

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

**Bid Receiving - PWGSC / Réception des
soumissions - TPSGC**

11 Laurier St., / 11, rue Laurier

Place du Portage, Phase III

Core 0A1/Noyau 0A1

Gatineau

Québec

K1A 0S5

Bid Fax: (819) 997-9776

**REQUEST FOR PROPOSAL
DEMANDE DE PROPOSITION**

**Proposal To: Public Works and Government
Services Canada**

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

**Proposition aux: Travaux Publics et Services
Gouvernementaux Canada**

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

Comments - Commentaires

Title - Sujet INFORMATICS PROFESSIONAL SERVICES		
Solicitation No. - N° de l'invitation 24062-120083/A	Date 2012-03-19	
Client Reference No. - N° de référence du client 24062-120083		
GETS Reference No. - N° de référence de SEAG PW-\$\$EL-606-23985		
File No. - N° de dossier 606el.24062-120083	CCC No./N° CCC - FMS No./N° VME	
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2012-04-11		Time Zone Fuseau horaire Eastern Daylight Saving Time EDT
F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input checked="" type="checkbox"/> Other-Autre: <input type="checkbox"/>		
Address Enquiries to: - Adresser toutes questions à: Mansour, Silvana		Buyer Id - Id de l'acheteur 606el
Telephone No. - N° de téléphone (819) 956-3519 ()		FAX No. - N° de FAX (819) 956-5925
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction: TREASURY BOARD OF CANADA, SECRETARIAT 300 LAURIER AVE W OTTAWA Ontario K1A0R5 Canada		

Instructions: See Herein

Instructions: Voir aux présentes

Vendor/Firm Name and Address

Raison sociale et adresse du

fournisseur/de l'entrepreneur

Issuing Office - Bureau de distribution

Informatics Professional Services - EL Division/Services
professionnels en informatique - division EL

4C2, Place du Portage

Gatineau

Québec

K1A 0S5

Delivery Required - Livraison exigée See Herein	Delivery Offered - Livraison proposée
Vendor/Firm Name and Address Raison sociale et adresse du fournisseur/de l'entrepreneur	
Telephone No. - N° de téléphone Facsimile No. - N° de télécopieur	
Name and title of person authorized to sign on behalf of Vendor/Firm (type or print) Nom et titre de la personne autorisée à signer au nom du fournisseur/ de l'entrepreneur (taper ou écrire en caractères d'imprimerie)	
Signature	Date

BID SOLICITATION

**FOR CONTRACT AGAINST A SUPPLY ARRANGEMENT FOR TASK-
BASED IN INFORMATICS PROFESSIONAL SERVICES (TBIPS)**

ONE PROGRAMMER / ANALYST - LEVEL 2

ONE TESTER - LEVEL 2

ONE BUSINESS ANALYST - LEVEL 3

ONE DATABASE MODELLER / IM MODELLER - LEVEL 3

THREE DATA CONVERSION SPECIALISTS - LEVEL 3

ONE PROJECT MANAGER - LEVEL 3

FOR

TREASURY BOARD SECRETARIAT

TABLE OF CONTENTS

PART 1 - GENERAL INFORMATION	5
1.1 Introduction	5
1.2 Summary	6
1.3 Debriefings	6
PART 2 - BIDDER INSTRUCTIONS	7
2.1 Standard Instructions, Clauses and Conditions	7
2.2 Submission of Bids	7
2.3 Enquiries - Bid Solicitation	7
2.4 Applicable Laws	7
2.5 Improvement of Requirement During Solicitation Period	8
PART 3 - BID PREPARATION INSTRUCTIONS	9

3.1 Bid Preparation Instructions	9
3.2 Section I: Technical Bid	9
3.3 Section II: Financial Bid	11
3.4 Section III: Certifications	11
PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION	12
4.1 Evaluation Procedures	12
4.2 Technical Evaluation - Mandatory Technical Criteria	12
4.3 Financial Evaluation	13
4.4 Basis of Selection	16
PART 5 - CERTIFICATIONS	18
5.1 Certifications Precedent to Contract Award	18
5.2 Federal Contractors Program - Certification	18
5.3 Former Public Servant Certification	19
5.4 Status and Availability of Resources	20
5.5 Education and Experience	20
5.6 Certification of Language	20
PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS	21
6.1 Security Requirement	21
PART 7 - RESULTING CONTRACT CLAUSES	22
7.1 Requirement	22
7.2 Task Authorization	22
7.3 Minimum Work Guarantee	23
7.4 Standard Clauses and Conditions	23
7.5 Security Requirement	23

7.6 Contract Period	24
7.7 Authorities	24
7.8 Payment	25
7.9 Invoicing Instructions	27
7.10 Certifications	27
7.11 Applicable Laws	27
7.12 Priority of Documents	28
7.13 Foreign Nationals (Canadian Contractor)	28
7.14 Insurance Requirements	28
7.15 Limitation of Liability - Information Management/Information Technology	29
7.16 Joint Venture Contractor	31
7.17 Professional Services - General	31
7.18 Safeguarding Electronic Media	32
7.19 Representations and Warranties	32
7.20 Government Property	33
7.21 Implementation	33
7.22 Identification Protocol Responsibilities	33

List of Annexes to the Resulting Contract:

Annex A Statement of Work

Appendix A to Annex A - Tasking Procedures

Appendix B to Annex A - Task Authorization (TA) Form

Appendix C to Annex A - Resource Assessment Criteria and Response Tables

Appendix D to Annex A - Certifications at the TA stage

Solicitation No. - N° de l'invitation

24062-120083/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur

606e1

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

24062-120083

File No. - N° du dossier

606e124062-120083

CCC No./N° CCC - FMS No/ N° VME

Annex B Basis of Payment
Annex C Security Requirements Check List

List of Attachments to Part 3 (Bid Preparation Instructions):

- Attachment 3.1: Bid Submission Form

List of Attachments to Part 4 (Evaluation Procedures and Basis of Selection):

- Attachment 4.1: Bid Evaluation Criteria

BID SOLICITATION

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ONE PROGRAMMER / ANALYST - LEVEL 2

ONE TESTER - LEVEL 2

ONE BUSINESS ANALYST - LEVEL 3

ONE DATABASE MODELLER / IM MODELLER - LEVEL 3

THREE DATA CONVERSION SPECIALISTS - LEVEL 3

ONE PROJECT MANAGER - LEVEL 3

FOR

TREASURY BOARD SECRETARIAT

PART 1 - GENERAL INFORMATION

1.1 Introduction

This document states terms and conditions that apply to bid solicitation # 24062-120083/A. It is divided into seven parts plus annexes and attachments 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 and states that the Bidder agrees to be bound by the clauses and conditions contained in all parts of 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, if applicable, 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, the RFP Evaluation Criteria, the Bid Submission Form and any other annexes or attachments.

1.2 Summary

- (a) This bid solicitation is being issued to satisfy the requirement of Treasury Board Secretariat (TBS) (the "Client") for Task-Based Informatics Professional Services (TBIPS) under the TBIPS Supply Arrangement (SA) method of supply.
- (b) It is intended to result in the award of one contract for three years.
- (c) There is a security requirement associated with this requirement. For additional information, see Part 6 - Security, Financial and Other Requirements, and Part 7 - Resulting Contract Clauses. Bidders should consult the "Security Requirements on PWGSC Bid Solicitations - Instructions for Bidders" document on the Departmental Standard Procurement Documents (<http://ssi-iss.tpsgc-pwgsc.gc.ca>) Website
- (d) The requirement is subject to the provisions of the World Trade Organization Agreement on Government Procurement (WTO-AGP), the North American Free Trade Agreement (NAFTA), the Canada-Chile Free Trade Agreement (CCFTA), the Agreement on Internal Trade (AIT), the Canada-Peru Free Trade Agreement (CPFTA), the Canada-Columbia Free Trade Agreement if it is in force, and the Canada-Panama Free Trade Agreement if it is in force.
- (e) Only TBIPS SA Holders currently holding a TBIPS SA for Tier 2 in the National Capital Region under the EN578-055605/D series of Supply Arrangements (SAs) are eligible to compete. The TBIPS Supply Arrangement EN578-055605/D is incorporated by reference and forms part of this bid solicitation, as though expressly set out in it, subject to any express terms and conditions contained in this bid solicitation. The capitalized terms not defined in this bid solicitation have the meaning given to them in the TBIPS SA.
- (f) The following resources in Categories of Personnel described below are required on an as and when requested basis in accordance with the TBIPS SA Annex "B":

CATEGORY OF PERSONNEL	LEVEL OF EXPERTISE	ESTIMATED NUMBER OF RESOURCES REQUIRED
A.7 Programmer / Analyst	Level 2	1
A.11 Tester	Level 2	1
B.1 Business Analyst	Level 3	1
I.4 Database Modeller / IM Modeller	Level 3	1
I.1 Data Conversion Specialists	Level 3	3
P.9 Project Manager	Level 3	1

1.3 Debriefings

After contract award, bidders may request a debriefing on the results of the bid solicitation. Bidders should make the request to the Contracting Authority within 15 working days of receipt of notification that their bid was unsuccessful. The debriefing may be provided in writing, by telephone or in person.

PART 2 - BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

- (a) 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 issued by Public Works and Government Services Canada (PWGSC).
- (b) 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.
- (c) The 2003 (2011-05-16) Standard Instructions - Goods or Services - Competitive Requirements are incorporated by reference into and form part of the bid solicitation, with Subsection 5.4 amended by deleting "sixty (60) days" and inserting "180 days". If there is a conflict between the provisions of 2003 and this document, this document prevails.

2.2 Submission of Bids

- (a) Bids must be submitted only to Public Works and Government Services Canada Bid Receiving Unit by the date, time and place indicated on page 1 of the bid solicitation.
- (b) Due to the nature of the bid solicitation, bids transmitted by facsimile or electronic mail to Public Works and Government Services Canada will not be accepted

2.3 Enquiries - Bid Solicitation

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

2.4 Applicable Laws

- (a) Any resulting contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario.
- (b) A bidder may, at its discretion, substitute the applicable laws of a Canadian province or territory of their choice without affecting the validity of its bid, by deleting the name of the Canadian province or territory specified and inserting the name of the Canadian province or territory of its choice. If no change is made, it acknowledges that the applicable laws specified are acceptable to the Bidder.

Note to Bidders: Bidders are requested to indicate the Canadian province or territory they wish to apply to any resulting contract in their Bid Submission Form.

2.5 Improvement of Requirement During Solicitation Period

Should bidders consider that the specifications or Statement of Work contained in the bid solicitation could be improved technically or technologically, bidders are invited to make suggestions, in writing, to the

Solicitation No. - N° de l'invitation	Amd. No. - N° de la modif.	Buyer ID - Id de l'acheteur
Client Ref. No. - N° de réf. du client	File No. - N° du dossier	CCC No./N° CCC - FMS No./N° VME

Contracting Authority named in the bid solicitation. Bidders must clearly outline the suggested improvement as well as the reasons for the suggestion. Suggestions that do not restrict the level of competition nor favour a particular bidder will be given consideration provided they are submitted to the Contracting Authority in accordance with the article entitled "Enquiries - Bid Solicitation". Canada will have the right to accept or reject any or all suggestions.

PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

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

- (i) Section I: Technical Bid (four (4) hard copies) and one (1) soft copy on a CD
- (ii) Section II: Financial Bid (two (2) hard copies)
- (iii) Section III: Certifications (one (1) hard copy)

If there is a discrepancy between the wording of the soft copy and the hard copy, the wording of the hard copy will have priority over the wording of the soft copy.

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

(b) Canada requests that Bidders follow the format instructions described below in the preparation of their bid:

- (i) use 8.5 x 11 inch (216 mm x 279 mm) paper;
- (ii) use a numbering system that corresponds to the bid solicitation;
- (iii) include a title page at the front of each volume of the bid that includes the title, date, bid solicitation number, Bidder's name and address and contact information of its representative; and
- (iv) include a table of contents.

(c) Multiple bids from the same Bidder (or a bid from a Bidder and another bid from any of its affiliates) are not permitted in response to this bid solicitation. Each Bidder must submit only a single bid. For the purpose of this bid solicitation, individual members of a joint venture cannot participate in another bid, either by submitting a bid alone or by participating in another joint venture. If any Bidder submits more than one bid (or an affiliate also submits a bid), either on its own or as part of a joint venture, Canada will choose in its discretion which bid to consider.

3.2 Section I: Technical Bid

(a) The technical bid consists of the following:

- (i) **Bid Submission Form:** Bidders are requested to include the Bid Submission Form - Attachment "3.1" with their bids. It provides a common form in which Bidders can provide information required for evaluation and contract award, such as a contact name, the Bidder's Procurement Business Number, the Bidder's status under the Federal Contractors Program for Employment Equity, etc. Using the form to provide this information is not mandatory, but it is recommended. If Canada determines that the information required by the Bid Submission Form is incomplete or requires correction, Canada will provide the Bidder with an opportunity to do so.
- (ii) **Security Clearance:** Bidders are requested to submit the following security information for each of the proposed resources with their bids on or before the bid closing date. If the Bidder has not included the security information, the Contracting Authority will provide the Bidder with an opportunity to submit the security information during the evaluation period. If the Bidder has not submitted the security information within the period set by the Contracting Authority, its bid will be declared non-responsive.

SECURITY INFORMATION	BIDDER TO INSERT DATA
Name of individual as it appears on security clearance application form	

Solicitation No. - N° de l'invitation	Amd. No. - N° de la modif.	Buyer ID - Id de l'acheteur
Client Ref. No. - N° de réf. du client	File No. - N° du dossier	CCC No./N° CCC - FMS No./N° VME

Level of security clearance obtained	
Validity period of security clearance obtained	
Security Screening Certificate and Briefing Form file number	

- (iii) **Substantiation of Technical Compliance:** The technical bid must substantiate the compliance with the specific articles of Attachment 4.1 which is the requested format for providing the substantiation. The substantiation must not simply be a repetition of the requirement(s), but must explain and demonstrate how the Bidder will meet the requirements and carry out the required Work. Simply stating that the Bidder or its proposed solution or product complies is not sufficient. Where Canada determines that the substantiation is not complete, the Bidder will be considered non-responsive and disqualified. The substantiation may refer to additional documentation submitted with the bid - this information can be referenced in the "Bidder's Response" column of Attachment 4.1 where Bidders are requested to indicate where in the bid the reference material can be found, including the title of the document, and the page and paragraph numbers; where the reference is not sufficiently precise, Canada may request that the Bidder direct Canada to the appropriate location in the documentation.
- (iv) **For the Proposed Resources:** The technical bid must include résumés for the resources identified in the bid solicitation. The Technical bid must demonstrate that each proposed individual meets the qualification requirements described (including any educational requirements, work experience requirements, and professional designation or membership requirements). With respect to the proposed resources:
- (A) Proposed resources may be employees of the Bidder or employees of a subcontractor, or these individuals may be independent contractors to whom the Bidder would subcontract a portion of the Work (refer to Part 5, Certifications).
 - (B) For educational requirements for a particular degree, designation or certificate, Canada will only consider educational programmes that were successfully completed by the resource by the time of bid closing.
 - (C) For requirements relating to professional designation or membership, the resource must have the required designation or membership by the time of bid closing and must continue, where applicable, to be a member in good standing of the profession's governing body throughout the evaluation and Contract Period.
 - (D) For work experience, Canada will not consider experience gained as part of an educational programme, except for experience gained through a formal co-operative programme at a post-secondary institution.
 - (E) For any requirements that specify a particular time period (e.g., 2 years) of work experience, Canada will disregard any information about experience if the technical bid does not include the relevant date(s) (month and year) for the experience claimed (i.e., the start date and end date).
 - (F) For work experience to be considered by Canada, the technical bid must not simply indicate the title of the individual's position, but must demonstrate that the resource has the required work experience by explaining the responsibilities and work performed by the individual while in that position. Only listing experience without providing any supporting data to describe responsibilities, duties and relevance to the requirement, or reusing the same wording as this bid solicitation, will not be considered "demonstrated" for evaluation purposes. The Bidder should provide complete details as to where, when, month and year, and how, through which activities/responsibilities, the stated qualifications/experience were obtained. In situations in which a proposed resource worked at the same time on more than one project, only one project will be counted toward any requirements that relate to the individual's length of experience.

- (v) **Customer Reference Contact Information:** When requested by PWGSC, the Bidder must provide customer references who must each confirm the facts identified in the Bidder's proposal. For each customer reference, the Bidder must, at a minimum, provide the name and either the telephone number or e-mail address for a contact person. Bidders are also requested to include the title of the contact person. If there is a conflict between the information provided by the customer reference and the bid, the information provided by the customer reference will be evaluated instead of the information in the bid. If the named individual is unavailable when required during the evaluation period, the Bidder may provide the name and contact information of an alternate contact from the same customer.

