provide the required services described herein, the Contractor must:

1. Recruit, select, train and retain (when possible) fluently bilingual team members who are effective in dealing with the public and with citizen's requests.
2. Maintain an inventory of pre-screened team members with demonstrated capabilities and/or past performance necessary to meet the required performance standards.
3. Provide security cleared team members (as described in Annex “E” - Security Requirements Check List) at every function.
4. Maintain an objective system of team member performance review.

The following chart illustrates the Contractor staffing requirements across ICMD, as detailed in the sub-sections below:



4.1.1 1 800 O-Canada Staffing Requirements

While resource requests for this staffing requirement will vary given the dynamic environment, the Contractor must provide the staffing for the following anticipated team member complement:

- 3 Team Leaders – Contact Centre Operations
- 15 Supervisors
- 15 Senior Information Officers
- 200 Information Officers
- 2 Research Officers
- 3 Coordinators
- 2 Administrative Support / Receptionist

Currently, CEC has implemented a full-time / part-time resource ratio of between 50:50 and 70:30. As such the 200 information officer “head-count” translates into 140 to 175 full-time equivalents (FTEs) on a weekly basis. This ensures that the service makes the most effective use of resources and targets the hours of work of information officers more closely to the calling patterns of the public. It also provides extra trained capacity that can be drawn from in order to help deal with peak call volume periods.

The intent is for the 1 800 O-Canada service to grow capacity (refer to Section 6.1.2 Long-Term Volume Change). The Contractor must be able to provide additional Information Officers and appropriate increase in Supervisors, Team Leaders, and Management staff at various locations throughout Canada if and when required.

Additional professional resources may be required on an if and when requested basis in support of evolving contact centre service delivery. These resources include:

- Project Managers
- Database and Reporting Experts
- Quality Control Specialists

The qualifications for these team members are outlined in Annex "D" – Team Member Roles.

4.1.2 Customized Information Services (CIS) Staffing Requirements

Project specific activities are those that are focused on the delivery of discrete enquiry services for Service Canada's clients (this includes units within Service Canada as well as other GC organizations). Similar to regular program activities project activities are also focused on providing services for telephone, e-mail, fax and regular mail activities.

In addition to the requirement to supply new staff resources to maintain existing projects as a result of attrition, new project based staffing requirements can commonly be categorized as:

1. Small-scale projects – Projects that require an initial staffing complement of less than 11 individuals. The duration of the project is generally 2 to 3 weeks; however, this may be extended based on topic of service and call demand. These requests occur approximately 20 – 25 times over a 12-month period.
2. Medium-scale projects – Projects that require an initial staffing complement of 11 to 50 individuals. The duration of the project is generally three months; however, this may be extended based on topic of service and call demand. These requests occur approximately 8 – 10 times over a 12-month period.
3. Large-scale projects – Projects that require an initial staffing complement of more than 50 individuals. The duration of the project is generally three months; however, this may be extended based on topic of service and call demand. These requests occur approximately 2 - 3 times over a 12-month period.

Service requests for small, medium and large project-based requirements occur randomly throughout the year and often occur concurrently.

On occasion requests will be received to deliver exceptionally large projects (100 or more staff). These types of requests may occur once or twice a year.

The staff resource numbers identified above are intended to highlight the initial staffing complement only. Over the course of the project these numbers will fluctuate depending on call demand. In many cases staffing numbers will decrease over the lifecycle of the project.

While project based activities may fluctuate on an ad hoc basis, the team complement required for the above volume of requests, averaged over a 12-month period, is normally:

- 2 Team Leaders – Contact Centre Operations
- 10 to 12 Supervisors
- 5 to 6 Senior Information Officers
- 100 to 120 Information Officers
- 10 Research Officers

Additional professional resources may be required on an if and when requested basis in support of specific project activity. These resources include:

- Project Managers
- Database and Reporting Experts

- Quality Control Specialists

The qualifications for these team members are outlined in Annex "D" – Team Member Roles.

4.1.3 Information Management (IM) Staffing Requirements

While resource requests for this staffing requirement may vary, the staffing is fairly stable. The Contractor must provide team member staffing for the following anticipated complement to conduct the IM activities:

- 3 Team Leaders – Information Management
- 1 Team Leader – Editing and Linguistic Services
- 3 Senior Information Management Officers
- 20 Information Management Officers
- 5 Senior Editors
- 6 Editors
- 1 Coordinator

Additional professional resources may be required on an if and when requested basis in support of improved information integration across the delivery channels. These resources include:

- Project Managers
- Web Content Creation Specialists
- Business Analysts
- User Experience and Interface Design Specialists
- Quality Control Specialists

The qualifications for these team members are outlined in Annex "D" – Team Member Roles.

4.1.4 Operations Support Unit (OSU) Staffing Requirements

Throughout the term of the Contract the Contractor must maintain an Operations Support Unit (OSU) that will work on-site to provide reporting and testing services in support of ICMD business lines. The OSU must provide high-volume reporting and testing results as planned as well as responding to ad-hoc reporting requests with little notice and tight deadlines. Reporting and testing requests include work that is facilitated with automated processes as well as work that requires customization and/or the creation of new reporting solutions.

The OSU ensures that the appropriate level of support is provided for contact centre reporting, work processes, and database user acceptance testing. The Unit's main activities are the following:

- Creating and producing reports and tools
- Simplifying the reporting process for all services
- Ensuring the accuracy of data and reports
- User acceptance testing of specialized applications
- Providing reporting and tools support

While resource requests may vary given the dynamic environment, the anticipated team member staffing complement that the Contractor must provide to conduct the OSU activities is as follows:

- 1 Team Leader
- 4 Reporting Officers

Additional professional resources may be required on an if and when requested basis in support of the OSU. These resources include:

- Database and Reporting Experts
- Quality Control Specialists

The qualifications for these team members are outlined in Annex “D” – Team Member Roles.

4.1.5 The Contractor's Operations Management Team (OMT) Staffing Requirements

Throughout the term of the Contract the Contractor must maintain an Operations Management Team (OMT) that will work on-site to manage the on-going activities. OMT is responsible for all employer activities, processes and standards, as well as to manage employee performance, development and wellbeing.

The critical activity of the on-site OMT is to manage the Contractor's workforce according to set standards, to effectively respond to the highly frequent “on demand” need of appropriate resources, and to daily liaise very closely with Service Canada management for shared responsibilities.

OMT also performs a variety of enabling functions (such as reporting, recruiting, payroll, billing etc.) to manage the deliverables required under the Contract, however they do not need to be located on-site to conduct these functions.

Specifically, the required on-site OMT activities and responsibilities are as follows:

- Provide for effective service delivery:
 - Adhere to the quality and timeliness of the deliverables as stated in the contract
 - Evaluate the effectiveness of procedures and processes through the analysis of resource and financial data
 - Manage team / employee productivity levels
 - Manage employees punctuality, attendance, and schedule adherence for all employees in an ongoing fashion (hourly for the contact centre – daily for the IMC)
 - Manage the approbation and reporting process for employee scheduled and unscheduled leave
 - Manage employees and potential movement of staff across locations
 - Implement the set monitoring strategy in the contact centre
- Manage, grow, and retain competent employees:
 - Provide expert advice on priorities and compliance issues to the PA and CEC management
 - Ensure appropriate security screening and clearance of all employees
 - Conduct first level screening of potential candidates for the organisation based on identified skills and experience requirements. Maintain an inventory of qualified resources. Respond in a timely fashion to new resources requests. Coordinate 2nd level interviews as required with Team Leaders and Supervisors.
 - Manage and implement Career Path / Staff Development strategies and plans
 - Devise plans and implement strategies in response to employee satisfaction survey and service delivery survey findings
 - Enforce all defined employee policies
 - Manage the performance management process for the employees and follow-up on disciplinary files
 - Organize and deliver skills training, Personal Development training, and employee wellness strategies and plans
 - Define and lead employee communication, workplace wellbeing and enhancement initiatives (including Health and Safety committee, emergency procedures and plans etc...)
 - Manage internal selection / competitive processes

- Deliver orientation training to employees (policies, tools etc...)
 - Administer employee benefits program
 - Manage employee issues through to successful resolution
- Conduct strong relationship management with CEC management:
 - Work closely with the CEC management, maintaining open lines of communication

The on-site OMT size must be flexible and scaled to effectively manage the number and variations of contracted resources required, while minimizing impact on delivering services. The OMT must be bilingual.

The on-site OMT must maintain separate systems from the Services Canada network (accessible from the ICMD location) to protect privacy and confidentiality of both Service Canada and the Contractor's resource and management information.

4.2 Language Requirements of Contractor Team Members

The Contractor must provide service team members who can perform all tasks related to the assigned position in both official languages (English and French) and of equal quality, excluding additional professional services. The public must be able to communicate to the Government of Canada, as represented by the Contractor's team members, in the official language of the client's choice. The CEC standard is to answer calls live; therefore clients are not pre-screened by language of choice (or any other parameter). Information Officers must always use a bilingual greeting and all subsequent information must be provided to the client in the official language of their choice and of equal quality. Information is created, updated, managed, edited and translated in the Information Management Centre (IMC) in both official languages and team members must be able to produce high quality work in both official languages and of equal quality.

All service requirements that vary from this standard will be clearly expressed in the Resource Request and the essential language required will be identified.

Language requirements for the additional professional services will be determined at time of resource need.

4.3 Candidate Recruitment Inventory and Response Times

In order to meet the dynamic and highly responsive nature of resourcing, the Contractor must maintain an inventory of resource candidates for recruitment. Service Canada and the Contractor will, on a monthly basis, review the seasonal requirement for the team member inventory that the Contractor must maintain for the 1 800 O-Canada and IMC service requirements. Discussions relating to the team member inventory for CIS projects will be more frequent, occurring as special project requirements emerge.

The Contractor's inventory of available team member candidates must meet the following minimum levels of resource provisioning by position type (i.e. information officer, information management officer, editor) and skill set unless otherwise specified as part of a specific requirement:

- 1 800 O-Canada:
 - A minimum of fifteen (15) qualified bilingual Information Officers within five (5) working days of receipt of the resource request; and
 - A minimum of thirty (30) qualified bilingual Information Officers within ten (10) working days of receipt of the resource request.
- Information Management Centre:

- A minimum of three (3) qualified Information Management Officers and/or two (2) Editors within ten (10) working days of receipt of the resource request; and
- A minimum of eight (8) qualified Information Management Officers and/or four (4) Editors within twenty (20) working days of receipt of the resource request.
- Customized Information Services Project Resources:
 - Up to ten (10) qualified bilingual Information Officers within one (1) working day of receipt of the resource request;
 - Eleven (11) to fifty (50) qualified bilingual Information Officers within five (5) working days of receipt of the resource request; and
 - Over fifty (50) qualified bilingual Information Officers within ten (10) working days of receipt of the resource request.
- Additional Professional Services Resources:
 - Professional services resources will be required from time to time to assist in a variety of projects or services, such as web development projects, administration services, or project management roles. Request for these qualified resources must be fulfilled within five (5) working days of receipt of the resource request.

In addition to these ongoing staffing requirements there are occasions where the CEC has a requirement to staff exceptionally large projects (more than 100 bilingual Information Officers). In these cases the CEC PA will meet with the Contractor to identify the resource requirements and the deadlines for recruiting these resources to meet the service needs.

4.4 Recruitment Pre-Screening and Turnover Rate Standards

The Contractor must ensure that the following standards are adhered to:

1. Pre-Screening Standard:

When the Contractor presents suitable candidates for recruitment, the standard is to have work unit supervisors and team leaders perform a second-level screening (interview and/or testing). In order to limit the impact of recruitment on operational activities, the Contractor must use sufficiently comprehensive first-level screening techniques (such as: testing for oral and written communication skills, technical skills, and professional suitability inherent to the position; ensuring personal suitability (such as possessing good judgment, positive attitude, respectful, reliable, ability to handle stress inherent to the position, adaptable to work environment changes, and flexible)) to pre-screen candidates in order to ensure that at least two (2) out of three (3) candidates are subsequently determined to possess the required skills for the relevant position.

2. Turnover Rate Standards:

The Contractor must employ sufficiently comprehensive strategies, processes and procedures to meet the turnover standards of team members. Retention is critical to maintaining service standards.

Turnover includes leaves of absences, resignations and terminations, but excludes unscheduled absences, downsizing and vacation. The turnover rate must be calculated as follows: the total number of exits (termination of employment offer, resignations, leave of absences) of team members, minus the number of additions from those returning from leaves of absences, divided by the average size of the team by position, project / project grouping, or work unit during the specified period.

The turnover rate standard for the contact centre Operations is less than 8% by position, project / project grouping, or work unit per quarter (i.e. every three months).

The turnover rate standard for the IMC is:

- Less than 20% for Information Management Officers and Senior Information Management Officers per six (6) months period, ending September 30 and March 31
- Less than 20% for Editors and Senior Editors per six (6) months period, ending September 30 and March 31

5.0 Training

The Contractor must maintain a program of both induction and ongoing professional development training of resources dedicated to supporting the full range of the staffing requirements as described in Section 4.0 Service Staffing Requirements. Specifically, Contractor resource training must consist of:

- induction training
- on-going program and service delivery training
- linguistic training
- information management training
- skill set training
- professional development training

Training curriculum will be developed jointly between the Contractor and Service Canada and approved by the PA. The Contractor is responsible for coordinating and delivering the training. The training requirements are designed around three (3) key pillars that reinforce the principles of overall customer-centric service delivery:

1. Customer Service / Customer Satisfaction
2. Strong consistent tools and processes
3. Building knowledge and expert resources

In order for the overall client experience to be positive, it is imperative that all three of these elements are properly represented in each contact the client has with Service Canada. To this end, and to ensure that the training is pertinent, the Contractor must ensure that all training sessions over the term of the Contract support at least one of these principles.

5.1 Operational Induction Training Requirements for Externally Recruited Resource

The training requirements for any externally recruited resource have a pre-determined formal and practical training period that varies depending upon the level of the position and the assignment in the organization, and is specified in the Resource Request submitted by the PA (or designate) to the Contractor.

New recruits will be paid at the set training rate (as provided by the Contractor in Basis of Payment – Annex B) for the duration of the formal and practical training period identified (rarely beyond one [1] month). Service Canada will not owe payment for the training billing of any new externally recruited team member assigned in response to a Resource Request who does not meet the identified functional requirement for the position, or who resigns or faces termination of employment, within the agreed upon formal and practical training period (typically the practical training period is equal to the number of formal training days).

5.1.1 New Information Officers (IO)

The training requirements for new IOs will vary depending upon the skill sets requirements as specified in the Resource Request. The standard is to train groups of five (5) to twelve (12) Information Officers in a session. The following training periods for the services must be conducted:

- 1 800 O-Canada: two (2) weeks of formal training and two (2) weeks training lab
- CIS: formal training as specified in the Resource Request plus equal number of days practical training in the contact centre environment

The Contractor must ensure that within the practical training period determined (generally five [5] working days after induction training for CIS services and within ten [10] working days after training for 1 800 O-Canada service) the assigned team member is able to:

1. Meet the service level or work schedule required.
2. Operate at an acceptable level of performance (Individual information officers who are evaluated during these monitoring periods are required to receive average scores of 90% for Foundation skills, 90% for Finesse skills and 85% for Information accuracy).
3. Function without requiring continuous monitoring and coaching.

Senior Information Officers (SIO), Supervisors and Team Leaders for 1 800 O-Canada and CIS must have prior experience as an IO. Ongoing professional development training is important to acquire the necessary competencies for these positions (in particular project management, leadership competencies, and writing skills). Supervisors and Team Leaders can also be recruited externally as required (especially for CIS).

5.1.2 New Information Management Officers (IMO) and Editors in the IMC

Upon being nominated to the position, an IMO takes part in a six-month training program and is paid at the training rate (as provided by the Contractor in Basis of Payment – Annex B) during the entire period. This program includes a two to three month period as an IO with the 1 800 O-Canada service (step 1) and time spent in the IMC to learn about managing contact information (step 2), followed by training on all other regular IMO duties and responsibilities (step 3). These steps are detailed below:

Step 1: The IMO in training follows the same formal and practical training program as an Information Officer with the 1 800 O-Canada service: two (2) weeks of formal training and two (2) weeks training lab. This is the only period that is at no charge to Service Canada should the new IMO resign or perform below set standards; IMOs in training must meet all the operational and professional requirements of the IO position and obtain satisfactory good monitoring results before moving on to the next step of the training and integration program.

A new IMO who has already acquired the necessary expertise and experience as a 1 800 O-Canada IO will not be required to participate in this first phase and will move directly to the second step of the training and integration program.

Step 2: Formal training for step 2 is four (4) days followed by a period of up to two (2) months of applied training in the IMC on how to manage contact information in the Information Management System (IMS); IMOs in training must meet all the operational and professional requirements of the position before moving on to the next step of the training and integration program.

Step 3: Formal training for step 3 is five (5) days leading to a formal integration within one of the IM team. IMO is introduced to and trained on all other regular IMO duties and responsibilities.

Upon joining the Editing and Linguistic Services (ELS) unit, a new Editor follows two (2) weeks of formal training and two (2) weeks of practical training. The training period will be at no charge to Service Canada should the new Editor resign or perform below set standards.

Within three (3) months of recruitment, the Editor is expected to be autonomous. Within six (6) months of recruitment, the Editor is expected to perform all core duties independently, to seek the help of more experienced colleagues when necessary, and to require limited supervision. Their performance should be in line with ELS benchmarks and performance indicators (productivity, work quality, reliability, and attendance).

Senior Information Management Officers (SIMOs), Senior Editors and Team Leaders are recruited via an internal selection process within the IMC and must have prior experience as an IMO or Editor. Ongoing professional development training is important to acquire the necessary competencies for these positions (in particular project management and leadership competencies). Upon appointment, they follow a five (5) day formal training program.

5.2 Training Team

The Contractor must provide a dedicated group of training professionals to manage training and professional development activities for various team member activities consistent with business process, multiple different working patterns, and high quality business standards.

The complexity and duration of the specific training required will vary. In some cases, extensive training (up to four [4] weeks) may be required for specialized services.

Based on the historical scale of service activities described herein, the team member complement for training-specific activities, averaged over a twelve (12) month period, is normally:

- 1 Training Coordinator
- 1 Training Facilitator

This training team compliment will need to increase in response to growth in resource allocations.

The qualifications for these team members are outlined in Annex "D" – Team Member Roles.

6.0 Operational Requirements

The Contractor must provide the on-going staffing resource needs to support the ICMD resource requirements, which generally include ten or more ad hoc small, medium and large CIS project initiatives.

Staffing increases to support changes in 1 800 O-Canada or IMC services and additional professional services are fulfilled as required in Section 4.3 Candidate Recruitment Inventory and Response Times.

Staffing increases to support CIS project services, which generally have a shorter duration, are typically requested with shorter lead times. The level of complexity and subject matter of short term projects will also vary. Accordingly, the Contractor may be required to provide personnel resources for project activities that may be based on both basic information dissemination and more complex information issues with a high degree of sensitivity.

On occasion, the Contractor may be required to provide personnel resources for one or more small and medium size projects together with a request for a large project requirement during the same ten (10) day period.

More particularly, within such a ten (10) day period, the Contractor may be required to provide personnel resources for the following operational requirements which could include:

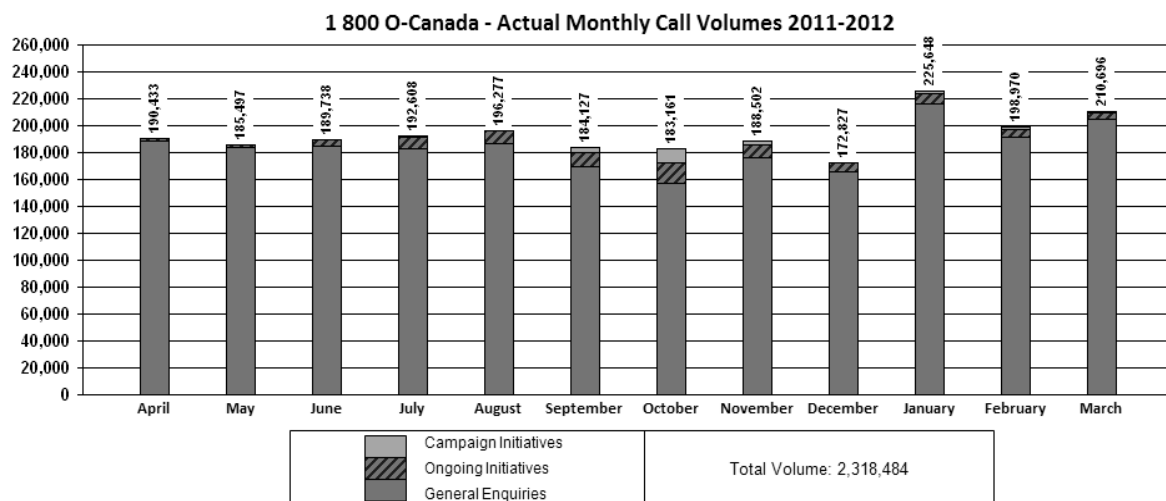
1. The provision of additional team members for the overall program and training as described above.
2. Establishing a team of the required size for one or more small-scale projects to initiate training and deployment. The Contractor must completely fulfill requirements of this level within very short time frames of one (1) day.
3. Establishing a team of the required size for one or more medium scale projects to initiate training and deployment. This type of requirement can be for all services. The Contractor must completely fulfill requirements of this level within short time frames of two (2) to five (5) days.
4. Establishing a team of the required size for one or more larger scale projects to initiate training and deployment. The Contractor must completely fulfill requirements of this level within time frames that vary from five (5) to fifteen (15) days.

