

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

**THIS DOCUMENT CONTAINS A SECURITY
REQUIREMENT**

Title - Sujet PROFESSIONAL SERVICES UNDER THE	
Solicitation No. - N° de l'invitation W6369-10P5BZ/A	Date 2012-11-06
Client Reference No. - N° de référence du client W6369-10P5BZ	
GETS Reference No. - N° de référence de SEAG PW-\$\$ZM-608-25064	
File No. - N° de dossier 608zm.W6369-10P5BZ	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2012-11-29	Time Zone Fuseau horaire Eastern Standard Time EST
F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input type="checkbox"/> Other-Autre: <input type="checkbox"/>	
Address Enquiries to: - Adresser toutes questions à: Kelly, James	Buyer Id - Id de l'acheteur 608zm
Telephone No. - N° de téléphone (819) 956-5701 ()	FAX No. - N° de FAX (819) 956-1207
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction: Specified Herein Précisé dans les présentes	

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 Division / Division des services professionnels en informatique
11 Laurier St., / 11, rue Laurier
3C2, 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 CONTRACTS AGAINST A SUPPLY ARRANGEMENT FOR
TASK-BASED INFORMATICS PROFESSIONAL SERVICES (TBIPS)
FOR
DEPARTMENT OF NATIONAL DEFENCE

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BID SOLICITATION FOR
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FOR
DEPARTMENT OF NATIONAL DEFENCE

PART 1 - GENERAL INFORMATION

1.1 Introduction

This document states terms and conditions that apply to bid solicitation W6369-10P5BZ/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 the Department of National Defence (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 up to two contracts, each for three years plus two one-year irrevocable options allowing Canada to extend the term of the contract.
- (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://www.pwgsc.gc.ca/acquisitions/text/plain/plain-e.html#top>) 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, the Canada-Panama Free Trade Agreement (CPanFTA) 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 NO. OF RESOURCES
A.6 Programmer/Software Developer	2	2
A.8 System Analyst	2	6
A.11 Tester	2	2
B.1 Business Analyst	3	6
B.11 IT Instructor	3	6
B.14 Technical Writer	2	1
I.9 System Administrator	3	6
I.11 Technology Architect	3	3
P.9 Project Manager	3	2
P.10 Project Scheduler	2	1

1.3 Communications Notification

As a courtesy, the Government of Canada requests that successful Bidders notify the Contracting Authority in advance of their intention to make public an announcement related to the award of a contract.

1.4 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 (2012-03-02) 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 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

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

- (b)

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

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File No. - N° du dossier

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CCC No./N° CCC - FMS No/ N° VME

2.5 Improvement of Requirement During Solicitation Period

Should Bidders consider that the specifications or Statement of Work contained in the bid solicitation could be improved technically or technologically, Bidders are invited to make suggestions, in writing, to the Contracting Authority named in the bid solicitation. Bidders must clearly outline the suggested improvement as well as the 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.

2.6 Volumetric Data

The number of days for each resource category has been provided to Bidders to assist them in preparing their bids. The inclusion of this data in this bid solicitation does not represent a commitment by Canada that Canada's future usage of the services identified in this bid solicitation will be consistent with this data. It is provided purely for information purposes.

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 (five hard copies and two soft copies on CD/DVD);
- (ii) Section II: Financial Bid (one hard copy and one soft copy on CD/DVD); and
- (iii) Section III: Certifications (one hard copies).

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

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

(d) **Submission of Only One Bid from a Bidding Group:**

- (i) The submission of more than one bid from members of the same bidding group is not permitted in response to this bid solicitation. If members of a bidding group participate in more than one bid, Canada will choose in its discretion which bid to consider.
- (ii) For the purposes of this article, "**bidding group**" means all entities (whether those entities include one or more natural persons, corporations, partnerships, limited liability partnerships, etc.) that are related to one another. Regardless of the jurisdiction where any of the entities concerned is incorporated or otherwise formed as a matter of law, entities are considered "**related**" for the purposes of this bid solicitation if:
 - (A) they are the same legal entity (i.e., the same natural person, corporation, partnership, limited liability partnership, etc.);

- (B) they are "related persons" or "affiliated persons" according to the Canada Income Tax Act;
- (C) the entities have now or in the two years before bid closing had a fiduciary relationship with one another (either as a result of an agency arrangement or any other form of fiduciary relationship); or
- (D) the entities otherwise do not deal with one another at arm's length, or each of them does not deal at arm's length with the same third party.

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

- (iii) **For the Proposed Resources:** The technical bid must include the number of résumés, per Resource Category identified in Annex D. 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.

(iv) Customer Reference Contact Information:

- (A) The Bidder must provide customer references who must each confirm if requested by PWGSC, that the bidder has provided the customer with informatics professional services through IM/IT contract(s) managed within the last five years. For each contract identified, the customer must also confirm the following:
 - (1) that the contract value is at least of \$5M and the duration is at least three years;
 - (2) that the services under the contract were provided using Task Authorizations;
 - (3) that the bidder provided at least 10 resources simultaneously for a period of at least 12 consecutive months; and
 - (4) that the bidder was the Prime Contractor.
- (B) The form of question to be used to request confirmation from customer references is as follows:

[Sample Question to Customer Reference: "Has [the bidder] provided your organization with informatics professional services through IM/IT contract(s) managed by the bidder within the last five years? For each contract identified, please confirm the following:

 - (1) *that the contract value is at least of \$5M and the duration is at least three years;*
 - (2) *that the services under the contract were provided using Task Authorizations;*

(3) *that the bidder provided at least 10 resources simultaneously for a period of at least 12 consecutive months; and*

(4) *that the bidder was the Prime Contractor.”*

Yes, the bidder has provided my organization with the services described above.

No, the bidder has not provided my organization with the services described above.

I am unwilling or unable to provide any information about the services described above.]”