3.3 Section II: Financial Bid

- (a) **Pricing:** Bidders must submit their financial bid in accordance with the Basis of Payment provided in Annex "B" of this bid solicitation. The total amount of Goods and Services Tax or Harmonized Sales Tax must be shown separately, if applicable. Bidders must include a single, firm, all-inclusive per diem rate in Canadian dollars in each cell requiring an entry in the pricing tables. The Bidder's proposed firm per diem rates for the first year of the contract must not exceed those rates set out in Annex "C" to Part A Schedule of Per Diem Rates of the SA Holder's Supply Arrangement. SA Holders may offer a percentage discount on their per diem rates. The rates quoted for the subsequent two years of contract must not be lower than the corresponding rate(s) quoted for the first year of contract. Failure to abide with this condition will result in a bid being considered non-responsive.
- (b) **Variation in Professional Services Resource Rates from Year to Year:** The Bidder may propose different rates for resources for future periods of the resulting contract, including option years at a rate higher than the current applicable ceiling rate. The Bidder's firm per diem rate must remain within the current applicable ceiling rate for the initial contract period of any resulting contract.
- (c) **All Costs to be Included:** The financial bid must include all costs for the requirement described in the bid solicitation for the entire Contract Period. The identification of all necessary equipment, software, peripherals, cabling and components required to meet the requirements of the bid solicitation and the associated costs of these items is the sole responsibility of the Bidder.
- (d) **Blank Prices:** Bidders are requested to insert "\$0.00" for any item for which it does not intend to charge or for items that are already included in other prices set out in the tables. If the Bidder leaves any price blank, Canada will treat the price as "\$0.00" for evaluation purposes and may request that the Bidder confirm that the price is, in fact, \$0.00. No Bidder will be permitted to add or change a price as part of this confirmation. Any Bidder who does not confirm that the price for a blank item is \$0.00 will be declared non-responsive.

3.4 Section III: Certifications

Bidders must submit the certifications required under Part 5.

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

- (a) Bids will be evaluated in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria.

There are several steps in the evaluation process, which are described below. Even though the evaluation and selection will be conducted in steps, the fact that Canada has proceeded to a later step does not mean that Canada has conclusively determined that the Bidder has successfully passed all the previous steps. Canada may conduct steps of the evaluation in parallel.

- (b) An evaluation team composed of representatives of the Client and PWGSC will evaluate the bids on behalf of Canada. Canada may hire any independent consultant, or use any Government resources, to evaluate any bid. Not all members of the evaluation team will necessarily participate in all aspects of the evaluation.
- (c) In addition to any other time periods established in the bid solicitation:
- (i) **Requests for Clarifications:** If Canada seeks clarification or verification from the Bidder about its bid, the Bidder will have 2 working days (or a longer period if specified in writing by the Contracting Authority) to provide the necessary information to Canada. Failure to meet this deadline will result in the bid being declared non-responsive.
 - (ii) **Extension of Time:** If additional time is required by the Bidder, the Contracting Authority may grant an extension in his or her sole discretion.

4.2 Technical Evaluation - Mandatory Technical Criteria

- (a) Each bid will be reviewed to determine whether it meets the mandatory requirements of the bid solicitation. All elements of the bid solicitation that are mandatory requirements are identified specifically with the words "must" or "mandatory". Bids that do not comply with each and every mandatory requirement will be considered non-responsive and be disqualified. The Mandatory evaluation criteria are described in Attachment "4.1" - Evaluation Criteria.

- (b) **Point-Rated Technical Criteria:**

Each bid will be rated by assigning a score to the rated requirements, which are identified in the bid solicitation by the word "rated" or by reference to a score. Bidders who fail to submit complete bids with all the information requested by this bid solicitation will be rated accordingly. The rated evaluation criteria are described in Attachment "4.1" - Evaluation Criteria.

Category	Max. Points	Min. Points
Corporate	70	49
A.7 Programmer Analyst (1) - Level 2	70	49
A.11 Tester (1) - Level 2	90	63
B.1 Business Analyst (1) - Level 3	80	56
I.1 Database Modeller / IM Modeller (1) - Level 3	70	49
I.4 Data Conversion Specialists (3) - Level 3	(3 x 80) = 240	(3 x 56) = 168
P.9 Project Manager (1) - Level 3	80	56
TOTAL	700	490

- (c) **Reference Checks:** Canada may conduct reference checks to verify the accuracy of the information provided. If reference checks are done, they will be conducted in writing by e-mail (unless the contact at the reference is only available by telephone). Canada will not allocate any

points nor consider a mandatory criteria met unless the response is received within 5 working days. On the third working day after sending out the e-mails, if Canada has not received a response, Canada will notify the Bidder by e-mail, to allow the Bidder to contact its reference directly to ensure that it responds to Canada within 5 working days. Wherever information provided by a reference differs from the information supplied by the Bidder, the information supplied by the reference will be the information evaluated. Points will not be allocated or a mandatory criteria considered as met if the reference customer is not a customer of the Bidder itself (for example, the customer cannot be the customer of an affiliate of the Bidder). Nor will points be allocated or a mandatory criteria considered as met if the customer is itself an affiliate or other entity that does not deal at arm's length with the Bidder. Crown references will be accepted.

(d) **Number of Resources Evaluated:**

Only a certain number of resources per category will be evaluated as part of this bid solicitation as identified in Annex A. Additional resources will only be assessed after contract award once specific tasks are requested of the Contractor. After contract award, the Task Authorization process will be in accordance with Part 7 - Resulting Contract Clauses, Article 7.2 Task Authorization. When a Task Authorization Form (TA Form) is issued, the Contractor will be requested to propose a resource to satisfy the specific requirement based on the TA Form's Statement of Work. The proposed resource will then be assessed against the criteria identified in the Contract's Statement of Work in accordance with Appendix C of Annex A.

- (e) **Resource Qualifications:** The qualifications and experience of the proposed resource(s) will be evaluated against the requirements set out in this bid solicitation. Canada may request proof of successful completion of formal training, as well as reference information. The Contracting Authority reserves the right to request references from a Bidder to conduct a reference check to verify the accuracy of the information provided.

4.3 Financial Evaluation

- (a) The Financial evaluation will be conducted only on proposals that are technically responsive by using these rates to calculate the Total Financial Score. For the first year of any contract (from date of award) resulting from this bid solicitation, the applicable firm per diem rates must not exceed those rates specified in Annex "C" - Schedule of Per Diem Rates of the SA Holder's Supply Arrangement for each relevant resource. Failure to abide with this condition will result in a proposal being considered non-responsive.

(b) **Firm Per Diem Median Rate Evaluation Method**

1) There are two financial evaluation methods possible for this requirement. The first method will be used if 3 or more bids are determined responsive (see 2) Financial Evaluation - Method 1 below), and the second method will be used if fewer than 3 bids are determined responsive (see 3) Financial Evaluation - Method 2 below).

2) Financial Evaluation - Method 1: The following financial evaluation method will be used if 3 or more bids are determined responsive:

- (i) **STEP 1 - ESTABLISHING THE LOWER AND UPPER MEDIAN BAND LIMITS FOR EACH YEAR AND EACH RESOURCE CATEGORY:** The Contracting Authority will establish, for each year and each Resource Category, the median band limits based on the firm per diem rates provided by the technically responsive bids. For each year and each Resource Category, the median will be calculated using the median function in Microsoft Excel and will represent a range that encompasses any rate to a value of minus (-) 20% of the median, and any rate of a value of plus (+) 30% of the median. When an even number of technically responsive bids have been determined, an average of the middle two rates will be used to calculate the median band limits and for an odd number of technically responsive bids, the middle rate will be used.

- (ii) **STEP 2 - POINTS ALLOCATION:** For each year and each Resource Category points will be allocated as follows:

- (A) A Bidder's proposed firm per diem rate that is either lower than the established lower median band limit or higher than the established upper median band limit for that year and Resource Category will be allocated 0 points.
- (B) A Bidder's proposed firm per diem rate falling within the upper and lower median band limits, for that year and Resource Category, will be allocated points using the following calculation, which will be rounded to two decimal places:
- $$\frac{\text{Lowest proposed firm per diem rate within the median band limits}}{\text{Bidder's proposed firm per diem rate Within the median band limit}} \times \text{Maximum Points Assigned at Table 1 below}$$
- (C) A Bidder's proposed firm per diem rate falling within the established median band limits which is the lowest proposed firm per diem rate will be allocated the applicable maximum points assigned at Table 1 below.

TABLE 1 - MAXIMUM POINTS ASSIGNED				
RESOURCE CATEGORIES	FIRST YEAR OF CONTRACT PERIOD	SECOND YEAR	THIRD YEAR	TOTAL POINTS
Programmer / Analyst - Level 2	120	120	240	480
Tester - Level 2	120	240	240	600
Business Analyst - Level 3	240	240	240	720
Database Modeller / IM Modeller - Level 3	240	240	240	720
Data Conversion Specialists - Level 3	240	240	240	720
Project Manager - Level 3	120	240	240	600
TOTAL	1,080	1,320	1,440	3,840

- (iii) **STEP 3 - TOTAL FINANCIAL SCORE:** Points allocated under STEP 2 for each year and Resource Category will be added together and rounded to two decimal places to produce the total financial score. Bidders will find below an example of a financial evaluation using method 1.

- (iv) **EXAMPLE OF A FINANCIAL EVALUATION USING METHOD 1**

TABLE 2 - EXAMPLE OF A FINANCIAL EVALUATION USING METHOD 1:							
Resource Category	Max. Points	Bidder 1		Bidder 2		Bidder 3	
		Year 1	Year 2	Year 1	Year 2	Year 1	Year 2
Programmer	150 (75 pts. per year)	\$400.00	\$400.00	\$420.00	\$450.00	\$450.00	\$450.00
Business Analyst	100 (50 pts. per year)	\$600.00	\$600.00	\$600.00	\$620.00	\$650.00	\$820.00
Project Manager	50 (25 pts. per year)	\$555.00	\$900.00	\$750.00	\$800.00	\$700.00	\$800.00
TOTAL	300						
STEP 1 - ESTABLISHING THE LOWER AND UPPER MEDIAN BAND LIMITS FOR EACH YEAR AND EACH RESOURCE CATEGORY							
(Median 1) For the Programmer Resource Category, the year 1 median would be \$420.00. The lower median							

Solicitation No. - N° de l'invitation	Amd. No. - N° de la modif.	Buyer ID - Id de l'acheteur
Client Ref. No. - N° de réf. du client	File No. - N° du dossier	CCC No./N° CCC - FMS No./N° VME

band limit would be \$336.00 and higher median band limit would be \$546.00.

(Median 2) For the Programmer Resource Category, the year 2 median would be \$450.00. The lower median band limit would be \$360.00 and higher median band limit would be \$585.00.

(Median 3) For the Business Analyst Resource Category, the year 1 median would be \$600.00. The lower median band limit would be \$480.00 and higher median band limit would be \$780.00.

(Median 4) For the Business Analyst Resource Category, the year 2 median would be \$620.00. The lower median band limit would be \$496.00 and higher median band limit would be \$806.00.

(Median 5) For the Project Manager Resource Category, the year 1 median would be \$700.00. The lower median band limit would be \$560.00 and higher median band limit would be \$910.00.

(Median 6) For the Project Manager Resource Category, the year 2 median would be \$800.00. The lower median band limit would be \$640.00 and higher median band limit would be \$1,040.00.

STEP 2 - POINTS ALLOCATION:

Bidder 1:

Programmer Year 1	= 75 points (lowest rate within the lower and upper median band limits)
Programmer Year 2	= 75 points (lowest rate within the lower and upper median band limits)
Business Analyst Year 1	= 50 points (lowest rate within the lower and upper median band limits)
Business Analyst Year 2	= 50 points (lowest rate within the lower and upper median band limits)
Project Manager Year 1	= 0 points (outside the lower and higher median band limits)
Project Manager Year 2	= 22 points (based on the following calculation = (Lowest rate of \$800.00 / Bidder's proposed rate of \$900.00) Multiplied by 25 pts)

Bidder 2:

Programmer Year 1	= 71 points (based on the following calculation = (Lowest rate of \$400.00 / Bidder's proposed rate of \$420.00) Multiplied by 75 pts)
Programmer Year 2	= 67 points (based on the following calculation = (Lowest rate of \$400.00 / Bidder's proposed rate of \$450.00) Multiplied by 75 pts)
Business Analyst Year 1	= 50 points (lowest price within the lower and upper median band limits)
Business Analyst Year 2	= 48 points (based on the following calculation = (Lowest rate of \$600.00 / Bidder's proposed rate of \$620.00) Multiplied by 50 pts)
Project Manager Year 1	= 23 points (based on the following calculation = (Lowest rate of \$700.00 / Bidder's proposed rate of \$750.00) Multiplied by 25 pts)
Project Manager Year 2	= 25 points (lowest price within the lower and upper median band limits)

Bidder 3:

Programmer Year 1	= 67 points (based on the following calculation = (Lowest rate of \$400.00 / Bidder's proposed rate of \$450.00) Multiplied by 75 pts)
Programmer Year 2	= 67 points (based on the following calculation = (Lowest rate of \$400.00 / Bidder's proposed rate of \$450.00) Multiplied by 75 pts)
Business Analyst Year 1	= 46 points (based on the following calculation = (Lowest rate of \$600.00 / Bidder's proposed rate of \$650.00) Multiplied by 75 pts)
Business Analyst Year 2	= 0 points (outside the lower and higher median band limits)
Project Manager Year 1	= 25 points (lowest price within the lower and upper median band limits)
Project Manager Year 2	= 25 points (lowest price within the lower and upper median band limits)

STEP 3 - TOTAL FINANCIAL SCORE:

Bidder 1

75 + 75 + 50 + 50 + 0 + 22 = Total financial score of 272 points out of a possible 300 points

Bidder 2

71 + 67 + 50 + 48 + 23 + 25 = Total financial score of 284 points out of a possible 300 points

Page 16 of - de 77

Solicitation No. - N° de l'invitation	Amd. No. - N° de la modif.	Buyer ID - Id de l'acheteur
Client Ref. No. - N° de réf. du client	File No. - N° du dossier	CCC No./N° CCC - FMS No./N° VME

Bidder 3

67 + 67 + 46 + 0 + 25 + 25 = Total financial score of 230 points out of a possible 300 points

3) Financial Evaluation - Method 2: The following financial evaluation method will be used if less than 3 bids are determined responsive:

(i) **STEP 1 - POINTS ALLOCATION:** For each year and each Resource Category points will be allocated as follows:

(A) Points will be established based on the following calculation, with points rounded to two decimal places:

$$\frac{\text{Lowest proposed firm per diem rate}}{\text{Bidder's proposed firm per diem rate}} \times \text{Maximum Points Assigned at Table 1 below}$$

(B) The Bidder with the lowest proposed firm per diem rate will be allocated the applicable maximum points assigned at Table 3 below.

TABLE 1 - MAXIMUM POINTS ASSIGNED				
RESOURCE CATEGORIES	INITIAL (1 YEAR) CONTRACT PERIOD	OPTION PERIOD 1	OPTION PERIOD 2	TOTAL POINTS
Programmer / Analyst - Level 2	120	120	240	480
Tester - Level 2	120	240	240	600
Business Analyst - Level 3	240	240	240	720
Database Modeller / IM Modeller - Level 3	240	240	240	720
Data Conversion Specialists - Level 3	240	240	240	720
Project Manager - Level 3	120	240	240	600
TOTAL	1,080	1,320	1,440	3,840

STEP 2 - TOTAL FINANCIAL SCORE: Points allocated under STEP 1, for each year and each Resource Category, will be added together and rounded to two decimal places to produce the Total Financial Score.

(c) **Substantiation of Professional Services Rates**

In Canada's experience, bidders will from time to time propose rates at the time of bidding for one or more categories of resources that they later refuse to honour, on the basis that these rates do not allow them to recover their own costs and/or make a profit. When evaluating the rates for professional services bid, Canada may, but will have no obligation to, require price support for any rates proposed (either for all or for a specific Resource Category). If Canada requests price support, it will be requested from all compliant bidders proposing a rate that is at least 20% lower than the median rate bid by all compliant bidders for the relevant Resource Category or Categories. Where Canada requests price support, the following information is required:

- (i) an invoice (referencing a contract serial number) that shows that the Bidder has recently provided and invoiced another customer (with whom the Bidder deals at arm's length) for services performed for that customer similar to the services that would be provided in the relevant Resource Category, where those services were provided in the National Capital Region for at least three months within the twelve months prior to the bid solicitation issuance date, and the fees charged were equal to or less than the rate offered to Canada;
- (ii) in relation to the invoice in (i), a signed contract with, or a letter of reference signed by, the Bidder's client that includes at least 50% of the tasks listed in this solicitation's Statement of Work for the Resource Category being examined for an unreasonably low rate;
- (iii) in respect of each referenced contract, a resume for the resource that performed under that contract that shows the resource would pass the Resource Category's mandatory requirements and achieve the required pass mark for the Resource Category's rated criteria; and
- (iv) the name, telephone number and, if available, e-mail address of the invoiced client for each of the resources invoiced, so Canada can verify any facts presented for the affected categories.