6.1 Business Activity Levels

6.1.1 Fluctuations

The requirement for program delivery services is determined by factors such as the type and number of CIS projects, duration of each project and expected call volume levels. For example, telephone call activity levels can fluctuate continually depending on project load and activity periods. Call volumes may range from 20 to 30 calls per hour, during a low activity period, to 200 to 250 calls per hour, during a high activity period. This impacts the services managed and delivered directly by Service Canada

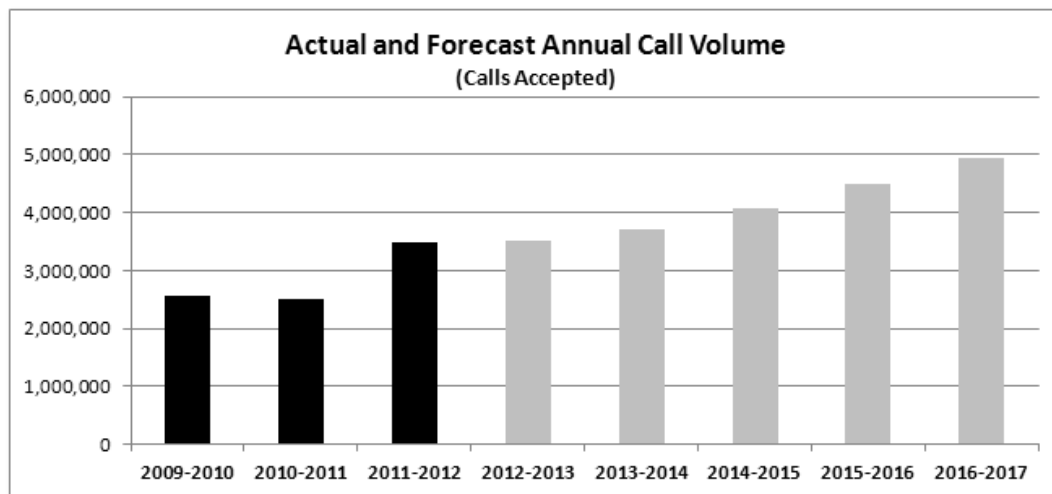
The following chart illustrates the fluctuation levels of actual call volume (calls answered by Agents) for the fiscal year 2011-2012.



6.1.2 Long-Term Volume Change

1 800 O-Canada has experienced significant growth in call volumes since it was first created. The profile of this service has increased among Canadians primarily because of its central role in

supporting key GC advertising, communication activities, communication needs in crisis situations and delivers general enquiry services on behalf of other GC organizations. In many of these cases large national multi-media advertising campaigns have been used that feature the number. Actuals (fiscal years 2009-10, 2010-11, 2011-12) and forecasted volumes (calls accepted) for the CEC are included below.



Enquiry volume is forecast to continue to increase at a rate of 5% - 10% (or greater) over the ensuing fiscal years, expanding capacity (additional Contractor resources) as required. However, significant volume fluctuations may be experienced, either upwards or downwards, due to any of the following events:

- Increase or decrease in advertising campaigns
- Rise or fall in crisis situations
- Introduction of new service offerings
- A change in the overall contact centre and / or multi-channel service delivery strategy for Service Canada

Service Canada will review with the Contractor on an annual basis the forecast volume, which will be reflected in the fiscal year authorizations as described in Section 2.5 Resource Requests.

Increased capacity to address increase in enquiry volume may require additional service locations to be established outside of the National Capital Region. If this business requirement arises, Service Canada will work with the Contractor to determine resource impact, and to plan and deliver to meet this business requirement.

6.2 Hours of Operation

Current hours of operation are identified by service in Section 1.2 Current Services

In the event that Service Canada should significantly change the hours of operation of CEC for an extended period of time (such as expanding the service into evenings, weekends, or holidays), the Contractor must cooperate with Service Canada to quickly and appropriately adjust the scale and composition of its team. In some cases, resources may be called upon to be on standby to allow for rapid response to service needs. Service Canada will pay for standby services.

6.3 Holidays

Services are not normally required on the following statutory holidays:

- New Year's Day
- Family Day (February)
- Good Friday
- Easter Monday
- Victoria Day
- Canada Day
- Civic Holiday (Ontario) - 1st Monday in August
- Labour Day
- Thanksgiving Day
- Remembrance Day
- Christmas Day
- Boxing Day

The Contractor must provide the appropriate scale and level of its team members' services on these holidays should the need so arise. Service Canada agrees to plan for such occasions in as much advance time as possible.

If the CEC service locations expand beyond the NCR, then the applicable provincial statutory holidays will apply for the required Contractor resource levels.

6.4 Health and Safety Committee

All organizations with more than nineteen (19) employees are required to have a Health and Safety Committee in accordance with the laws of Ontario. The Contractor agrees to adhere to The Occupational Health and Safety Act, as it applies to each Ontario CEC call sites. This includes and is not limited to ensuring a team member has First-Aid for any one shift, reporting of any injuries, and monitoring compliance. For sites outside of Ontario, the health and safety standards of that province apply.

Hours spent by team members on this committee are not to be billed to Service Canada.

The Contractor must provide a Health and Safety Report to the PA on a monthly basis.

6.5 Timeliness of Response

The Contractor must confirm receipt of resource requests for all new requests or changes to service requirements in writing or via e-mail, within two (2) hours of their receipt of the request. These requests will specify the deadline dates to be met for the requested action (such as recruitment and training of new team members required for new special projects or anticipated call volume surges).

6.6 Establishing and Maintaining a Professional Work Place Environment

A professional work place environment is vital to conducting high quality service to citizen calls. Therefore, the Contractor must provide for a professional work place environment. This includes establishing policies regarding appropriate attire, workstation cleanliness, music, safety, and any additional policies that together contribute to a high level of professionalism. The Contractor must enforce such policies.

7.0 Reporting Requirements

The Contractor must adhere to the following criteria for all reports identified in the following sections:

- The daily and weekly reports are highly critical to the effective management of resources in this high volatile resourcing environment and to achieving the CEC mandate. The Contractor must provide the reports in the timeliness stated
- Reports must be provided electronically as well as in hardcopy
- Reports must be provided in English
- Clear distinction must be made between service lines, so that each service line can effectively utilize their own report information
- For reporting, the PA includes providing the reports to the CEC Management Team

The following report descriptions use "program" to refer to 1 800 O-Canada and Information Management services.

7.1 Daily Team Member Status Report

On a daily basis for all operational days, the Contractor must provide to the PA:

- By 8 a.m., the current day resource deficiencies (Daily Resource Deficiencies Report) to meet set 1 800 O-Canada and project resource targets expressed in number of hours (factoring in unscheduled leave [absenteeism]).
- On-going report updates throughout the day
- By 10:30 a.m., the current day resource deficiencies to meet set IMC resource targets

7.2 Weekly Team Status Reports

On a weekly basis (by noon of every Thursday of the following week), the Contractor must provide to the PA a written report which details:

1. A summary of the actions, issues, corrective measures and plans addressing the current priorities and requirements;
2. The number of the Contractor's team members currently on strength (the working day immediately prior to the date of the report's filing) by program and/or project and position / profile;
3. Active employee list;
4. The number of individuals not currently on strength but in the Contractor's recruitment inventory and available for immediate assignments if required by program and job profile. This should highlight the individuals training and/or previous experience if applicable;
5. Resource scheduled and unscheduled leave by employee, by profile, by program and by project for the past week;
6. Resource performance measurements results, probations, security status.
7. Hours of work report by program and/or project by individual (daily breakdown with weekly totals);
8. Timeliness of resource request responses detailing each request that the Contractor received or are still outstanding (since the previous report) for actions to assign or reassign team members. This detail should include, by request, the following:
 - a. the date the Contractor received the request
 - b. the steps taken by the Contractor to fulfill the request and, if completed, the date on which the request was completely fulfilled
9. Resource assignment movement journal outlining all resource changes for the past week (including project and program assignments and re-assignments, position changes, departures, new hires, leave of absences etc);
10. Modification of pay rate report by employee, program, and project with narrative justification;
11. Security clearance status report by resource;

12. Average mean billing rate per assignment;
13. Overtime approval report by project;
14. Overtime hours and rate; and
15. Invoice report including employee, position, level, rate of pay, hours worked (by projects) for the week, shift premium, and shift hours rate.

7.3 Monthly Reports

The Contractor must provide a monthly report to the PA, by the 15th day of the month, which includes narrative and statistical information on the previous month's activities and year to date cumulative values where required, as follows:

1. Team member performance exceptions, by program and by project, including:
 - a. team members which the Contractor has identified as requiring performance expectation improvement or any remedial action on the part of the Contractor
 - b. the Contractor must be prepared to provide detail such as the nature and duration of the performance deficiency and the Contractor's proposed actions
 - c. future written reports will describe which of these performance exceptions are continuing and which have been resolved
2. Contract deliverable performance exceptions:
 - a. Contractor must report all instances of exceptions in meeting contract deliverables along with recommended remedial measures
3. Health and safety meeting synopsis (as required by Legislation and Regulatory requirements for the province that the Contractor is operating in).
4. Staffing activity, including:
 - a. training offered and taken
 - b. number of resignations and the experience levels to be restored
 - c. down-sizing activities
 - d. for positions filled during the month, the number of internal vs. external applicants for vacant positions by job category, and the number of people hired by the competitive interviewing process
 - e. the number of team members that do not meet the training requirements
 - f. new resources hours worked report by program/project by individual highlighting resources that have not completed their training program (daily breakdown with monthly totals)
 - g. resource tenure, turnover rates and exit interview summary reports including analysis and trends
5. A synopsis of any invoicing discrepancies, the remedial action taken as well as the date by which each will be or has been resolved.
6. Expenditures report by program/project rolled up by Resource Request within Task Authorization.
7. Priorities and planned activities for the following month, including training, skills development, and performance evaluation activities and plans.

7.4 Quarterly Reports

A Quarterly Turnover Report by program/project, based on a six (6) month start and end date envelope, must be provided quarterly - starting the first of the third month after the contract award date. This report must include analysis and recommended approaches to optimize resource retention.

7.5 Semi-Annual Reports

A Performance Appraisal Summary Report must be provided semi-annually that shows per group (1-800, CIS, IMC) the percentage of staff who received at least a "met expectations" rating for that period. Performance appraisals due during that period but not delivered will be included in the total for that period and given a rating of "Does Not Meet".

7.6 Annual Report

An annual report must be filed annually within thirty (30) calendar days following the end of a contract year. This report will provide an overall summary of the Contractor's performance according to the performance objectives. Any discrepancies in performance will be discussed at an annual meeting of Service Canada and Contractor senior executives who will together determine what, if any, improvements in services will be made.

7.7 Ad hoc Reports

At the request of the PA, the Contractor must provide ad hoc reports of an agreed information and format within an agreed time depending on the complexity of the request.

7.8 Report Modifications and Future New Reports

Periodically, modifications to existing reports may be required to better serve management's needs. This will be achieved with the Contractor in consultation with CEC Management, including time and compensation required based on the complexity of the reporting change.

Additional reports may be added or introduced to replace existing reports as the operations of the service evolve during the period of the contract. For the introduction (or replacement) of new reports, any transition time or compensation will be discussed in advance with the Contractor.

8.0 Performance Objectives

The Contractor's performance in providing the services required under the Contract will be measured against the service quality measures detailed herein. The Contractor must advise Service Canada, at its earliest opportunity, of any forces beyond its control which could detrimentally affect service quality. The Contractor must, at this early opportunity, recommend reasonable and cost-effective solutions to maintain the service and where possible improve service quality.

8.1 Performance Measures – 1 800 O-Canada Services

In order to deliver a high quality of service, an information centre service must utilise various performance indicators to assess its quantitative and qualitative service levels. CEC has identified six (6) key areas for service standards and designed a number of performance indicators to measure progress against these goals. These service standards are:

Quantitative:

- Timeliness
- Accessibility

Qualitative:

- Courtesy
- Responsiveness
- Accuracy
- Caller Satisfaction – Service Quality Ongoing Evaluations

The quantitative service standards are timeliness and accessibility. It should be noted that the quantitative service standards listed below are ideal service standards. The quantitative level of service for each project is arrived at in conjunction with the client. Items such as client budgetary constraints and the urgency of information delivery will be considered when establishing goals for the service.

The qualitative service standards include courtesy, responsiveness and accuracy. The qualitative level of service is a CEC standard and is not to be compromised solely to reduce costs or increase profits. For example, all of the Information Officers must be fluently bilingual, providing service of equal quality in either French or English, must participate in a minimum one day Customer Service Workshop and will have calls monitored by Supervisors on an ongoing basis.

8.1.1 Timeliness

Timeliness is measured against the objective of “responding to an enquiry rapidly without compromising the accuracy and appropriate level of detail required to answer the enquiry.” The target is not necessarily to shorten the “talk time” but to attain an “appropriate” talk time for the nature and volume of the enquiries received.

Performance indicators for this service standard include: average talk time of individual information officers, average talk time of all information officers, and ongoing monitoring of queue activities.

For enquiries that cannot be readily addressed, call backs are undertaken within one Canadian business day of the original enquiry. Calls requiring research are passed on to an Information Management Officer the same day as the call is received and call backs must occur within one Canadian business day of the receipt of the enquiry.

8.1.2 Accessibility

Callers can expect to access the service easily. Performance indicators for this service standard include:

- 95% of callers' attempts to reach the service must be successful
- A maximum of 5% of attempts to reach the service during the hours of operation can receive a busy signal. A maximum of 5% of callers will abandon while in the queue
- 85% of all calls that reach an Information Officer must be answered within 18 seconds

A Nortel Automated Call Distributor (ACD) Management Information System is used to monitor compliance to this standard. The ACD is pre-programmed to produce call performance reports at thirty (30) minute intervals. These reports identify anomalies to the PA for analysis at the beginning of each workday.

8.1.3 Courtesy

Information Officers must respond to callers with the highest degree of courtesy, professionalism and proper telephone etiquette. This service standard is achieved by one-on-one coaching of employees, Customer Service Workshops, and the silent monitoring of calls. Call monitoring of Information Officers is a key method of providing feedback on their performance. In this way, areas of strength can be emphasized and potential problems do not go undetected.

8.1.4 Responsiveness

If an answer or a correct referral cannot be immediately found to satisfy the caller's enquiry, every effort must be made to respond to the caller in an appropriate time frame. This service standard is measured through the monitoring of call back turnaround times.

8.1.5 Accuracy

The Information Officers must always be thorough in defining a caller's needs. They must answer every call using all approved tools and resources at their disposal. The call monitoring process is the evaluation mechanism utilized for maintaining this service standard.

8.1.6 Caller Satisfaction - Service Quality Ongoing Evaluations

To ensure that the services provided are being delivered in line with the quality objectives and the customer-centric philosophy in place at the CEC, Service Canada will work closely with the Contractor to ensure a comprehensive quality assurance process is in place to evaluate call performance. The current quality assurance practices as conducted by the Contractor include:

- Mentoring sessions for new staff (minimum of 5 hours of 1-on-1 mentoring during induction period on line)
- Increased call monitoring for new staff (two [2] calls per day per information officer) for induction period on line
- Post-training feedback provided to all new staff members (following their initial training period);
- Regular call monitoring (two [2] calls per week per Information Officer)
- Targeted mentoring sessions for experienced staff
- Trend analysis of coaching feedback and monitoring results to identify areas for improvement and development of training

The call monitoring process to be conducted by the Contractor, which is a key feature of the overall quality assurance practices, includes the following features:

- Calls are monitored live (in real-time), on-site by Supervisors and Senior Information Officers
- Feedback and coaching on monitored calls is provided immediately following the monitoring session to ensure that the Information Officer remembers the call, is able to relate the feedback to specific instances, and is then able to implement any corrective measures in a timely fashion
- Call evaluation is divided into 3 key areas:
 1. Foundation Skills – These are defined as skills or tasks should take place during every transaction; the same performance is expected of all Information Officers, regardless of the level of experience. They include following standards related to the protocols for the greeting and closing, determining the call origin, the source where the person obtained the toll-free number, place a caller on hold, transferring a call, recording document orders, call backs and statistics as well as remaining neutral and complying with the project mandate.
 2. Finesse Skills – These are defined as techniques that can be performed with varying degrees of skill. They contribute to the personality of a call. There are different ways to successfully perform the skill. Performance generally improves with experience. They include probing, paraphrasing, effective communication, situating the caller, language, listening, managing the conversation, diplomacy and writing.
 3. Information Accuracy - The Information Accuracy score evaluates the response to the caller's enquiry. This includes a review of all actions taken or information offered and if each was relevant or irrelevant to the caller's request.

Individual Information Officers who are evaluated during these monitoring periods are required to receive average scores of 90% for Foundation skills, 90% for Finesse skills and 85% for Information Accuracy.

The PA may, on occasion, perform silent monitoring.

Relevance (including accuracy) and consistency of response are monitored via a satisfaction survey conducted by Service Canada.

In addition to internal quality assurance processes, Service Canada has partnered with an independent private organization to perform annual customer satisfaction surveys and to provide benchmarking data concerning services. These surveys, which have been performed since 2001-02, allow Service Canada to:

- Obtain an independent assessment of client satisfaction
- Measure the services provided by the CEC against other contact centres along key customer service indicators
- Identify the gaps between the CEC's service delivery strategies and performance and those of the industry leaders
- Target key areas for improvement

Periodically, Service Canada conducts Mystery Shopping Research. The last one was conducted in the winter of 2012. "Shoppers" posing as clients conduct a certain number of shops using scenarios, based on life events, to observe qualitatively the client experience while interacting with service delivery personnel and channels. This exercise tests the service standards and procedures in place and how well and how often the service delivery aligns to define strategies.

Finally, Service Delivery Assessments are conducted by the CEC contact centre management team throughout the year to validate how well and how often the services delivered measure against service delivery standards and the service experience model defined.

8.1.7 Email Response Standards

Responses to e-mail requests currently constitute approximately 5% of the total enquiries processed by CEC. Due to the wide variety of enquiries received and the nature of the printed word, responses are currently custom-written and reviewed by Editors and are therefore currently more time-consuming than telephone enquiry responses.

Performance indicators for this service standard include:

- 85% of emails' received must be answered in an average of one (1) Canadian business day from receipt
- processing time (team hours spent researching and drafting the reply) - average of thirty (30) minutes per e-mail request
- quality of language - measured by reviews by Supervisors
- accuracy and completeness - measured by reviews by Supervisors

8.2 Performance Measures - Customized Information Services

The quantitative and qualitative service levels described in Section 8.1 Performance Measures – 1 800 O-Canada above apply to CIS.

Specific quality service standards and objectives for Special CIS Projects will be established as a result of discussion between Service Canada and the Contractor through the life of the contract.

These standards may vary from project to project and may be established by other government departments.

8.3 Performance Measures - Information Management Services

The following service standards are used to measure progress towards the Information Management Centre (IMC) service delivery goals.

8.3.1 Yearly Information Update

The IMC yearly update schedule and objectives will be published at the beginning of each fiscal year and revised in July and November, as required. The following performance measures apply:

- 100% of the content managed must be standardized in accordance with IMC database standards
- 100% of the content managed must follow the terminology and language standards established by the ELS unit
- 100% of the database content must be validated by designated departmental program officers
- 100% of the content managed must be available in French and English, and be equivalent in both languages
- All programs and services that are included in the top 80% of call volume activity must be updated every six (6) months
- The program and services that fall within the remaining 20% of call volume activity must be updated once a year
- 100% of all update Bring Forward forms must be reviewed and acted upon prior to the date of the projected change

8.3.2 Call-backs

When the program/project service cannot answer the enquiry upon the first call, the enquiries are sent to the Information Management Centre for callbacks to be made within one (1) Canadian business day. In the event that further research is required, the caller will be given an estimated time as to when the Information Management Centre will be able to provide them with the appropriate information or referral.

The following performance measurements apply:

- 100% of all action requests requiring a call-back or with a high-priority status must be handled within one (1) Canadian business day
- 100% of all action requests with a normal priority status must be handled within two (2) Canadian business days

8.3.3 Information Maintenance

For the 1 800 O-Canada and In-Person information database, all components of the database must be updated at least once during the fiscal year (April 1 to March 31). Ad hoc change requests to the database, based on new information or changes to existing information are to be updated in the database within one Canadian business day, according to the priority assigned to the request.

All components of the CIS projects databases are to be updated at least once during the fiscal year (April 1 to March 31). Ad hoc change requests to the CIS project databases, based on new information or changes to existing information must be updated in the database within one (1) Canadian business day. It is also possible that there may be major revisions and/or additions to

a CIS project in support of the service activities of the client department. As well, it is possible that a customized database will need to be created to support a CIS project. The turnaround times on these projects are usually very short and are dealt with on a case by case basis.

The Information Management Centre is responsible for the creation and maintenance of keywords for all databases on a daily basis.

8.3.4 Editing and Translation

Before information is put on line for all databases it must be reviewed by the editing team for style, grammar, and language. The Editing Team is also responsible for reviewing the e-mail responses drafted for client requests for style, grammar and language prior to transmission on a daily basis.