(C) For each customer reference, the Bidder must, at a minimum, provide the name and e-mail address for a contact person. Bidders are also requested to include the title of the contact person. It is the sole responsibility of the Bidder to ensure that it provides a contact who is knowledgeable about the services the Bidder has provided to its customer and who is willing to act as a customer reference.

(D) Crown references will be accepted.

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 and Annex “C” to Part A of their Supply Arrangement. 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 Year 1 of the Initial Contract Period 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.

(b) **Variation in Professional Services Resource Rates from Year to Year:** For any given resource category, where the financial tables provided by Canada allow different firm rates to be charged for a resource category during different time periods:

- (i) the rate bid must not increase by more than 5% from one time period to the next ; and
- (ii) the rate bid for the same resource category during any subsequent time period must not be lower than the rate bid for the time period that includes the first month of the Initial Contract Period.

(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, including any option years. 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.

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(e) SACC Manual Clauses

(i) C3011T (2010-01-11), Exchange Rate Fluctuation

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 assessed 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 two 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) **Requests for Interviews:** If Canada wishes to interview the Bidder and/or any or all of the resources proposed by the Bidder to fulfill the requirements of the bid solicitation, the Bidder will have two working days following notice by the Contracting Authority to make any necessary arrangements (at the Bidder's sole cost) for the interview to take place at PWGSC in Gatineau, Québec.
- (iii) **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

(a) Mandatory Technical Criteria

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 Annex D - Bid 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 Annex D - Evaluation Criteria.

(c) Reference Checks:

- (i) For reference checks, Canada will conduct the reference check in writing by e-mail. Canada will send all e-mail reference check requests to contacts supplied by all the Bidders within a 72-hour period using the e-mail address provided in the bid. Canada will not award any points and/or a bidder will not meet the mandatory experience requirement (as applicable) unless the response is received within 5 working days of the date that Canada's e-mail was sent.

- (ii) If Canada does not receive a response from the contact person within the 5 working days, Canada will not contact the Bidder and will not permit the substitution of an alternate contact person.
- (iii) 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.
- (iv) Points will not be allocated and/or a bidder will not meet the mandatory experience requirement (as applicable) 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 instead of being a customer of the Bidder itself). Nor will points be allocated if the customer is itself an affiliate or other entity that does not deal at arm's length with the Bidder.
- (v) Whether or not to conduct reference checks is discretionary. However, if PWGSC chooses to conduct reference checks for any given rated or mandatory requirement, it will check the references for that requirement for all bidders to be recommended for contract award.

(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 D. 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 assessed 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 Bidder must provide firm, all inclusive per diem rates for the initial contract period and option periods for each Resource Category identified in Annex B using the tables attached at Annex B. The Financial evaluation will be conducted only on bids that are technically responsive by using these rates to calculate the Total Bid Price. For Year 1 of the initial contract period 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 bid being considered non-responsive.

(b) Calculation of Total Bid Price:

The Total Bid Price will be determined for each Bidder by multiplying its firm per diem rates for each of the Initial Contract Period and the Option Periods (or the median rate, whichever is higher) with the estimated number of days of work for each period, for all the Categories of Personnel stated in Annex B - Basis of Payment. The sum of such rates will constitute the Total Bid Price for that Bidder.

(c) Firm Per Diem Median Rate Evaluation Method

In conducting the financial evaluation, with respect to the professional services rates proposed, a firm per diem rate median evaluation method will be used, as follows:

- (i) **Use of Method:** The firm per diem rate median calculation will apply to modify the rate to be assessed in the financial evaluation of a bidder, where that bidder submits a firm per diem rate for a resource that is lower than the median as calculated below. The firm per diem median rate calculation is for evaluation purposes only, and the actual submitted per diem rate will be used in the resulting contract in all instances.
- (ii) **Calculation:** Using the per diem rate proposed for each individual resource by the technically responsive bidders, a median rate will be determined for each Resource Category and Period. The median will be used to calculate each technically responsive bidder's per diem rate for the Initial Contract Period and Option Periods. If a Bidder quotes a firm per diem rate for any Resource Category that is lower than the median, the median per diem rate will be used to evaluate that Bidder's proposal for this Resource Category.

If that Bidder quoted a firm per diem rate that is lower than the median for that Resource Category, and it is determined to be the winning Contractor, the firm per diem rate which was quoted originally by the Bidder will be included in the resulting contract.

(d) 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 or other unique contract identifier) that shows that the Bidder has provided and invoiced a 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 closing date, and the fees charged were equal to or less than the rate offered to Canada;
- (ii) in relation to the invoice in (i), evidence from the bidder's customer that the services identified in the invoice include at least 50% of the tasks listed in the Statement of Work for the category of resource being assessed for an unreasonably low rate. This evidence must consist of either a copy of the contract (which must describe the services to be provided and demonstrate that at least 50% of the tasks to be performed are the same as those to be performed under the Statement of Work in this bid solicitation) or the customer's signed certification that the services subject to the charges in the invoice included at least 50% of the same tasks to be performed under the Statement of Work in this bid solicitation);
- (iii) in respect of each contract for which an invoice is submitted as substantiation, a resume for the resource that provided the services under that contract that demonstrates that, in relation to the resource category for which the rates are being substantiated, the resource would meet the mandatory requirements and achieve any required pass mark for any rated criteria; and

- (iv) the name, telephone number and, if available, e-mail address of a contact person at the customer who received each invoice submitted under (i), so that Canada can verify any information provided by the Bidder .

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, including information that would allow Canada to verify information with the resource proposed) 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. If Canada determines that the information provided by the Bidder does not adequately substantiate the unreasonably low rates, the bid will be declared non-responsive.