Once Canada requests substantiation of the rates bid for any Resource Category, it is the sole responsibility of the Bidder to submit information (as described above and as otherwise may be requested by Canada) that will allow Canada to determine whether it can rely, with confidence, on the Bidder's ability to provide the required services at the rates bid. Where Canada determines that the information provided by the Bidder does not substantiate the unreasonably low rates, the proposal will be considered non-responsive and will receive no further consideration. Only the Firm Per Diem Rates of proposals that are technically responsive will be considered.

(d) **Formulae in Pricing Tables**

If the pricing tables provided to Bidders include any formulae, Canada may re-input the prices provided by Bidders into a fresh table, if Canada believes that the formulae may no longer be functioning properly in the version submitted by a Bidder.

4.4 Basis of Selection

- (a) A bid must comply with the requirements of the bid solicitation and meet all mandatory evaluation criteria to be declared responsive. The responsive bid that obtains the highest combined rating of technical merit and price, by adding the technical score with the financial score, will be recommended for award of a contract. The total possible technical score is 60 while the total possible financial score is 40.
- (b) One contract may be awarded in total as a result of this solicitation.
- (c) Bidders should note that all contract awards are subject to Canada's internal approvals process, which includes a requirement to approve funding in the amount of any proposed contract. Despite the fact that the Bidder may have been recommended for contract award, a contract will only be awarded if internal approval is granted according to Canada's internal policies. If approval is not granted, no contract will be awarded.

(d) **Evaluation of Proposal - Best Overall Value**

The Method of Selection to issue the resulting Contract is the Best Overall Value.

The technically responsive proposal that obtains the highest combined rating of technical merit and price, e.g. adding the technical score with the financial score, will be recommended for award of a contract. The total possible technical score is 60 while the total financial score is 40. Where two or more proposals achieve the identical highest combined technical (60%) and financial (40%) score, the proposal with the highest financial score will be recommended for award of a contract.

For each proposal:

Calculation of Technical Score: The technical component score will constitute 60% of the total Bidder's score. The Final Technical score (out of 60 points) will be computed for each responsive Bidder. The Final Technical score will then be converted to points (i.e. Scored), and rounded to two decimal places, based upon compliant proposals at this phase of the evaluation, using the following formula:

$$\frac{\text{Total Bidder Technical Score Obtained}}{700 \text{ points}} \times 60 \text{ Points} = \text{Technical Score (Max. of 60 points)}$$

The Bidder must obtain a minimum overall pass mark of 490 points out of a maximum of 700 points in order to be considered responsive.

Calculation of Financial Score: The Financial Score will be calculated in accordance with the following formula:

$$\frac{\text{Bidder's Total Financial Score}}{\text{Table 1 - Maximum Points Assigned}} \times 40 \text{ Points} = \text{Financial Proposal Score (Max. of 40 points)}$$

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 in accordance with the articles below.

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.

5.1 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.

5.2 Federal Contractors Program - Certification

- (a) 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 is subject to the FCP, evidence of its commitment must be provided before the award of the Contract.
- (b) 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 Contract 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 fewer than 100 employees. Any bids from ineligible contractors will be declared non-responsive.
- (c) If the Bidder does not fall within the exceptions enumerated in (d)(i) or (ii) 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.
- (d) Each bidder is requested to indicate in its bid whether it is:
 - (i) not subject to FCP, having a workforce of fewer than 100 permanent full or part-time permanent employees, or temporary employees having worked 12 weeks or more in Canada;
 - (ii) not subject to FCP, being a regulated employer under the *Employment Equity Act*, S.C. 1995, c. 44;
 - (iii) subject to the requirements of FCP, because it has a workforce of 100 or more permanent full or part-time permanent employees, or temporary employees having worked 12 weeks or more in Canada, but it has not previously obtained a certificate number from HRSD (because it has not bid before on requirements of \$200,000 or more), in which case a duly signed certificate of commitment is required from the Bidder; or

Solicitation No. - N° de l'invitation	Amd. No. - N° de la modif.	Buyer ID - Id de l'acheteur
Client Ref. No. - N° de réf. du client	File No. - N° du dossier	CCC No./N° CCC - FMS No./N° VME

- (iv) subject to FCP, and has a valid certification number (i.e., has not been declared an ineligible contractor by HRSDC).
- (e) Further information on the FCP is available on the following HRSDC Website:
<http://www.hrsdc.gc.ca/eng/labour/equality/fcp/index.shtml>.

Note to Bidders: Bidders are requested to use the Bid Submission Form to provide information about their status under this program. For a joint venture bidder, this information must be provided for each member of the joint venture.

5.3 Former Public Servant Certification

- (a) 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 spending public funds. In order to comply with Treasury Board policies and directives on contracts with FPS, bidders must provide the information required below.
- (b) For the purposes of this clause,
 - (i) **"former public servant"** means a 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 and includes:
 - (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.
 - (ii) **"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.
 - (iii) **"pension"** means, in the context of the fee abatement formula, 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 *Canadian Pension Plan Act*, R.S., 1985, c. C-8.
- (c) If the Bidder is an FPS in receipt of a pension as defined above, the Bidder must provide the following information:
 - (i) name of former public servant;
 - (ii) date of termination of employment or retirement from the Public Service.
- (d) If the Bidder is an FPS who received a lump sum payment pursuant to the terms of a work force reduction program, the Bidder must provide the following information:
 - (i) name of former public servant;
 - (ii) conditions of the lump sum payment incentive;

Solicitation No. - N° de l'invitation	Amd. No. - N° de la modif.	Buyer ID - Id de l'acheteur
Client Ref. No. - N° de réf. du client	File No. - N° du dossier	CCC No./N° CCC - FMS No./N° VME

- (iii) date of termination of employment;
 - (iv) amount of lump sum payment;
 - (v) rate of pay on which lump sum payment is based;
 - (vi) period of lump sum payment including start date, end date and number of weeks; and
 - (vii) number and amount (professional fees) of other contracts subject to the restrictions of a work force reduction program.
- (e) For all contracts awarded during the lump sum payment period, the total amount of fee 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.
- (f) By submitting a bid, the Bidder certifies that the information submitted by the Bidder in response to the above requirements is accurate and complete.

Note to Bidders: Bidders are requested to provide the information required by this clause in their Bid Submission Form.

5.4 Status and Availability of Resources

- (a) By submitting a bid, 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.
- (b) If the Bidder has proposed any individual who is not an employee of the Bidder, by submitting a bid, 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. Failure to comply with the request may result in the bid being declared non-responsive.

5.5 Education and Experience

- (a) By submitting a bid, the Bidder certifies that all the information provided in the résumés and supporting material submitted with its bid, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Bidder to be true and accurate. Furthermore, the Bidder warrants that every individual proposed by the Bidder for the requirement is capable of performing the Work described in the resulting contract.
- (b) All of the resources proposed must meet the minimum experience requirements detailed in the Supply Arrangement for the category of personnel for which they are being proposed. By submitting a bid, the SA Holder acknowledges that the Department of Public Works and Government Services Canada reserves the right to verify this certification prior to contract award or during contract performance and that untrue statements may result in the proposal being declared non-responsive or any other action which the Minister may consider appropriate.

5.6 Certification of Language

By submitting a bid, the Bidder certifies that, should it be awarded a contract as result of the bid solicitation, every individual proposed in its bid will be fluent in English. The individuals proposed must be able to communicate orally and in writing in English without any assistance and with minimal errors.

The proposed **Business Analyst** must be fluent in both official languages of Canada (French and English). The individual proposed must be able to perform the work in English and French and to communicate orally and in writing in French and English without any assistance and with minimal errors.

PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS

6.1 Security Requirement

- (a) Before award of a contract, the following conditions must be met:
 - (i) the Bidder must hold a valid organization security clearance as indicated in Part 7 - Resulting Contract Clauses;
 - (ii) 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.
- (b) Canada will not delay the award of any contract to allow Bidders to obtain the required clearance.
- (c) For additional information on security requirements, Bidders should consult the "Security Requirements for PWGSC Bid Solicitations - Instructions to Bidders" document on the Departmental Standard Procurement Documents Website.
- (d) In the case of a joint venture Bidder, each member of the joint venture must meet the security requirements.

PART 7 - RESULTING CONTRACT CLAUSES

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

7.1 Requirement

- (a) _____ (the "**Contractor**") agrees to supply to the Client the services described in the Contract, including the Statement of Work, in accordance with, and at the prices set out in, the Contract. This includes providing professional services, as and when requested by Canada to one or more locations to be designated by Canada, excluding any locations in areas subject to any of the Comprehensive Land Claims Agreements.
- (b) **Client:** Under the Contract, the "**Client**" is Treasury Board Secretariat.
- (c) **Reorganization of Client:** The Contractor's obligation to perform the Work will not be affected by (and no additional fees will be payable as a result of) the renaming, reorganization, reconfiguration, or restructuring of any Client. The reorganization, reconfiguration and restructuring of the Client includes the privatization of the Client, its merger with another entity, or its dissolution, where that dissolution is followed by the creation of another entity or entities with mandates similar to the original Client.
- (d) **Defined Terms:** Words and expressions defined in the General Conditions or Supplemental General Conditions and used in the Contract have the meanings given to them in the General Conditions or Supplemental General Conditions. Any reference to an Identified User in the Supply Arrangement is a reference to the Client. Also, any reference to a "deliverable" or "deliverables" includes all documentation outlined in this Contract.

7.2 Task Authorization

- (a) **Purpose of a TA:** Services to be provided under the Contract on an as-and-when-requested basis will be ordered by Canada using a Task Authorization ("TA").
- (b) **Process of Issuing a TA:** The processes for issuing, responding to, assessing and approving Task Authorizations are stated in Appendices A, B, C and D of Annex A.
- (c) **Process for Issuing a Valid TA:**
To be validly issued, a TA must include the following signatures:
 - (i) For any TA with a value less than or equal to \$250,000.00 (including GST/HST), the TA must be signed by:
 - (A) the Project Authority; and
 - (B) a representative of the Administration and Security Directorate, Corporate Services Sector of the Treasury Board Secretariat (TBS); and
 - (ii) For any TA with a value greater than this amount, a TA must include the following signatures:
 - (A) the Project Authority;
 - (B) a representative of the Administration and Security Directorate, Corporate Services Sector of the Treasury Board Secretariat (TBS); and
 - (C) the Contracting Authority.

Any TA that does not bear the appropriate signatures is not validly issued by Canada. Any work performed by the Contractor without receiving a validly issued TA is done at the Contractor's own risk. If the Contractor receives a TA that is not appropriately signed, the Contractor must notify the Contracting Authority. By providing written notice to the Contractor, the Contracting Authority may

suspend TBS's ability to issue TAs at any time, or reduce the dollar value threshold described in sub-article (i) above.

- (d) **Charges for Work under a TA:** The Contractor must not charge Canada anything more than the price set out in the Task Authorization unless Canada has issued a TA amendment authorizing the increased expenditure. Canada will not pay the Contractor during the Transition In and for any design changes, modifications or interpretations of the Work unless they have been approved, in writing, by the Contracting Authority before being incorporated into the Work.
- (e) **Task Authorization Quotations:** The Contractor is required to submit a responsive quotation in response to every TA Form issued to it by Canada. In addition to Canada's other rights to terminate the Contract, Canada may immediately, and without further notice, terminate the Contract for default if during the Contract Period the Contractor in at least three instances has either not responded or has not submitted responsive quotations when issued a TA Form. A responsive quotation is one that is submitted within the time stated in the TA Form and meets all requirements of the TA issued, including quoting the required number of resources that meet the minimum experience and other requirements of the Categories of Personnel identified in the TA at pricing not exceeding the rates of Annex B.
- (f) **Consolidation of TAs for Administrative Purposes:** The Contract may be amended from time to time to reflect all Task Authorizations issued and approved by the Contracting Authority to date, to document the Work performed under those TAs for administrative purposes.
- (g) **TA Reports:** The Contractor must submit a TA report on a quarterly basis that identifies each TA issued during that quarter and its dollar value. The TA report must be sent to:
 - (i) *the Project Authority;*
 - (ii) *the Administration and Security Directorate, Corporate Services Sector of the Treasury Board Secretariat (TBS) at the following address:*
 _____; *and*
 - (iii) *the Contracting Authority.*
- (h) **Period of Services:** No Task Authorizations may be entered into after the expiry date of the Contract.

7.3 Minimum Work Guarantee

- (a) In this clause, "**Minimum Contract Value**" means 3% of the amount identified as the Total Estimated Cost on page 1 of the Contract when it is first awarded.
- (b) The Contractor must perform the Work described in the Contract as and when requested by Canada during the Contract Period. Canada's obligation under the Contract is to request Work in the amount of the Minimum Contract Value or, at Canada's option, to pay the Contractor at the end of the Contract in accordance with paragraph (c). In consideration of this obligation, the Contractor agrees to stand in readiness throughout the Contract Period to perform the Work described in the Contract.
- (c) If Canada does not request work in the amount of the Minimum Contract Value during the Contract Period, Canada must pay the Contractor the difference between the Minimum Contract Value and the cost of the Work performed.
- (d) Canada will have no obligation to the Contractor under this clause if Canada terminates the Contract in whole or in part for default.

7.4 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 (<http://sacc.pwgsc.gc.ca/sacc/index-e.jsp>) issued by Public Works and Government Services Canada.

Solicitation No. - N° de l'invitation	Amd. No. - N° de la modif.	Buyer ID - Id de l'acheteur
Client Ref. No. - N° de réf. du client	File No. - N° du dossier	CCC No./N° CCC - FMS No./N° VME

(a) **General Conditions:**

- (i) 2035 (2011/05/16), General Conditions - Higher Complexity - Services, apply to and form part of the Contract.

(b) **Supplemental General Conditions:**

The following Supplemental General Conditions:

- (i) 4002 (2010/08/16), Supplemental General Conditions - Software Development or Modification Services;
- (ii) 4006 (2010/08/16), Supplemental General Conditions - Contractor to Own Intellectual Property Rights in Foreground Information;

apply to and form part of the Contract.

7.5 Security Requirement

The following Security Requirement (SRCL and related clausung), as set out under Annex "A" to Part B to the Supply Arrangement applies to the Contract.

SECURITY REQUIREMENT FOR CANADIAN SUPPLIER:

- (a) The Contractor must, at all times during the performance of the Contract, hold a valid Facility Security Clearance at the level of SECRET, issued by the Canadian and International Industrial Security Directorate, Public Works and Government Services Canada.
- (b) The Contractor personnel requiring access to PROTECTED/CLASSIFIED information, assets or sensitive work site(s) must EACH hold a valid personnel security screening at the level of SECRET, granted or approved by the Canadian and International Industrial Security Directorate (CIISD), Public Works and Government Services Canada (PWGSC).
- (c) The Contractor MUST NOT remove any PROTECTED/CLASSIFIED information from the identified work site(s), and the Contractor must ensure that its personnel are made aware of and comply with this restriction.
- (d) Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of CIISD/PWGSC.
- (e) The Contractor must comply with the provisions of the:
- (iii) Security Requirements Check List EN578-055605/D, described in Annex "A";
- (iv) Industrial Security Manual (Latest Edition).

7.6 Contract Period

- (a) **Contract Period:** The "Contract Period" is the entire period of time during which the Contractor is obliged to perform the Work, which begins on the date the Contract is awarded and ends three years later.

7.6 Authorities

(a) **Contracting Authority**

The Contracting Authority for the Contract is:

Name: Silvana Mansour
Title: Supply Specialist
Public Works and Government Services Canada
Acquisitions Branch
Directorate: Informatics and Telecommunications Systems Procurement Directorate

Solicitation No. - N° de l'invitation	Amd. No. - N° de la modif.	Buyer ID - Id de l'acheteur
Client Ref. No. - N° de réf. du client	File No. - N° du dossier	CCC No./N° CCC - FMS No./N° VME

Address: 11 Laurier St., Gatineau, Québec
 Telephone: (819) 956-3519
 Facsimile: (819) 956-5925
 E-mail address: silvana.b.mansour@tpsgc-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.

(b) **Technical Authority**

The Technical Authority for the Contract is:

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

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

(c) **Contractor's Representative**

Note to Bidders: The Contractor's Representative, Contracting Authority, Technical Authority and contact information will be identified at the time of contract award.

7.7 Payment

(a) **Basis of Payment**

- (i) **Professional Services provided under a Task Authorization with a Maximum Price:**
 For professional services requested by Canada, in accordance with an approved Task Authorization, Canada will pay the Contractor, in arrears, up to the Maximum Price for the TA, for actual time worked and any resulting deliverables in accordance with the firm all-inclusive per diem rates set out in Annex B, Basis of Payment, GST/HST extra. Partial days will be prorated based on actual hours worked based on a 7.5-hour workday.