The following performance standards apply:

- 100% of the database content must be reviewed by the ELS team for linguistic correctness and equivalency in both official languages
- A standardized phrasing request is a service request submitted to ELS to standardize text that appears in more than one (1) database document (often as part of a series of related programs). ELS is responsible for ensuring the linguistic quality of standardized phrasing and for managing its inclusion in the SPOT database
- 100% of the documents must be edited with track changes

Performance measures for editing and translation requests are as follows:

- Regular Requests to edit new or modified database documents: fifteen (15) business days or less
- Priority Requests to edit new or modified database documents: More than two (2) but less than fifteen (15) business days
- Rush Requests to edit new or modified database documents: Before the end of the next business day
- Rush Requests - The Daily Articles: within one (1) hour of submission
- Rush Keyword Requests: Same day (by 5:30 p.m. or as specified by the client)
- Priority Keyword Requests: Date and time specified by client
- Special Requests: Date specified by client

8.3.5 Internet and Media Monitoring

The Information Management Centre is responsible for monitoring information on the Internet and contained in the news media on a daily basis. The IMC is responsible for writing a synopsis of current events and other items of interest in the DAILY communication bulletin.

The following performance measurements apply:

- 95% of the Daily-worthy announcements identified through media monitoring activities must be published or amended within one hour during IMC core business hours (7 a.m. to 6 p.m.)
- 100% of all valid content additions brought to the attention of IMC staff must be included in a DAILY article

8.4 Contractor Team Members Satisfaction

There is a strong correlation between client satisfaction and the morale / job satisfaction of the resources delivering the service. The Contractor must have in place measures to evaluate the job satisfaction of their contract resources on a regular basis to identify trends with staff and to

suggest enhancements that will improve morale. The Contractor must perform a third party evaluation of their resources on an annual basis to obtain an independent assessment of job satisfaction as well as suggestions for means of improving this satisfaction based on best practices in the industry.

8.5 Process Efficiency

The Contractor is expected to develop and recommend measures which could be implemented to improve the efficiency of its contract handling process. The CEC's performance against process efficiency standards will be accepted as indication of the Contractor's performance and will be taken into consideration by Service Canada as it considers whether to exercise the options to extend the contract.

8.6 Non-Performance

In cases where the Contractor is in a situation of non-performance, credits will be applied in accordance with Annex "F" – Non-Performance Credits.

9.0 Performance Review

Performance reviews will be undertaken on 1 800 O-Canada and IMC services, CIS projects, training activities (including team member inventory management and turnover rates), and other ICMD services undertaken throughout the course of the contract.

In any case where they fail to meet the required operational or support service performance levels 90% of the time, measured on a quarterly basis, Service Canada reserves the right, on the third instance of an unresolved deficiency, to terminate all or part of the contract.

The following performance review process will be employed:

1. Performance levels, including the service levels described in Annex "F" – Non-Performance Credits, will be measured and reported on a quarterly basis and verified by the PA.
2. Failure to achieve 90% of the service level requirement(s) three times in any quarterly reporting period will result in the following:
 - a. a notification letter will be sent to the Contractor's senior Operations Management Team (OMT) member indicating the performance deficiency or deficiencies.
 - b. a review meeting will be arranged between the PA and the Contractor's Senior Account Executive within a reasonable period of time (normally two weeks) after receipt of the notification letter.
 - c. within one week following this executive-level review, the Contractor must present their plan to address all noted deficiencies and ensure that future incidences do not reoccur.
3. If there is continued failure to meet the expected performance levels, following the implementation of the Contractor's performance resolution and improvement plan, the above process will again be employed along with the Contractor's explanation of the failure of their previous plans to address the deficiencies and a revised plan for correcting and preventing future deficiencies.

10.0 Financial Management

10.1 Invoicing Process

Due to the complexities of very high resource movement across multiple services in response to constantly changing service demands, the invoicing process requires very strong rigor in ensuring

that all resourcing has been appropriately verified and invoiced in a timely manner. The onus is on the Contractor to ensure and prove that all invoices are accurate to the best of their knowledge. The Contractor's invoice controls and processes will be subject to periodic reviews and audit by Service Canada; the timing to be determined by the Contractor and Service Canada.

Invoicing must be done weekly. The Contractor must provide an invoice and supporting documentation by Thursday noon of the following week period. The invoicing frequency may be subject to change depending on best alignment to Service Canada's financial reporting needs.

The invoicing process will be as follows:

1. Contractor prepares and validates the invoice and supporting documentation, confirming quality.
2. Contractor provides an electronic copy (PDF and excel) of the invoice and supporting documentation to Service Canada.
3. Service Canada captures the invoice details.
4. Service Canada provides payment to the Contractor.
5. Service Canada verifies the invoice details. Discrepancies are documented and discussed with the Contractor. Any agreed discrepancies are provided as a credit adjustment on the next invoice cycle, and are subject to non-performance credits as described in Annex "F" – Non-Performance Credits.
6. Contractor tracks accumulated invoices against the Task Authorization (TA).

The Contractor's invoice validation process must, at a minimum, consist of the following quality checks:

- Confirm that hours indicated were indeed worked
- Confirm that all overtime was approved
- Confirm that time off and absences were approved and tracked
- Confirm that assignments were approved by resource requests
- Confirm that pay scales adhere to the contract
- Confirm that pay scales adhere to resource movements
- Confirm that invoices are within authorized TA value and correspond to the right projects

The Contractor must provide the following supporting documentation:

- Employee Assignment Tracking
- Active Employee List
- Invoice Report
 - Employee number
 - Employee position and level
 - Rate of pay
 - Hours worked (by projects) for the week
 - Shift premium and shift hours rate
 - Overtime hours and rate.
- Overtime Approval Report by project
- Overall Invoice Summary page (1 page) that contains:
 - Invoice number
 - Date of invoice
 - Project number
 - TA number
 - Week-ending date
 - Invoice amount without taxes
 - Tax amount
 - Total number of hours
 - Contract number (PWGSC)

- Supporting Invoices for each summary page item noted above, that contains:
 - Employee number
 - Date of the invoice
 - Week-ending date
 - Number of hours per employee
 - Employee rate
 - Amount invoiced per employee
 - Employee position title and level
 - Total hours per employee
 - Total amount of invoice
- Employee Detailed Timesheets
- Hours Worked Report:
 - by project
 - by employee
 - by day
- Absence and Time Off (Time not worked) Report
 - by employee
 - by project
- Modification of Pay Rate Tracking Report: this written report must outline any increase in rate of pay that would be the result of the Contractor's employee policy, with an explanation and effective date.
- No Charge to Service Canada Report: itemizes Contractor activity not charged to Service Canada, such as unsuccessful training.

Additional supporting documentation may be required as determined by Service Canada and agreed by the Contractor.

The Contractor must utilize an automated time system to capture and report on all of the elements specified in the supporting documentation identified above and to meet the reporting requirements as specified in Section 7 Reporting Requirements. As well, the system must be able to capture constant employee and project changes quickly and accurately.

Contractor Rate of Pay Changes: All modifications to a Contractor's employee rate of pay must be applied to the invoice within two (2) weeks of the effective date, accompanied by justification of the rate change. Because of the complexity of internal cost recovery for departmental projects (CIS services), Service Canada will not accept invoice amendments related to retroactive pay changes beyond two (2) weeks of the effective date of a modification to the Contractor's employee's rate of pay.

11.0 Transition Period

11.1 Transition In As New Contractor

The Contractor must assume all responsibilities of the requirement in delivering the services commencing on the contract start date of **November 30th, 2013**.

The transition period is from contract award date to contract start date.

Prior to the contract award date, and within 10 (ten) business days of written notice to the Contractor, the Contractor must provide a draft Transition Plan to the PWGSC Contracting Authority (CA) and the Service Canada Project Authority (PA) for review and agreement. The draft Transition Plan must address the following objectives and needs:

1. Objectives

- a. Maintenance of service quality;
- b. Avoidance of service interruptions;
- c. Avoidance of costly duplication of administration or service delivery;
- d. Minimization of the transition period; and,
- e. Minimization of loss of skilled team members.

2. Needs

- a. For a rapid and effective transition to new administration and operating procedures (if any);
- b. To manage any issues related to any period of parallel operations by two Contractors;
- c. For the incoming Contractor to have the management and operational capacity to take on 100% of the current business activities at the time of contract start date;
- d. To communicate and manage the Contractor's move-in and setup timetable;
- e. To transfer authority and reporting relationship between Contractors' OMTs;
- f. To cooperate with the out-going Contractor to schedule the formal transfer and implementation of all new arrangements; and,
- g. To identify risks and recommend / implement mitigation measures.

During the transition period, the Contractor must provide the following deliverables:

1. The Contractor must be available to meet with the CA, PA, and incumbent Contractor to review and agree on the draft Transition Plan. The final Transition Plan must be implemented within ten (10) business days of contract award date.
2. Within thirty (30) days of contract start date, the Contractor must establish a fully operational and functional test and training facility in the National Capital Region for completing the required recruitment, training, and testing functions. The facility must be equipped with a minimum of five (5) appropriately configured microcomputers for recruitment, testing, and training of potential candidates. The microcomputers must be compatible with Service Canada working standards and equipped with software in use by Service Canada's contact centre. Currently, the environment is Windows XP Operating System and MS Office Suite 2003 Pro version (consisting of Word, Excel, PowerPoint, Access, Outlook and Internet Explorer) for which they will test the computer literacy of potential candidates.

As well, the Contractor may be required to establish test / training facilities in additional geographic locations depending upon future growth in CEC services beyond the NCR and perhaps across the country.

3. Within thirty (30) days of contract start date, the Contractor must provide to the PA a list of all team members that will be assigned to this requirement and have passed the pre-screening tests.

11.2 Transition Out To Another Contractor

The Contractor must continue to deliver high quality service while it cooperates with any incoming Contractor.

The Contractor must make its team members available for transition planning meetings with any incoming Contractor as per the agreed incoming Contractor's Transition Plan and must cooperate with the incoming Contractor in transition matters - particularly related to providing the incoming Contractor with speedy access to the incumbent Contractor's team members for recruitment purposes.

ANNEX B

BASIS OF PAYMENT

It is mandatory that all blocks of the Basis of Payment be completed.

Bidders must provide unit prices in the unit requested. If the Bidder's proposal contains pricing in a unit other than the ones requested, the bid will be found non-compliant and no further evaluation will be done.

Prices must be in Canadian dollars, Goods and Services Tax or Harmonized Sales Tax excluded.

B1. FIRM MONTHLY MANAGEMENT FEE

The Bidder must provide a firm all inclusive, monthly management fee for Work performed pursuant to this Contract - including the Bidder's senior representatives assigned to this account, the Bidder's Operations Management Team (OMT) and all management support systems, methods, procedures and mechanism used to facilitate the smooth functioning of Service Canada's requirements, but not including the team members billing rates. Canada will not pay any additional fees beyond the firm monthly management fee for basic billing and administrative services.

Contract Period	Firm Monthly Management Fee (\$/mo.)
Contract Year 1	\$_____/month

Annual Billing Rates Adjustment

For each subsequent year of the contract the increase in the monthly rate will be determined by the Consumer Price Index (CPI) for the previous 12 month period, as measured by Statistics Canada. For example, the monthly rate for the period from November 30, 2014 to November 29, 2015 will be calculated using the CPI for the period from September 1, 2013 to August 31, 2014

B1.1 CPI Calculation

For each contract year starting at year 2, the monthly rate will be adjusted by an amount established based on the percentage increase or decrease in the annual average index of the Consumer Price Index for Canada, All-Items (Not Seasonally Adjusted), published in Statistics Canada Catalogue no. 62-001-X, Table 5, in accordance with the following formula:

$$\text{Economic Price Adjustment} = (A/B - 1) \times 100$$

Where:

A = Average of the monthly CPI for Canada, for the 12 months ending three months prior to the current contract year, rounded to 2 decimal places.

B = Average of the monthly CPI for Canada for the 12 months ending three months prior to the end of the previous contract year, rounded to 2 decimal places.

Example:

In Year 2 of the contract commencing August 1, 20XX, the Year 1 rates in Annex B would be increased by 2.40% based on the following assumptions:

A = Annual Average Index for the 12 months ending April 20XX (three (3) months prior to the current contract year = 145.3)

B = Annual Average Index for the 12 months ending April 20XX, (fifteen (15) months year prior to the current contract year = 141.9)

Economic Price Adjustment= $(A/B - 1) \times 100$

Economic Price Adjustment= $(145.3/141.9 - 1) \times 100$

Economic Price Adjustment= 2.40%

In the event that the average annual CPI is below 0.0% for the previous calendar year, the monthly management fee will remain unchanged from the previous twelve (12) month period.

B2. FIRM HOURLY BILLING AND WAGE RATES

The Bidder must complete the billing and wage rate tables as described below. Failure to complete the tables will result in the bid being non-compliant and no further evaluation will be done.

The billing and wage rate tables include five (5) classification levels per team member category. This is for representation purposes only. The Bidder must provide the number of classification levels that they will utilize, from a minimum of three (3) to a maximum of five (5).

A) FIRM HOURLY BILLING RATES (TEAM MEMBERS)

The Bidder must provide firm, all-inclusive hourly billing rates in Table 1 which will cover the services of the team of information specialists on the basis of hours worked at the applicable and pre-established hourly billing rates for the appropriate period during which the work was performed. For time worked that is less than one hour, the hourly billing rate will be prorated to reflect the actual time worked (e.g., 0.5 hours). The Bidder must also provide firm, all-inclusive hourly wage rates in Table 2.

TABLE 1 - Firm Hourly Billing Rates for Team Members for contract year 1:

Team Member Category	Guaranteed Firm Hourly Billing Rate for Team Members					Guaranteed Firm Hourly Trainee Billing Rate	Firm Hourly Shift Premium* (\$/hr)
	By Classification Level (minimum 3, maximum 5)						
	A	B	C	D	E		
Team Leader – Contact Centre Operations							
Team Leader – Information Management							
Team Leader – Editing and Linguistic Services							
Team Leader – Operations Support							
Supervisor							
Information Officer							
Senior Information Officer							
Information Management Officer							
Senior Information Management Officer							
Editor							
Senior Editor							
Research Officer							
Coordinator							
Reporting Officer							
Training Coordinator							
Training Facilitator							
Administrative Support / Receptionist							
Reporting / Database Expert							

Web Content Creation Specialist							
User Experience and Interface Design Specialist							
Business Analysis							
Project Manager							
Quality Control Specialist							

***Shift Premiums**

The use of shift premiums for team members who work outside of the core hours of business is a common practice within the contact centre industry. If Canada requires work outside of core hours, the Contractor can bill shift premiums. The Bidder should identify if they intend to employ this practice as part of team member benefits and indicate how this will be applied (including, but not limited to the shifts to which it will apply and the amount of the premium per shift). Canada is not liable for shift premium charges that are not preauthorized by the Project Authority.

Annual Billing Rates Adjustment

For each subsequent year of the contract, the increase in the rates identified in Table 1 above will be determined by the Consumer Price Index (CPI) for the previous 12 month period, as measured by Statistics Canada. For example, the rates for the period from November 30, 2014 to November 29, 2015 will be calculated using the CPI for the period from September 1, 2013 to August 31, 2014

See B1.1 for calculation of CPI.

B) FIRM HOURLY WAGE RATES (TEAM MEMBERS)

The bidder must supply firm hourly wage rates in Table 2 - column "A" that are equal to or greater than the minimum wage rates found in Annex "C". If the Bidder's proposal does not contain firm hourly wage rates that are equal to or greater than the minimum wage rates in Annex C, the bid will be found non-compliant and no further evaluation will be done.

TABLE 2 - Firm Hourly Wage Rates for Team Members for contract year 1:

Team Member Category	Guaranteed Firm Hourly Wage Rate for Team Members					Guaranteed Firm Hourly Trainee Wage Rate	Firm Hourly Shift Premium* (\$/hr)
	By Classification Level (minimum 3, maximum 5)						
	A	B	C	D	E		
Team Leader – Contact Centre Operations							
Team Leader – Information Management							
Team Leader – Editing and Linguistic Services							
Team Leader – Operations Support							
Supervisor							

Information Officer							
Senior Information Officer							
Information Management Officer							
Senior Information Management Officer							
Editor							
Senior Editor							
Research Officer							
Coordinator							
Reporting Officer							
Training Coordinator							
Training Facilitator							
Administrative Support Receptionist							
Reporting / Database Expert							
Web Content Creation Specialist							
User Experience and Interface Design Specialist							
Business Analysis							
Project Manager							
Quality Control Specialist							

***Shift Premiums**

The use of shift premiums for team members who work outside of the core hours of business is a common practice within the contact centre industry. If Canada requires work outside of core hours, the Contractor can bill shift premiums. The Bidder should identify if they intend to employ this practice as part of team member benefits and indicate how this will be applied (including, but not limited to the shifts to which it will apply and the amount of the premium per shift). Canada is not liable for shift premium charges that are not preauthorized by the Project Authority.

Annual Rates Adjustment

For each subsequent year of the contract, the increase in the rates identified in Table 2 above will be determined by the Consumer Price Index (CPI) for the previous 12 month period, as measured by Statistics Canada. For example, the rates for the period from November 30, 2014 to

November 29, 2015 will be calculated using the CPI for the period from September 1, 2013 to August 31, 2014

See B1.1 for calculation of CPI.

B3. TRAVEL AND LIVING EXPENSES

The Contractor will be reimbursed its authorized travel and living expenses reasonably and properly incurred in the performance of the Work, at cost, without any allowance for profit and/or administrative overhead, in accordance with the meal, private vehicle and incidental 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 "travelers", rather than those referring to "employees".

All travel must have the prior authorization of the Project Authority.

All payments are subject to government audit.

B4. OTHER BUSINESS-RELATED EXPENSES

From time to time, the Contractor may be required to incur unanticipated expenses related to fulfilling their responsibilities under the contract. These expenses include - but are not limited to: required training courses (e.g. not provided by the Contractor), the rental of specialized training aids required for special projects training, and any expenses related to Duty to Accommodate in accordance to provincial legislation and / or policies.

All other business-related expenses must have prior authorization of the Project Authority and only preauthorized business-related expenses will be considered for payment. Other business-related expenses will be treated as direct expenses. The Contractor will be reimbursed its direct expenses reasonably and properly incurred. These expenses will be paid at actual cost without markup, upon submission of an itemized statement supported by receipt vouchers. All payments are subject to government audit.

B5. OVERTIME AND STAND-BY

The Contractor may be required to provide personnel to work overtime. If and when required, the Project Authority (or designate) will request in writing to the Contractor, any requirement for overtime work. Canada is not liable for overtime charges that are not preauthorized by the Project Authority. Overtime is to be charged in accordance with provincial legislation, and to be applied to the wage rate.

The Contractor may be required to provide personnel to be available for work on Stand-By. Stand-By duty is when Service Canada pays for a contractor to be available between certain hours to either be called or to come into work, if required. For each person on stand-by duty, one half (1/2) hour may be invoiced at the Contractor's billing rate for each block of four (4) hours on call or part thereof. Personnel committing to stand-by duty must be available during their period of stand-by at a known telephone number and be readily able to work remotely or return for duty as quickly as possible, if called. No stand-by duty payment shall be granted if the Contractors designated stand by person(s) is unable to report for duty when required. If the Contractors designated stand-by individual(s) is required to take a call while on stand-by (work remotely), the Contractor may invoice the time worked. If the Contractors designated stand-by individual reports to work on-site, a minimum of three (3) hours may be invoiced as well as any time worked that exceeds the minimum. For example, a Team Leader on-call from 8:30 to 17:30 (9 hours) may invoice 1.5 hours. If they spend two (2) hours working on the phone to support

Solicitation No. - N° de l'invitation
G9420-120003/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur
cy007

Client Ref. No. - N° de réf. du client

File No. - N° du dossier
G9420-12-0003

CCC No./N° CCC - FMS No/ N° VME
cy007G9420-120003

Ops remotely, they would bill one (1) hours of stand-by for the seven (7) hours and two (2) hours of work-time. Stand-by time and work time cannot overlap.

ANNEX C

MINIMUM HOURLY WAGE RATES

The bidder must supply wage rates for column "A" of Table 2 - Firm Hourly Wage Rates for Team Members, that are equal to or greater than the minimum hourly wage rates found below.

These wage rates are reflective of the National Capital Region and are not representative of wage rates that may be applied in other geographic locations if Contractor resources are required at additional service locations.

Team Member Category	Minimum Hourly Wage Rates
Team Leader – Contact Centre Operations	\$33.00
Team Leader – Information Management	\$33.00
Team Leader – Editing and Linguistic Services	\$33.00
Team Leader – Operations Support	\$33.00
Supervisor	\$26.00
Information Officer	\$21.00
Senior Information Officer	\$23.00
Information Management Officer	\$26.00
Senior Information Management Officer	\$28.00
Editor	\$27.00
Senior Editor	\$30.00
Research Officer	\$22.00
Coordinator	\$27.00
Reporting Officer	\$23.00
Training Coordinator	\$27.00
Training Facilitator	\$25.00
Administrative Support / Receptionist	\$21.00
Database and Reporting Expert	\$29.00
Web Content Creation Specialist	\$29.00
User Experience and Interface Design Specialist	\$36.00
Business Analyst	\$39.00
Project Manager	\$39.00
Quality Control Specialist	\$31.00

ANNEX D

TEAM MEMBER ROLES

The Team Members Roles by organization have been identified as follows:

1 800 O-Canada Services:

- Team Leader – Contact Centre Operations
- Supervisor
- Information Officer (IO)
- Research Officer
- Coordinator
- Administrative Support / Receptionist
- Project Manager
- Database and Reporting Expert
- Quality Control Specialist

Customized Information Services:

- Team Leader – Contact Centre Operations
- Supervisor
- Senior Information Officer (SIO)
- Information Officer (IO)
- Research Officer
- Coordinator
- Project Manager
- Database and Reporting Expert
- Quality Control Specialist

Information Management Services:

- Team Leader – Information Management
- Team Leader – Editing and Linguistic Services
- Senior Information Management Officer (SIMO)
- Information Management Officer (IMO)
- Senior Editor
- Editor
- Coordinator
- Project Manager
- Web Content Creation Specialist
- Business Analyst
- User Experience and Interface Design Specialist
- Quality Control Specialist

Operations Support Unit:

- Team Leader – Operations Support
- Reporting Officer
- Database and Reporting Expert
- Quality Control Specialist

Training:

- Coordinator
- Facilitator

The following pages describe in detail the role overview and scope of work.