(e) **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 – Highest Combined Rating of Technical Merit and Price

- (a) To be evaluated as compliant, a bid must:
- (i) comply with all the requirements of the bid solicitation;
 - (ii) meet all mandatory requirements of the bid solicitation; and
 - (iii) obtain the required minimum score of the points for each proposed resource category, which are subject to point rating.
- (b) Bids not meeting (i), (ii) or (iii) above will be evaluated as non-responsive and will be given no further consideration. The technically responsive bid(s) that obtains the highest combined rating of technical merit and price, i.e. adding the technical score with the financial score, will be recommended for award of a contract up to the maximum number of contracts to be awarded. The total possible technical score is 60 while the total financial score is 40. Where two or more bids achieve the identical highest combined technical (60%) and financial (40%) score, the bid with the lowest total cost submitted will be ranked higher.
- (c) For each bid:

Calculation of Technical Score: the technical score is calculated by prorating the technical score obtained by the bid against the total possible score of 60.

$$\text{Example: TECHNICAL SCORE} = \frac{\text{Bidder's TECHNICAL SCORE}}{\text{Total Possible TECHNICAL SCORE}} \times 60 \text{ points}$$

Calculation of Financial Score: the financial score is calculated by giving full points (40) to the lowest priced responsive bid and prorating all other responsive bid financial scores accordingly.

$$\text{Example: FINANCIAL SCORE} = \frac{\text{Lowest TOTAL ESTIMATED COST (\$)}}{\text{Bidder's TOTAL ESTIMATED COST (\$)}} \times 40 \text{ points}$$

- (d) The following Fund Allocation Formula will be used to allocate the estimated funds for each Contract:

CONTRACTOR	Total Point Score	Fund Allocation Formula	Total Funds
X	68	$68/128 \times 100 = 53.13$	\$3,187,500.00
Y	60	$60/128 \times 100 = 46.88$	\$2,812,500.00
Total	128		\$6,000,000.00

NOTE: This is an example only. Actual numbers will be determined after bid evaluation.

The Estimated Number of Days provided in Annex B, Basis of Payment, are used for the evaluation process only, and do not represent a commitment by Canada or a limitation on Canada to purchase services under the resulting contracts in these or any amounts.

- (e) 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.

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 for Employment Equity (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
 - (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/en/gateways/topics/wzp-gxr.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;
 - (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 Professional Services Resources

- (a) By submitting a bid, the Bidder certifies that, if it is awarded a contract as a result of the bid solicitation, every individual proposed in its bid or in response to a Task Authorization 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) 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.
- (c) If the Bidder is unable to provide the services of an individual named in its bid due to the death, sickness, extended leave (including parental leave or disability leave), retirement, resignation or dismissal for cause of that individual, the Bidder may propose a substitute to the Contracting Authority, providing:
 - (i) the reason for the substitution with substantiating documentation acceptable to the Contracting Authority;
 - (ii) the name, qualifications and experience of a proposed replacement immediately available for work;
 - (iii) proof that the proposed replacement has the required security clearance granted by Canada, if applicable.

No more than one substitute will be considered for any given individual proposed in the bid. In response to the Bidder's proposed substitution, the Contracting Authority may elect in its sole discretion either to:

- (A) set aside the bid and give it no further consideration; or
 - (B) evaluate the replacement in accordance with the requirements of the bid solicitation in the place of the original resource as if that replacement had originally been proposed in the bid, with any necessary adjustments being made to the evaluation results, including the rank of the bid vis-à-vis other bids.
- (d) 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.
- (e) 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.

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; and
 - (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) Bidders are reminded to obtain the required security clearance promptly. Any delay in the award of a contract to allow the successful bidder to obtain the required clearance will be at the entire discretion of the Contracting Authority.
- (c) For additional information on security requirements, Bidders should consult the "Security Requirements for PWGSC Bid Solicitations - Instructions to Bidders" document (<http://tpsgc-pwgsc.gc.ca/app-acq/lc-pl/lc-pl-eng.html#a31>) 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.

6.2 Financial Capability

- (a) SACC Manual clause A9033T (2011-05-16) Financial Capability; except that subsection 3 is deleted and replaced with the following: "If the Bidder is a subsidiary of another company, then any financial information required by the Contracting Authority in 1(a) to (f) must be provided by each level of parent company, up to and including the ultimate parent company. The financial information of a parent company does not satisfy the requirement for the provision of the financial information of the Bidder; however, if the Bidder is a subsidiary of a company and, in the normal course of business, the required financial information is not generated separately for the subsidiary, the financial information of the parent company must be provided. If Canada determines that the Bidder is not financially capable but the parent company is, or if Canada is unable to perform a separate assessment of the Bidder's financial capability because its financial information has been combined with its parent's, Canada may, in its sole discretion, award the contract to the Bidder on the condition that the parent company grant a performance guarantee to Canada."
- (b) In the case of a joint venture Bidder, each member of the joint venture must meet the financial capability requirements.

6.3 Controlled Goods Requirement

- (a) SACC Manual clause A9130T (2011-05-16), Controlled Goods Program
- (b) In the case of a joint venture Bidder, each member of the joint venture must meet the requirements of the Controlled Goods Program.

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 the Department of National Defence (DND).
- (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 the 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) **Authority to Issue a TA:** Any TA with a value less than or equal to \$250,000.00 (including GST/HST) may be issued by the DND Procurement Representative. Any TA with a value greater than this amount must be issued directly by the Contracting Authority. By providing written notice to the Contractor, the Contracting Authority may suspend the DND Procurement Representative's authority to issue TAs at any time.
- (d) **Charges for Work under a TA:** The Contractor must not charge Canada anything more than the price set out in the TA unless Canada has issued a TA amendment authorizing the increased expenditure. Canada will not pay the Contractor for any design changes, modifications or interpretations of the Work unless they have been approved, in writing, by the Contracting Authority before 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.