Estimated Cost: \$_____

- (ii) **Pre-Authorized Travel and Living Expenses**
 Canada will not pay any travel or living expenses associated with performing the Work.

- (iii) **GST/HST:** Estimated Cost: \$_____

- (iv) **Competitive Award:** The Contractor acknowledges that the Contract has been awarded as a result of a competitive process. No additional charges will be allowed to compensate for errors, oversights, misconceptions or underestimates made by the Contractor when bidding for the Contract.

- (v) **Professional Services Rates:** In Canada's experience, Bidders from time to time propose rates at the time of bidding for one or more categories of resources that they later refuse to

honour, on the basis that these rates do not allow them to recover their own costs and/or make a profit. This denies Canada of the benefit of the awarded contract. If three times or more the Contractor refuses, or is unable, to provide an individual with the qualifications described in the Contract within the time described in the Contract (or proposes instead to provide someone from an alternate category at a different rate), whether or not Canada terminates the Contract as a whole, Canada may impose sanctions or take other measures in accordance with the PWGSC Vendor Performance Policy (or equivalent) then in effect, which may include prohibiting the Contractor from bidding on future requirements that include any professional services, or rejecting the Contractor's other bids for professional services requirements on the basis that the Contractor's performance on this or other contracts is sufficiently poor to jeopardize the successful completion of other requirements.

- (vi) **Purpose of Estimates:** All estimated costs contained in the Contract are included solely for the administrative purposes of Canada and do not represent a commitment on the part of Canada to purchase goods or services in these amounts. Any commitment to purchase specific amounts or values of goods or services are described elsewhere in the Contract.

(b) **Limitation of Expenditure**

- (i) Canada's total liability to the Contractor under the Contract must not exceed \$_____. Customs duties are excluded and Goods and Services Tax or Harmonized Sales Tax is extra, if applicable. Any commitments to purchase specific amounts or values of goods or services are described elsewhere in the Contract.
- (ii) 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 exceed 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:
- (A) it is 75 percent committed, or
- (B) 4 months before the Contract expiry date, or
- (C) as soon as the Contractor considers that the contract funds provided are inadequate for the completion of the Work,
- whichever comes first.
- (iii) If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority a written estimate for the additional funds required. Providing this information does not increase Canada's liability.

(c) **Method of Payment - Monthly Payment**

- (i) H1008C (2008/05/12), Monthly Payment

(d) **Method of Payment for Task Authorizations with a Maximum Price:** For each Task Authorization issued under the Contract that contains a maximum price:

- (i) Canada will pay the Contractor no more frequently than once a month in accordance with the Basis of Payment. The Contractor must submit time sheets for each resource showing the days and hours worked to support the charges claimed in the invoice.
- (i) Once Canada has paid the maximum TA price, Canada will not be required to make any further payment, but the Contractor must complete all the work described in the TA, all of which is required to be performed for the maximum TA price. If the work described in the TA is completed in less time than anticipated, and the actual time worked (as supported by the time sheets) at the rates set out in the Contract is less than the maximum TA price, Canada is only required to pay for the time spent performing the work related to that TA.

(e) Time Verification

Time charged and the accuracy of the Contractor's time recording system are subject to verification by Canada, before or after payment is made to the Contractor. If verification is done after payment, the Contractor must repay any overpayment, at Canada's request.

(c) Price Protection - Most Favoured Customer

- (i) To the best of the Contractor's knowledge, the prices it is charging to Canada under the Contract are not higher than the lowest prices/rates that it has charged any other customer (including other Government of Canada entities) for a similar quality and quantity of goods and services in the year before the Contract was awarded.
- (ii) The Contractor also agrees that, if after the date of the Contract it reduces the prices it charges to other customers for a similar quality and quantity of goods and services, it will reduce the prices for all remaining deliveries under the Contract (with notice to the Contracting Authority).
- (iii) At any time during the 6 years after making the final payment under the Contract or until all claims and disputes then outstanding are settled, whichever is later, Canada has the right to audit the Contractor's records to verify that it is receiving (or has received) these prices. Canada will give at least 2 weeks of notice before the audit.
- (iv) During this audit, the Contractor must produce invoices and contracts for similar quality or quantity of goods or services sold to other customers from one year before the Contract was awarded until the end of the Contract Period. If the Contractor is required by law or by contract to keep another customer's information confidential, the Contractor may black out any information on the invoices or contracts that could reasonably reveal the identity of the customer (such as the customer's name and address), as long as the Contractor provides, together with the invoices and contracts, a certification from its Chief Financial Officer describing the profile of the customer (e.g., whether it is a public sector or private sector customer and the customer's size and service locations).
- (v) In determining whether the goods and services sold to another customer were of similar quality, the terms and conditions of the contract under which those goods and services were delivered will be considered, if those terms and conditions are reasonably likely to have had a material effect on pricing.
- (vi) If Canada's audit reveals that the Contractor charged lower prices for a similar quality and quantity of goods and services under any contract where deliveries were made in the year before the Contract was awarded, or that the Contractor delivered additional goods or services under the Contract after reducing its prices for other customers but without reducing the prices under the Contract, then the Contractor must pay to Canada the difference between the amount charged to Canada and the amount charged to the other customer, up to a maximum of 25% of the value of the Contract.
- (vii) Canada acknowledges that this commitment does not apply to prices charged by any affiliates of the Contractor

(d) No Responsibility to Pay for Work not performed due to Closure of Government Offices

- (i) Where the Contractor, its employees, subcontractors, or agents are providing services on government premises under the Contract and those premises are inaccessible because of the evacuation or closure of government offices, and as a result no work is performed, Canada is not responsible for paying the Contractor for work that otherwise would have been performed if there had been no evacuation or closure.
- (ii) If, as a result of any strike or lock-out, the Contractor or its employees, subcontractors or agents cannot obtain access to government premises and, as a result, no work is performed, Canada is not responsible for paying the Contractor for work that otherwise would have been performed if the Contractor had been able to gain access to the premises

7.5 Invoicing Instructions

- (a) The Contractor must submit invoices in accordance with the information required in the General Conditions.
- (b) The Contractor's invoice must include a separate line item for each subparagraph in the Basis of Payment provision.
- (c) By submitting invoices, the Contractor is certifying that the goods and services have been delivered and that all charges are in accordance with the Basis of Payment provision of the Contract, including any charges for work performed by subcontractors.
- (d) The Contractor must provide the original of each invoice to the Technical Authority, and a copy to the Contracting Authority.

7.6 Certifications

- (a) Compliance with the certifications provided by the Contractor in its response to the bid solicitation or a TA request is a condition of the Contract and subject to verification by Canada during the entire Contract Period. If the Contractor does not comply with any certification or it is determined that any certification made by the Contractor in its bid or a TA response is untrue, whether made knowingly or unknowingly, Canada has the right, under the default provision of the Contract, to terminate the Contract for default.

7.7 Applicable Laws

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

7.8 Priority of Documents

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

- (a) these Articles of Agreement, including any individual SACC clauses incorporated by reference in these Articles of Agreement;
- (b) Supplemental General Conditions, in the following order:
 - (i) 4002 (2010/08/16), Supplemental General Conditions - Software Development or Modification Services;
 - (ii) 4006 (2010/08/16), Supplemental General Conditions - Contractor to Own Intellectual Property Rights in Foreground Information;
- (c) General Conditions 2035 (2011/05/16);
- (d) Annex A, Statement of Work - Annex A including its Appendices as follows:
 - (i) Appendix A to Annex A - Tasking Procedures
 - (ii) Appendix B to Annex A - Task Authorization (TA) and Acceptance Form
 - (iii) Appendix C to Annex A - Resource Assessment Criteria and Response Tables
 - (iv) Appendix D to Annex A - Certification at the TA stage
 - (v) Annex B, Basis of Payment;
- (e) Annex C, Security Requirements Check List;
- (f) the signed Task Authorizations including any required Certifications;

Solicitation No. - N° de l'invitation	Amd. No. - N° de la modif.	Buyer ID - Id de l'acheteur
Client Ref. No. - N° de réf. du client	File No. - N° du dossier	CCC No./N° CCC - FMS No./N° VME

- (g) Supply Arrangement Number EN578-055605/xxx/EL (the "Supply Arrangement"); and
- (h) the Contractor's bid dated _____ (*insert date of bid*), as amended _____ (*insert date(s) of amendment(s) if applicable*).

7.9 Foreign Nationals (Canadian Contractor)

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

7.10 Insurance Requirements

(a) Contractor's Responsibility

- (i) It will be the sole responsibility of the Contractor to decide whether or not any insurance coverage is necessary for its own protection or to fulfill its obligations under the Contract. Any such insurance will be provided and maintained by the Contractor at its own expense. The insurance stipulation provisions contained herein will not limit any insurance required by federal, provincial or municipal law. The required insurance is to the benefit and protection of the Contractor and will not be deemed to release or diminish its liability in any manner including as may be referenced elsewhere by the provision of the Contract.
- (ii) The Contracting Authority reserves the right to request at any time, evidence that the insurance requirements, stipulated herein, are met.
- (iii) The evidence of insurance, if requested, is to be provided in the following manner:
 - (A) Certificate(s) of insurance signed by the insurer's underwriter containing reasonable detail of the insurance coverage, exclusions, deductibles and conditions applying to such policies and confirming that the insurance is in force to meet these requirements; or
 - (B) A certified true copy of the policy.

(b) Commercial General Liability (CGL)

Commercial General Liability insurance will be effected by the Contractor and maintained in force throughout the duration of the Contract, in an amount usual for a contract of this nature, but, in any case, for a limit of liability **NOT LESS THAN \$2 million** per accident or occurrence and in the annual aggregate.

(c) CGL Endorsements

The following endorsements must be incorporated into the conditions of the Contractor's Commercial General Liability insurance policy:

- (i) Additional Insured Endorsement: Canada is included as an additional insured, but only with respect to liabilities that may arise from the contractor's own negligence, in the performance of the contract.
- (ii) The interest of Canada as additional insured should read as follows: Canada, represented by Public Works and Government Services Canada.
- (iii) Notice of Cancellation Endorsement: The Insurer agrees to provide the SO/SA Authority thirty (30) days written notice of policy cancellation;
- (iv) Cross Liability Endorsement: Without increasing the limit of liability, the policy will protect all insured parties to the full extent of coverage provided. Further, the policy will apply to each Insured in the same manner and to the same extent as if a separate policy had been issued to each;
- (v) Contractual Liability Endorsement: The policy will, on a blanket basis or by specific reference to threshold limits of the SO/SA Tiers, extend to assumed liabilities with respect to contractual insurance provisions;

Solicitation No. - N° de l'invitation	Amd. No. - N° de la modif.	Buyer ID - Id de l'acheteur
Client Ref. No. - N° de réf. du client	File No. - N° du dossier	CCC No./N° CCC - FMS No./N° VME

- (vi) Contingent Employer's Liability Endorsement": To protect Contractor for liabilities arising in the management and administration of statutory and contractual entitlements of their employees;
- (vii) Employees and (where applicable) Volunteers as Additional Insured: All employees and (where applicable) volunteers, on behalf of the Contractor, will be included as additional insured.
- (viii) Voluntary Medical Payments, \$5,000 per person, \$25,000 per accident: To provide, without contestation, for expenses incurred in instances of minor accidental bodily injuries.
- (ix) Products and Completed Operations Broad Form (24 months): While not limited to, the endorsement should include service, assembly and repair activities as well as material, parts or equipment furnished in connection with the work performed by the Contractor or on it's behalf.
- (x) Personal Injury Broad Form: While not limited to, the endorsement should include coverage for Violation of Privacy, Libel and Slander, False Arrest, Detention or Imprisonment and Defamation of Character.
- (xi) Independent Contractors Liability Endorsement (if any): Unless otherwise insured elsewhere, and evidence thereof is secured by the Contractor; all subcontractors are included as Insured by the policy;
- (xii) Non-Owned Automobile Endorsement: To protect the Contractor for liabilities arising by their use of vehicles owned by other parties including Canada.
- (xiii) Where the Contractor is a Joint Venture, for the purposes of the Contract and any related documents (including insurance certificates), Canada requires that the Joint Venture Contractor identify itself by a single name. Upon request by Canada, a Joint Venture Contractor must specify the name of the Joint Venture to the Contracting Authority.

7.11 Limitation of Liability - Information Management/Information Technology

- (a) This section applies despite any other provision of the Contract and replaces the section of the general conditions entitled "Liability". Any reference in this section to damages caused by the Contractor also includes damages caused by its employees, as well as its subcontractors, agents, and representatives, and any of their employees. This section applies regardless of whether the claim is based in contract, tort, or another cause of action. The Contractor is not liable to Canada with respect to the performance of or failure to perform the Contract, except as described in this section and in any section of the Contract pre-establishing any liquidated damages. The Contractor is only liable for indirect, special or consequential damages to the extent described in this Article, even if it has been made aware of the potential for those damages.
- (b) **First Party Liability:**
 - (i) The Contractor is fully liable for all damages to Canada, including indirect, special or consequential damages, caused by the Contractor's performance or failure to perform the Contract that relate to:
 - (A) any infringement of intellectual property rights to the extent the Contractor breaches the section of the General Conditions entitled "Intellectual Property Infringement and Royalties";
 - (B) physical injury, including death.
 - (ii) The Contractor is liable for all direct damages affecting real or tangible personal property owned, possessed, or occupied by Canada.
 - (iii) Each of the Parties is liable for all direct damages resulting from any breach of confidentiality under the Contract. Each of the Parties is also liable for all indirect, special or consequential damages in respect of any unauthorized disclosure of the other Party's trade secrets (or

trade secrets of a third party provided by one Party to another under the Contract) relating to information technology.

- (iv) The Contractor is liable for all direct damages relating to any encumbrance or claim relating to any portion of the Work for which Canada has made any payment. This does not apply to encumbrances or claims relating to intellectual property rights, which are addressed under (i)(A) above.
- (v) The Contractor is also liable for any other direct damages to Canada caused by the Contractor in any way relating to the Contract, including:
 - (A) any breach of the warranty obligations under the Contract, up to the total amount paid by Canada (including any applicable taxes) for the goods and services affected by the breach of warranty; and
 - (B) Any other direct damages, including all identifiable direct costs to Canada associated with re-procuring the Work from another party if the Contract is terminated either in whole or in part for default, up to an aggregate maximum for this subparagraph (B) of the greater of .75 times the total estimated cost (meaning the dollar amount shown on the first page of the Contract in the cell titled "Total Estimated Cost" or shown on each call-up, purchase order or other document used to order goods or services under this instrument), or \$1,000,000.00.

In any case, the total liability of the Contractor under subparagraph (v) will not exceed the total estimated cost (as defined above) for the Contract or \$1,000,000.00, whichever is more.

- (vi) If Canada's records or data are harmed as a result of the Contractor's negligence or willful act, the Contractor's only liability is, at the Contractor's own expense, to restore Canada's records and data using the most recent back-up kept by Canada. Canada is responsible for maintaining an adequate back-up of its records and data.

(c) **Third Party Claims:**

- (i) Regardless of whether a third party makes its claim against Canada or the Contractor, each Party agrees that it is liable for any damages that it causes to any third party in connection with the Contract as set out in a settlement agreement or as finally determined by a court of competent jurisdiction, where the court determines that the Parties are jointly and severally liable or that one Party is solely and directly liable to the third party. The amount of the liability will be the amount set out in the settlement agreement or determined by the court to have been the Party's portion of the damages to the third party. No settlement agreement is binding on a Party unless its authorized representative has approved the agreement in writing.
- (ii) If Canada is required, as a result of joint and several liability, to pay a third party in respect of damages caused by the Contractor, the Contractor must reimburse Canada by the amount finally determined by a court of competent jurisdiction to be the Contractor's portion of the damages to the third party. However, despite Sub-article (i), with respect to special, indirect, and consequential damages of third parties covered by this Section, the Contractor is only liable for reimbursing Canada for the Contractor's portion of those damages that Canada is required by a court to pay to a third party as a result of joint and several liability that relate to the infringement of a third party's intellectual property rights; physical injury of a third party, including death; damages affecting a third party's real or tangible personal property; liens or encumbrances on any portion of the Work; or breach of confidentiality.
- (iii) The Parties are only liable to one another for damages to third parties to the extent described in this Sub-article (c).