Team Leader – Contact Centre Operations

Work Unit: Call Centre Operations, Ottawa ON
Reporting To: Contractor's Operations Management Team (OMT) – Project Lead
Directorate: ICMD

Overview of Work Unit:

Built around a dynamic, team-based environment, the Call Centre Operations unit delivers quality information services for the Government of Canada (GC). The main business lines are:

- 1 800 O-Canada - which is the primary toll-free access point for information on GC programs, services and initiatives
- Customized Information Services - which deliver a variety of communications services on behalf of GC clients that relate to specific issues, initiatives and crisis situations
- On-line Enquiry Services - which provide e-mail and telephone support for a variety of GC Internet sites, including the Canada Site (the primary Internet access point for the GC)

Summary of the role:

Overseeing a team of coordinators, supervisors, senior information officers, information officers and research officers, the Team Leader's main objective is to ensure that all services delivered to the public on behalf of the GC consistently meet service level objectives. By working closely with other CEC units, and utilizing his/her extensive knowledge of the GC structure and programs, the Team Leader participates in the management and administration of all aspects of the activities within Operations.

Scope of the Work

Core Duties:

A team leader will be expected to perform all of the following core duties:

Operations management

- Coordinate all call centre activities for new and existing projects
- Monitor service levels and ensure targets are met
- Identify, implement and review quality assurance procedures
- Problem solve team issues and basic technical issues
- Implement action plans in the event of emergencies or crises
- Act as a mediator and/or arbitrator when managing interaction within the team
- Handle sensitive or confidential information in a discreet and appropriate fashion

Internal and external communication

- Communicate trends and policy changes to staff members and ensure the flow of information between all levels of Call Centre Operations through various activities, including meetings and information updates
- Establish and maintain contact with clients and ensure all parties are kept up-to-date by requesting and offering information updates as necessary

Supervisor support, feedback and development

- Manage the supervisor group's activities by acting as a resource person for work-related enquiries, by assisting them in their daily tasks through the review and editing of reports and performance appraisals, and by accepting call transfers as required
- Review and update supervisor files
- Play an active leadership role in the professional development of supervisors by providing feedback, coaching and help in establishing career goals

Staffing

- Coordinate and participate in the recruitment of new supervisors in conjunction with the employer
- Communicate various staffing recommendations to the employer, including the hiring of new staff and the reassignment or re-evaluation of current staff members
- Provide the employer with recommendations regarding the participation of staff members in various projects and activities, including fairs and special assignments
- Ensure that all teams within Call Centre Operations maintain a balanced structure

Training coordination

- Manage and assist with the daily activities of the training staff by acting as a resource person for work-related enquiries, by identifying training requirements and by facilitating supervisor training sessions

Administrative tasks

- Forecast and coordinate various administrative requirements within Operations, such as preparing schedules, signing time sheets and approving vacation requests
- Establish, update and document Call Centre Operations procedures, including those related to the preparation, review and submission of Call Centre Operations' reports and the review and updating of employee files

Supervisor

Work Unit: Call Centre Operations, Ottawa ON
Reporting To: Call Centre Operations, Team Leader
Directorate: ICMD

Overview of Work Unit:

Built around a dynamic, team-based environment, the Call Centre Operations unit delivers quality information services for the Government of Canada (GC). The main business lines are:

- 1 800 O-Canada - which is the primary toll-free access point for information on GC programs, services and initiatives
- Customized Information Services - which deliver a variety of communications services on behalf of GC clients that relate to specific issues, initiatives and crisis situations
- On-line Enquiry Services - which provide e-mail and telephone support for a variety of GC Internet sites, including the Canada Site (the primary Internet access point for the GC)

Summary of the Role:

Overseeing a team of information officers (or research officers) and senior information officers, the Supervisor's main goal is to ensure that customer service and service level objectives are met. Through activities such as monitoring, coaching and feedback sessions, a supervisor helps maintain a high standard of service delivery and contributes to the professional development of information officers, research officers and senior information officers.

Scope of the Work

Core Duties:

A Supervisor will be expected to perform all of the following core duties:

Provide team support and contribute to team development

- Assist information officers and research officers as they respond to enquiries (telephone, e-mail, fax) while understanding, following and promoting project mandates
- Accept call transfers as required
- Monitor and evaluate calls and e-mails, as well as the performance of information officers and research officers, and provide feedback in a timely fashion
- Troubleshoot and resolve basic technical issues
- Quickly respond to client-impact situations, making timely and appropriate decisions and ensuring necessary action is taken
- Write and deliver performance appraisals and performance improvement plans
- Provide feedback and coaching to information officers and research officers in order to contribute to their professional development and help them achieve their career goals
- Hold team meetings and information sessions to ensure information officers and research officers remain up-to-date on various matters (e.g. current events, internal/external news)
- Participate in succession planning

Communicate with and support peers

- Promote adherence to policies and procedures
- Maintain constant communication with team leaders, colleagues and team members
- Help with the development of new supervisors through training and pairing sessions, as well as shadowing and mentoring exercises

Complete administrative tasks as required

- Open, close and test business lines
- Prepare and submit daily, weekly and monthly reports on the performance of information officers and research officers and the project status, and record events in the Supervisor's Log
- Prepare team members' schedules, approve shift changes, and verify and sign time sheets
- Review and approve Action Request Forms sent by team members
- Monitor and manage service levels and answer calls as necessary
- Edit e-mail templates (based on project mandate)
- Put forward and approve suggestions for improvements to tools and resources
- Review and update employee files

Participate in staffing and recruitment activities

- Participate in staffing decisions in conjunction with the employer (e.g. selection of senior information officers)
- Take part in the recruitment process in conjunction with the employer (e.g. prepare for and conduct interviews, offer recommendations on employment)

Additional Duties:

In addition to the core duties listed above, a supervisor may be called upon to perform any of the following additional duties:

Training and development

- Create and/or update training material and facilitate group and one-on-one training sessions
- Prepare and deliver feedback following training
- Compile and manage feedback provided by trainees on trainers and coaches

Special assignments

- Participate in short-term projects and initiatives

Information Officer

Work Unit: Call Centre Operations, Ottawa ON
Reporting To: Call Centre Operations, Supervisor
Directorate: ICMD

Overview of Work Unit:

Built around a dynamic, team-based environment, the Call Centre Operations unit delivers quality information services for the Government of Canada (GC). The main business lines are:

- 1 800 O-Canada - which is the primary toll-free access point for information on GC programs, services and initiatives
- Customized Information Services - which deliver a variety of communications services on behalf of GC clients that relate to specific issues, initiatives and crisis situations
- On-line Enquiry Services - which provide e-mail and telephone support for a variety of GC Internet sites, including the Canada Site (the primary Internet access point for the GC)

Summary of the Role:

- Reporting to a team supervisor, information officers (IOs) are responsible for delivering quality information to citizens on federal programs and services to Canadians, utilizing sound knowledge of the structure and activities of the federal government and current affairs. IOs are monitored, coached, and trained and receive regular feedback as part of the ongoing quality assurance process.

Scope of the Work

Core Duties:

- Answers telephone enquiries (may also answer some email enquiries) on federal programs and services, following established telephone etiquette and official languages policies, to provide accurate and complete information to callers
- Records each call or e-mail transaction in the electronic statistical program
- Records comments, complaints and callbacks, when applicable
- Keeps up to date on the information in the database and the secondary sources to ensure the accuracy and efficiency of service to the public
- Keeps up to date on current affairs by reading newspapers, browsing the specified Internet sites and studying the various material prepared by the Information Management Centre
- Develops an in-depth knowledge of the Canadian government and its structure
- Makes suggestions for improvements to database information
- Completes various administrative tasks, such as reports and callback requests
- Attends meetings on procedures and other work-related subjects
- Participates in special projects and assignments, as required

Additional Duties:

In addition to the core duties listed above, an Information Officer may be called upon to work on various ad hoc and special projects upon request.

Research Officer

Work Unit: Call Centre Operations, Ottawa ON
Reporting To: Call Centre Operations, Supervisor
Directorate: ICMD

Overview of Work Unit:

Built around a dynamic, team-based environment, the Call Centre Operations unit delivers quality information services for the Government of Canada (GC). The main business lines are:

- 1 800 O-Canada - which is the primary toll-free access point for information on GC programs, services and initiatives
- Customized Information Services - which deliver a variety of communications services on behalf of GC clients that relate to specific issues, initiatives and crisis situations
- On-line Enquiry Services - which provide e-mail and telephone support for a variety of GC Internet sites, including the Canada Site (the primary Internet access point for the GC)

Summary of the Role:

Assigned to On-line Enquiry Services, a research officer is responsible for providing navigational support and delivering quality information to the public (mainly by e-mail and telephone), utilizing superior research and problem solving techniques.

Scope of Work

Core Duties:

A research officer will be expected to perform all of the following core duties:

- Answer enquiries from the public, mainly by e-mail and telephone
- Provide accurate information to the public on various subjects pertaining to the GC, using project-related tools and resources (e.g. e-mail templates, writing tools) as well as a wide range of GC Internet sites
- Record demographic statistics for each enquiry, as well as comments, complaints and call-backs as necessary
- Process document orders as required
- Provide callers with navigational support on project-related Web sites
- Answer telephone and/or fax enquiries as necessary

Keep up-to-date with current events, changes and updates

- Review internal tools and resources regularly (e.g. intranet site)
- Review external tools and resources (e.g. newspapers, news, government Web sites)
- Develop in-depth knowledge of GC programs, services and Internet sites

Communicate with and support peers

- Report on news and events that may affect e-mail and/or call volume
- Provide feedback on the quality of the work environment and offer suggestions for improvement (i.e. regarding peers, supervisors, processes)
- Complete administrative tasks as required
- Understand and follow office policies and procedures, as well as the project mandate

Additional Duties:

In addition to the core duties listed above, a research officer may be called upon to perform any of the following additional duties:

Training and development

- Create and/or update training material and facilitate training sessions
- Carry out targeted peer mentoring, pairing and coaching activities
- Provide performance-related feedback on training participants to peers and supervisors
- Prepare and implement a self-development plan, in collaboration with a supervisor

Special assignments

- Receive training on other information services and special projects and rotate between initiatives as required

Administrative duties

- Open, close and test business lines
- Prepare call-back and comment reports
- Assist in editing e-mail templates
- Sort incoming e-mail enquiries and assign them to team members

Coordinator

Work Unit: Various ICMD Units, Ottawa, ON

Reporting To: Various ICMD Units

Directorate: ICMD

Overview of Work Unit:

Built around a dynamic, team-based environment, the ICMD delivers quality information services and the associated critical support functions to these services for the Government of Canada (GC). The unit's main business lines are the following:

- Internet and Intranet – which designs, publishes and manages internet and intranet sites, such as servicecanada.gc.ca and Canada.gc.ca
- 1 800 O-Canada - which is the primary toll-free access point for information on GC programs, services and initiatives
- Customized Information Services - which deliver a variety of communications services on behalf of GC clients that relate to specific issues, initiatives and crisis situations
- On-line Enquiry Services - which provide e-mail and telephone support for a variety of GC Internet sites, including the Canada Site (the primary Internet access point for the GC)
- Information Management Centre – which organizes, updates and maintains information in the database used by the 1 800 O-Canada service, the databases used by certain projects within the Canada Enquiry Centre's (CEC) Customized Information Services and new Service Canada business and core offerings.

Summary of the Role:

The Coordinator is asked to play a leadership role in performing, coordinating and overseeing all activities or projects in a designated area of specialization/work unit. Working closely with team leaders and other ICMD work units, the Coordinator is responsible for implementing, promoting and supporting activities and projects related to specific internal initiatives or business lines, leveraging thorough knowledge of the ICMD structure and programs. Area of specialization may be technical in nature.

Scope of Work

Core Duties:

A coordinator will be expected to perform all of the following core duties:

Lead the development, implementation and ongoing activities or projects in a designated area of specialization

- Training, workforce management, staff development, distribution, Web site management, Information system
- Manage his/her own workload and then delegate remaining tasks as need
- Analyse situations, make appropriate decisions and take necessary action

Communicate with and support peers as well as project members

- Act as a lead to project members while they are working on project-related tasks
- Assist project members as they perform their tasks while understanding, following and promoting project-specific mandates and processes
- Participate in project planning and the planning of project activities
- Monitor and evaluate project activities, as well as the performance of project members, and provide feedback in a timely fashion

- Maintain constant communication with direct supervisor, employer, team leaders and colleagues
- Handle sensitive or confidential information in a discreet and appropriate fashion
- Promote adherence to general unit/organisation policies and procedures

Maintain constant communication with other ICMD work units and groups

- Schedule meetings with other groups and perform liaison activities with them
- Proactively and consistently inform other groups of project activities that relate to them and encourage them to do the same
- Proactively keep up-to-date with other groups and their activities
- Anticipate upcoming events that relate to project activities and take appropriate action

Conduct research and development

- Promote the development of the project
- Provide project-related recommendations to other groups based on best practices
- Create documents, such as templates, checklists, project plans and requirements.
- Collect data on various topics from employees and various sources and analyse trends
- Develop, implement maintain and administer information systems, reports and Web sites in support of Operations or projects

Complete administrative tasks as required

- Keep calendar up-to-date with tasks, deadlines and related information
- Keep documents up-to-date, such as templates and checklists
- Perform quality assurance on project activities and documents
- Participate in project team staffing and recruitment activities

Additional Duties:

In addition to the core duties listed above, a coordinator may be called upon to perform any of the following additional duties:

Training and development

- Create and/or update training material and facilitate group and one-on-one training sessions
- Participate in info-sessions to inform employees about project-related activities

Administrative Support / Receptionist

Work Unit: Various ICMD Units, Ottawa, ON
Reporting To: Various ICMD Units
Directorate: ICMD

Overview of the Work Unit:

Built around a dynamic, team-based environment, the ICMD delivers quality information services and the associated critical support functions to these services for the Government of Canada (GC). The unit's main business lines are the following:

- Internet and Intranet – which designs, publishes and manages internet and intranet sites, such as servicecanada.gc.ca and Canada.gc.ca
- 1 800 O-Canada - which is the primary toll-free access point for information on GC programs, services and initiatives
- Customized Information Services - which deliver a variety of communications services on behalf of GC clients that relate to specific issues, initiatives and crisis situations
- On-line Enquiry Services - which provide e-mail and telephone support for a variety of GC Internet sites, including the Canada Site (the primary Internet access point for the GC)
- Information Management Centre – which organizes, updates and maintains information in the database used by the 1 800 O-Canada service, the databases used by certain projects within the Canada Enquiry Centre's (CEC) Customized Information Services and new Service Canada business and core offerings.

Summary of the Role:

The Administrative Support Receptionist will be responsible to provide administrative and support services to the managers and team leads within ICMD. The administrative assistant also plays a key role in supporting other personnel by carrying out various receptionist and administrative tasks.

Scope of the Work

Core Duties:

The Administrative Support/Receptionist will be expected to perform all of the following core duties:

- Coordinate the flow of information, including correspondence, telephone calls, e-mail and other requests for information and refer requests to the appropriate officials for action or follow-up on their inquiries or, when appropriate responds directly
- Plan and manages the logistics related to meetings, conferences, workshops and other major events
- Participate in meetings, noting key points and drafting minutes to accurately report proceedings and follow-up requirements
- Update and maintains the client organization's information in financial and administrative databases
- Process financial transactions for the office and prepares reports
- Coordinate purchases and maintains storage of office supplies
- Answer calls, respond to e-mails and greet visitors with proper etiquette
- Receive telephone, e-mail and in-person messages and dispatch them to the appropriate recipient as required
- Follow established procedures for handling in-coming and out-going mail and/parcels

Communication

- Assess incoming correspondence of varying levels of complexity and encompassing many issues
- Exchange information on a range of topics with clients organizations and departmental staff and contractors, and contacts
- Discuss with internal clients, managers and staff with respect to arrangements surrounding meetings, the manager's agenda and deadlines for the submission of correspondence and briefing documents
- Draft administrative correspondence, compose clear summaries or background reports on matters of current or potential concern to the manager, as well as provide feedback on the quality control of correspondence and documents
- Keep the reception/administrative supervisor up-to-date on daily activities
- Report problematic situations to the appropriate individual and follow established procedures

Administrative

- Prepares agendas and provides background material, files, briefing binders and any other information required for appointments and meetings and conferences in order to assist the manager in meeting operational requirements
- Provides a link to the manager's office for managers, staff and clients; provides information, negotiates deadlines and prepares correspondence
- Coordinates and prioritizes correspondence for the office of the manager, controls its flow by means of computerized correspondence system and directs it to the appropriate directorate or division for action in order to ensure a timely flow of information
- Reviews correspondence and information requests, determines content, action required and priority, disseminates to designated staff, tracks and monitors completion and forwards products to requestors
- Perform various human resource and administrative tasks, such as coordinating access cards, maintaining and updating the visitor log and keeping record of boardrooms reserved through reception
- Prepare and submit weekly employee security lists for building management
- Open and close the reception area
- Assist staff members with various administrative duties such as printing and photocopying documents, communicating with Central Supply (distribution) to maintain the office supply inventory

Handle Mail

- Distribute incoming and outgoing mail
- Send and receive courier deliveries
- Reconcile courier accounts

Training

- Create and/or update training material and facilitate training sessions for new receptionists
- Participate in pairing activities with peers regarding reception-related tasks
- Provide performance feedback to peers and supervisor

Project Manager

Work Unit: Various units across ICMD, Ottawa, ON
Reporting To: The Contractor's Operations Management Team (OMT)
Directorate: ICMD

Overview of Work Unit:

Built around a dynamic, team-based environment, the ICMD delivers quality information services and the associated critical support functions to these services for the Government of Canada (GC). The unit's main business lines are the following:

- Internet and Intranet – which designs, publishes and manages internet and intranet sites, such as servicecanada.gc.ca and Canada.gc.ca
- 1 800 O-Canada - which is the primary toll-free access point for information on GC programs, services and initiatives
- Customized Information Services - which deliver a variety of communications services on behalf of GC clients that relate to specific issues, initiatives and crisis situations
- On-line Enquiry Services - which provide e-mail and telephone support for a variety of GC Internet sites, including the Canada Site (the primary Internet access point for the GC)
- Information Management Centre – which organizes, updates and maintains information in the database used by the 1 800 O-Canada service, the databases used by certain projects within the Canada Enquiry Centre's (CEC) Customized Information Services and new Service Canada business and core offerings.

Summary of the Role:

Overseeing a team of various resources (the make-up of these resources will be dependent on the project), the Project Manager's main objective is to ensure that the service(s) (these may be either delivered to the public on behalf of the GC, or in support of ICMD) or project(s) for which they are overall responsible consistently meet the performance and deliverable objectives. By working closely with other ICMD units and managers, the Project Manager participates in the management, administration and evaluation of all aspects of the project to which they have been assigned. Project area of specialization may be technical in nature.

Scope of the Work

Core Duties:

A Project Manager will be expected to perform all of the following core duties:

Project Management

- Direct and oversee the development and implementation of activities for new and existing projects
- Monitor project progress to ensure that performance targets and project objectives are met
- Identify, implement and review quality assurance procedures (as required)
- Implement action plans in the event of emergencies or crises
- Provide regular reports on the project status

Internal and External Communication

- Communicate project objectives, priorities and key deliverables to project team members to ensure all members of the team have clear directives and are working towards a common objective
- Ensure the flow of information with clients through various activities, including meetings and information updates

- Establish and maintain effective communication channels with clients to ensure all parties are kept up-to-date by requesting and offering updates as necessary
- Represent the organization at meetings and events as required
- Participate in internal and external meetings as required

Team Support, Feedback and Development

- Manage all the team members activities by acting as a resource person for work-related enquiries, by assisting them in their daily tasks and through the review of their deliverables
- Ensure the staff have access to the necessary training tools and resources to ensure that they have the skills required to accomplish their roles
- Review and update team member files
- Play an active role in the professional development of team members by providing feedback, coaching and help in establishing career goals
- Ensure the preparation of timely and comprehensive performance appraisals

Staffing

- Coordinate and participate in the recruitment of new staff in conjunction with the employer as required
- Communicate various staffing recommendations to the employer, including the hiring of new staff and the reassignment or re-evaluation of current staff members
- Provide the employer with recommendations regarding the participation of staff members in various projects and activities, including fairs and special assignments
- Ensure that the project team maintains a balanced structure
- Act as a mediator and/or arbitrator when managing interaction within the team

Administrative Tasks

- Ensure the timely and accurate completion of all administrative tasks that are required to support the development and delivery of the project objectives
- Establish, update and document procedures

Database and Reporting Expert

Work Unit: Various ICMD Units, Ottawa, ON
Reporting To: Various ICMD Units
Directorate: ICMD

Overview of Work Unit:

Built around a dynamic, team-based environment, the ICMD delivers quality information services and the associated critical support functions to these services for the Government of Canada (GC). The unit's main business lines are the following:

- Internet and Intranet – which designs, publishes and manages internet and intranet sites, such as servicecanada.gc.ca and Canada.gc.ca
- 1 800 O-Canada - which is the primary toll-free access point for information on GC programs, services and initiatives
- Customized Information Services - which deliver a variety of communications services on behalf of GC clients that relate to specific issues, initiatives and crisis situations
- On-line Enquiry Services - which provide e-mail and telephone support for a variety of GC Internet sites, including the Canada Site (the primary Internet access point for the GC)
- Information Management Centre – which organizes, updates and maintains information in the database used by the 1 800 O-Canada service, the databases used by certain projects within the Canada Enquiry Centre's (CEC) Customized Information Services and new Service Canada business and core offerings
- In-person services – which deliver a variety of services through points of presence across Canada

Summary of the Role:

Under the supervision of the Service Delivery Specialist, Business Intelligence and Resource Determination Unit, the Database and Reporting Expert (DRE) is responsible for the development, implementation and maintenance of various reporting activities in support of one or more service delivery channels. The DRE gathers, aggregates, maintains, validates and organizes data collected through various tracking systems, databases and other processes. He also develops, organizes, analyses and prepares numerous reports (weekly, monthly, yearly, program-related, etc.) to support operations, business decisions and long-term strategic planning. The DRE also addresses problems, issues and concerns regarding statistical reporting with staff and management within the BIRD Unit and provides training on technical processes regarding database management and reporting.