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- (f) **Consolidation of TAs for Administrative Purposes:** The Contract may be amended from time to time to reflect all TAs 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 to the Contracting Authority a TA report on a quarterly basis that identifies each TA issued during that quarter and its dollar value.
- (h) **Period of Services:** No TAs may be entered into after the expiry date of the Contract.
- (i) **Allocation of Task Authorizations:** More than one contract has been awarded for this requirement. As a result, the Task Authorizations issued under this series of contracts will be allocated in accordance with the following:
- (i) At the time this series of contracts was awarded, each contractor was allocated an amount of funding as specified in the Limitation of Expenditure in respect of Task Authorizations based on the evaluation process described in the bid solicitation that resulted in the award of this series of contracts.
 - (ii) Canada will use a rotational method to allocate the Task Authorizations, where the rotation is based on the amount of funding remaining under each of the respective contracts.
 - (iii) Canada will send the first draft Task Authorization to the contractor with the greatest value of funding under its contract. If more than one contractor has the same value, it will be assigned to the contractor ranked first as determined under the evaluation process in the bid solicitation that resulted in the award of this series of contracts.
 - (iv) The contractor sent a draft TA will have the time set out further under the sub-paragraph entitled "**Task Authorization Quotations**" to respond to the DND Procurement Representative.
 - (v) If the contractor to whom the draft TA is first sent either fails to respond on time or confirms in writing that it refuses to perform the task, the draft TA will then be forwarded to the contractor with the next-greatest balance remaining of allocated funding.
 - (vi) The process of sending out a draft TA to the contractor with the greatest balance remaining will continue until Canada either cancels the requirement for the task or it has been issued to one of the contractors. If none of the contractors can perform the task (in accordance with all the terms and conditions of this series of contracts), Canada may acquire the required Work by other means.
 - (vii) Once the Task Authorization is issued, for the purposes of calculations for the allocation of Task Authorizations, the value of that Task Authorization (and the value of any subsequent amendment to that TA increasing or decreasing the value) will be subtracted from the funding allocated to that contractor.
 - (viii) When the next requirement to perform a task is identified, it will be sent to the contractor with the greatest balance remaining of allocated funding. If more than one contractor has the greatest balance remaining of allocated funds (i.e., several contractors have equal amounts of allocated funding), the draft TA will be sent to the contractor among them that ranked highest under the bid solicitation evaluation process. If any contract in this series of contracts is amended to add funding for Task Authorizations, all the remaining contracts (i.e., all contracts that have not previously been terminated) will be amended to add funding in amounts proportionate to the funding initially provided under each contract for Task Authorizations (e.g., if three contracts were awarded with \$2M, \$1M and \$750,000 in funding for Task Authorizations respectively, and \$200,000 is added to the first contract, then \$100,000 will be added to the second contract and \$75,000 will be added to the third).

(ii) Refusal of Task Authorizations:

The Contractor is not required to submit a quotation in response to every draft statement of task issued by Canada. However, 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. Should a Contractor refuse a TA under the Contract, the other Contractor, under the same allocation process, will be offered the TA. The dollar value of the refused TA will be subtracted from the dollar value of the Contractor's Contract and may be re-allocated, at the Contracting Authority's sole discretion, in whole or in part, to the other Contractor. Should both Contractors refuse a TA, Canada reserves the right to use other methods of supply.

7.3 Minimum Work Guarantee

(a) In this clause,

- (i) **"Maximum Contract Value"** means the amount specified in the **"Limitation of Expenditure"** clause set out in the Contract (excluding GST/HST); and
- (ii) **"Minimum Contract Value"** means 2% of the amount identified as the Total Estimated Cost on page 1 of the Contract when it is first awarded.

(b) 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) subject to paragraph (d). In consideration of such obligation, the Contractor agrees to stand in readiness throughout the Contract Period to perform the Work described in the Contract. Canada's maximum liability for work performed under the Contract must not exceed the Maximum Contract Value, unless an increase is authorized in writing by the Contracting Authority.

(c) In the event that 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 total cost of the Work requested .

(d) Canada will have no obligation to the Contractor under this clause if Canada terminates the entire Contract: :

- (i) for default;
- (ii) for convenience as a result of any decision or recommendation of a tribunal or court that the contract be cancelled, re-tendered or awarded to another supplier; or
- (iii) for convenience within ten business days of Contract award.

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.

(a) **General Conditions:**

- (i) 2035 (2012-03-02), General Conditions - Higher Complexity - Services, apply to and form part of the Contract.

(b) **Supplemental General Conditions:**

The following Supplemental General Conditions:

- (i) 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

- (a) The Contractor/Offeror must, at all times during the performance of the Contract/Standing Offer, hold a valid Facility Security Clearance at the level of SECRET, issued by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC).
- (b) The Contractor/Offeror 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 CISD/PWGSC.
- (c) The Contractor/Offeror MUST NOT remove any PROTECTED/CLASSIFIED information from the identified work site(s), and the Contractor/Offeror 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 CISD/PWGSC.
- (e) The Contractor/Offeror must comply with the provisions of the:
- (i) Security Requirements Check List and security guide (if applicable), attached at Annex C
- (ii) 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 includes:

- (i) The "**Initial Contract Period**", which begins on the date the Contract is awarded and ends three years later; and
- (ii) The period during which the Contract is extended, if Canada chooses to exercise any options set out in the Contract.

(b) **Option to Extend the Contract:**

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

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

7.7 Authorities

(a) Contracting Authority

The Contracting Authority for the Contract is:

Name: James Kelly
 Title: Supply Team Leader
 Public Works and Government Services Canada
 Acquisitions Branch
 Directorate: Informatics and Telecommunications Systems Procurement Directorate
 Address: 11 Laurier St., Gatineau, Québec

Telephone: 819-956-5701
 Facsimile: 819-956-1207
 E-mail address: james.kelly@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:

(To be provided at the time of contract award.)

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) DND Procurement Representative

The DND Procurement Representative for the Contract is:

(To be provided at the time of contract award.)