7.12 Joint Venture Contractor

- (a) Supply Arrangement (SA) Holders who wish to submit their proposal as a joint venture must have already been qualified under the SA #EN578-055605/D as a joint venture.
- (b) The Contractor confirms that the name of the joint venture is _____ and that it is comprised of the following members: *[list all the joint venture members named in the Contractor's original bid]*.
- (c) With respect to the relationship among the members of the joint venture Contractor, each member agrees, represents and warrants (as applicable) that:
 - (i) _____ has been appointed as the "representative member" of the joint venture Contractor and has fully authority to act as agent for each member regarding all matters relating to the Contract;
 - (ii) by giving notice to the representative member, Canada will be considered to have given notice to all the members of the joint venture Contractor; and
 - (iii) all payments made by Canada to the representative member will act as a release by all the members.
- (d) All the members agree that Canada may terminate the Contract in its discretion if there is a dispute among the members that, in Canada's opinion, affects the performance of the Work in any way.
- (e) All the members are jointly and severally or solidarily liable for the performance of the entire Contract.
- (f) The Contractor acknowledges that any change in the membership of the joint venture (i.e., a change in the number of members or the substitution of another legal entity for an existing member) constitutes an assignment and is subject to the assignment provisions of the General Conditions.

The Contractor acknowledges that all security and controlled goods requirements in the Contract, if any, apply to each member of the joint venture Contractor.

7.13 Professional Services - General

- (a) The Contractor must provide professional services on request as specified in this Contract. The individuals proposed in its bid are required to perform the Work, the Contractor must make such persons available to perform the work within 10 working days of the issuance of the Contract or the TA (whichever first contains instructions from Canada for those individuals to report to the Work site). Where such a specific individual is unavailable to perform the Work, Canada may elect to either (i) exercise its rights or remedies under the Contract or at law (including terminating the Contract for default), or (ii) Canada may require the Contractor to propose the replacement of the specific individual in accordance with the Article titled, "Replacement of Specific Individuals" in the General Conditions 2035. This obligation applies despite any changes that Canada may have made to any hardware, software or any other aspect of the Client's operating environment. In respect of any given Category of Resource, any replacement resource will be rated by the Technical Authority and the score obtained must be equal or superior to the score obtained for that original resource; or where multiple resources were evaluated, the median score of all the resources.
- (b) If there must be a change in a resource performing work under the Contract (which must in any case comply with the requirements in the section of the General Conditions entitled "Replacement of Specific Individuals"), the Contractor must make the replacement available for work within 10 working days of the departure of the existing resource (or, if Canada has requested the replacement, within 15 working days of Canada's notice of the requirement for a replacement).
- (c) All resources provided by the Contractor must meet the qualifications described in the Contract (including those relating to previous experience, professional designation, education, and language proficiency) and must be competent to provide the required services by any delivery dates described in the Contract. The resource must be approved by Canada prior to the replacement at the Work site.

Solicitation No. - N° de l'invitation	Amd. No. - N° de la modif.	Buyer ID - Id de l'acheteur
Client Ref. No. - N° de réf. du client	File No. - N° du dossier	CCC No./N° CCC - FMS No./N° VME

- (d) The Contractor must monitor its employees to ensure satisfactory performance and that progress of the Work is maintained to Canada's satisfaction. A Contractor representative will meet with the Technical Authority on a regular basis (as specified by Canada) to discuss the performance of its resources and to resolve any issues at hand.
- (e) If the Contractor fails to meet any of its obligations under this Article, or fails to deliver any deliverable or complete any task described in the Contract on time, in addition to any other rights or remedies available to Canada under the Contract or the law, Canada may notify the Contractor of the deficiency, in which case the Contractor must submit a written plan to the Technical Authority within 10 working days detailing the actions that the Contractor will undertake to remedy the deficiency. The Contractor must prepare and implement the plan at its own expense.

7.14 Safeguarding Electronic Media

- (a) Before using them on Canada's equipment or sending them to Canada, the Contractor must use a regularly updated product to scan electronically all electronic media used to perform the Work for computer viruses and other coding intended to cause malfunctions. The Contractor must notify Canada if any electronic media used for the Work are found to contain computer viruses or other coding intended to cause malfunctions.
- (b) If magnetically recorded information or documentation is damaged or lost while in the Contractor's care or at any time before it is delivered to Canada in accordance with the Contract, including accidental erasure, the Contractor must immediately replace it at its own expense

7.15 Representations and Warranties

The Contractor made statements regarding its and its proposed resources experience and expertise in its bid that resulted in the award of the Contract and issuance of TA's . The Contractor represents and warrants that all those statements are true and acknowledges that Canada relied on those statements in awarding the Contract. The Contractor also represents and warrants that it has, and all its resources and subcontractors that perform the Work have, and at all times during the Contract Period they will have, the skills, qualifications, expertise and experience necessary to perform and manage the Work in accordance with the Contract, and that the Contractor (and any resources or subcontractors it uses) has previously performed similar services for other customers.

7.16 Government Property

- (a) Even though Canada will become the owner of the following deliverables in accordance with the Contract, the Contractor may use them to perform the Work (the "**Government Property**"):
 - (i) Refer to Annex A, Statement of Work, for the list of tasks and deliverables required from each resource category.
- (b) The Contractor must label each of the deliverables that it uses to perform the Work as the property of Canada and keep a separate inventory of the Government Property.
- (c) On request, the Contractor must provide a report to the Technical Authority (updated as necessary from time to time) that includes the description, manufacturer, model number, serial number, supplier, price, and location of all deliverables it uses to perform the Work.
- (d) The section of the General Conditions entitled "Government Property" also applies to the use of the Government Property by the Contractor.

7.17 Implementation

- (a) **Implementation of Professional Services:** If similar professional services are currently being provided by another supplier or by Canada's own personnel, the Contractor is responsible for ensuring that the transition to the professional services it provides under the Contract is completed in a way that does not disrupt Canada's operations or users, and does not result in any interim

Solicitation No. - N° de l'invitation	Amd. No. - N° de la modif.	Buyer ID - Id de l'acheteur
Client Ref. No. - N° de réf. du client	File No. - N° du dossier	CCC No./N° CCC - FMS No./N° VME

degradation to the timeliness or quality of service. The Contractor is solely responsible for any additional training required by its resources to perform the Work, and time spent by resources on that training or becoming familiar with the Client's environment must not be charged to Canada. The transition will be considered complete once the Contractor has demonstrated, to the satisfaction of the Technical Authority, that it is ready and able to carry out the Work. The transition must be complete by no later than 10 working days after the Contract is awarded. All costs associated with establishing itself to provide the professional services are the responsibility of the Contractor.

7.18 Identification Protocol Responsibilities

The Contractor will be responsible for ensuring that each of its agents, representatives or subcontractors (hereinafter referred to as Contractor Representatives) complies with the following self-identification requirements:

- (a) Contractor Representatives who attend a Government of Canada meeting (whether internal or external to Canada's offices) must identify if an individual is not a permanent employee of the Contractor prior to the commencement of the meeting, to ensure that each meeting participant is aware of the fact that the individual is not a Contractor permanent employee;
- (b) During the performance of any Work at a Government of Canada site, each Contractor Representative must be clearly identified at all times as being a Contractor Representative; and
- (c) If a Contractor Representative requires the use of the Government of Canada's e-mail system in the performance of the Work, then the individual must clearly identify him or herself as an agent or subcontractor of the Contractor in all electronic mail in the signature block as well as under "Properties." This identification protocol must also be used in all other correspondence, communication, and documentation.
- (d) If Canada determines that the Contractor is in breach of any obligation stated in this Article, upon written notice from Canada the Contractor must submit a written action plan describing corrective measures it will implement to eliminate the recurrence of the problem. The Contractor will have 5 working days to deliver the action plan to the Client and the Contracting Authority, and 20 working days to rectify the underlying problem.
- (e) In addition to any other rights it has under the Contract, Canada may terminate the Contract for default if the corrective measures required of the Contractor described above are not met.

ANNEX A

STATEMENT OF WORK

1. Objective

The Executive Director of Strategic Infrastructure and Information Management (ED SIIM) within OCHRO requires the services of qualified resources to provide support and help build and improve OCHRO's Human Resources data warehouse environment, including its evolving business intelligence reporting system.

2. Background

As part of its role to oversee Human Resources Information Management (HRIM) for the public service, the Office of the Chief Human Resources Officer (OCHRO) collects and analyzes departmental HR data in support of enterprise monitoring, auditing, analysis, and performance measurement requirements.

Currently, OCHRO is the owner and administrator of 12 reporting databases and applications capturing and/or receiving key departmental HR data including position and classification information, leave transactions, and other key pieces of HR information. OCHRO is seeking to move its reporting databases and applications to a modern database platform complemented by modern business intelligence and other reporting tools, more commonly known as a data warehouse.

3. Scope of Work

On an 'as and when requested basis', the Contractor will provide the services of a Project Manager, Business Analyst, Database Modeller / IM Modeller, Data Conversion Specialists as well as a Programmer/Analyst and Tester in order to support the operations of the Strategic Infrastructure and Information Management (SIIM) organization within OCHRO.

4. Resource Requirements

The Contractor will be required to provide an estimated number of resources in the following categories with the associated language and security level requirements:

RESOURCE CATEGORY	LEVEL	ESTIMATED Number of Resources	SECURITY LEVEL	LANGUAGE Requirement
Programmer/Analyst	2	1	Secret	English
Tester	2	1	Secret	English
Business Analyst	3	1	Secret	Bilingual
Database Modeller / IM Modeller	3	1	Secret	English
Data Conversion Specialist	3	3	Secret	English
Project Manager	3	1	Secret	English

5. Tasks

A.7 Programmer/Analyst - Level 2

The Programmer Analyst's responsibilities will include, but are not limited to:

- Create and modify code and software.

- Create and modify screens and reports.
- Gather and analyze data for the conduct of studies to establish the technical and economic feasibility of proposed computer systems, and for the development of functional and system design specifications.
- Identify and recommend technical options. Prepare and present technical briefing materials to project authorities.
- Develop, test and implement small computer systems, and sub-systems of larger systems.
- Produce forms, manuals, programs, data files, and procedures for systems and/or applications.

A.11 Tester - Level 2

The Tester's responsibilities will include, but are not limited to:

- Test planning and coordination.
- Supervise testing in accordance with the plan.
- Manage and monitor test plans for all levels of testing.
- Manage walkthroughs and reviews related to testing and implementation readiness.
- Prepare status reports.
- Develop test scenarios and test scripts.
- Establish and maintain source and object code libraries for a multi-platform, multi-operating system environment.
- Establish software testing procedures for unit test, integration testing and regression testing with emphasis on automating the testing procedures.
- Establish and operate "interoperability" testing procedures to ensure that the interaction and co-existence of various software elements, which are proposed to be distributed on the common infrastructure, are conform to appropriate departmental standards (e.g. For performance, compatibility, etc.) and have no unforeseen detrimental effects on the shared infrastructure.
- Establish a validation and verification capability which assumes functional and performance compliance.

B.1 Business Analyst - Level 3

The Business Analyst's responsibilities will include, but are not limited to:

- Perform business analysis of functional requirements to identify information, procedures, and decision flows.
- Develop Business Requirements Document and supporting user cases.
- Evaluate existing procedures and methods, identify and document items such as database content, structure, and application subsystems.
- Co-develop data dictionary with data modeller.
- Define and document interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems.
- Identify candidate business processes for re-design, prototype potential solutions, provide trade-off information and suggest a recommended course of action. Identify the modifications to the automated processes.
- Establish acceptance test criteria in collaboration with the client.

- Support and use the selected departmental methodologies.

I.1 Data Conversion Specialist - Level 3

The Data Conversion Specialist's responsibilities will include, but are not limited to:

- Oversee all aspects of the conversion process.
- Complete mapping, interfaces, mock conversion work, enhancements, actual conversion of data, and verify completeness and accuracy of converted data.
- Establish a strong working relationship with all clients, interact effectively with all levels of client personnel, and provide conversion support.
- Analyze and coordinate data file conversions.
- Work with imported files from heterogeneous platforms.

I.4 Database Modeller / IM Modeller - Level 3

The Database Modeller / IM Modeller's responsibilities will include, but are not limited to:

- Design, develop and maintain Logical Data Models.
- Analyze proposed changes to databases from the context of the Logical Data Model.
- Provide technical expertise in the use and optimization of data modeling techniques to team members.
- Provide technical assistance, guidance and direction in terms of data analysis and modeling to team members.
- Provide assistance to project team and business users relating to data issues and data analysis concepts.
- Participate in the development of data modeling and metadata policies and procedures.
- Participate in data analysis as a result of new/updated requirements.
- Apply approved changes to logical data models.
- Comply with corporate data architectures, strategies and frameworks, including enterprise data warehouse activities.
- Analyze and evaluate alternative data architecture solutions to meet business problems/requirements to be incorporated into the corporate data architecture.
- Review corporate architecture strategies and directions, data requirements, and business information needs and devise data structures to support them.
- Improve modeling efficiency through recommendations on how to better utilize current metadata repositories.
- Comply with corporate repository metadata directions.
- Provide input to refinement of data architectures.
- Participate in data architecture refinement.
- Define access strategies.
- Construct, monitor and report on work plans and schedules.
- Co-develop data dictionary with the Business Analyst

- Develop and maintain the Architecture and Data Models for corporate and project specific initiatives. This responsibility includes the identification of data most valuable to the department, the integration of this data, and the development of core relating data models. The resulting data models will be based on data architecture and modeling design principles and tenets.

P.9 Project Manager - Level 3

The Project Manager's responsibilities will include, but are not limited to:

- Manage the project during the development, implementation and operations startup by ensuring that resources are made available and that the project is developed and is fully operational within previously agreed time, cost and performance parameters.
- Formulate statement of problems; establish procedures for the development and implementation of significant, new or modified project elements to solve these problems, and obtains approval thereof.
- Report progress of the project on an ongoing basis and at scheduled points in the life cycle.
- Meet with stakeholders and other project managers to outline encountered problems in a comprehensive manner for the purpose of finding solutions.
- Prepare plans, charts, tables and diagrams to assist in analyzing or displaying problems; work with a variety of project management tools.
- Project sign-off.

6. DELIVERABLES

A.7 Programmer/Analyst – Level 2

The resource must provide the following deliverables:

- Status reports & timelines, as requested
- Presentation of technical briefings to project authorities in MS PowerPoint format
- Delivery, for system testing, of unit-tested software by the programmer/analyst that meets documented requirements.
- Where requested, delivery of detailed estimates gauging the level of effort for development of business intelligence deliverables.

A.11 Tester – Level 3

The resource must provide the following deliverables:

- Status reports & timelines, as requested
- Test scenarios and test scripts.
- MS Word Document detailing software testing procedures for unit test (where applicable), integration testing and regression testing.

B.1 Business Analyst – Level 3

The resource must provide the following deliverables:

- Status reports & timelines, as requested

- Business Requirement Definition document and supporting use cases in MS Word.
- Screenshots and mock interfaces designed in MS Visio to illustrate User Interface concepts and designs to clients.
- Status Reports in MS Excel or MS Word demonstrating status of the requirements gathering phase, documentation phase, etc.
- Plans, charts, tables and diagrams to assist the Project Manager in analyzing or displaying problems;
- Support the creation of a representative Data Dictionary in MS Excel.

I.4 Database Modeller / IM Modeller – Level 3

The resource must provide the following deliverables:

- Status reports & timelines, as requested
- Design of documents in MS Visio, ERWIN or MS Word detailing technical architectures, frameworks, strategies and options for a system.
- Presentation of technical briefings to project authorities in MS PowerPoint format.
- Creation and delivery of a representative Data Dictionary in MS Excel.
- Detailed estimates gaging the level of effort for development of data models (conceptual, logical or physical)
- Delivery of unit-tested software that meets documented requirements.

I.1 Data Conversion Specialist – Level 3

The resource must provide the following deliverables:

- Status reports & timelines, as requested
- Detailed Design documentation
- Data conversion mapping rules documentation
- Data flow diagrams
- Data conversion code migration documentation
- Operational User Guide documentation
- Completed SSIS packages ready for migration
- Completed SQL scripts ready for migration, as required
- Work breakdown structure documents for high-level tasks, as required
- Detailed estimates gauging the level of effort for development of data conversion deliverables
- Unit-tested software that meets documented requirements and specifications
- Software upgrades and full testing as it relates to Data Conversion
- Version & code control notes, and bug fixing documentation

P.9 Project Manager – Level 3

The resource must provide the following deliverables:

- Status reports & timelines, as requested
- Project plan in MS Project detailing resource allocation, work breakdown structure and timelines for the development of a system.
- Project briefings to project authorities in MS PowerPoint format.
- Project status reports in MS Word for distribution to clients and project authorities.

7. TECHNICAL ENVIRONMENT

The resources will be working in the following technical environment: SQL Server 2005, MS Visual Studio 2008, VSS, C#, ASP.NET, MS Office 2003, MS Visio 2003, Gemini Bug Tracking Tool.

8. CONSTRAINTS

The resources will be required to work on-site Monday to Friday, during regular business hours.

9. LANGUAGE REQUIREMENT

The Business Analyst must be fluent in English and French.

The Database Modeller / IM Modeller, Programmer/Analyst, Tester and the Project Manager must be fluent in English.