Scope of the Work

Core Duties:

A Database and Reporting Expert will be expected to perform all of the following core duties:

Main functions:

- Plans annual resource needs for the network of 600+ offices across the country
- Provides costing Forecasts for Tier 1 services across all channels
- Manages information flow and ensures integrity of data in channel management information databases
- Produces and publishes activity reports on the three channels (Web, phone, in-person), including monthly dashboards for key programs such as Employment Insurance, Canada Pension Plan, Social Insurance, Passport, etc.

- Provides input to corporate reporting exercise such as the Service Canada Scorecard, the Report on Plans and Priorities, the Departmental Performance Report
- Forecasts 10 year staffing needs for new or refitted offices
- Provides Business Intelligence on key departmental initiatives

Create, generate and maintain various reports:

- Prepare daily, weekly, monthly, quarterly, yearly and ad hoc reports for clients and management
- Identify the need for new scripts and macros for the production of statistical reports
- Define and proposes new methods or formats for reports, through analysis and consultation
- Develop, under the guidance of the supervisor, the appropriate infrastructure for the immediate and future reporting needs of the organization
- Identify business requirements for database development by Informatics specialists
- Publish reports via web applications such as Sharepoint

Communicate and work with peers and other contacts within the organization:

- Work closely with all other ICMD divisions (Web channel operations, In-Person Operations, Information Management Centre, Client Services, etc.) and clients outside the directorate for the development and publication of reports
- Brief and advise audiences on issues related to the collection, analysis and reporting of channel metrics
- Participate in special assignments and operational meetings as required
- Work closely with the supervisor and manager to ensure that right statistical data is transmitted to the appropriate sections of the organization
- Liaise with Information and Innovation Technology Branch (IITB) to obtain and extract the necessary data to prepare reports

Additional Duties:

In addition to the core duties listed above, a Database and Reporting Expert may be called upon to perform any of the following additional duties:

Training and development

- Train Service Canada staff, or provide input into online training modules, in the use of reporting tools developed by the Unit.
- Create and/or update training material
- Analyze feedback following training and prepare recommendations for the supervisor on future enhancements to the training modules

Special assignments

- Participate in short-term projects and initiatives

Quality Control Specialist

Work Unit: Various work units

Reporting To: A work unit Team Leader or the Contractor's Project Manager (OMT)

Directorate: ICMD

Overview of Work Unit:

Built around a dynamic, team-based environment, the ICMD delivers quality information services and the associated critical support functions to these services for the Government of Canada (GC). The unit's main business lines are the following:

- Internet and Intranet – which designs, publishes and manages internet and intranet sites, such as servicecanada.gc.ca and Canada.gc.ca
- 1 800 O-Canada - which is the primary toll-free access point for information on GC programs, services and initiatives
- Customized Information Services - which deliver a variety of communications services on behalf of GC clients that relate to specific issues, initiatives and crisis situations
- On-line Enquiry Services - which provide e-mail and telephone support for a variety of GC Internet sites, including the Canada Site (the primary Internet access point for the GC)
- Information Management Centre – which organizes, updates and maintains information in the database used by the 1 800 O-Canada service, the databases used by certain projects within the Canada Enquiry Centre's (CEC) Customized Information Services and new Service Canada business and core offerings.

Summary of the Role:

The Quality Control Specialist ensures that information systems and web sites accurately reflect the functional intent in support of ICMD Operations and/or projects. The Quality Control Specialist is also responsible for ensuring that technical elements of information systems and web site are functional and that the quality control and testing is maintained in order to support the success of the service delivery network within ICMD.

Scope of Work

Core Duties:

A Quality Control Specialist will be expected to perform all of the following core duties:

Quality Control

- Develops, implements and conducts quality control and assurance processes on information systems and web sites
- Create functional test scripts
- Maintain test databases
- Utilizes equipment to test and analyze tools and procedures and generates reports on testing and provides recommendations and advice to management and technical experts, leveraging knowledge of test tools
- Participate in the definition of functional requirements in order to develop and conduct appropriate functional tests

Communicate With Users

- Manage his/her own workload
- Participate in appropriate users committees, meetings, and working groups
- Proactively and consistently inform other groups of activities that relate to them and encourage them to do the same

- Proactively keep up-to-date with other groups and their activities
- Anticipate upcoming events that relate to project activities and take appropriate action
- Identifies and resolves problem issues and concerns with tests and test results, coordinates services with subject matter experts, and provides logistics and support to project teams
- Contributes as a representative of the Unit to various Branch, Departmental and Interdepartmental committees involved in the analysis and development of website content and information management policies and related guidelines

Complete administrative tasks as required

- Keep calendar up-to-date with tasks, deadlines and related information
- Keep documents up-to-date, such as templates and checklists
- Participate in various unit meetings

Additional Duties:

In addition to the core duties listed above, a Quality Control Specialist may be called upon to perform any of the following additional duties:

Training and development

- Create and/or update training material and facilitate group and one-on-one training sessions
- Participate in info-sessions to inform employees about project-related activities

Special assignments

- Work on various ad hoc and special projects upon request

Senior Information Officer

Work Unit: Call Centre Operations, Ottawa ON
Reporting To: Call Centre Operations, Supervisor
Directorate: ICMD

Overview of Work Unit:

Built around a dynamic, team-based environment, the Call Centre Operations unit delivers quality information services for the Government of Canada (GC). The main business lines are:

- 1 800 O-Canada - which is the primary toll-free access point for information on GC programs, services and initiatives
- Customized Information Services - which deliver a variety of communications services on behalf of GC clients that relate to specific issues, initiatives and crisis situations
- On-line Enquiry Services - which provide e-mail and telephone support for a variety of GC Internet sites, including the Canada Site (the primary Internet access point for the GC)

Summary of the Role:

In addition to delivering quality information to the public, a Senior Information Officer (SIO) provides team support by carrying out various activities. He / she acts as a resource person for information officers and, as required, helps supervisors with their daily tasks.

Scope of the Work

Core Duties:

- Answer enquiries from the public, mainly by telephone and/or e-mail
- Answers telephone enquiries (may also answer some email enquiries) on federal programs and services, following established telephone etiquette and official languages policies, to provide accurate and complete information to callers
- Record demographic statistics for each enquiry, as well as comments, complaints and call-backs as necessary
- Provide callers with navigational support on project-related Web sites (based on project mandate)
- Process faxes and orders and provide quotes and referral prices (based on project mandate)
- Develops an in-depth knowledge of the Canadian government and its structure
- Makes suggestions for improvements to database information
- Attends meetings on procedures and other work-related subjects
- Understands and follows office policies and procedures, as well as the project mandate

Keep up-to-date with current events, changes and updates

- Review internal tools and resources regularly (e.g. intranet site)
- Review external tools and resources (e.g. newspapers, news, government Web sites)
- Maintain in-depth knowledge of GC programs and services

Communicate with and support peers

- Act as the first point of contact for questions raised by information officers and research officers
- Provide performance-related feedback on team members to supervisors
- Provide leadership and support to the team by assisting peers who are dealing with problematic situations and by promoting adherence to policies and procedures
- Report on news and events that may affect call and/or e-mail volume
- Provide feedback on the quality of the work environment and offer suggestions for improvement (e.g. regarding peers, supervisors, processes)

Complete administrative tasks as required

- Open, close and test business lines
- Complete various reports relating to enquiry statistics, comments, complaints and call-backs
- Send letters and print labels (based on project mandate)
- Participate in client meetings and perform various administrative tasks on behalf of clients (e.g. consult client accounts, locate publications on client Web sites) (based on project mandate)

Perform various supervisory tasks as required

- Replace supervisor as required
- Prepare team schedules as required
- Manage shift changes and early departures within the team and record events in the Supervisor's Log
- Review and approve Action Request Forms sent by information officers and research officers
- Accept call transfers as required
- Monitor service levels and modify activities accordingly
- Edit e-mail templates (based on project mandate)

Provide technical support for peers

- Configure information officer and research officer workstations as required
- Troubleshoot and resolve basic technical problems

Additional Duties:

In addition to the core duties listed above, a senior information officer may be called upon to perform any of the following additional duties:

Training and development

- Create and/or update training material and facilitate group and one-on-one training sessions
- Carry out targeted peer mentoring, pairing and coaching activities
- Provide performance-related feedback on training participants to peers and supervisors
- Prepare and implement a self-development plan, in collaboration with a supervisor

Special assignments

- Receive training on other information services and special projects and rotate between initiatives as required

- Co-facilitate interviews and take part in the recruitment of new information officers and research officers
- Deliver information sessions regarding internal training and office policies and procedures

Peer support and development

- Monitor and evaluate calls/e-mails and provide coaching and feedback to peers

Team Leader – Information Management

Work Unit: Information Management Centre
Reporting to: The Contractor's Operations Management Team (OMT)
Directorate: ICMD

Overview of Work Unit:

The Information Management Centre (IMC) organizes, maintains and updates the information contained in the knowledge repositories used by the 1 800 O-Canada service and the Customized Information Services (CIS). The IMC also manages information in support of the in-person network and contributes more generally to the consistent delivery of information across all channels.

The IMC is composed of two teams, namely the Information Management (IM) team and the Editing and Linguistic Services (ELS) team, and of a distribution coordinator, representing a total staff of approximately 40 people

Summary of the Role:

As the leader of one of the IM teams, the IM Team Leader plays a key role in the professional development of the team and works in close collaboration with the IMC manager and heads, other IM team leaders and the ELS team leaders to oversee IMC operations and ensure that all database information and communication products developed by the IMC are of the highest quality. The Team Leader has mastered all SIMO (Senior Information Management Officer) roles and responsibilities and acquired significant supervision and coordination experience.

Scope of the Work

Core Duties:

The IM Team Leader is expected to perform all of the following core duties:

Leadership

- Supervise a team of IMOs and SIMOs with varied levels of experience, and provide them with regular feedback
- Prepare regular evaluations of the research skills and performance of team members
- Coach team members on new tasks and ensure they have the tools required to perform them
- Handle sensitive or confidential information in a discreet and appropriate fashion

Quality Control

- Manage the Information Management System (IMS), which contains information on federal programs, services and new initiatives, to ensure that the information provided to the Operations unit is accurate and complete and conform to set IM guidelines and standards
- Assign updates to be completed by the team and establish updating guidelines and procedures for all database information
- Review work completed by team members before it is submitted to the ELS unit and provide team members with feedback on their work
- Liaise with the ELS unit, the Call Centre Operations unit and other representatives of the various sections of ICMD and Service Canada
- Perform various quality control mechanisms to monitor the work of the IM team including description Sign-out, ARF QA and Contact audits

- Implement quality control mechanisms; produce performance reports, administrative briefings and activity reports; monitor media coverage, and assess issues, trends and developments that might impact the assigned activity area.

Task Management

- Ensure the flow of information between the IMC and the Call Centre Operations unit
- Coordinate and prioritize the updating activities of the team by following yearly updating schedules, and coordinate and prioritize the data maintenance work of the team
- Ensure that the IM team meets its deadlines and obligations for updating and maintaining database information and answering action requests

Communication

- Communicate as needed with other IM team leaders and ELS team leaders to discuss projects, work requirements and other issues
- Meet regularly with the IMC heads to discuss progress on specific files organize and chair team meetings
- Encourage strong communication between the IM and ELS teams keep team members well informed of developments and policy changes within the IMC, ICMD and Service Canada
- Promote high motivation and enthusiasm within the team by ensuring the professional development of team members
- Work with the IMC manager and heads to contribute to objectives and priorities for the IMC
- Submit information to the IMC bi-weekly reporting cycles
- Participate in organisation workgroup and committees as required

Information Management

- Develop a sound knowledge of the activities and overall structure of the federal government by monitoring the media, conducting research and reading material received from federal departments and agencies
- Develop a sound knowledge of the Information Management System (IMS) and the related reports and updating procedures
- Develop and maintain a network of contacts within the federal departments and agencies; ensure the effective flow of information between the IMC and other federal government departments and agencies for the purpose of updating the organisational holdings

Recruitment and Training

- Participate in the staffing process for the IM Unit, including interviewing candidates
- Coordinate training schedules and deliver training to new recruits
- Oversee coaching and mentoring of team members
- Make suggestions for new tools, resources and specialized training for the IM Unit

Other Responsibilities

- Facilitate the introduction of new technology and procedures in the IMC and make suggestions for their implementation and improvement
- Trouble-shoot basic computer and software problems within the team
- Participate in special projects, initiatives and regular updating duties, as required

Team Leader - Editing and Linguistic Services

Work Unit: Information Management Centre
Reporting to: The Contractor's Operations Management Team (OMT)
Directorate: ICMD

Overview of Work Unit:

The Information Management Centre (IMC) organizes, maintains and updates the information contained in the knowledge repositories used by the 1 800 O-Canada service and the Customized Information Services (CIS). The IMC also manages information in support of the in-person network and contributes more generally to the consistent delivery of information across all channels.

The IMC is composed of two teams, namely the Information Management (IM) team and the Editing and Linguistic Services (ELS) team, and of a distribution coordinator, representing a total staff of approximately 40 people.

Summary of the Role:

The ELS Team Leader supervises and coordinates a team of specialized, bilingual language experts (editors and senior editors) who provide editing, translation and related linguistic services to the IMC, as well as other client groups within the organisation. The Team Leader has mastered all senior editor roles and responsibilities and has acquired significant supervisory and coordination experience.

Scope of Work:

Core Duties:

The ELS Team Leader will be expected to perform all of the following duties:

Team Coordination, Supervision and Leadership

- Supervise the activities of the team
- Assign and delegate various roles and responsibilities to team members and supervise their work and performance
- Prepare and deliver performance appraisals for team members
- Provide coaching and feedback to team members as require
- Ensure that policies and procedures are followed by team members
- Organize and lead meetings as require
- Assist the head of ELS with the recruitment process for the ELS unit (e.g. interviews, test corrections)
- Coordinate the training and coaching of new team members
- Coordinate professional development activities within the team (e.g. team-calibration exercises, refresher training sessions)
- Advise the head of ELS on complex or sensitive issues
- Promote motivation and enthusiasm within the team
- Handle sensitive or confidential information in a discreet and appropriate fashion

Work Processes

- Coordinate the process of editing and translating documents submitted by clients
- Regularly check the various workload and performance reports and databases and ensure that they are accurate and efficient; propose improvements to these tools as required

- Analyze team activities and workflow to ensure that the team is able to meet the changing needs of the organization; make recommendations to the head of ELS to that effect
- Monitor incoming submissions, including rush and priority documents; ensure work is returned to clients in a timely fashion
- Develop editing-related guidelines for editors and clients (e.g. submission guidelines)
- Develop standardization guidelines and tools (e.g. style guidelines, templates)
- Advise the head of ELS on the improvement of editing and translation services, tools, priorities and plans

Quality Assurance

- Propose, implement and coordinate various quality assurance mechanisms to evaluate the work of the team and of individual editors
- Perform and coordinate the regular quality assessment of documents reviewed by the editors
- Coordinate the regular quality assessment of ELS linguistic tools and organize cleanups
- Ensure that documents that are non-compliant are properly flagged and resubmitted
- Provide feedback on clients' work to their supervisors upon request

Liaison with Clients

- Liaise with the heads on common projects
- Encourage good communication between the ELS unit and its clients
- Coordinate the linguistic training and coaching of clients as required
- Participate in the introduction of new technology and procedures by making suggestions regarding their implementation and improvement
- Keep the editors informed of developments and policy changes within the organization
- Provide linguistic advice to clients
- Prepare for and attend various meetings
- Follow employer policies and procedures

Editing and Translation

- Edit and translate sensitive and confidential documents
- Edit and translate other documents as required

Data Maintenance

- Develop and maintain various linguistic and keyword indexing tools and inform the head of ELS of any requirements in this respect
- Develop and maintain the content of the ELS section of the intranet

Senior Information Management Officer

Work Unit: Information Management Centre
Reporting to: Team leader, Information Management
Directorate: ICMD

Overview of Work Unit:

The Information Management Centre (IMC) organizes, maintains and updates the information contained in the knowledge repositories used by the 1 800 O-Canada service and the Customized Information Services (CIS). The IMC also manages information in support of the in-person network and contributes more generally to the consistent delivery of information across all channels.

The IMC is composed of two teams, namely the Information Management (IM) team and the Editing and Linguistic Services (ELS) team, and of a distribution coordinator, representing a total staff of approximately 40 people.

Summary of the Role:

The Senior Information Management Officer (SIMO) is a content management/development expert who is responsible for researching, organizing, updating and maintaining bilingual federal and related information for databases used by information officers on various projects when responding to enquiries from the public.

Given their IM expertise and experience, SIMOs will be required to assume a more prominent role in the formulation of IMC policies and the development of IMC staff. The SIMO will be required to take the lead in coordinating special projects and will be instrumental in the recruitment, training and integration of new IMOs and in the ongoing coaching of portfolio team members. The SIMO has mastered all IMO roles and responsibilities and continues to participate in the annual updating of and data maintenance of programs and services thereby helping the IMC fulfill its mandate and meet its updating objectives

Scope of the Work

Core Duties:

The SIMO is expected to perform all of the following core duties:

Updating

- Write, update and maintain bilingual descriptions and related documents for federal (and some provincial/territorial and private-sector) programs and services, according to established standards and guidelines
- Establish how federal organizations and their programs and services will be structured and presented in the internal databases
- Update and maintain contact information records for several internal databases
- Develop and maintain a network of federal government contacts for research and updating activities
- Promote organisation services and the IMC's information management methodologies and tools in order to encourage various departmental contacts to proactively collaborate on IMC updating activities
- Participate in client meetings
- Participate in off-site projects, such as the Speech from the Throne, the federal budget and elections
- Inform the team leaders of all progress and any difficulties encountered

Data Maintenance

- Perform media monitoring activities, using such tools as the Internet, newspapers, e-mail and press releases, to stay abreast of news and developments that may be relevant to the delivery of federal government programs and services
- Write articles for publication on The Daily
- Monitor and maintain databases to ensure that outdated documents/information are removed in a timely fashion
- Respond to ad hoc requests from clients and other sections of the organization
- Liaise with Client Services staff to ensure that new initiatives are properly integrated in the database
- Respond to various action request forms (ARFs) within one to two business days as per the IMC service standards
- Liaise with the distribution coordinator to organize and follow up on all issues related to order publications

Quality Assurance

- Maintain and audit lists of URLs to ensure that links are functional
- Participate in various quality assurance activities to ensure that all work carried out in the IMC is consistent across all portfolio teams
- Follow established IM procedures and guidelines
- Adhere to all IMC productivity, quality, reliability and service standards
- Consult with editors about terminology, writing guidelines and document clarity, as required
- Consult and liaise with team leaders within Call Centre Operations to ensure that complex IM initiatives, projects and updates are managed according to appropriate deadlines and are easily understood by information officers
- Self-actualize through reading, research, coaching and feedback received, and develop the knowledge required to become fully proficient in the assigned area of responsibility
- Develop sound knowledge of the overall activities and structure of the federal government by monitoring the media, conducting research and reading material received from federal organization (this will allow the SIMO to achieve multidisciplinary development)
- Participate in the ongoing improvement of all IM processes, standards, procedures and guidelines

Coordination/Supervision

- Assign ARFs to portfolio team members and monitor the quality of the answers provided and the turnaround times
- Create, delete, modify and maintain location groups in internal databases (the SIMO is assigned the rights to perform advanced administrative functions in IMS)
- Review and sign off on documents produced by the portfolio team before they are submitted for editing to ensure that guidelines and standards are being followed
- Coordinate and lead IMC-wide workgroup activities, such as standards committees, work enhancement initiatives, training schedules, and quality assurance projects
- Participate in the staffing process, including the preparation of test questions and the interviewing of potential IMOs
- Lead the development of various technological work tools for the IMC
- Lead various quality assurance activities, as instructed by a team leader
- Coordinate schedules and workloads for IMOs in training and prepare their formal feedback following training

- Provide feedback to the appropriate team leader on the performance of portfolio team members
- Replace team leaders in their absence, as required
- Handle sensitive and confidential information in a discreet and appropriate manner

Administrative Tasks

- Track all activities to ensure that time is used efficiently
- Attend weekly team meetings and record minutes during these meetings
- Attend other meetings and information sessions, as required
- Participate in training sessions, as required
- Perform various administrative and clerical duties
- Follow existing employer policies and procedures
- Attend meetings on behalf of a team leader

Training and Peer Development

- Coach and mentor less experienced colleagues
- Develop and update training material
- Prepare and deliver training for members of the IM Team and CEC

Information Management Officer

Work Unit: Information Management Centre
Reporting to: Team leader, Information Management
Directorate: ICMD

Overview of Work Unit:

The Information Management Centre (IMC) organizes, maintains and updates the information contained in the knowledge repositories used by the 1 800 O-Canada service and the Customized Information Services (CIS). The IMC also manages information in support of the in-person network and contributes more generally to the consistent delivery of information across all channels.