The DND Procurement Representative is the representative of the department or agency for whom the Work is being carried out under the Contract and is responsible for matters concerning the administrative aspects of the Work under the Contract, communication with the Contracting Authority on all matters concerning the Contract, procurement initiation authority, providing PWGSC with reports on Contract utilization, management of Contract cashflow and FAA Section 34 approval and processing of all invoices. Technical matters may be discussed with the DND Procurement Representative, however, the DND Procurement Representative 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.

(d) Contractor's Representative

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

7.8 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: \$(To be determined)
- (ii) **Pre-Authorized Travel and Living Expenses:**
Canada will reimburse the Contractor for its pre-authorized travel and living expenses reasonably and properly incurred in the performance of the Work outside the National Capital Area, at cost, without any allowance for profit and/or administrative overhead, in accordance with the meal, private vehicle and incidental expenses provided in Appendices B, C and D of the Treasury Board Travel Directive, and with the other provisions of the directive referring to "travellers", rather than those referring to "employees". All travel must have the prior authorization of the Technical Authority. All payments are subject to government audit. The Contractor will not be able to charge for time spent travelling at the per diem rates set out in the Contract.
Estimated Cost: \$(To be determined)
- (iii) **GST/HST:** Estimated Cost: \$(To be determined)
- (iv) **Overtime Work:**
- (A) All proposed personnel must be available to work outside normal office hours during the duration of the Contract.
- (B) The Technical Authority will advise the Contractor as soon as possible of any overtime requirements. All overtime must be pre-approved by the Technical Authority.
- (v) **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.
- (vi) **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 measures may include an assessment that results in conditions applied against the Contractor before doing further business with Canada, or full debarment of the Contractor from bidding on future requirements.

- (vii) 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 the amount set out on page 1 of the Contract, less any applicable GST or HST. With respect to the amount set out on page 1 of the contract, Customs duties are included and Goods and Services Tax or Harmonized Sales Tax is included, 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 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.

(d) 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 Contract must repay any overpayment, at Canada's request.

(e) 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.

7.9 Invoicing Instructions

- (b) 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 DND Procurement Representative, and a copy to the Contracting Authority.

7.10 Certifications

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.

7.11 Applicable Laws

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

7.12 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) 4006 (2010-08-16), Supplemental General Conditions - Contractor to Own Intellectual Property Rights in Foreground Information;
- (c) general conditions 2035 (2012-03-02), General Conditions - Higher Complexity - Services;
- (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) Form
- (iii) Appendix C to Annex A - Resource Assessment Criteria and Response Tables
- (iv) Appendix D to Annex A - Certification at the TA stage
- (e) Annex B, Basis of Payment;
- (f) Annex C, Security Requirements Check List;
- (g) the signed Task Authorizations including any required Certifications;
- (h) Supply Arrangement Number EN578-055605/xxx/EL (the "Supply Arrangement"); and
- (i) the Contractor's bid dated _____ (*insert date of bid*), as amended _____ (*insert date(s) of amendment(s) if applicable*), not including any software publisher license terms and conditions that may be included in the bid, not including any provisions in the bid with respect to limitations on liability, and not including any terms and conditions incorporated by reference (including by way of a web link) in the bid.

7.13 Foreign Nationals (Canadian Contractor)

- (a) SACC Manual clause A2000C (2008-05-12) Foreign Nationals (Canadian Contractor)

Note to Bidders: *Either this clause or the one that follows, whichever applies (based on whether the successful bidder is a Canadian Contractor or Foreign Contractor), will be included in any resulting contract.*

7.13 Foreign Nationals (Foreign Contractor)

- (a) SACC Manual clause A2001C (2008-05-12) Foreign Nationals (Foreign Contractor)

7.14 Defence Contract

- (a) SACC Manual clause A9006C (2008-05-12) Defence Contract

7.15 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) To meet the insurance requirements of the Contract, the Contractor must provide in its application a Certificate of Insurance 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, at the request of the Contracting Authority, a certified true copy of all applicable insurance policies.

- (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 \$10 million** per accident or occurrence and in the annual aggregate.

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.
The interest of Canada as additional insured should read as follows: Canada, represented by Public Works and Government Services Canada;
 - (ii) Notice of Cancellation Endorsement: The Insurer agrees to provide the Contracting Authority thirty (30) days written notice of policy cancellation;
 - (iii) 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;
 - (iv) 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;
 - (v) Contingent Employer's Liability Endorsement: To protect Contractor for liabilities arising in the management and administration of statutory and contractual entitlements of their employees;
 - (vi) 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;
 - (vii) 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;
 - (viii) 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 its behalf;
 - (ix) 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;
 - (x) 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;
 - (xi) Non-Owned Automobile Endorsement: To protect the Contractor for liabilities arising by their use of vehicles owned by other parties including Canada.
- (c) Where the Contractor is a Joint Venture, for the purposes of this 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.

(d) Errors and Omissions Insurance

Errors and Omissions 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 \$1 million** per loss and in the annual aggregate, inclusive of defence costs.

If this is a claims made policy and the duration of the Contract exceeds the policy term; in the event of cancellation or non-renewal of the policy, an Extended Claims Reporting Endorsement, minimum twelve (12) months, must be secured by the Contractor.

Errors and Omissions Endorsements

The following clauses must be incorporated into the conditions of the Contractor's Errors and Omissions Liability coverage:

- (i) Notice of Cancellation Endorsement: The Insurer agrees to provide the Contracting Authority thirty-day written notice of policy cancellation.

7.16 Controlled Goods Program

- (a) SACC Manual clause A9131C (2011-05-16) Controlled Goods Program
- (b) SACC Manual clause B4060C (2011-05-16) Controlled Goods

7.17 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 caused by the Contractor's performance or failure to perform the Contract 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's performance or failure to perform the Contract that relates to:
- (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 by Canada 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).