10. GOVERNMENT FURNISHED EQUIPMENT/INFORMATION

An office, desk, PC, and all required project documentation, software & licenses required to perform the work will be provided to the Contractor.

11. LOCATION OF WORK

Work will be performed at OCHRO's main office currently located at 300 Laurier - Esplanade Laurier, in Ottawa, Ontario.

ANNEX B**BASIS OF PAYMENT**

In respect of the "Estimated Number of Days" listed below in (C*) the estimated number of days is for evaluation purposes only during the solicitation process. The actual number of days during the Contract Period and Option Periods may be more or less, as determined by the Technical Authority.

In respect of the "Firm Per Diem Rates" for the first year of the contract period listed below, (D*) Firm Per Diem Rates must not exceed those rates set out in Annex (C) Schedule of Per Diem Rates of the SA Holder's Supply Arrangement.

The rate(s) quoted for any subsequent year must not be lower than the corresponding rate(s) quoted for the first year of Contract.

FIRST YEAR OF CONTRACT:

First year of Contract (Date of Contract to one year later)					
	(B)	(C*)		(D*)	(E)
Resource Category	Level of Expertise	Estimated Number of Days		Firm Per Diem Rate	Total Cost [Cx D]
Programmer / Analyst (1)	Level #2	120		\$	\$
Tester (1)	Level #2	120		\$	\$
Business Analyst (1)	Level #3	240		\$	\$
Database Modeller / IM Modeller (1)	Level #3	240		\$	\$
Data Conversion Specialists (3)	Level #3	720		\$	\$
Project Manager (1)	Level #3	120		\$	\$
Total Estimated First Year Contract Cost:					\$ <TBD>

SECOND YEAR OF CONTRACT:

Second year of Contract (Date of Contract to two years later)					
	(B)	(C*)		(D*)	(E)
Resource Category	Level of Expertise	Estimated Number of Days		Firm Per Diem Rate	Total Cost [Cx D]
Programmer / Analyst (1)	Level #2	120		\$	\$
Tester (1)	Level #2	240		\$	\$
Business Analyst (1)	Level #3	240		\$	\$
Database Modeller / IM Modeller (1)	Level #3	240		\$	\$
Data Conversion Specialists (3)	Level #3	720		\$	\$
Project Manager (1)	Level #3	240		\$	\$
Total Estimated Second Year Cost:					\$ <TBD>

Solicitation No. - N° de l'invitation	Amd. No. - N° de la modif.	Buyer ID - Id de l'acheteur
Client Ref. No. - N° de réf. du client	File No. - N° du dossier	CCC No./N° CCC - FMS No./N° VME

THIRD YEAR OF CONTRACT:

	Third Year of Contract (Date of Contract to three years later)
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	(B)	(C*)		(D*)	(E)
Resource Category	Level of Expertise	Estimated Number of Days		Firm Per Diem Rate	Total Cost [Cx D]
Programmer / Analyst (1)	Level #2	240		\$	\$
Tester (1)	Level #2	240		\$	\$
Business Analyst (1)	Level #3	240		\$	\$
Database Modeller / IM Modeller (1)	Level #3	240		\$	\$
Data Conversion Specialists (3)	Level #3	720		\$	\$
Project Manager (1)	Level #3	240		\$	\$
Total Estimated Third Year Cost:					\$ <TBD>

Total Estimated Cost
(Total Contract Period - First + Second + Third Year) \$TBD

Solicitation No. - N° de l'invitation

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur

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

File No. - N° du dossier

CCC No./N° CCC - FMS No./N° VME

ANNEX C - SECURITY REQUIREMENTS CHECK LIST

Solicitation No. - N° de l'invitation

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur

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

File No. - N° du dossier

CCC No./N° CCC - FMS No./N° VME

ATTACHMENT 4.1 BID EVALUATION CRITERIA

CORPORATE MANDATORY REQUIREMENTS

A. Corporate Mandatory Requirements			
Item	Mandatory Requirement	Met Not Met	Bidder's Response
M1	<p>The Bidder must demonstrate its capability to provide the services required under this RFP by providing two (2) Reference Projects for the provision of IT Professional Services for the development, implementation or post-implementation operations support of client application systems.</p> <p>For each of the project references, the contract must have had:</p> <ol style="list-style-type: none"> 1. A minimum contract value of \$1,000,000 (Canadian dollars); 2. A minimum contract period of six months; 3. The project must have been completed in the last five years or have been ongoing for a minimum of six months (as of RFP close date); and 4. The Bidder must have performed at least 50% of the tasks listed in this solicitation's Statement of Work for the identified Resource Categories, delivering professional services in an application development or application support environment. 		
Item	Point-Rated Requirement	Max Points	Bidder's Response
R1	<p>The Bidder should demonstrate its project experience working with a Federal Government of Canada client entity.</p> <ul style="list-style-type: none"> • 10 points for project experience, as described in M1, with Federal department or agency. • 0 experience in a Federal department or agency = 0 points 	10	

R2	<p>The Bidder should demonstrate its experience delivering IT projects using IIS</p> <ul style="list-style-type: none"> • 5 points for IIS versions lower than 6.0 • 10 points for IIS 6.0 or higher 	10	
R3	<p>The Bidder should demonstrate its experience delivering IT projects using a Microsoft Database Server</p> <ul style="list-style-type: none"> • 10 points for Microsoft SQL 2000 • 20 points for Microsoft SQL 2005 or higher 	20	
R4	<p>The Bidder should demonstrate its experience delivering IT projects using Business Intelligence software</p> <ul style="list-style-type: none"> • 15 points for Cognos Business Intelligence Tools version 7 • 20 points for Microsoft SSAS 2005+ or Cognos 8.4+ 	20	
R5	<p>The Bidder should demonstrate its experience delivering IT projects using Systems Development Life Cycle Tools</p> <ul style="list-style-type: none"> • 5 points for Visual Source Safe • 10 points for Microsoft Team Foundation Server 	10	
Maximum Score		70	
Minimum Score Note: Proposals that do not meet the minimum score of 49 points (70%) will not be evaluated further.		49	

RESOURCE MANDATORY REQUIREMENTS

A.7 Programmer Analyst – Level 2			
Item	Mandatory Requirement	Met Not Met	Reference to Resume (Page and Project #)
M1	The proposed resource must have a minimum of four (4) years experience designing and creating technical specifications; and developing by taking technical specifications and turning them into technical deliverables, queries and reports using a Business Intelligence (BI) tool.		
M2	The proposed resource must have a minimum of two (2) years experience designing and developing data warehouse specific queries and reports.		
M3	The proposed resource must have a minimum of three (3) years experience using MS SQL Server 2000 or higher to develop databases and related objects (tables, views, indexes, relationship and stored procedures).		

A.11 Tester – Level 2			
Item	Mandatory Requirement	Met Not Met	Reference to Resume (Page and Project #)
M1	The proposed resource must have a minimum of five (5) years experience performing System testing, Regression testing and User Acceptance Testing (UAT).		
M2	The proposed resource must have a minimum of two (2) years experience logging and tracking the resolution of defects in a commercial off the shelf (COTS) bug tracking application.		
M3	The proposed resource must have a minimum of three (3) years experience developing and executing test plans, cases and scripts in an application development environment.		
M4	The proposed resource must have a minimum of three (3) years experience testing databases and database functionality, including creating SQL scripts, and database queries.		

B.1 Business Analyst – Level 3

Item	Mandatory Requirement	Met Not Met	Reference to Resume (Page and Project #)
M1	The proposed resource must have a minimum of ten (10) years experience leading Joint Applications Development (JAD) sessions.		
M2	The proposed resource must have a minimum of ten (10) years experience writing business requirements documents.		
M3	The proposed resource must have a minimum of five (5) years experience collecting business requirements for a data warehouse environment.		
M4	The proposed resource must have a minimum of five (5) years experience developing presentation materials communicating business requirements to clients and senior management.		

I.1 Database Modeller / IM Modeller – Level 3

Item	Mandatory Requirement	Met Not Met	Reference to Resume (Page and Project #)
M1	The proposed resource must have a minimum of ten (10) years experience designing and developing logical and physical data models.		
M2	The proposed resource must have a minimum of five (5) years experience designing and developing data warehouse specific logical and physical data models.		
M3	The proposed resource must have a minimum of three (3) years experience building data models with ERWIN.		

I.4 Data Conversion Specialists – Level 3

Item	Mandatory Requirement	Met Not Met	Reference to Resume (Page and Project #)
M1	The proposed resource must have a minimum of ten (10) years experience designing and developing data conversion processes and scripts.		

M2	The proposed resource must have a minimum of three (3) years experience designing and developing data warehouse specific data conversion processes and scripts.		
M3	The proposed resource must have a minimum of two (2) years experience extracting, transforming and loading data with MS SQL Server 2005 (or higher) SQL Server Integration Services (SSIS).		

P.9 Project Manager – Level 3

Item	Mandatory Requirement	Met Not Met	Reference to Resume (Page and Project #)
M1	The proposed resource must have a minimum of eight (8) years experience managing IT projects and preparing project deliverables (project charter, project plans, Work Breakdown Structure (WBS), risk/issue management plans).		
M2	The proposed resource must have a minimum of six (6) years experience managing, at a minimum, medium-scale IT projects of a minimum budget of \$500,000 for a federal, provincial or municipal Government.		

RESOURCE POINT RATED REQUIREMENTS

A.7 Programmer Analyst – Level 2			
Item	Point-Rated Requirement	Max Points	Reference to Resume (Page and Project #)
R1	<p>The bidder should demonstrate that the proposed resource has experience designing and developing data warehouse specific queries and/or reports.</p> <p>More than 4 years = 20 points 4 years = 15 points 3 years = 10 points</p>	20	
R2	<p>The bidder should demonstrate that the proposed resource has experience using MS SQL Server 2000 or higher to develop databases and related objects (tables, views, indexes, relationship and stored procedures).</p> <p>More than 5 years = 20 points 5 years = 15 points 4 years = 10 points</p>	20	
R3	<p>The bidder should demonstrate that the proposed resource has experience using Cognos 7 suite of tools (or higher) to develop queries and reports.</p> <p>More than 5 years = 20 points 4-5 years = 15 points 2-3 years = 10 points</p>	20	
R4	<p>The bidder should demonstrate that the proposed resource has experience using Cognos Framework Manager (version 7 or higher) to design and develop business intelligence models and objects.</p> <p>More than 3 years = 10 points 1-3 years = 5 points</p>	10	
Maximum Score		70	
Minimum Score Note: Proposals that do not meet the minimum score of 49 points (70%) for the proposed resource of this category will not be evaluated further.		49	

A.11 Tester – Level 2			
Item	Point-Rated Requirement	Max Points	Bidder's Response
R1	<p>The bidder should demonstrate that the proposed resource has experience developing and executing test plans, cases and scripts.</p> <p>More than 5 years = 20 points 4-5 years = 15 points 2-3 years = 10 points</p>	20	
R2	<p>The bidder should demonstrate that the proposed resource has experience creating, executing and documenting data warehouse-specific test scenarios and scripts.</p> <p>More than 2 years = 20 points 1-2 years = 10 points</p>	20	
R3	<p>The bidder should demonstrate that the proposed resource has experience testing MS SQL Server 2005 SQL Server Integration Services (SSIS) packages.</p> <p>More than 2 years = 10 points 1-2 years = 5 points</p>	10	
R4	<p>The bidder should demonstrate that the proposed resource has experience testing databases and database functionality, including: creating SQL scripts, and database queries.</p> <p>More than 5 years = 20 points 4-5 years = 15 points 2-3 years = 10 points</p>	20	
R5	<p>The bidder should demonstrate that the proposed resource has experience testing Business Intelligence functionality developed using Cognos tools version 7 and higher (e.g. Query Studio, Analysis Studio, Decision Stream, Data Manager, Framework Manager, etc.).</p> <p>More than 2 years = 10 points 1-2 years = 5 points</p>	10	

R6	The bidder should demonstrate that the proposed resource has experience using a bug tracking tool. More than 4 years = 10 points 3-4 years = 5 points	10	
Maximum Score		90	
Minimum Score Note: Proposals that do not meet the minimum score of 63 points (70%) for the proposed resource of this category will not be evaluated further.		63	

B.1 Business Analyst – Level 3			
Item	Point-Rated Requirement	Max Points	Bidder's Response
R1	The bidder should demonstrate that the proposed resource has obtained Business Analysis Certification, such as International Institute of Business Analysts (IIBA), or Certified Business Analysis Professional (CBAP), or equivalent, or completed relevant formal training. IIBA, CBAP (or equivalent) certification = 10 points Formal training courses, completed at a recognized institution, related to Business Analysis as follows: Over 29 course hours = 10 points 16 – 29 course hours = 7 points A minimum of 15 course hours = 4 points Copy of Certification to be provided with the bid. If a copy is not provided, points will not be awarded.	20	
R2	The bidder should demonstrate that the proposed resource has experience working on data warehouse project with a defined Business Intelligence (BI) component using Cognos technology. More than 10 years = 20 points 9-10 years = 15 points	20	

	7-8 years = 10 points 5-6 years = 5 points		
R3	The bidder should demonstrate that the proposed resource has experience coordinating and leading functional testing activities. More than 9 years = 20 points 8-9 years = 15 points 6-7 years = 10 points 4-5 years = 5 points	20	
R4	The bidder should demonstrate that the proposed resource has experience using a commercial off the shelf tool (COTS) for requirements definition, functional design, testing and traceability (i.e. Rational Suite, DOORS). 8-9 years = 20 points 6-7 years = 15 points 4-5 years = 10 points	20	
Maximum Score		80	
Minimum Score Note: Proposals that do not meet the minimum score of 56 points (70%) for the proposed resource of this category will not be evaluated further.		56	

I.1 Database Modeller / IM Modeller – Level 3			
Item	Point-Rated Requirement	Max Points	Bidder's Response
R1	The bidder should demonstrate that the proposed resource has experience designing and developing logical and physical data models. More than 14 years = 20 points 12 –14 years = 15 points 10 - 11 years = 10 points	20	
R2	The bidder should demonstrate that the proposed resource has experience designing and developing data warehouse specific logical and physical data models.	20	

	<p>More than 12 years = 20 points 10 -12 years = 15 points 7 - 9 years = 10 points</p>		
R3	<p>The bidder should demonstrate that the proposed resource has experience working with ERWIN for the purpose of building data models.</p> <p>More than 10 years = 20 points 8 - 10 years = 15 points 5 - 7 years = 10 points</p>	20	
R4	<p>The bidder should demonstrate that the proposed resource has experience working in a group/sector/branch/division where the core business was Human Resources.</p> <p>More than 5 years = 10 points 3-5 years = 5 points</p>	10	
Maximum Score		70	
Minimum Score Note: Proposals that do not meet the minimum score of 49 points (70%) for the proposed resource of this category will not be evaluated further.		49	

I.4 Data Conversion Specialists – Level 3

Item	Point-Rated Requirement	Max Points	Bidder's Response
R1	<p>The bidder should demonstrate that the proposed resource has experience designing and developing data conversion processes and scripts.</p> <p>More than 13 years = 20 points 12 –13 years = 15 points 10 - 11 years = 10 points</p>	20	
R2	<p>The bidder should demonstrate that the proposed resource has experience designing and developing data warehouse specific data conversion processes and scripts.</p> <p>More than 7 years = 20 points 6 - 7 years = 15 points 4 - 5 years = 10 points</p>	20	

R3	The bidder should demonstrate that the proposed resource has experience using MS SQL Server 2005 SQL Server Integration Services (SSIS). More than 5 years = 20 points 4 - 5 years = 15 points 2 - 3 years = 10 points	20	
R4	The bidder should demonstrate that the proposed resource has experience extracting, transforming, and loading data into a Microsoft SQL Server environment. More than 7 years = 10 points 4 - 7 years = 5 points	10	
R5	The bidder should demonstrate that the proposed resource has experience scheduling stored procedures, TSQL and SSIS objects using SQL Agent More than 1 year = 10 points 0 experience = 0 points	10	
Maximum Score		80	
Minimum Score Note: Proposals that do not meet the minimum score of 56 points (70%) for each proposed resource of this category will not be evaluated further.		56	

P.9 Project Manager – Level 3			
Item	Point-Rated Requirement	Max Points	Bidder's Response
R1	The bidder should demonstrate that the proposed resource holds a current PMP certification. Copy of Certification to be provided with the bid. If a copy is not provided, points will not be awarded.	10	
R2	The bidder should demonstrate that the proposed resource has obtained Business Analysis Certification, such as International Institute of Business Analysts (IIBA), or	10	