The IMC is composed of two teams, namely the Information Management (IM) team and the Editing and Linguistic Services (ELS) team, and of a distribution coordinator, representing a total staff of approximately 40 people.

Summary of the Role:

The information management officer (IMO) is a content management/development specialist who is responsible for researching, organizing, updating and maintaining bilingual federal and related information databases used by information officers on various projects when responding to enquiries from the public.

Scope of Work

- Upon joining the IMC, the IMO takes part in a six-month training and integration program.
- As a member of a portfolio team, the IMO is assigned to the annual updating of and data maintenance for a series of programs and services. By carrying out these activities, the IMO helps the IMC fulfill its mandate and meet its updating objectives.
- The IMO researches, monitors and compiles assigned information according to established schedules, guidelines and procedures. The IMO may also be asked to participate in other projects, including various committees, training delivery and diverse ongoing improvement initiatives within the IMC.

Core Duties:

The IMO is expected to perform all of the following core duties:

Updating

- write, update and maintain bilingual descriptions and related documents for federal (and some provincial/territorial and private-sector) programs and services, according to established standards and guidelines
- establish how federal organizations and their programs and services will be structured and presented in the internal databases
- update and maintain contact information records for several internal databases
- collaborate with Editing and Linguistic Services in developing bilingual keyword strings that allow users to quickly and accurately access information in internal databases
- develop and maintain a network of federal government contacts for research and updating activities
- promote ICMD services and the IMC's information management methodologies and tools in order to encourage various departmental contacts to proactively collaborate on IMC updating activities
- participate in client meetings

- participate in off-site projects, such as the Speech from the Throne, the federal budget and elections
- inform the team leaders of all progress and any difficulties encountered

Data Maintenance

- perform media monitoring activities, using such tools as the Internet, newspapers, e-mail, press releases and faxes, in order to stay abreast of news and developments that may be relevant to the delivery of federal government programs and services
- write articles for publication on The Daily
- monitor and maintain databases to ensure that outdated documents/information are removed in a timely fashion
- respond to ad hoc requests from clients and other sections of the organization
- liaise with Client Relations staff to ensure that new initiatives are properly integrated in the database
- respond to various action requests (ARFs) within one to two business days as per IMC service standards
- liaise with the distribution coordinator to organize and follow up on issues related to order publication

Quality Assurance

- maintain and audit lists of publications and URLs to ensure that titles are accurate and links are functional
- participate in various quality assurance activities to ensure that all work carried out in the IMC is consistent across all portfolio teams
- follow established IM procedures and guidelines
- adhere to all IMC productivity, quality, reliability and service standards
- consult with editors about terminology, writing guidelines and document clarity, as required
- consult and liaise with team leaders within Call Centre Operations to ensure that complex IM initiatives, projects and updates are managed according to appropriate deadlines and are easily understood by information officers
- self-actualize through reading, research, coaching and feedback received, and develop the knowledge required to become fully proficient in the assigned area of responsibility
- develop sound knowledge of the overall activities and structure of the federal government by monitoring the media, conducting research and reading material received from federal organizations (this will allow the IMO to achieve multidisciplinary development)

Administrative Tasks

- track all activities to ensure that time is used efficiently
- attend weekly team meetings and record minutes during these meetings
- attend other meetings and information sessions, as required
- participate in training sessions, as required
- perform various administrative and clerical duties
- follow existing employer policies and procedures

Additional Duties:

In addition to the core duties listed above, the IMO may be called upon to perform any of the following additional duties:

Distribution

- carry out the duties of the distribution coordinator, as required

Training and Peer Development

- coach and mentor less experienced colleagues
- develop and update training material
- prepare and deliver training for members of the IM Team and the organisation

Special Assignments

- participate in the ongoing improvement of all information management processes, standards, procedures and guidelines
- participate in workgroups and committees set up to develop and enhance IMC standards and guidelines
- test and provide feedback on various internal and external applications

Senior Editor

Work Unit: Information Management Centre
Reporting To: Team Leader, Editing and Linguistic Services (ELS)
Directorate: ICMD

Overview of Work Unit:

The Information Management Centre (IMC) organizes, maintains and updates the information contained in the knowledge repositories used by the 1 800 O-Canada service and the Customized Information Services (CIS). The IMC also manages information in support of the in-person network and contributes more generally to the consistent delivery of information across all channels.

The IMC is composed of two teams, namely the Information Management (IM) team and the Editing and Linguistic Services (ELS) team, and of a distribution coordinator, representing a total staff of approximately 40 people.

Summary of the Role:

Senior Editors are bilingual linguistic experts. Given their editing and linguistic expertise in both official languages, Senior Editors are required to play a prominent role in the training of new editors and information management officers (IMOs), in the coaching and mentoring of less experienced colleagues, in quality assurance activities and in the development of specialized linguistic tools. Furthermore, Senior Editors may be required to take the lead in coordinating special ELS or IMC projects. The Senior Editor has mastery of all editor roles and responsibilities.

Scope of the Work

Core Duties:

In addition to performing all the core duties of an editor (see [Editor job description](#)), the Senior Editor is expected to do the following:

Editing and Translation

- Edit sensitive and confidential documents

Data Maintenance

- Assign linguistic and keyword-related action request forms (ARFs) to other editors and ensure that ARF standards are applied (ARF manager)
- Maintain the keywords database using the KMF functionality
- Coordinate the development of internal linguistic tools (e.g. SPOT, Term Bank, Writing Solutions, Corporology)

Training, Coaching and Professional Development

- Create and update training material for editors and IMOs
- Prepare and deliver coaching sessions for editors and IMOs
- Develop writing guidelines and standards
- Coordinate professional development activities (e.g. team-calibration exercises, the development of user manuals, research into new tools and reference material)
- Handle sensitive and confidential information in a discreet and appropriate manner

Peer Development

- Act as resource person and role model for other team members
- Coach new editors and IMOs during their integration period

- Provide feedback on new editors and IMOs to the ELS team leaders

Coordination/Supervision/Recruitment

- Inform the team leaders in a timely fashion of any problems (technical, behavioural, etc.) that may arise within the team
- Advise the team leaders on complex or sensitive issues
- Coordinate and participate in ELS or IMC-wide workgroup activities (e.g. standards committees, work enhancement initiatives, training programs, quality assurance projects)
- Coordinate and participate in various quality assurance activities
- Participate in recruitment activities

Editor

Work Unit: Information Management Centre
Reporting To: Team Leader, Editing and Linguistic Services (ELS)
Directorate: ICMD

Overview of Work Unit:

The Information Management Centre (IMC) organizes, maintains and updates the information contained in the knowledge repositories used by the 1 800 O-Canada service and the Customized Information Services (CIS). The IMC also manages information in support of the in-person network and contributes more generally to the consistent delivery of information across all channels.

The IMC is composed of two teams, namely the Information Management (IM) team and the Editing and Linguistic Services (ELS) team, and of a distribution coordinator, representing a total staff of approximately 40 people.

Summary of the Role:

Editors are bilingual linguistic specialists responsible for providing editing, translation and related linguistic services to the IMC, the 1 800 O-Canada service and other client groups within the organisation. Editors play a key role in ensuring the linguistic quality of all written material prepared by the IMC, e-mail replies produced by the call centre and internal corporate documents.

Scope of the Work

- Editors work very closely with the Information Management (IM) teams to ensure that all written material produced within the IMC is of appropriate linguistic quality, clear and equivalent in both official languages.
- Editors establish language and terminology standards, proofread all database content, provide advice and coaching on linguistic issues to information management officers (IMOs) at all levels, and help develop guidelines and linguistic tools for standardizing the way information is presented in the various databases.
- Editors also maintain the Information Management System (IMS) keywords database (a keyword index of English and French word combinations), which helps information officers locate the most appropriate programs, services and delivery points in the 1 800 O-Canada database in order to properly respond to enquiries.
- In addition, editors provide editing and translation services to other sections of the organization and edit e-mail responses produced by the call centre team.

Core Duties

Editors are expected to perform all of the following core duties:

Editing and Translation

- Edit database documents (IMPACT)
- Edit e-mails submitted by the call centre
- Edit and translate administrative documents submitted by corporate clients
- Edit material that is posted on The Daily Web page
- Proofread documents in IMS (Sweep)
- Edit and translate material that is posted on the IMC intranet site (e.g. guidelines, standardized phrasing)
- Compile and edit the organisation Weekly Highlights, if required

- Edit material related to special projects (usually carried out off-site) such as the federal budget and the Speech from the Throne, if required

Data Maintenance

- Create and manage keywords in IMS, according to established standards and guidelines
- Research and respond to linguistic and keyword-related action requests (ARFs)
- Maintain the keywords database using the KMF functionality
- Contribute to the development of internal linguistic tools such as SPOT, the Term Bank, the Writing --- Solutions intranet page and the Corporology database
- Enter data in the IMS "Admin Treeview"

Training, Coaching and Professional Development

- Participate in professional development activities (e.g. team-calibration exercises, research into new tools and reference material)
- Provide linguistic advice to clients and answer any questions they may have
- Participate in training sessions, if required
- Handle sensitive and confidential information in a discreet and appropriate manner

Administrative Tasks

- Respond to work-related e-mails and ad hoc requests
- Update reports and tracking charts (e.g. duty logs, workflow reports)
- Prepare for and attend weekly unit and team meetings, IMC meetings, information sessions, -performance appraisal discussions and other meetings
- Perform various administrative and clerical duties
- Record and edit team meeting minutes, if required
- Monitor and assign incoming submissions to ELS, if required

Additional Duties:

In addition to the core duties listed above, editors may be called upon to perform any of the following additional duties:

Peer Development

- Coach new editors and IMO's during their integration period
- Coach colleagues on specific subjects, if required

Quality Assessment

- Participate in various quality assurance activities

Special Assignments

- Participate in the ongoing improvement of all IMC processes, standards, procedures and guidelines
- Participate in various workgroups
- Test and provide feedback on various internal and external applications
- Participate in pairing sessions with information officers and other members of the organization in order to remain current on internal work practices

Web Content Creation Specialist

Work Unit: Various ICMD Units, Ottawa ON
Reporting To: Various ICMD Units
Directorate: ICMD

Overview of Work Unit:

Built around a dynamic, team-based environment, the ICMD delivers quality information services and the associated critical support functions to these services for the Government of Canada (GC). The unit's main business lines are the following:

- Internet and Intranet – which designs, publishes and manages internet and intranet sites, such as servicecanada.gc.ca and Canada.gc.ca
- 1 800 O-Canada - which is the primary toll-free access point for information on GC programs, services and initiatives
- Customized Information Services - which deliver a variety of communications services on behalf of GC clients that relate to specific issues, initiatives and crisis situations
- On-line Enquiry Services - which provide e-mail and telephone support for a variety of GC Internet sites, including the Canada Site (the primary Internet access point for the GC)
- Information Management Centre – which organizes, updates and maintains information in the database used by the 1 800 O-Canada service, the databases used by certain projects within the Canada Enquiry Centre's (CEC) Customized Information Services and new Service Canada business and core offerings.

Summary of the Role:

The Web Content Creation Specialist formats and publishes content for web properties.

Core Duties:

A Web Content Creation Specialist will be expected to perform all of the following core duties:

Web Site Management Technical Support

- Produce, update, and maintain web pages in HTML5 for publication
- Convert design mock-ups using the latest web based and other technologies for publication on the internet / intranet
- Participate and provide technical expertise on a variety of projects
- Participate in the definition of technical requirements to enhance current products and tools
- Monitor and maintain content and information on web sites
- Conduct regular internet / intranet searches for new web site linkages and information
- Provide user support and expert advice to staff and clients in the field of web page creation and design
- Align web content with overall information processes and procedures

Communicate With Users

- Participate in appropriate users committees, meetings, and working groups
- Proactively and consistently inform other groups of activities that relate to them and encourage them to do the same
- Proactively keep up-to-date with other groups and their activities
- Anticipate upcoming events that relate to project activities and take appropriate action

Complete Administrative Tasks As Required

- Manage his/her own workload

- Keep calendar up-to-date with tasks, deadlines and related information
- Keep documents up-to-date, such as templates and checklists
- Perform quality assurance on project activities and documents
- Keep functional documentation of web products and systems up to date
- Participate in various meetings

Additional Duties:

- In addition to the core duties listed above, a Web Content Creation Specialist may be called upon to work on various ad hoc and special projects upon request.

Business Analyst

Work Unit: Various ICMD Units, Ottawa, ON
Reporting To: Various ICMD Units
Directorate: ICMD

Overview of Work Unit:

Built around a dynamic, team-based environment, the ICMD delivers quality information services and the associated critical support functions to these services for the Government of Canada (GOC). The unit's main business lines are the following:

- Internet and Intranet – which designs, publishes and manages internet and intranet sites, such as servicecanada.gc.ca and Canada.gc.ca
- 1 800 O-Canada - which is the primary toll-free access point for information on GC programs, services and initiatives
- Customized Information Services - which deliver a variety of communications services on behalf of GC clients that relate to specific issues, initiatives and crisis situations
- On-line Enquiry Services - which provide e-mail and telephone support for a variety of GC Internet sites, including the Canada Site (the primary Internet access point for the GC)
- Information Management Centre – which organizes, updates and maintains information in the database used by the 1 800 O-Canada service, the databases used by certain projects within the Canada Enquiry Centre's (CEC) Customized Information Services and new Service Canada business and core offerings.

Summary of the Role:

The Business Analyst helps collect, develop, and document business requirements for key projects and initiatives, such as web redesigns and new system enhancements. The work would include the development of Use Case for application development as well as the development of scenarios for user acceptance testing.

Core Duties:

A Business Analyst will be expected to perform all of the following core duties:

Business Requirement Definition

- Produce, update, and maintain business requirements documents
- Convert design mock-ups into business requirements documents for future application development
- Translate client requirements using a variety of software
- Participate and provide business analysis expertise on a variety of projects
- Participate in the definition of business requirements to enhance current products and tools
- Conduct regular tiger team meetings to gather and document business requirements
- Provide user support and expert advice to staff and clients in the field of Project Management and user Acceptance Testing

Development, Implementation, Maintenance, and Analysis of Reports and Systems in Support of ICMD Project Management Activities

- Create, update, and maintain various documents aimed at improving business definition analysis
- Develop, organize, analyze, and prepare various reports and statistics to support application
- Development and project management activities

Communicate With Users

- Manage his/her workload
- Participate in appropriate users committees, meetings, and working groups
- Proactively and consistently inform other groups of activities that relate to them and encourage them to do the same
- Proactively keep up-to-date with other groups and their activities
- Anticipate upcoming events that relate to project activities and take appropriate action

Complete Administrative Tasks As Required

- Keep calendar up-to-date with tasks, deadlines and related information
- Keep documents up-to-date, such as templates and checklists
- Perform quality assurance on project activities and documents
- Keep functional documentation of web products and systems up to date
- Participate in various meetings

Additional Duties:

In addition to the core duties listed above, a Business Analyst may be called upon to perform any of the following additional duties:

Training and Development

- Create and/or update training material and facilitate group and one-on-one training sessions
- Participate in info-sessions to inform employees about project-related activities

Special Assignments

- Work on various ad hoc and special projects upon request

User Experience and Interface Design Specialist

Work Unit: Various ICMD Units, Ottawa, ON
Reporting To: Various ICMD Units
Directorate: ICMD

Overview of Work Unit:

Built around a dynamic, team-based environment, the ICMD delivers quality information services and the associated critical support functions to these services for the Government of Canada (GC). The unit's main business lines are the following:

- Internet and Intranet – which designs, publishes and manages internet and intranet sites, such as servicecanada.gc.ca and Canada.gc.ca
- 1 800 O-Canada - which is the primary toll-free access point for information on GC programs, services and initiatives
- Customized Information Services - which deliver a variety of communications services on behalf of GC clients that relate to specific issues, initiatives and crisis situations
- On-line Enquiry Services - which provide e-mail and telephone support for a variety of GC Internet sites, including the Canada Site (the primary Internet access point for the GC)
- Information Management Centre – which organizes, updates and maintains information in the database used by the 1 800 O-Canada service, the databases used by certain projects within the Canada Enquiry Centre's (CEC) Customized Information Services and new Service Canada business and core offerings.

Summary of the Role:

The User Experience and Interface Design Specialist (UEIDS) creates original graphics, user interface models, storyboards, functional prototypes, and templates, according to W3C specifications and the TBS's new usability standard, accessibility standard, and interoperability standard.

Scope of the Work

Core Duties:

A UEIDS will be expected to perform all of the following core duties:

Web Site Management Technical Support

- Produce, update, and maintain web templates in HTML5, java script, and cascading style sheets (CSS)
- Produce multi-media interfaces in an accessible format, including video and audio players
- Create functional design mock-ups using the latest web based and other technologies for publication on the internet/intranet
- Design original graphics to meet client requirements using a variety of software that meet W3C accessibility standards
- Create user interfaces for multi-media and for multiple devices
- Participate and provide usability and user interface advise and technical expertise on a variety of projects
- Participate in the definition of UX and interface technical and user experience requirements to enhance current products and tools
- Provide user support and expert advice to staff and clients in the field of web page creation and design, HTML5, java script, CSS, multi-media players and coding for multiple formats

Communicate With Users

- Manage his/her own workload
- Participate in appropriate users committees, meetings, and working groups
- Proactively and consistently inform other groups of activities that relate to them and encourage them to do the same
- Proactively keep up-to-date with other groups and their activities
- Anticipate upcoming events that relate to project activities and take appropriate action

Complete Administrative Tasks As Required

- Keep calendar up-to-date with tasks, deadlines and related information
- Keep documents up-to-date, such as templates and checklists
- Perform quality assurance on project activities and documents
- Keep functional documentation of web products and systems up to date
- Participate in various meetings

Additional Duties:

In addition to the core duties listed above, a UEIDS may be called upon to work on various ad hoc and special projects upon request.

Team Leader - Operations Support

Work Unit: Operations Support Unit, Canada Enquiry Center
Reporting To: Contractor's Operations Management Team
Directorate: ICMD

Built around a dynamic, team-based environment, the CEC delivers quality information services for the Government of Canada (GOC). The unit's main business lines are the following:

- 1 800 O-Canada - which is the primary toll-free access point for information on GC programs, services and initiatives
- Customized Information Services - which deliver a variety of communications services on behalf of GC clients that relate to specific issues, initiatives and crisis situations
- On-line Enquiry Services - which provide e-mail and telephone support for a variety of GC Internet sites, including the Canada Site (the primary Internet access point for the GC)

The Operations Support Unit supports the CEC in the areas of call centre reporting and work process development. The unit's main activities are:

- Designing and producing activity reports for the Operations Unit, CEC clients, and Service Canada management
- Quality assurance of reports
- Creating and maintaining reporting processes for the Operations Unit
- Designing and producing reporting tools for various CEC work units
- Testing services for internal product/program enhancements such as Impact

Summary of the Role:

Overseeing the Operations Support Unit staff, the Team Leader's main objective is to provide accurate and timely data and analysis in response to requests from internal and external clients. The Team Leader analyses the business processes and tools of other CEC work units and suggests ways to improve their efficiency and productivity.

Scope of Work

Core Duties:

A Team Leader will be expected to perform all of the following core duties:

Management

- Coordinate all work unit activities for new and existing projects
- Monitor productivity and ensure deadlines are met
- Develop, implement and review quality assurance procedures

Internal and external communication

- Communicate trends and policy changes to staff members and ensure the flow of information between all levels of CEC business lines through various activities, including meetings and information updates
- Establish and maintain contact with internal clients and ensure all parties are kept up-to-date by requesting and offering information updates as necessary

Support, feedback and development

- Manage the operations support staff's activities by acting as a resource person for work-related enquiries and assisting them in their daily tasks through the review and editing of reports and tools.
- Update and review employee files
- Play an active role in the professional development of operations support staff by providing feedback, coaching and help in establishing career goals
- Handle sensitive or complicated information in a discreet and appropriate fashion

Staffing

- Coordinate and participate in the recruitment of operations support staff in conjunction with the employer
- Communicate various staffing recommendations to the employer, including the hiring of new staff and the reassignment or re-evaluation of current staff members
- Provide the employer with recommendations regarding the participation of staff members in various projects and activities

Administrative tasks

- Forecast and coordinate various administrative requirements within the work unit such as preparing schedules and approving time sheets and vacation requests
- Establish, update and document Operations Support procedures

Professional Development

- Must maintain up to date knowledge of forecasting methodologies and applications, data analytics and call center technologies as they pertain to the Operations Support Unit
- Continue to refine skills in all facets of the role described above through training and development as well as self-study

Reporting Officer

Work Unit: Operations Support, Canada Enquiry Center
Reporting To: Team Leader, Operations Support
Directorate: ICMD

Overview of Work Unit

Built around a dynamic, team-based environment, the Operations Support Unit is an integral part of CEC Operations, which delivers quality information services for the Government of Canada (GC), through the following services.