7.18 Joint Venture Contractor

- (a) The Contractor confirms that the name of the joint venture is [REDACTED] and that it is comprised of the following members: *[list all the joint venture members named in the Contractor's original bid]*.
- (b) With respect to the relationship among the members of the joint venture Contractor, each member agrees, represents and warrants (as applicable) that:
- (i) [REDACTED] 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.
- (c) 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.
- (d) All the members are jointly and severally or solidarily liable for the performance of the entire Contract.
- (e) 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.
- (f) The Contractor acknowledges that all security and controlled goods requirements in the Contract, if any, apply to each member of the joint venture Contractor.

Note to Bidders: *This Article will be deleted if the Bidder awarded the contract is not a joint venture. If the contractor is a joint venture, this clause will be completed with information provided in its bid.*

7.19 Professional Services - General

- (a) The Contractor must provide professional services on request as specified in this Contract. The individual(s) proposed in its bid is required to perform the Work, the Contractor must make such person 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 that individual 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 Personnel, 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.
- (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.
- (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.

7.20 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.

7.21 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 TAs. The Contractor represents and warrants that all those statements are true and acknowledges that Canada relied on those statements in awarding the Contract and adding work to it through TAs. 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.

7.22 Access to Canada's Property and Facilities

Canada's property, facilities, equipment, documentation, and personnel are not automatically available to the Contractor. If the Contractor would like access to any of these, it is responsible for making a request to the Technical Authority. Unless expressly stated in the Contract, Canada has no obligation to provide any of these to the Contractor. If Canada chooses, in its discretion, to make its property, facilities, equipment, documentation or personnel available to the Contractor to perform the Work, Canada may require an adjustment to the security requirements.

7.23 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 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 completed by no later than 15 working days after the Contract is awarded. All costs associated with establishing itself to provide the professional services are the responsibility of the Contractor.

7.24 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.

7.25 Transition Services at end of Contract Period

The Contractor agrees that, in the period leading up to the end of the Contract Period, it will make all reasonable efforts to assist Canada in the transition from the Contract to a new contract with another supplier. The Contractor agrees that there will be no charge for these services.

7.26 Training:

- (i) The Contractor must provide the following services on an "as-and-when-requested" basis during the Contract Period when a Task Authorization for training is issued in accordance with the Contract:
 - (A) classroom training and one-on-one coaching for in-service and new implementation of solutions within DND; and

-
- (B) review and update training manuals/materials and develop reference guides in MS Office format.
- (ii) The training must be provided at various locations across the National Capital Region, as requested in the Task Authorization.
 - (iii) The training must be available within 15 working days of the Task Authorization being issued.
 - (iv) The training, including both the instruction and the course materials, must be provided in English or French. Specific language requirements will be identified on each Task Authorization.
 - (v) Before providing any training, at least 10 working days in advance of the first training session, the Contractor must submit the Training Schedule and the training materials to the Technical Authority for approval.

ANNEX A

STATEMENT OF WORK

1. BACKGROUND

- 1.1. Government of Canada (GC) Information Management (IM) policy and legislation clearly outline Departmental responsibility to manage information effectively and efficiently. The Department of National Defence/Canadian Forces (DND/CF) requires the professional services of resources to support implementation and sustainment (in-service) activities related to Record and Document Management (RDM) and Collaboration activities across DND/CF. Currently these activities are based on a suite of applications which includes OpenText Document Management/Records Management (DM/RM) referred to as GCDOCS, Windows SharePoint Services (WSS) 3.0, and Microsoft MOSS 2007. The department is analysing new offerings by Open Text, Microsoft (including SharePoint 2010) and others, and will very likely migrate to a new enterprise toolset in the next 12 to 36 months.
- 1.2. As the departmental functional authority for RDM and Collaboration, the client is responsible as the functional lead for in-service support and implementation of all RDM and Collaboration solutions for DND/CF. The professional services resources are required to execute activities including, but not limited to, implementation, and change management, coordination of functional capability rollout, client relationship management and communications.

2. OBJECTIVE

- 2.1. DND requires informatics professional services to perform day-to-day in-service support activities to the RDM and Collaboration solutions deployed within DND, including surge activities on the Defence Wide Area Network (DWAN) and the Classified Domain.

3. RDM AND COLLABORATION TECHNICAL ENVIRONMENT

The technical environment for RDM and Collaboration within the department is in transition, with a goal of achieving a standard environment deployed to all users. The existing environment consists of:

Record and Document Management Solutions:

There are currently several RDM solutions deployed within the department, each addressing a variety of requirements. Discussions to standardize the department on one solution are on-going and it is unknown at this time which will be selected as the final solution. The primary RDM solutions within the department are:

- a. Open Text eDOCs v5.2;
- b. Open Text Livelink v9.7.5;
- c. WSS 3.0;

- d. MOSS 2007; and
- e. Document Management Control System (DMCS) v5.

Collaboration Solution:

The department currently has many WSS 3.0 and MOSS 2007 site deployed and will be migrating to SharePoint 2010. Although not standardized at this time, a standardized collaboration solution is being sought and will be selected by the end of 2012.

Desktop Operating System:

The current deployment to the desktop is Windows 2003. A project to migrate all desktops to Windows 2007 has been initiated.

Server Operating System:

The current standard for departmental servers is Windows Server 2003. A project migrate all servers to Windows Server 2008 has been initiated with an expectation that the migration will be completed by late 2012.

4. APPLICABLE DOCUMENTS

4.1. The following documents will be made available at contract award:

- 4.1.1.1. Policy on Information Management;
- 4.1.1.2. Record Document and Information Management System (RDIMS) Information Management Rules;
- 4.1.1.3. RDIMS Business Rules (User & Information Administrator); and
- 4.1.1.4. RDIMS Implementation Tool Kit.