	<p>Certified Business Analysis Professional (CBAP), or equivalent.</p> <p>Copy of Certification to be provided with the bid. If a copy is not provided, points will not be awarded.</p>		
R3	<p>The bidder should demonstrate that the proposed resource has experience managing as many projects in a data warehouse environment where the duration of each project was a minimum of 6 months.</p> <p>More than 3 Projects = 20 points 3 Projects = 15 points 2 Projects = 10 points 1 Project = 5 points</p>	20	
R4	<p>The bidder should demonstrate that the proposed resource has experience using MS Project.</p> <p>More than 10 years = 10 points 8-10 years = 7 points 5-7 years = 4 points</p>	10	
R5	<p>The bidder should demonstrate that the proposed resource has experience managing projects that follow or adhere to a software development lifecycle (SCLC)</p> <p>More than 8 years = 10 point 5-8 years = 5 points</p>	10	
R6	<p>The bidder should demonstrate that the proposed resource has experience facilitating meetings for key project stakeholders presenting project status, financial reporting, and risk management progress as well as delivering presentations to obtain client approvals.</p> <p>More than 10 years = 20 points 8-10 years = 15 points 5-7 years = 10 points</p>	20	
Maximum Score		80	
<p>Minimum Score Note: Proposals that do not meet the minimum score of 56 points (70%) for the proposed resource of this category will not be evaluated further.</p>		56	

ATTACHMENT 3.1**BIDDER FORMS**

BID SUBMISSION FORM		
Bidder's full legal name		
Authorized Representative of Bidder for evaluation purposes (e.g., clarifications)	Name	
	Title	
	Address	
	Telephone #	
	Fax #	
	Email	
Bidder's Procurement Business Number (PBN) [see the Standard Instructions 2003]		
Jurisdiction of Contract: Province in Canada the bidder wishes to be the legal jurisdiction applicable to any resulting contract (if other than as specified in solicitation)		
Former Public Servants See the Article in Part 5 of the bid solicitation entitled Former Public Servant Certification for a definition of "Former Public Servant".	Is the Bidder a FPS in receipt of a pension as defined in the bid solicitation? Yes ____ No ____ If yes, provide the information required by the Article in Part 5 entitled "Former Public Servant Certification"	
	Is the Bidder a FPS who received a lump sum payment under the terms of a work force reduction program? Yes ____ No ____ If yes, provide the information required by the Article in Part 5 entitled "Former Public Servant Certification"	
Canadian Content Certification As described in the solicitation, bids with at least 80% Canadian content are being given a preference. [For the definition of Canadian goods and services, consult the PWGSC SACC clause A3050T]	On behalf of the bidder, by signing below, I confirm that [check the box that applies]:	
	At least 80 percent of the bid price consists of Canadian goods and services (as defined in the solicitation)	
	Less than 80 percent of the bid price consists of Canadian goods and services (as defined in the solicitation)	

<p>Federal Contractors Program for Employment Equity (FCP EE) Certification:</p> <p>If the bidder is exempt, please indicate the basis for the exemption to the right. If the bidder does not fall within the exceptions enumerated to the right, the Program requirements do apply and the bidder is required either to:</p> <p>(a) submit to the Department of HRSD form LAB 1168, Certificate of Commitment to Implement Employment Equity, DULY SIGNED; or</p> <p>(b) submit a valid Certificate number confirming its adherence to the FCP-EE.</p> <p>Bidders are requested to include their FCP EE Certification or signed LAB 1168 with their bid; if this information is not provided in the bid, it must be provided upon request by the Contracting Authority during evaluation.</p> <p>For joint ventures, be sure to provide this information for each of the members of the joint venture.</p>	<p>On behalf of the bidder, by signing below, I also confirm that the bidder <i>[check the box that applies]</i>:</p>	
<p>Number of FTEs [Bidders are requested to indicate, the total number of full-time-equivalent positions that would be created and maintained by the bidder if it were awarded the Contract. This information is for information purposes only and will not be evaluated.]</p>	<p>(a) is not subject to Federal Contractors Program for Employment Equity (FCP-EE), because it has a workforce of less than 100 permanent full or part-time employees in Canada;</p>	
<p>Security Clearance Level of Bidder <i>[include both the level and the date it was granted]</i></p>	<p>(b) is not subject to FCP-EE, because it is a regulated employer under the <i>Employment Equity Act</i>;</p>	
<p>On behalf of the bidder, by signing below, I confirm that I have read the entire bid solicitation including the documents incorporated by reference into the bid solicitation and I certify that:</p> <p>1. The bidder considers itself and its products able to meet all the mandatory requirements described in the bid solicitation;</p> <p>2. This bid is valid for the period requested in the bid solicitation;</p> <p>3. All the information provided in the bid is complete, true and accurate; and</p> <p>4. If the bidder is awarded a contract, it will accept all the terms and conditions set out in the resulting contract clauses included in the bid solicitation.</p>	<p>(c) is subject to the requirements of FCP-EE, because it has a workforce of 100 or more permanent full or part-time employees in Canada, but has not previously obtained a certificate number from the Department of Human Resources and Skills Development (HRSD) (having not bid on requirements of \$200,000 or more), in which case a duly signed certificate of commitment is attached; OR</p>	
<p>Signature of Authorized Representative of Bidder</p>	<p>(d) is subject to FCP-EE, and has a valid certification number as follows: _____ (and has not been declared an Ineligible Contractor by HRSD).</p>	

APPENDIX A TO ANNEX A TASKING PROCEDURE

1. TASK AUTHORIZATION (TA) INITIATION

Where a requirement for a specific task has been identified and a TA is to be provided to the Contractor in accordance with the allocation methodology stated in the Contract Article titled "Task Authorization", a Task Authorization Form (TA Form) as attached at Appendix B of Annex "A" will be prepared by the Technical Authority and sent to the Contractor. A TA Form will contain the following information, if applicable:

- (i) a task number;
- (ii) the date by which the Contractor's quotation must be received by the Technical Authority;
- (iii) the Categories of Resources and the number required;
- (iv) a detailed Statement of Work (SOW) for the task outlining the work activities to be performed and describing the deliverables (such as reports) to be submitted, including the required format and media;
- (v) the required start and completion dates (if any);
- (vi) a schedule of milestone completion dates for major work activities, deliverables and payments (if applicable);
- (vii) the number of person-days of effort required;
- (viii) whether the work performance will require on-site activities at a given location;
- (ix) a description of any travel requirement, including the content and format of any required travel report;
- (x) whether performance of the work will require on-site activities;
- (xi) the level of security clearance required of the Contractor's personnel;
- (xii) the language profile required of the Contractor's personnel;
- (xiii) any funding sources against which the task will be tracked;
- (xiv) The maximum TA price payable to the Contractor for performing the task, indicating how the final amount payable will be determined; where the TA does not indicate how the final amount payable will be determined, the amount payable is the amount, up to the maximum, that the Contractor demonstrates was actually worked on the project, by submitting time sheets filled in at the time of the work by the individual resources to support the charges);
- (xv) and any other constraints that might affect the completion of the task.

2. THE CONTRACTOR'S TA QUOTATION

- 2.1 Once a TA Form is received the Contractor must submit to the Technical Authority a quotation of rates to supply the requested Categories of Resources based on the information identified in the TA Form. The rates quoted for any given Category of Resource must not exceed the Firm Per Diem Rates detailed in the Basis of Payment (Annex "B").
- 2.2 For each proposed resource the Contractor must supply a resume, the requested security clearance information and must complete the Response Tables at Appendix C of this Annex "A"

applicable to the Categories of Resources identified in the TA. The resumes should demonstrate that each proposed individual meets the qualification requirements described (including any educational requirements, work experience requirements, and professional designation or membership requirements). With respect to résumés and resources:

- A) Proposed resources may be employees of the Contractor or employees of a subcontractor, or these individuals may be independent contractors to whom the Contractor would subcontract a portion of the Work. (refer to Appendix D to Annex "A", Certifications). For educational requirements for a particular degree, designation or certificate, Canada will only consider educational programmes that were successfully completed by the resource before a TA Form is received by the Contractor.
- B) For requirements relating to professional designation or membership, the resource must have the required designation or membership by the time of the quotation and must continue, where applicable, to be a member in good standing of the profession's governing body throughout the Contract Period.
- C) For work experience, Canada will not consider experience gained as part of an educational programme, except for experience gained through a formal co-operative programme at a post-secondary institution.
- D) For any requirements that specify a particular time period (e.g., two years) of work experience, Canada will disregard any information about experience if the individual's résumé does not include the relevant dates for the experience claimed (i.e., the start date and end date).
- E) A résumé must not simply indicate the title of the individual's position, but must demonstrate that the resource has the required work experience by explaining the responsibilities and work performed by the individual while in that position. Only listing experience without providing any supporting data to describe responsibilities, duties and relevance to the requirement, or reusing the same wording as the TA Form, will not be considered "demonstrated" for the purposes of the assessment. The Contractor should provide complete details as to where, when, month and year, and how, through which activities/responsibilities, the stated qualifications / experience were obtained. In situations in which a proposed resource worked at the same time on more than one project, only one project will be counted toward any requirements that relate to the individual's length of experience.

- 2.3 The quotation must be signed and submitted to the Technical Authority within the time for response identified in the TA Form. The Contractor will be given a minimum of 48 hours turnaround time to submit a quotation.

3. Assessment

- 3.1 The qualifications and experience of the proposed resources will be assessed against the requirements set out in Appendix C to this Annex A to determine each proposed resource's compliance with the mandatory and rated criteria. Canada may request proof of successful completion of formal training, as well as reference information. Canada may conduct reference checks to verify the accuracy of the information provided. If reference checks are done, they will be conducted in writing by e-mail (unless the contact at the reference is only available by telephone). Canada will not assess any points or consider a mandatory criteria met unless the response is received within 5 working days. On the third working day after sending out the e-mails, if Canada has not received a response, Canada will notify the Bidder by e-mail, to allow the Bidder to contact its reference directly to ensure that it responds to Canada within 5 working days. Wherever information provided by a reference differs from the information supplied by the Contractor, the information supplied by the reference will be the information assessed. Points will not be allocated or a mandatory criteria considered as met if the reference customer is not a customer of the Contractor itself (for example, the customer cannot be the customer of an affiliate of the Contractor). Nor will points be allocated or a mandatory criteria considered as met if the

customer is itself an affiliate or other entity that does not deal at arm's length with the Contractor. Crown references will be accepted.

- 3.2 During the assessment of the resources proposed, should the references for two or more resources required under that TA either be unavailable or fail to substantiate the required qualifications of the proposed resources to perform the required services, the Contracting Authority may find the quotation to be non-responsive.
- 3.3 Only quotations that meet all of the mandatory criteria will be considered for assessment of the point rated criteria. Each resource proposed must attain the required minimum score for the point rated criteria for the applicable resource category. If the minimum score for any proposed resource is less than what is required, the Contractor's quotation will be found to be non-responsive.

4. Acceptance

- 4.1 Once the quotation been accepted by the Technical Authority, the TA Form will be signed by Canada and provided to the Contractor for signature. All TA Forms estimated at \$250,000.00 or less will be approved and signed by the Technical Authority who will send a copy of the signed TA to the Contracting Authority. All TA Forms estimated at over \$250,000.00 will be signed by the Technical Authority and the Contracting Authority.
- 4.2 The TA Form must be appropriately signed by Canada prior to commencement of any work. The Contractor must not commence work until a fully signed TA Form (the Task Authorization) has been received, and any work performed in its absence is done at the Contractor's own risk.

APPENDIX B TO ANNEX A

TASK AUTHORIZATION (TA) FORM

CONTRACTOR		CONTRACT NUMBER:			
COMMITMENT #		FINANCIAL CODING:			
TASK NUMBER		ISSUE DATE:		RESPONSE REQUIRED BY:	
1. STATEMENT OF WORK (WORK ACTIVITIES, CERTIFICATIONS AND DELIVERABLES)					
2. PERIOD OF SERVICES:		FROM (DATE):		TO (DATE):	
3. WORK LOCATION:					
4. TRAVEL REQUIREMENTS:					
5. LANGUAGE REQUIREMENTS:					
6. OTHER CONDITIONS/CONSTRAINTS:					
7. LEVEL OF SECURITY CLEARANCE REQUIRED FOR THE CONTRACTOR'S RESOURCES:					
RESOURCE FUNCTION	NAME OF PROPOSED RESOURCE	PWGSC SECURITY	PER DIEM	ESTIMATED # OF DAYS	TOTAL COST
ESTIMATED COST					
GST/HST					
TOTAL LABOUR ESTIMATED					
ESTIMATED TRAVEL & LIVING COST (IN ACCORDANCE WITH TBS GUIDELINES)					
TOTAL ESTIMATED COST					
8. SIGNING AUTHORITIES:					
Name, Title and Signature of Individual Authorized to Sign on behalf of Contractor (type or print)	Contractor's (signature)		Date:		
Name, Title and Signature of Individual Authorized to Sign on behalf of Treasury Board Secretariat Project Authority (type or print)	TBS Project Authority (signature) required for all TAs		Date:		
Name, Title and Signature of Individual Authorized to Sign on behalf of TBS's Administration and Security Directorate (type or print)	Administration and Security Directorate (signature) - required for all TAs		Date:		

TASK AUTHORIZATION (TA) FORM

CONTRACTOR		CONTRACT NUMBER:	
COMMITMENT #		FINANCIAL CODING:	
TASK NUMBER		ISSUE DATE:	RESPONSE REQUIRED BY:
Name, Title and Signature of Individual Authorized to Sign on behalf of PWGSC - Acquisitions Branch (AB) if the TA requirement is over \$250,000.00	PWGSC AB if the Requirement is over \$250,000.00	Date:	
You are requested to sell to Canada, in accordance with the terms and conditions set out herein, referred to herein, or attached hereto, the services listed herein and in any attached sheets at the price set out thereof.			

APPENDIX C TO ANNEX A

RESOURCES ASSESSMENT CRITERIA AND RESPONSE TABLE

To facilitate resource assessment, Contractors must prepare and submit a response to a Task Authorization using the tables provided in this Annex. When completing the resource grids, the specific information which demonstrates the requested criteria and reference to the page number of the resume should be incorporated so that the evaluator can verify this information. It is not acceptable that the tables should contain all the project information from the resume. Only the specific answer should be provided.

2.0 Mandatory Resource Requirements:

A.7 Programmer Analyst – Level 2			
Item	Mandatory Requirement	Met Not Met	Reference to Resume (Page and Project #)
M1	The proposed resource must have a minimum of four (4) years experience designing and creating technical specifications; and developing by taking technical specifications and turning them into technical deliverables, queries and reports using a Business Intelligence (BI) tool.		
M2	The proposed resource must have a minimum of two (2) years experience designing and developing data warehouse specific queries and reports.		
M3	The proposed resource must have a minimum of three (3) years experience using MS SQL Server 2000 or higher to develop databases and related objects (tables, views, indexes, relationship and stored procedures).		

A.11 Tester – Level 2			
Item	Mandatory Requirement	Met Not Met	Reference to Resume (Page and Project #)
M1	The proposed resource must have a minimum of five (5) years experience performing System testing, Regression testing and User Acceptance Testing (UAT).		
M2	The proposed resource must have a minimum of two (2) years experience logging and tracking the resolution of defects in a commercial off the shelf (COTS) bug tracking application.		

M3	The proposed resource must have a minimum of three (3) years experience developing and executing test plans, cases and scripts in an application development environment.		
M4	The proposed resource must have a minimum of three (3) years experience testing databases and database functionality, including creating SQL scripts, and database queries.		

B.1 Business Analyst – Level 3

Item	Mandatory Requirement	Met Not Met	Reference to Resume (Page and Project #)
M1	The proposed resource must have a minimum of ten (10) years experience leading Joint Applications Development (JAD) sessions.		
M2	The proposed resource must have a minimum of ten (10) years experience writing business requirements documents.		
M3	The proposed resource must have a minimum of five (5) years experience collecting business requirements for a data warehouse environment.		
M4	The proposed resource must have a minimum of five (5) years experience developing presentation materials communicating business requirements to clients and senior management.		

I.1 Database Modeller / IM Modeller – Level 3

Item	Mandatory Requirement	Met Not Met	Reference to Resume (Page and Project #)
M1	The proposed resource must have a minimum of ten (10) years experience designing and developing logical and physical data models.		
M2	The proposed resource must have a minimum of five (5) years experience designing and developing data warehouse specific logical and physical data models.		
M3	The proposed resource must have a minimum of three (3) years experience building data models with ERWIN.		

I.4 Data Conversion Specialists – Level 3

Item	Mandatory Requirement	Met Not Met	Reference to Resume (Page and Project #)
M1	The proposed resource must have a minimum of ten (10) years experience designing and developing data conversion processes and scripts.		
M2	The proposed resource must have a minimum of three (3) years experience designing and developing data warehouse specific data conversion processes and scripts.		
M3	The proposed resource must have a minimum of two (2) years experience extracting, transforming and loading data with MS SQL Server 2005 (or higher) SQL Server Integration Services (SSIS).		