- 1 800 O-Canada - which is the primary toll-free access point for information on GC programs, services and initiatives
- Customized Information Services - which delivers a variety of communications services on behalf of GC clients that relate to specific issues, initiatives and crisis situations
- On-line Enquiry Services - which provides e-mail and telephone support for a variety of GC Internet sites, including the Canada Site (the primary Internet access point for the GC)

The Operations Support Unit supports the CEC in the areas of call centre reporting and work process development. The unit's main activities are:

- Designing and producing activity reports for the Operations Unit, CEC clients, and Service Canada management
- Quality assurance of reports
- Creating and maintaining reporting processes for the Operations Unit
- Designing and producing reporting tools for various CEC work units
- Testing services for internal product/program enhancements such as Impact

Summary of the Role:

The Reporting Officer designs, creates, prepares and validates various reports of call centre activities. He/she also designs, implements and maintains business process and reporting solutions for various CEC work units.

Scope of Work

Core Duties:

A Reporting Officer will be expected to perform all of the following core duties:

Create, generate and maintain various reports

- Prepare daily, weekly, monthly, quarterly, yearly and ad hoc Operations reports for internal and external clients.
- Define and propose new reporting methods and/or processes for Operations
- Design, create and maintain business process tools and reports for various CEC work units
- Develop, under the guidance of the Team Leader, Operations Support, the appropriate Infrastructure for the immediate and future reporting needs of the organization
- Ensure common look and feel for all elements of reporting from the CEC wherever possible

Communicate and work with peers and other contacts within the organization

- Work closely with other CEC work units as required (Operations, Information Management Centre, Client Services, Technology Services) for the development of operational reports and the posting of data on the organization's intranet
- Provide consultation services to CEC work units on their business process and reporting requirements
- Work closely with the Team Leader, Operation Support, and CEC Management to ensure that right statistical data is transmitted to the appropriate sections of the organization
- Liaise with Technology Services to obtain and extract the necessary data to prepare reports
- Participate in special assignments and operational meetings as required

Additional Duties:

In addition to the core duties listed above, a Reporting Officer may be called upon to perform any of the following additional duties:

Training and development

- Train CEC staff in the use of reporting tools developed by the Unit
- Create and /or update training material to facilitate group one-on-one training sessions of report tools

Special assignments

- Participate in monthly readiness testing of the Business Resumption Plan site
- Participate in short-term projects and initiatives

Facilitator

Work Unit: Call Centre Operations, Ottawa ON
Reporting To: Call Centre Operations, Team Leader
Directorate: ICMD

Overview of Work Unit:

Built around a dynamic, team-based environment, the CEC Operations unit delivers quality information services for the Government of Canada (GC). The unit's main business lines are the following:

- 1 800 O-Canada - which is the primary toll-free access point for information on GC programs, services and initiatives
- Customized Information Services - which deliver a variety of communications services on behalf of GC clients that relate to specific issues, initiatives and crisis situations
- On-line Enquiry Services - which provide e-mail and telephone support for a variety of GC Internet sites, including the Canada Site (the primary Internet access point for the GC)

Summary of the Role:

The Training Facilitator is responsible for researching, developing and delivering training sessions and programs that address the development needs of the CEC.

Scope of Work

Core Duties

A Training Facilitator will be expected to perform all of the following core duties:

Facilitate training sessions

- Conduct a wide range of training sessions (e.g. formal/informal, internal/external, small/large groups, in- person/teleconference, independently/with colleagues) whilst enforcing CEC policies and procedures
- Prepare self-evaluation plans with a view to improving training performance

Carry out training-related planning, development and follow-up activities

- Research, design, develop and evaluate training programs, as well as training material, tools and techniques that will be useful in the CEC environment
- Assess the effectiveness of training sessions and the retention level of participants by consulting supervisors and gathering post-training feedback from trainees
- Redesign existing courses, lesson plans and materials, as required, to ensure they are up-to-date and useful
- Participate in discussions with internal and external parties regarding existing and/or new training needs in order to develop a solid understanding of course objectives to be taken into account when designing lesson plans
- Coordinate learning resources and the delivery of training sessions as requested by team leaders
- Maintain a log of exercises and sample activities for use in the development of training courses
- Train colleagues on how to prepare learning material and deliver training sessions following standardized guidelines and to measure trainees' suitability in order to provide team leaders and supervisors with an overview of strengths and areas of concern
- Ensure all training material meets CEC training standards

Complete administrative tasks as required

- Organize room set-up and advise the technology team of any requirements
- Prepare training schedules and keep an inventory of supplies
- Track attendance and completion of workshops by trainees
- Participate in various committees and workgroups (e.g. Social Committee, Health and Safety Committee)

Replace training coordinator


- Attend project training sessions in order to provide feedback on course effectiveness and trainer platform skills
- Assess and discuss the effectiveness of client training programs in terms of meeting CEC training standards
- Act as a resource person to those involved in training activities

Miscellaneous

- Keep up-to-date with all projects within Operations
- Oversee the activities carried out by the administrative assistant

ANNEX E

SECURITY REQUIREMENTS CHECK LIST

 Government of Canada / Gouvernement du Canada		Contract Number / Numéro du contrat G9420-12-0003	
		Security Classification / Classification de sécurité	
SECURITY REQUIREMENTS CHECK LIST (SRCL) LISTE DE VÉRIFICATION DES EXIGENCES RELATIVES À LA SÉCURITÉ			
PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE			
1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine HRSDC		2. Branch or Directorate / Direction générale ou Direction Citizen Service Branch	
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 Service delivery contract renewal (Integrated Channel Management Directorate).			
5. a) Will the supplier require access to Controlled Goods? / Le fournisseur aura-t-il accès à des marchandises contrôlées? <input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui			
5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? / Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques? <input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui			
6. Indicate the type of access required / Indiquer le type d'accès requis			
6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? / Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? (Specify the level of access using the chart in Question 7. c) / Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c) <input type="checkbox"/> No / Non <input checked="" type="checkbox"/> Yes / Oui			
6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. / Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé. <input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui			
6. c) Is this a commercial courier or delivery requirement with no overnight storage? / S'agit-il d'un service de messagerie ou de livraison commerciale sans entreposage de nuit? <input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui			
7. Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès			
Canada <input checked="" type="checkbox"/>		NATO / OTAN <input type="checkbox"/>	
Foreign / Étranger <input type="checkbox"/>			
7. b) Release restrictions / Restrictions relatives à la diffusion			
No release restrictions / Aucune restriction relative à la diffusion <input checked="" type="checkbox"/>		All NATO countries / Tous les pays de l'OTAN <input type="checkbox"/>	
Not releasable / À ne pas diffuser <input type="checkbox"/>		No release restrictions / Aucune restriction relative à la diffusion <input type="checkbox"/>	
Restricted to: / Limité à: <input type="checkbox"/>		Restricted to: / Limité à: <input type="checkbox"/>	
Specify country(ies) / Préciser le(s) pays:		Specify country(ies) / Préciser le(s) pays:	
7. c) Level of information / Niveau d'information			
PROTECTED A / PROTÉGÉ A <input type="checkbox"/>		NATO UNCLASSIFIED / NATO NON CLASSIFIÉ <input type="checkbox"/>	
PROTECTED B / PROTÉGÉ B <input checked="" type="checkbox"/>		NATO RESTRICTED / NATO DIFFUSION RESTREINTE <input type="checkbox"/>	
PROTECTED C / PROTÉGÉ C <input type="checkbox"/>		NATO CONFIDENTIAL / NATO CONFIDENTIEL <input type="checkbox"/>	
CONFIDENTIAL NATO / CONFIDENTIEL <input type="checkbox"/>		SECRET / NATO SECRET <input type="checkbox"/>	
SECRET COSMIC / SECRET <input type="checkbox"/>		TOP SECRET / COSMIC TRÈS SECRET <input type="checkbox"/>	
TOP SECRET / TRÈS SECRET <input type="checkbox"/>		PROTECTED A / PROTÉGÉ A <input type="checkbox"/>	
TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>		PROTECTED B / PROTÉGÉ B <input type="checkbox"/>	
		PROTECTED C / PROTÉGÉ C <input type="checkbox"/>	
		CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>	
		SECRET / SECRET <input type="checkbox"/>	
		TOP SECRET / TRÈS SECRET <input type="checkbox"/>	
		TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>	

GC-T65360103(2006-05-001)S

Security Classification / Classification de sécurité

Canada



Government of Canada
Gouvernement du Canada

Contract Number / Numéro du contrat

G9420-12-0003

Security Classification / Classification de sécurité

PART A (continued) / PARTIE A (suite)

8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS?
If Yes, indicate the level of sensitivity:
Dans l'affirmative, indiquer le niveau de sensibilité:

☒ No ☐ Yes
Non Oui

9. Will the supplier require access to extremely sensitive INFOSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate?

☒ No ☐ Yes
Non 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 - SIGHT
TRÈS SECRET - SIGHT

☐ 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 de travail?

☒ No ☐ Yes
Non Oui

If Yes, will unscreened personnel be escorted?
Dans l'affirmative, le personnel en question sera-t-il escorté?

☐ No ☐ Yes
Non 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 ☐ Yes
Non 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 ☐ Yes
Non 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 ☐ Yes
Non 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 ☐ Yes
Non 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 ☐ Yes
Non Oui

	Government of Canada Gouvernement du Canada	Contract Number / Numéro du contrat G9420-12-0003 Security Classification / Classification de sécurité
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PART C - (continued) / PARTIE C - (suite)

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

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

SUMMARY CHART / TABLEAU RÉCAPITULATIF


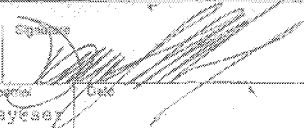
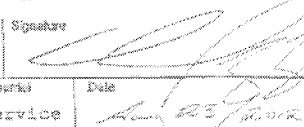
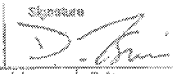
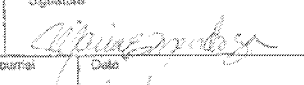
Category / Catégorie	PROTECTED / PROTÉGÉE			CLASSIFIED / CLASSIFIÉE		NATO				COMSEC						
				CONFIDENTIAL / CONFIDENTIEL	SECRET	TOP SECRET / TRÈS SECRET	NATO RESTRICTED / NATO DIFFUSION RESTREINTE	NATO CONFIDENTIAL / NATO CONFIDENTIEL	NATO SECRET	COMINT TOP SECRET / COMINT TRÈS SECRET	PROTECTED / PROTÉGÉE			CONFIDENTIAL / CONFIDENTIEL	SECRET	TOP SECRET / TRÈS SECRET
	A	B	C								A	B	C			
Information / Atouts / Renseignements / Données																
Production																
IT Media / Support TI																
IT Link / Liaison 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 / Non ☐ Yes / Oui

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

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

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

 Government of Canada / Gouvernement du Canada		Contract Number / Numéro du contrat G9420-12-0003	
		Security Classification / Classification de sécurité	
PART D - AUTHORIZATION / PARTIE D - AUTORISATION			
13. Organization Project Authority / Champ de projet de l'organisme			
Name (print) - Nom (en lettres majuscules) Daniel Tremblay		Title - Titre A/ Senior DG	
Signature 		Date	
Telephone No. - No de téléphone (513) 987-4707	Facsimile No. - No de télécopieur (513) 957-7600	E-mail address - Adresse courriel daniel.tremblay@scs	
14. Organization Security Authority / Responsable de la sécurité de l'organisme			
Name (print) - Nom (en lettres majuscules) David Bonzo		Title - Titre Regional Security	
Signature 		Date	
Telephone No. - No de téléphone (819) 997-6462	Facsimile No. - No de télécopieur (819) 952-2001	E-mail address - Adresse courriel david.bonzo@service	
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 / <input type="checkbox"/> Yes / Oui			
16. Procurement Officer / Agent d'approvisionnement			
Name (print) - Nom (en lettres majuscules) Danny Tsui		Title - Titre Contracting Specialist	
Signature 		Date	
Telephone No. - No de téléphone (819) 994-4461	Facsimile No. - No de télécopieur (819) 997-0442	E-mail address - Adresse courriel danny.tsui@hradc-rh	2012-07-11
17. Contracting Security Authority / Autorité contractante en matière de sécurité			
Name (print) - Nom (en lettres majuscules) Maria Mendoza		Title - Titre	
Signature 		Date	
Contract Security Officer, Contract Security Division Téléphone No. - No de téléphone Maria.Mendoza@psgs-pmgsc.gc.ca (Tel/Tel - 613-954-1819 / Fax/Téléc - 613-954-4177)			

ANNEX F

NON-PERFORMANCE CREDITS

1.0 Service Level Criteria

There are several key criteria that are critical to the ongoing success of the ICMD and its ability to continue to deliver on its service commitments and mandate:

1.1 Recruitment – the Contractor's ability to attract and retain qualified resources for the various services (1-800 O Canada, Information Management Centre, Custom Information Services) that make up the contract.

1.2 Turnover Rate – the Contractor's ability to retain an acceptable level of trained, experienced resources delivering to the required service levels. Turnover includes exits (leave of absences, resignations, and terminations), but excludes unscheduled absences, downsizing, and vacation. The turnover rate is provided in the Contractor's Quarterly Turnover report. The turnover rate is calculated as a percentage:

$$\frac{(\text{Total number of exits of team members}) - (\text{Number of those returning from leave of absence})}{\text{Average size of team by position, project, project grouping, or work unit for specified period}}$$

1.3 Resource Availability – the Contractor's ability to meet the daily resource requirements in order to achieve service targets, as reported on the Daily Resource Deficiencies Report. This includes the reliability of the contractor's resources to attend their regularly scheduled shifts and to adhere to their schedule to ensure that sufficient resources are available to respond to the forecasted call volumes. Absenteeism is a severe risk directly impacting service levels, and requires daily attention. This does not include scheduled time off or other leaves that have been approved by the Contractor in advance.

The resource availability is calculated and applied separately for the following services:

- 1 800 O-Canada overall service
- CIS overall total service
- Each CIS project that exceeds 49 resources
- IMC overall service

1.4 Timely Reporting – the Contractor's ability to prepare and deliver the detailed reports outlined in Section 7 Reporting Requirements of Annex "A" – Statement of Work by the required time.

1.5 Qualitative Monitoring – the Contractor's ability to meet the service quality standards for Information Officers for Foundation Skills, Finesse Skills, and Information Accuracy, as described in Section 8.1.6 Caller Satisfaction – Service Quality Ongoing Evaluations of Annex "A" – Statement of Work. Periodic live monitoring is to be conducted by Supervisors and Senior Information Officers, as well as the Project Authority. Performance exceptions are reported on the Contractor's monthly Team Member Performance Exceptions Report.

1.6 Performance Expectations – the ability of the Contractor's staff within the group (1 800 O-Canada, CIS overall service, and IMC) to consistently meet performance expectations for that group as indicated on the individual performance appraisal. A performance appraisal is conducted for each staff resource for every 975 hours

(about six (6) months). A summary of the performance appraisal ratings is provided on the Contractor's Semi-Annual Performance Appraisal Summary report.

1.7 Invoice Error Rate – the Contractor's ability to provide accurate and complete invoices. It is the Contractor's responsibility to confirm the accuracy and completeness of invoices and supporting documentation. Invoice errors cost undue time and effort for Service Canada. Service Canada will provide a weekly Invoice Error Report, detailing errors found per invoice, such as incorrect billable rates, incorrect billable hours, incorrect resource assignments etc. The Invoice Error Rate is the number of invoices containing errors divided by the total invoices provided for that week, calculated over the three month (quarter) period.

2.0 Minimum Service Levels

Failure of the Contractor to successfully deliver on these elements will negatively impact the Canada Enquiry Centre. To this end the following ongoing minimum service levels have been set for the Contractor as the minimum response levels that must be maintained:

2.1 Recruitment

As specified by the Resource Request:

- For recruitment deliverables of up to 10 resources - 100% achievement required within the requested timeframe, reported monthly.
- For recruitment deliverables of between 11 and 50 resources - 95% achievement required within the requested timeframe, reported quarterly.
- For recruitment deliverables of greater than 50 resources) - 90% achievement required within the requested timeframe, reported semi-annually.

2.2 Turnover Rate

- For Operations: less than 8% by position, project / project grouping, or work unit, per quarter (every three (3) months).
- For the IMC: less than 20% for IMOs and Editors per six (6) months of fiscal year.

2.3 Resource Availability

- A minimum of 93% attendance required at all times for each of the following services:
 - 1 800 O-Canada
 - CIS total projects
 - Each CIS project that exceeds 49 resources
 - IMC

2.4 Timely Reporting

- Daily Reports – 100% delivered on time.
- Weekly Reports – 100% delivered on time.
-

2.5 Qualitative Monitoring

For call monitoring conducted per quarter period (every three (3) months), the following minimum service levels apply, based on a minimum of 4,000 calls for that period:

-
-
-

2.6 Performance Expectations

- Foundation Skills – individual Information Officers must have an average score of 90%
- Finesse Skills – individual Information Officers must have an average score of 90%
- Information Accuracy – individual Information Officers must have an average score of 85%

2.7 Invoice Error Rate

- Less than or equal to 8% of invoices, as identified on the weekly Invoice Error Report.

3.0 Application of Non-Performance Credits

Service Canada will apply the following credits in the event that the Contractor is unable to maintain any of the minimum service levels described above.

The credits will be calculated separately and are cumulative (i.e. should the Contractor be subjected to providing credits of 10% for Resource Availability and 10% for Recruitment in a given month, the credits for that month will amount to 20% of the monthly management fee.). Credits will be applied on the following monthly management invoice.

Non-Performance Credits will be applied in the following manner:

3.1 Recruitment

If recruitment does not meet the Minimum Service Levels as described above in any given month, the Contractor must provide a credit to Service Canada in the following amounts:

- For recruitment deliverables of less than 11 resources - For every resource below the target level requested the Contractor shall provide a credit to Service Canada in the amount of 2% of the monthly management fee.
- For recruitment deliverables of between 11 to 50 resources - For every resource below the target level requested the Contractor shall provide a credit to Service Canada in the amount of 1% of the monthly management fee.
- For recruitment deliverables of greater than 50 resources - For every resource below the target level requested the Contractor shall provide a credit to Service Canada in the amount of 1% of the monthly management fee.

3.2 Turnover Rate

If the Turnover Rate does not meet the Minimum Service Levels as specified in the monthly report, the Contractor must provide a credit to Service Canada in the following amounts:

- For Operations: if the Turnover Rate is greater than or equal to 8% per quarter the Contractor shall provide a credit to Service Canada in the amount of 10% of the average monthly management fee for that period.
- For IMC: if the Turnover Rate is greater than or equal to 20% per six months the Contractor shall provide a credit to Service Canada in the amount of 10% of the average monthly management fee for that period.

3.3 Resource Availability

If the resource availability does not meet the Minimum Service Level target of 93% for the services specified above, as indicated on the Daily Resource Deficiencies Report, the Contractor must provide a credit to Service Canada as follows:

1. In the amount of 2% of the monthly management fee for every 1% below the minimum service level, calculated daily and accumulated, for the following conditions, which will be specified on the Resource Request:
 - Mondays
 - Project launch days
 - Application deadlines for government programs and benefits
2. Or, in the amount of 1% of the monthly management fee for every 1% below the minimum service level, calculated daily and accumulated, for all other conditions not specified in 1 above.

3.4 Timely Reporting

Failure to provide the daily or weekly reports, in entirety, to Service Canada on time will be cause for the Contractor to provide a credit in the amount of 2% of the monthly management fee per late report, accumulated throughout the month.

3.5 Qualitative Monitoring

If the overall Team Members performance does not meet the minimum service levels as described above averaged over a three (3) month period as indicated on the monthly Team Member Performance Exception Report, the Contractor must provide a credit to Service Canada in the amount of 2% of the monthly management fee for every 1% below the minimum service level for that period.

3.6 Performance Expectations

For every 1% below the minimum service level as described above over the course of the six (6) month period, the Contractor shall provide a credit to Service Canada in the amount of 4% of the monthly management fee for that period.

3.7 Invoice Error Rate

If the Invoice Error Rate is greater than the minimum service level as described above for the number of invoices submitted over a three (3) month period, the Contractor must provide a credit to Service Canada in the amount of 10% of the monthly management fee averaged over that period.

4.0 Reporting of Non-Performance Credits

Service Canada will produce a monthly Non-Performance Credits Tracking Report that identifies what service levels have been met / not met for the month, quarter, and semi-annual service levels, as applicable. The report will identify the credits owed to Service Canada, if any. The credits will be applied to the Contractor's next month's management fees invoice. A sample report template is shown below:

5.0 Review of Criteria and Application

The criteria and application of the non-performance credits will be reviewed and re-evaluated yearly with the Contractor. Service Canada will provide a summary document for discussion with the Contractor of the non-performance credits that were applied over the past year.

6.0 Corrective Measures

If the Contractor fails to meet the minimum service levels as outline above on one or more of the service level criteria outlined above for two (2) consecutive quarters within a contract year, the Contractor shall submit a written action plan describing measures it will implement or actions it will undertake to eliminate the recurrence of the problem. The Contractor shall have five (5) working days to deliver the action plan to the Client and the Contracting Authority and twenty (20) working days to rectify the underlying problem.

7.0 Termination for Failure to Meet Minimum Availability

In addition to any other rights of Canada under this Contract, Canada may terminate the Contract for default upon giving the Contractor six (6) months written notice of its intent, if the corrective measures required of the Contractor, as set out above, are not implemented successfully. Such termination shall become effective upon the expiry of the six (6) month notice period unless the Contractor has sustained the Minimum Availability Level during those six (6) months.