5. LOCATION OF WORK

5.1. The work will be performed primarily on DND premise, at 222 Nepean Street, Ottawa, Ontario, or at other DND locations in the National Capital Region (NCR) subject to the discretion of the Technical Authority (TA).

6. CONSTRAINTS

- 6.1. Resources must be available to work on DND premises within the NCR between the hours of 07:00 to 17:00, Monday to Friday, where the resources will be in contact with DND personnel on a regular basis.
- 6.2. All work performed outside of normal business hours must be pre-approved by the TA in writing. Should a resource anticipate that the 7.5 hour workday stipulated in the contract may be exceeded, approval must be obtained from the TA prior to work being carried out in excess of such period.

7. P.9 PROJECT MANAGER - LEVEL 3

7.1. SCOPE

The Project Manager is required to work collaboratively with other team members to provide service for the following activities:

- 7.1.1. Research and information gathering;
- 7.1.2. Analyzing and developing architecture requirements design, process development and process mapping; and
- 7.1.3. The development of business process renewal and migration strategy to aid in a smooth transformation.

7.2. TASKS AND DELIVERABLES

The Project Manager must perform the following tasks for in-service and new RDM implementations:

- 7.2.1. Prepare and submit to the TA a plan of activities using Microsoft Project (2003 or later), no later than five (5) working days after the approved Task Authorization, showing a detailed schedule of all activities, for review and approval by the TA. The schedule will provide, as a minimum, a detailed breakdown of all proposed activities associated with the task, including schedules for deliverables;
- 7.2.2. Prepare implementation strategy document and framework for submission to Senior Management;
- 7.2.3. Prepare and confirm project plan, schedule and resource plans on a monthly basis to the TA;
- 7.2.4. Collect and review data for planning and preparation activities;
- 7.2.5. Assess order of roll-out for client organizations;
- 7.2.6. Set priorities and track progress of deployment;
- 7.2.7. Liaise directly with the Project Team to coordinate implementations;
- 7.2.8. Liaise with IM personnel to determine business requirements that are technically associated with software;
- 7.2.9. Provide process guidance to the Project Team, Trainers, and Divisional Implementation Coordinators;
- 7.2.10. Prepare project documentation, including options analysis, business cases, communication plans, risk assessment documents and status reports;

- 7.2.11. Prepare other documents including presentations, communications to regional contacts or national announcements or both;
- 7.2.12. Coordinate and conduct client communications and change management activities;
- 7.2.13. Assess associated risks and bring them to the attention of the TA;
- 7.2.14. Provide input, feedback and requirements to the TA and Project Team on Management of Recorded Information (MoRI – The management of recorded information throughout its life cycle) policies, standards and guidelines, to sustain deployment; and
- 7.2.15. Perform other similar tasks described in this category as delegated by the TA.

8. A.8 SYSTEM ANALYST – LEVEL 2

8.1. SCOPE

The System Analyst is required to work collaboratively with other team members to provide service for the following activities:

- 8.1.1. Developing application/system specifications and designs;
- 8.1.2. Managing, scheduling and performing migration of related data into the system; and
- 8.1.3. Performing installation, configuration and testing of development environment.

8.2. TASKS AND DELIVERABLES

The System Analyst must perform the following tasks for in-service and new implementations of systems:

- 8.2.1. Provide a report on requirements by gathering and collecting information as instructed by the TA;
- 8.2.2. Liaise with the TA to develop prototypes, models, standards and other DND internal requirements for RDM and Collaboration products in the technical context of systems, applications and security;
- 8.2.3. Provide advice, guidance and knowledge transfer of new prototypes, models, standards to other team members;
- 8.2.4. Participate in implementation and in-service installations by troubleshooting, testing, maintaining and proving support through new deployments, upgrades and patches of MS Windows Operating Systems, MS Networking, other desktop and server applications, Relational Databases (Oracle and MS SQL) and the infrastructure that supports other Intranet/Internet server software and hardware;

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- 8.2.5. Develop application/system specifications and designs;
 - 8.2.6. Participate and conduct application integration and system testing, scheduling and coordination while adhering to change management methodology in the context of a testing environment;
 - 8.2.7. Perform analysis of test result data, associated reports and technical research;
 - 8.2.8. Manage, schedule and perform, as requested, the migration of all other related data;
 - 8.2.9. Conduct client service support both face-to-face and on the telephone, to analyze trouble call data and produce associated reports;
 - 8.2.10. Perform installation, configuration and testing of development environment and related applications on servers and workstations for proposed solutions;
 - 8.2.11. Provide support to keep the project on schedule, i.e., provide tasks required for the Work Breakdown Structure (WBS);
 - 8.2.12. Assist team leaders in planning, organizing, leading and monitoring the technical activities of the implementation and in-service support team;
 - 8.2.13. Notify the TA of discrepancies in planning and submit recommendations to resolve these issues;
 - 8.2.14. Maintain communications with the deployment team leaders and keep them notified of any related developments;
 - 8.2.15. Track any decisions made regarding requests for changes and outstanding items with assigned tasks;
 - 8.2.16. Develop .NET and Active Server Pages (ASP) custom application interface using Application Programming Interfaces (API);
 - 8.2.17. Provide technical instructions, explanations and advice on RDM & Collaboration hybrid solutions, features, limitations, configurations and risks;
 - 8.2.18. Debug and resolve any issues or errors during development;
 - 8.2.19. Maintain knowledge of vendor products, features, bugs and enhancement requests to assist all members in client delivery;
 - 8.2.20. Prepare technical briefings and make presentations, as requested by the TA; and
 - 8.2.21. Perform other similar tasks described in this category as delegated by the TA.