P.9 Project Manager – Level 3

Item	Mandatory Requirement	Met Not Met	Reference to Resume (Page and Project #)
M1	The proposed resource must have a minimum of eight (8) years experience managing IT projects and preparing project deliverables (project charter, project plans, Work Breakdown Structure (WBS), risk/issue management plans).		
M2	The proposed resource must have a minimum of six (6) years experience managing, at a minimum, medium-scale IT projects of a minimum budget of \$500,000 for a federal, provincial or municipal Government.		

3.0 Point Rated Assessment Criteria:

A.7 Programmer Analyst – Level 2			
Item	Point-Rated Requirement	Max Points	Reference to Resume (Page and Project #)
R1	<p>The bidder should demonstrate that the proposed resource has experience designing and developing data warehouse specific queries and/or reports.</p> <p>More than 4 years = 20 points 4 years = 15 points 3 years = 10 points</p>	20	
R2	<p>The bidder should demonstrate that the proposed resource has experience using MS SQL Server 2000 or higher to develop databases and related objects (tables, views, indexes, relationship and stored procedures).</p> <p>More than 5 years = 20 points 5 years = 15 points 4 years = 10 points</p>	20	
R3	<p>The bidder should demonstrate that the proposed resource has experience using Cognos 7 suite of tools (or higher) to develop queries and reports.</p> <p>More than 5 years = 20 points 4-5 years = 15 points 2-3 years = 10 points</p>	20	
R4	<p>The bidder should demonstrate that the proposed resource has experience using Cognos Framework Manager (version 7 or higher) to design and develop business intelligence models and objects.</p> <p>More than 3 years = 10 points 1-3 years = 5 points</p>	10	
Maximum Score		70	
Minimum Score Note: Proposals that do not meet the minimum score of 49 points (70%) for the proposed resource of this category will not be evaluated further.		49	

A.11 Tester – Level 2			
Item	Point-Rated Requirement	Max Points	Bidder's Response
R1	<p>The bidder should demonstrate that the proposed resource has experience developing and executing test plans, cases and scripts.</p> <p>More than 5 years = 20 points 4-5 years = 15 points 2-3 years = 10 points</p>	20	
R2	<p>The bidder should demonstrate that the proposed resource has experience creating, executing and documenting data warehouse-specific test scenarios and scripts.</p> <p>More than 2 years = 20 points 1-2 years = 10 points</p>	20	
R3	<p>The bidder should demonstrate that the proposed resource has experience testing MS SQL Server 2005 SQL Server Integration Services (SSIS) packages.</p> <p>More than 2 years = 10 points 1-2 years = 5 points</p>	10	
R4	<p>The bidder should demonstrate that the proposed resource has experience testing databases and database functionality, including: creating SQL scripts, and database queries.</p> <p>More than 5 years = 20 points 4-5 years = 15 points 2-3 years = 10 points</p>	20	
R5	<p>The bidder should demonstrate that the proposed resource has experience testing Business Intelligence functionality developed using Cognos tools version 7 and higher (e.g. Query Studio, Analysis Studio, Decision Stream, Data Manager, Framework Manager, etc.).</p> <p>More than 2 years = 10 points 1-2 years = 5 points</p>	10	

R6	The bidder should demonstrate that the proposed resource has experience using a bug tracking tool. More than 4 years = 10 points 3-4 years = 5 points	10	
Maximum Score		90	
Minimum Score Note: Proposals that do not meet the minimum score of 63 points (70%) for the proposed resource of this category will not be evaluated further.		63	

B.1 Business Analyst – Level 3			
Item	Point-Rated Requirement	Max Points	Bidder's Response
R1	The bidder should demonstrate that the proposed resource has obtained Business Analysis Certification, such as International Institute of Business Analysts (IIBA), or Certified Business Analysis Professional (CBAP), or equivalent, or completed relevant formal training. IIBA, CBAP (or equivalent) certification = 10 points Formal training courses, completed at a recognized institution, related to Business Analysis as follows: Over 29 course hours = 10 points 16 – 29 course hours = 7 points A minimum of 15 course hours = 4 points Copy of Certification to be provided with the bid. If a copy is not provided, points will not be awarded.	20	
R2	The bidder should demonstrate that the proposed resource has experience working on data warehouse project with a defined Business Intelligence (BI) component using Cognos technology. More than 10 years = 20 points 9-10 years = 15 points 7-8 years = 10 points 5-6 years = 5 points	20	

R3	<p>The bidder should demonstrate that the proposed resource has experience coordinating and leading functional testing activities.</p> <p>More than 9 years = 20 points 8-9 years = 15 points 6-7 years = 10 points 4-5 years = 5 points</p>	20	
R4	<p>The bidder should demonstrate that the proposed resource has experience using a commercial off the shelf tool (COTS) for requirements definition, functional design, testing and traceability (i.e. Rational Suite, DOORS).</p> <p>8-9 years = 20 points 6-7 years = 15 points 4-5 years = 10 points</p>	20	
Maximum Score		80	
Minimum Score Note: Proposals that do not meet the minimum score of 56 points (70%) for the proposed resource of this category will not be evaluated further.		56	

I.1 Database Modeller / IM Modeller – Level 3			
Item	Point-Rated Requirement	Max Points	Bidder's Response
R1	<p>The bidder should demonstrate that the proposed resource has experience designing and developing logical and physical data models.</p> <p>More than 14 years = 20 points 12 –14 years = 15 points 10 - 11 years = 10 points</p>	20	
R2	<p>The bidder should demonstrate that the proposed resource has experience designing and developing data warehouse specific logical and physical data models.</p> <p>More than 12 years = 20 points 10 -12 years = 15 points 7 - 9 years = 10 points</p>	20	

R3	The bidder should demonstrate that the proposed resource has experience working with ERWIN for the purpose of building data models. More than 10 years = 20 points 8 - 10 years = 15 points 5 - 7 years = 10 points	20	
R4	The bidder should demonstrate that the proposed resource has experience working in a group/sector/branch/division where the core business was Human Resources. More than 5 years = 10 points 3-5 years = 5 points	10	
Maximum Score		70	
Minimum Score Note: Proposals that do not meet the minimum score of 49 points (70%) for the proposed resource of this category will not be evaluated further.		49	

I.4 Data Conversion Specialists – Level 3

Item	Point-Rated Requirement	Max Points	Bidder's Response
R1	The bidder should demonstrate that the proposed resource has experience designing and developing data conversion processes and scripts. More than 13 years = 20 points 12 –13 years = 15 points 10 - 11 years = 10 points	20	
R2	The bidder should demonstrate that the proposed resource has experience designing and developing data warehouse specific data conversion processes and scripts. More than 7 years = 20 points 6 - 7 years = 15 points 4 - 5 years = 10 points	20	
R3	The bidder should demonstrate that the proposed resource has experience using MS SQL Server 2005 SQL Server Integration Services (SSIS). More than 5 years = 20 points 4 - 5 years = 15 points 2 - 3 years = 10 points	20	

R4	The bidder should demonstrate that the proposed resource has experience extracting, transforming, and loading data into a Microsoft SQL Server environment. More than 7 years = 10 points 4 - 7 years = 5 points	10	
R5	The bidder should demonstrate that the proposed resource has experience scheduling stored procedures, TSQL and SSIS objects using SQL Agent More than 1 year = 10 points 0 experience = 0 points	10	
Maximum Score		80	
Minimum Score Note: Proposals that do not meet the minimum score of 56 points (70%) for each proposed resource of this category will not be evaluated further.		56	

P.9 Project Manager – Level 3			
Item	Point-Rated Requirement	Max Points	Bidder's Response
R1	The bidder should demonstrate that the proposed resource holds a current PMP certification. Copy of Certification to be provided with the bid. If a copy is not provided, points will not be awarded.	10	
R2	The bidder should demonstrate that the proposed resource has obtained Business Analysis Certification, such as International Institute of Business Analysts (IIBA), or Certified Business Analysis Professional (CBAP), or equivalent. Copy of Certification to be provided with the bid. If a copy is not provided, points will not be awarded.	10	
R3	The bidder should demonstrate that the proposed resource has experience managing as many projects in a data warehouse	20	

	<p>environment where the duration of each project was a minimum of 6 months.</p> <p>More than 3 Projects = 20 points 3 Projects = 15 points 2 Projects = 10 points 1 Project = 5 points</p>		
R4	<p>The bidder should demonstrate that the proposed resource has experience using MS Project.</p> <p>More than 10 years = 10 points 8-10 years = 7 points 5-7 years = 4 points</p>	10	
R5	<p>The bidder should demonstrate that the proposed resource has experience managing projects that follow or adhere to a software development lifecycle (SCLC)</p> <p>More than 8 years = 10 point 5-8 years = 5 points</p>	10	
R6	<p>The bidder should demonstrate that the proposed resource has experience facilitating meetings for key project stakeholders presenting project status, financial reporting, and risk management progress as well as delivering presentations to obtain client approvals.</p> <p>More than 10 years = 20 points 8-10 years = 15 points 5-7 years = 10 points</p>	20	
Maximum Score		80	
Minimum Score Note: Proposals that do not meet the minimum score of 56 points (70%) for the proposed resource of this category will not be evaluated further.		56	

APPENDIX D TO ANNEX A

CERTIFICATIONS AT THE TA STAGE

The following Certifications are to be used, as applicable. If they apply, they must be signed and attached to the TA Form when it is submitted to Canada.

1. CERTIFICATION OF EDUCATION AND EXPERIENCE

The Contractor certifies that all statements made with regard to the education and the experience of individuals proposed for completing the subject work are accurate and factual, and we are aware that the Department of Public Works and Government Services reserves the right to verify any information provided in this regard and that untrue statements may result in the TA response being declared non-responsive or in other action which the Minister may consider appropriate.

Print name of authorized individual & sign above Date

CERTIFICATION OF AVAILABILITY AND STATUS OF PERSONNEL

2. AVAILABILITY OF PERSONNEL

The Contractor certifies that, should it be authorized to provide services under any Task Authorization resulting from this Contract, the persons proposed in the TA response will be available to commence performance of the work within a reasonable time from the date of acceptance of the Task Authorization, or within the time specified in the TA Form, and will remain available to perform the work in relation to the fulfillment of the requirement.

Print name of authorized individual & sign above Date

3. STATUS OF PERSONNEL

If the Contractor has proposed any person in fulfillment of this requirement who is not an employee of the Contractor, the Contractor hereby certifies that it has written permission from such person (or the employer of such person) to propose the services of such person in relation to the work to be performed in fulfillment of this requirement and to submit such person's resume to the Contracting Authority. As well, the Contractor hereby certifies that the proposed person is aware that overtime may be required and is willing to comply.

Print name of authorized individual & sign above

Date

4. CERTIFICATION OF LANGUAGE -

The Contractor certifies that the proposed resources in response to this Task Authorization are fluent in English. The individual(s) proposed must be able to communicate orally and in writing in English without any assistance and with minimal errors.

The Contractor also certifies that the proposed Business Analyst is fluent in both official languages of Canada (French and English). The individual proposed must be able to communicate orally and in writing in French and English without any assistance and with minimal errors.

Print name of authorized individual & sign above

Date



Government of Canada
Gouvernement du Canada

Contract Number / Numéro du contrat

EN578-055605-D

Security Classification / Classification de sécurité
UNCLASSIFIED

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

PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE			
1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine		Public Works and Government Services Canada	
2. Branch or Directorate / Direction générale ou Direction		Acquisitions	
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 Standing Offer for the provision of Task Based Informatics Professional Services to the Government of Canada			
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 type="checkbox"/> Yes Oui
6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé.		<input checked="" type="checkbox"/> No Non	<input type="checkbox"/> Yes Oui
6. c) Is this a commercial courier or delivery requirement with no overnight storage? S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit?		<input checked="" type="checkbox"/> No Non	<input type="checkbox"/> Yes Oui
7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès			
Canada <input checked="" type="checkbox"/>		NATO / OTAN <input type="checkbox"/>	Foreign / Étranger <input type="checkbox"/>
7. b) Release restrictions / Restrictions relatives à la diffusion			
No release restrictions Aucune restriction relative à la diffusion <input checked="" type="checkbox"/>		All NATO countries Tous les pays de l'OTAN <input type="checkbox"/>	No release restrictions Aucune restriction relative à la diffusion <input type="checkbox"/>
Not releasable À ne pas diffuser <input type="checkbox"/>			
Restricted to: / Limité à: <input type="checkbox"/>		Restricted to: / Limité à: <input type="checkbox"/>	Restricted to: / Limité à: <input type="checkbox"/>
Specify country(ies): / Préciser le(s) pays:		Specify country(ies): / Préciser le(s) pays:	Specify country(ies): / Préciser le(s) pays:
7. c) Level of information / Niveau d'information			
PROTECTED A PROTÉGÉ A <input checked="" type="checkbox"/>		NATO UNCLASSIFIED NATO NON CLASSIFIÉ <input type="checkbox"/>	PROTECTED A PROTÉGÉ A <input type="checkbox"/>
PROTECTED B PROTÉGÉ B <input checked="" type="checkbox"/>		NATO RESTRICTED NATO DIFFUSION RESTREINTE <input type="checkbox"/>	PROTECTED B PROTÉGÉ B <input type="checkbox"/>
PROTECTED C PROTÉGÉ C <input checked="" type="checkbox"/>		NATO CONFIDENTIAL NATO CONFIDENTIEL <input type="checkbox"/>	PROTECTED C PROTÉGÉ C <input type="checkbox"/>
CONFIDENTIAL CONFIDENTIEL <input type="checkbox"/>		NATO SECRET NATO SECRET <input type="checkbox"/>	CONFIDENTIAL CONFIDENTIEL <input type="checkbox"/>
SECRET SECRET <input checked="" type="checkbox"/>		COSMIC TOP SECRET COSMIC TRÈS SECRET <input type="checkbox"/>	SECRET SECRET <input type="checkbox"/>
TOP SECRET TRÈS SECRET <input type="checkbox"/>			TOP SECRET TRÈS SECRET <input type="checkbox"/>
TOP SECRET (SIGINT) TRÈS SECRET (SIGINT) <input type="checkbox"/>			TOP SECRET (SIGINT) TRÈS SECRET (SIGINT) <input type="checkbox"/>



PART A (continued) / PARTIE A (suite)

8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS? ☒ No ☐ Yes
Non Oui

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

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

- | | | | |
|--|---|--|--|
| <input type="checkbox"/> RELIABILITY STATUS
COTE DE FIABILITÉ | <input type="checkbox"/> CONFIDENTIAL
CONFIDENTIEL | <input checked="" type="checkbox"/> SECRET
SECRET | <input type="checkbox"/> TOP SECRET
TRÈS SECRET |
| <input type="checkbox"/> TOP SECRET - SIGINT
TRÈS SECRET - SIGINT | <input type="checkbox"/> NATO CONFIDENTIAL
NATO CONFIDENTIEL | <input type="checkbox"/> NATO SECRET
NATO SECRET | <input type="checkbox"/> COSMIC TOP SECRET
COSMIC TRÈS SECRET |
| <input type="checkbox"/> SITE ACCESS
ACCÈS AUX EMPLACEMENTS | | | |

Special comments:

Commentaires spéciaux : _____

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

REMARQUE : Si plusieurs niveaux de contrôle de sécurité sont requis, un guide de classification de la sécurité doit être fourni.

10. b) May unscreened personnel be used for portions of the work?
Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail? ☒ No ☐ 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



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

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

Les utilisateurs qui remplissent le formulaire **manuellement** doivent utiliser le tableau récapitulatif ci-dessous pour indiquer, pour chaque catégorie, les niveaux de sauvegarde requis aux installations du fournisseur.

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

Dans le cas des utilisateurs qui remplissent le formulaire **en ligne** (par Internet), les réponses aux questions précédentes sont automatiquement saisies dans le tableau récapitulatif.

SUMMARY CHART / TABLEAU RÉCAPITULATIF

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

EN578-055605

Security Classification / Classification de sécurité
UNCLASSIFIED

PART D - AUTHORIZATION / PARTIE D - AUTORISATION

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

Name (print) - Nom (en lettres moulées)	Title - Titre	Signature	
Chamberlain, Tamara	A/Supply Team Leader		
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date
819-956-1442	819-956-2590	tamara.chamberlain@pwgsc.gc.ca	

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

Name (print) - Nom (en lettres moulées)	Title - Titre	Signature	
Gauthier, Simone	Security Official		
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date
819-934-0513	-	simone.gauthier@pwgsc.gc.ca	

15. Are there additional instructions (e.g. Security Guide, Security Classification Guide) attached? ☐ No ☐ Yes
Des instructions supplémentaires (p. ex. Guide de sécurité, Guide de classification de la sécurité) sont-elles jointes? ☐ Non ☐ Oui

16. Procurement Officer / Agent d'approvisionnement

Name (print) - Nom (en lettres moulées)	Title - Titre	Signature	
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date

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

Name (print) - Nom (en lettres moulées)	Title - Titre	Signature	
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date