8.0 Credits Apply During Contract Period

The Parties agree that the above-noted credits shall apply throughout the Contract Period and any exercised option periods.

9.0 Canada's Right to Obtain Payment

Canada shall have the right to holdback, drawback, deduct and set off from and against the amounts of any moneys owing at any time by Canada to the Contractor, any credits owing and unpaid under this article. Should Canada elect not to exercise the foregoing right at any given time, this shall not be deemed a waiver of this right nor shall it affect the right(s) described above.

10.0 Canada's Rights & Remedies Not Limited

Nothing in this article is to be interpreted as limiting the rights and remedies to which Canada may otherwise be entitled under this Contract, including the right to terminate the Contract for default.

ANNEX G**RATED CRITERIA EVALUATION GRIDS**

The Bidders responses to the rated criteria detailed in PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION will be evaluated as follows:

R1 Overall Presentation and Format of Proposal (maximum points 4 - no pass threshold)

Criterion	Weighting*	0 points (criterion is not met)	1 point (criterion is partially met)	2 points (criterion is fully met)
a) Table of Contents (Max 1 point)	.5	Not provided	Incomplete	Complete
b) Order (Max 1 point)	.5	Responses not provided in the same order as RFP	Not all responses in the same order as RFP; or No reference to RFP numbering.	All responses in the same order as RFP with referencing numbering in the RFP
c) Conciseness and clarity (Max 2 points)	1	Unclear; Requires extensive clarification	Information provided relies on generic promotional materials; Some clarification required	Information provided responds directly and clearly to the information requested; No clarification required
Total Points for R1 _____ / 4				

***Weighting:** To determine the Bidder's points, the points obtained for each criterion listed above will be multiplied by the weighting factor. For example, where a weighting factor for a criterion is .5 and the Bidder's score is 2 points, the total points for that criteria will be 1.

R2 Corporate Commitment and Strategy Alignment (maximum points 15, pass threshold 10)

1. Corporate Commitment Criterion	Weighting	0 points (criterion is not met)	1 point (criterion is partially met)	2 points (criterion is fully met)
a) Lines of communication; level of decision making authority; level of involvement (Max 1 point)	.5	Not defined	Defined but unclear; Clarification required; or Not all elements present;	Defined with clear lines of communication; No clarification required; All elements provided (lines of communication, level of decision making, level of involvement)
b) Corporate Team (Max 2 points)	1	Not provided	Information demonstrates basic understanding and capability to meet requirements; Information unclear; Clarification required	Information is clear and complete and demonstrates understanding and capability to meet requirements; No clarification required

c) Local Functional Office (Max 2 points)	1	No local functional office or commitment to establish	Existing or proposed functional office does not demonstrate understanding or capability to meet requirements	Existing or proposed functional office demonstrates understanding and capability to meet requirements
Total for Corporate Commitment _____ / 5				

2. Corporate Strategy Alignment Criterion	Weighting	0 points (criterion is not met)	1 point (criterion is partially met)	2 points (criterion is fully met)
a) Experience providing team or team support services to information services or contact centre businesses (Max 4 points)	2	No experience	Less than three (3) years	Three (3) or more years experience
b) Relationship of Requirement to Core Services (Max 4 points)	2	No relationship demonstrated	Defined but unclear; Clarification required	Clear demonstrated relationship
c) Corporate Development Plans (Max 2 points)	1	No development plans	Does not clearly demonstrate any ongoing development plans; Plans provided are not detailed or complete; Clarification required	Clearly demonstrates ongoing development plans; Plans provided are detailed and complete; No clarification required
Total for Corporate Strategy Alignment _____ / 10				
Total for R2: _____ / 15				

R3 Project Experiences (maximum points 20, pass threshold 14)

Each project will be evaluated up to a maximum of 10 points

1. Project Description Criterion	Weighting	0 points (criterion is not met)	1 point (criterion is partially met)	2 points (criterion is fully met)
Project Description (max 1 point per project)	.5	No provided	Not fully described; Some elements missing.	Fully Described; All elements provided
Total points for Services Provided: _____ / 2 (Max 1 point per project)				

2. Services Provided Criterion	0 points (criterion is not met)	.5 point (criterion is partially met)	1 point (criterion is fully met)
Description of services provided will be evaluated as follows:	Service not provided	Description demonstrates basic capability; Limited experience; Description is unclear Some clarification required.	Description clearly demonstrates capability and experience; Information clear and complete; No clarification required
Bilingual services provided (maximum 1 point per project)			
Recruitment (maximum 1 point per project)			
Training programs (maximum 1 point per project)			
Inbound call enquiry services (maximum 1 point per project)			
Web / e-mail query services (maximum 1 point per project)			
Query research and information dissemination services (maximum 1 point per project)			
Information-based content management services – updating agent reference information (maximum 1 point per project)			
Total points for Services Provided: _____ / 14 (Max 7 points per project)			

3. Monitoring and Control Criterion	Weighting	0 points (criterion is not met)	1 point (criterion is partially met)	2 points (criterion is fully met)
Performance Standards (maximum 1 point per project)	.5	Not provided	Performance standards were monitored; Unclear on how they were monitored or what was being monitored; Requires clarification.	Performance standards were monitored; Information is clear and complete and details how performance standards were monitored and what was being monitored; No clarification required.
Operational Needs (max .5 points per project)	.25	No tailoring of service is described	Project details included some tailoring of the service arrangement to meet the clients operational needs; Information is incomplete or unclear; Requires clarification.	Project details included tailoring of the service arrangement to meet the clients operational needs; Information is detailed and clear; No clarification required.
Quality Assurance and Control (max .5 points per project)	.25	The project description does not include any apparent QA / QC programs	QA/QC programs were developed and implemented; Information is incomplete or unclear; Requires clarification.	QA/QC programs were developed and implemented; Information is detailed and clear;

				No clarification required.
Total points for Monitoring and Control: _____ / 4 (2 points per project)				
Total for Project 1 (Project Description, Services Provided, Monitoring and Control) : _____ / 10				
Total for Project 2 (Project Description, Services Provided, Monitoring and Control): _____ / 10				
Total for R3 (Total for Project 1 and total for Project 2): _____ / 20				

R4 Information Management Experience (maximum points 15, pass threshold 7.5)

Criterion	Weight-ing	0 points (criterion is not met)	1 point (criterion is partially met)	2 points (criterion is fully met)
Project Description including dates and duration (max 5 points)	2.5	Does not demonstrate Information Management experience	Does not fully demonstrate experience; Information is incomplete or unclear; Requires clarification	Demonstrates experience; Information is detailed and clear; No clarification required
Resource Description (max 5 points)	2.5	No dedicated resources provided for Information Management	Dedicated resources provided for either editor or information management officers but not both	Dedicated resources provided for both editor and information management officer positions
Content Description (max 5 points)	2.5	Content was not maintained or updated	Content simple or maintenance limited	Content complex and high maintenance activity
Total for R4: _____ / 15				

R5 Risk Management (maximum points 15, pass threshold 10)

Each risk identified will be evaluated as follows:

Criterion	Weight-ing	0 points (criterion is not met)	1 point (criterion is partially met)	2 points (criterion is fully met)
Risks 1 through 8 (max 1.5 point for each risk, for maximum of 12 points);	.75	Risk is not assessed in terms of importance; impact and likelihood of occurring;	Risk is assessed in terms of importance; impact and likelihood of occurring;	Risk is assessed in terms of importance, impact and likelihood of occurring;
For up to 2 additional risks identified by The Bidder (1.5 points for each risk to a maximum of 3 points)	.75	Does not address measures to reduce or eliminate the risk	Demonstrates a basic risk management strategy; Does not fully address strategy to reduce or eliminate the risk; or strategy does not fully demonstrate how the risk would be reduced	Demonstrates a comprehensive risk management strategy that fully addresses how risks can be reduced or eliminated; Clearly describes how risks will be monitored and controlled through

			or eliminated; Does not clearly describe how risks will be monitored and controlled through the life of the contract	the life of the contract
Total for R5: _____ / 15				

R6 Quality Assurance and Quality Control (QA/QC) (maximum points 20, pass threshold 14)

Criterion	Weighting	0 points (criterion is not met)	1 point (criterion is partially met)	2 points (criterion is fully met)
Outline, implementation and maintenance (max 4 points)	2	Not provided	Provided; Demonstrates basic QA/QC capability; Information is incomplete or unclear; Some clarification required	Provided; Clearly demonstrates QA/QC capability; Details QA/AC program, implementation methods and maintenance processes; Information is clear and complete; No clarification required
QA/QC Audits (max 6 points)	3	No QA/QC audit information provided	QA/QC audit information provided but no indication of how feedback is used to implement changes; Method and frequency demonstrate basic audit capability; Information provided is unclear or incomplete; Links to improvement in business processes is unclear	QA/QC audit information provided and clear indication of how feedback is used to implement change; Method and frequency demonstrate effective audit capability; Links to improvement in business processes is clearly demonstrated.
Link to recruitment, screening, assessment, career development, training and retention 1 point for each element linked for a maximum of 6 points	.5	Element not linked to QA QC program	Element not clearly linked to QA QC program; Information is incomplete or unclear; Some clarification required	Element clearly linked to QA QC program: Information is detailed and complete; No clarification required
Lessons learned (max 2 points per lesson to a maximum of 4 points)	1	Lesson learned not provided	Lesson learned provided but no clear demonstrated improvement to client service	Lesson learned provided and clearly demonstrates improvement to client service
Total for R6: _____ / 20				

R7 Relationship Management (maximum points 10, pass threshold 7)

A. Relationship Management Strategy	Weighting	0 points (criterion is not met)	1 point (criterion is partially met)	2 points (criterion is fully met)
Overall Relationship Management Strategy (maximum 1 points)	.5	No strategy provided	Strategy provided; Does not clearly demonstrate ability; Does not fully demonstrate an understanding of the requirements; Not all elements addressed	Strategy provided; Clearly demonstrates ability; Demonstrates complete and full understanding of requirements; All elements addressed
Relationship Management Strategy: For each of the 6 elements (as identified in R7 1. through 6.) addressed in the Bidders strategy, a maximum of 1 point will be allocated for a <u>total</u> of 6 points	.5	Not addressed	Partially addressed; Demonstrates basic understanding of requirement; Some clarification required	Fully addressed Demonstrates full understanding of requirement; Clear and complete; No clarification required
Total points for Relationship Management Strategy: _____ / 7 points				

B. Account Management	Weighting	0 points (criterion is not met)	1 point (criterion is partially met)	2 points (criterion is fully met)
1. Executive responsible (max 2 points)	1	Not provided	Name and profile provided; Demonstrates basic capability; Roles and responsibilities does not fully demonstrate an understanding of requirement	Name and profile provided; Demonstrates experience and capability; Roles and responsibilities fully demonstrates understanding of requirement
2. Frequency of reviews (max .5 points)	.25	Frequency not provided	Frequency is provided	Frequency is provided and supported
3. An organization chart (max .5 point)	.25	Not provided	Provided but does not show complete reporting structure	Provided and shows complete reporting structure
Total points for Account Management: _____ / 3				
Total for R7: _____ / 10				

R8 Bidder's Understanding of Public Sector Contact Centres (maximum points 10, pass threshold 5)

Criterion	Weighting	0 points (criterion is not met)	1 point (criterion is partially met)	2 points (criterion is fully met)
Success factors, risks and challenges (maximum 3 points)	1.5	Not provided	Critical success factors, risks and challenges are identified but not fully described; Not clearly linked to public sector information centres	Critical success factors, risks and challenges are identified and fully described; Clearly linked to public sector information centres
Perspectives on future direction (maximum 2 points)	1	Not provided	Perspective of future direction provided; Not fully described. Some clarification required; Not all elements addressed; Does not clearly demonstrate an understanding of the industry	Perspective of future direction provided ; Fully described; No clarification required; All elements addressed; Clearly demonstrates understanding of the industry
Approach to managing staffing and scheduling (maximum 5 points)	2.5	Not provided	Approach to staffing strategies provided but does not fully address all of the following: a) full-time b) part-time c) shift preferences d) scheduling processes Does not clearly demonstrate an understanding of staffing and scheduling requirements of public sector contact centres	Approach to staffing strategies provided and fully addresses all of the following: a) full-time b) part-time c) shift preferences d) scheduling processes Clearly demonstrates an understanding of staffing and scheduling requirements of public sector contact centres
Total for R8: _____ / 10				

R9 CEC Scenario (maximum points 20, pass threshold 12)

Criterion	Weighting	0 points (criterion is not met)	1 point (criterion is partially met)	2 points (criterion is fully met)
Overall scenario response (maximum 5 points)	2.5	Not provided	Response is not complete; Lacks some detail; Some clarification required; Does not clearly demonstrate ability to meet the requirements of the scenario	Response is complete; Detailed and comprehensive; Clearly demonstrates ability to meet all the requirements of the scenario
Scenario response elements:	7.5	Not addressed	Partially addressed; Does not clearly	Fully addressed; Clearly demonstrates

Maximum of 1.5 points for each of the 10 elements addressed in the Bidders response for a <u>total of 15 points</u>			demonstrates an understanding of requirement of scenario; Some clarification required	understanding of requirements of scenario; No clarification required
Total for R9: _____ / 20				

R10 Management Team (maximum points 20, pass threshold 12)

Criterion	Weighting	0 points (criterion is not met)	1 point (criterion is partially met)	2 points (criterion is fully met)
Off-site management team (maximum 5 points)	2.5	Team proposed does not meet minimum requirements; Roles and responsibilities are not provided; Does not demonstrate an understanding of requirements; Proposed team will not meet operational requirements	Team proposed meets minimum requirements; Roles and responsibilities are not clearly described; Management and communication with team members in various locations not fully described	Team proposed meets minimum requirements; Roles and responsibilities are detailed and clearly described and demonstrate an understanding of the requirements; management and communication fully described
On-site OMT team (maximum 5 points)	2.5	Proposed OMT does not include the minimum required resources; Roles and responsibilities are not provided;	Proposed OMT includes the minimum required resources; The OMT is capable of providing bilingual service; Roles and responsibilities are not clearly described; Circumstances where an increase in the size of the OMT is not described and supported	Proposed OMT includes the minimum required resources; The OMT is capable of providing bilingual service; Roles and responsibilities are clearly described and demonstrate an understanding of the requirements; Circumstances where an increase in the size of the OMT is described and supported
Project Manager (maximum 2 points)	1	CV not provided; or No contact centre project management experience	CV provided; Demonstrates some contact centre project management experience	CV provided; Demonstrates extensive contact centre project management experience
Qualifications and experience of the two Resource Coordinators (maximum 1 point for each coordinator for a maximum of 2 points)	.5	CVs not provided; No resourcing experience	CVs provided; Demonstrates some resourcing experience; Does not demonstrate high volume resource fluctuation experience (minimum of 30 resources for a single project)	CVs provided; Demonstrates extensive resourcing experience; Demonstrates experience resourcing in a high fluctuation environment (minimum of 30 resources for a

				single project)
OMT description of means by which they can be contacted have authority to act; react to changes; resolve problems: Maximum of 1.5 points for each of the 4 elements addressed in the Bidders response for a total of 6 points	.75	Not addressed	Partially addressed; Does not clearly demonstrate an understanding of requirement; Not clear that there is a capability to meet requirement	Fully addressed; Demonstrates a clear understanding of requirement; Demonstrates a clear capability to meet requirement
Total for R10: _____ / 20				

R11 Recruitment Methodology (maximum points 20, pass threshold 14)

Criterion	Weighting	0 points (criterion is not met)	1 point (criterion is partially met)	2 points (criterion is fully met)
Candidate inventory management (max 2 points)	1	Not described	Described but not clear how inventory will ensure sufficient number of pre-qualified people to respond to fluctuations and special projects	Described and clearly demonstrates how inventory will ensure sufficient number of pre-qualified people to respond to fluctuations and special projects
Inventory management system (maximum 2 points)	1	Not described	Described but unclear; Unclear how the inventory is monitored; Updates are infrequent; No evidence of an electronic inventory system	Described and clear how the inventory is maintained; Updates are frequent demonstrating currency of information; An electronic inventory management system is in place
Recruitment methods (maximum 4 points)	2	Not described	Limited recruitment mechanisms	Broad range of recruitment mechanisms
Quality control : -language proficiency assessment methods (max 1 point) -testing procedures and standards (max 1 point) -structured interview techniques (max 1 point) -skills evaluation processes (max 1 point)	.5	Not described	Partially addressed; Demonstrates basic quality controls in place; Does not fully demonstrate how quality controls ensure quality of recruits is consistent with required service quality; Unclear or some clarification required	Fully addressed; Demonstrates extensive quality controls in place; Demonstrates quality controls ensure quality of recruits is consistent with required service quality; Clear and complete; No clarification required
Turnaround for un-forecasted recruitment requirements (maximum 4 points)	2	Not described	Does not fully demonstrate ability to meet rapid turnaround for un-forecasted requirements	Fully demonstrates ability to meet rapid turnaround for un-forecasted requirements

			Unclear or some clarification required	Clear and complete; No clarification required
Performance evaluation process (maximum 2 points)	1	Not described	Processes in place Not fully described; Unclear or some clarification required	Processes in place clearly demonstrates ability to replace team members not meeting performance standards Clear and complete No clarification required
Corporate Support (maximum 2 points)	1	Not described	Minimal corporate support demonstrated	Demonstrates full corporate commitment to support OMT for recruitment
Total for R11: _____ / 20				

R12 Training and Professional Development (maximum points 15, pass threshold 10)

Criterion	Weighting	0 points (criterion is not met)	1 point (criterion is partially met)	2 points (criterion is fully met)
Overall training approach (maximum 5 points)	2.5	Not described	Not fully described; Impact on ongoing business operations not clear; Addresses some of the benefits of: a. Improved performance, service quality, and productivity b. Stable working environment c. Higher retention rates	Fully described; Impact on business operations stated; Clearly addresses all of the benefits of: a. Improved performance, service quality, and productivity b. Stable working environment c. Higher retention rates
Training methods (maximum 5 points)	2.5	Not described	Relies on the same method of training for all requirements; Not fully described	Includes different methods of training; Detailed and complete
Training and professional development (maximum 5 points)	2.5	Not described	Demonstrates limited training and professional development opportunities (less than 5)	Demonstrates many training and professional development opportunities (5 or more)
Total for R12: _____ / 15				

R13 Team Member Retention Strategy (maximum points 20, pass threshold 14)

Criterion	Weighting	0 points (criterion is not met)	1 point (criterion is partially met)	2 points (criterion is fully met)
Overall retention strategy (maximum 2 points)	1	No strategy provided	Strategy demonstrates limited benefits, incentives and programs in place for retention (less than 4)	Strategy demonstrates extensive benefits, incentives and programs in place for retention (4 or more)
Maximum of 2 points for each of the 8 elements (a through h of R13) addressed in the Bidders response for a total of 16 points	1	Not provided	Partially addressed; Unclear or some clarification required	Fully addressed; Clear and complete; No clarification required
Other Benefits (maximum 2 points)	1	Not provided	One additional benefit described	Two or more additional benefits described
Total for R13: _____ / 20				

R14 Bidder's Automated Time Capture and Reporting System (maximum points 10, pass threshold 5)

Criterion	Weighting	0 points (criterion is not met)	1 point (criterion is partially met)	2 points (criterion is fully met)
System Description maximum 1 point for each of the 4 elements provided for a total of 4 points	.5	Not described	Partially described; Capability not clear	Fully described; Clearly demonstrates capability
Functional requirements Maximum of 1 point for each of the 6 elements described for a total of 6 points	.5	Not described	Partially described; Capability not clear	Fully described; Clearly demonstrates capability
Total for R14: _____ / 10				

R15 Innovation and Value-Added (maximum points 6, no pass threshold)

Criterion	Weighting	0 points (criterion is not met)	1 point (criterion is partially met)	2 points (criterion is fully met)
Innovation and value-added (maximum 2 points for each innovation or enhancement identified to a maximum of 6 points)	1	Not provided	Innovation or value added is described; Unclear how it could contribute to the overall quality of CEC operations	Innovation or value added is described; Clearly describes how it could contribute to the overall quality of CEC operations

Total for R15: _____ / 6

R16 Additional Requirement for Contact Centre Resourcing Beyond NCR (maximum points 10, pass threshold 5)

Criterion	Weight -ing	0 points (criterion is not met)	1 point (criterion is partially met)	2 points (criterion is fully met)
Approach to staffing (maximum of 3 points)	1.5	Not provided	Approach provided; Does not clearly demonstrate an understanding of the requirement; Some clarification required Not clear how the resource levels would be sustained	Approach provided; Clearly demonstrates an understanding of the requirement; Clearly describes how the resource levels would be sustained
Coordination and Interaction with the NCR office (maximum of 2 points)	1	Not provided	Approach provided; Communications and authorities between offices not clear	Approach provided; Communications and authorities between offices clearly described
Leveraging existing OMT, procedures, and systems (maximum 3 points)	1.5	Not provided	Approach provided; Not clear how the existing OMT, procedures, and systems are to be leveraged	Approach provided; Clearly describes how the existing OMT, procedures, and systems are to be leveraged

Criterion	Weight -ing	0 points (criterion is not met)	2 points (criterion is fully met)
Estimated resource allocation and cost (maximum 2 points)	1	Not provided	Estimated resource allocation and monthly cost for the additional OMT, OSU, and management provided

Total for R16: _____ / 10