9. I.11 TECHNOLOGY ARCHITECT - LEVEL 3

9.1. SCOPE

The Technology Architect is required to work collaboratively with other team members to provide service for the following activities:

- 9.1.1. Preparing an assessment of the current state of the technical system architecture and detailing technical requirements;
- 9.1.2. Providing impact analysis and cost-benefit analysis of new processes and solutions; and
- 9.1.3. Providing support to applications or technical support teams in the proper application of existing infrastructure.

9.2. TASKS AND DELIVERABLES

The Technology Architect must perform the following tasks for in-service and new implementations of systems:

- 9.2.1. Review and report on the current state of the technical system architecture;
- 9.2.2. Review and assess the overall response time for end-users of the system;
- 9.2.3. Analyze the existing capabilities and recommend areas for improved capability and integration;
- 9.2.4. Provide written advice, recommendations and a strategy on a feasible, efficient, scalable and sustainable solution, its features, components, limitations, configurations and risks in the context of the DND environment;
- 9.2.5. Develop a technical architecture, frameworks and strategies and associated or integrated applications, to meet business, functional and application requirements;
- 9.2.6. Gather, collect and document information on DND RDIMS-specific system architectural requirements. Identify and document system-specific technical standards including data dictionaries, naming conventions and custom components;
- 9.2.7. Develop the necessary integration between new and/or existing systems;
- 9.2.8. Analyse and evaluate upgrades and new releases, and make recommendations on the advisability of proceeding with such upgrades;
- 9.2.9. Analyze and evaluate alternative technology solutions to meet DND business requirements and provide a report with the findings;
- 9.2.10. Perform an impact analysis of proposed technology changes;
- 9.2.11. Perform a cost-benefit analysis of implementing new processes and solutions;

- 9.2.12. Develop a prototype of potential solutions and suggest recommended courses of action;
- 9.2.13. Review technical infrastructure design to ensure adherence to standards and to recommend performance improvements;
- 9.2.14. Evaluate hardware relative to its ability to support the departments RDM & Collaboration system and associated applications and by determining potential and actual bottlenecks, improve system performance through recommended hardware changes;
- 9.2.15. Monitor industry trends to ensure that solutions fit with government and industry directions for technology; and
- 9.2.16. Perform other similar tasks described in this category as delegated by the TA.

10. B.11 IT INSTRUCTOR - LEVEL 3

10.1. SCOPE

The IT Instructor is required to work collaboratively with other team members to provide service for the following activities:

- 10.1.1. Reviewing existing training materials;
- 10.1.2. Delivering classroom based training and one-on-one coaching; and
- 10.1.3. Updating training manuals and developing reference guides in Microsoft Office format.

10.2. TASKS AND DELIVERABLES

The IT Instructor must perform the following tasks for in-service and new implementation of solutions within the department:

- 10.2.1. Review existing DND training materials;
- 10.2.2. Deliver existing DND training courses to DND/CF users as follows:
 - 10.2.2.1. Provide full day user courses: Quantity three to four courses per week for a maximum of 10 students per course with a general RM/DM component;
 - 10.2.2.2. A two-day Records Management Administrative Tool course with a general RM/DM component: Quantity one course per month for a maximum of 10 students per course; and
 - 10.2.2.3. Provide one-on-one coaching as required. This will involve a personalized 1 hour desk side session with the trainer and the client;

- 10.2.3. Create and disseminate a Training Schedule in the form of a calendar of training events showing the details of course offerings;
- 10.2.4. Coordinate and confirm registration of students, by coordinating training activities with Records Specialist and/or Group/Divisional Information Administrators (IA) and Divisional Training Coordinators;
- 10.2.5. Coordinate and book DND/CF Boardrooms and/or Classrooms;
- 10.2.6. Coordinate and provide a combination of unilingual and bilingual training material (including student feedback questionnaires) to each student attending training sessions – material and templates will be provided by DND/CF;
- 10.2.7. Report training equipment problems to the support technician (Technology Architect) for resolution;
- 10.2.8. Maintain DND training hardware/software and training environment to ensure their readiness for training courses;
- 10.2.9. Submit an attendees list after each training session to the functional authority and Group/Divisional Information Administrators;
- 10.2.10. Provide feedback to the Technical Authority on updates to training packages, business processes and instructions;
- 10.2.11. Produce a monthly status report of issues, tasks and training delivered;
- 10.2.12. Attend monthly status meetings;
- 10.2.13. Develop Quick and Easy Reference Guides to be inserted into the training manuals to be used by information administrators and general users - templates will be provided by DND/CF;
- 10.2.14. Update training manuals and student handouts to reflect changes resulting from version upgrade and new business rules; and
- 10.2.15. Perform other similar tasks described in this category as delegated by the TA.

11. I.9 SYSTEM ADMINISTRATOR - LEVEL 3

11.1. SCOPE

The System Administrator is required to work collaboratively with other team members to provide service for the following activities:

- 11.1.1. Performing in-service, tactical and operational support; and

11.1.2. Providing advice with regard to the integrations of the departments approved applications.

11.2. TASKS AND DELIVERABLES

The System Administrator must perform the following tasks for in-service and new implementations of solutions:

- 11.2.1. Provide a report on requirements by gathering and collecting information as instructed by the DND TA;
- 11.2.2. Install, monitor, upgrade and maintain operating systems;
- 11.2.3. Install, monitor, upgrade and maintain hardware and software;
- 11.2.4. Work with TA, Business Analysts, Project Managers, Developers, and clients/stakeholders to maintain and improve software performance;
- 11.2.5. Apply problem solving skills to troubleshoot and resolve technical problems;
- 11.2.6. Ensure timely and reliable system administration procedures, such as backup and/or recovery;
- 11.2.7. Analyze system performance and recommend improvements;
- 11.2.8. Provide expert advice and guidance and mentor other team members;
- 11.2.9. Participate in the implementation and in-service installations by troubleshooting, testing, maintaining and supporting the team through new deployments, upgrades, and patches of MS Windows Operating Systems, MS Networking, other desktop and server applications, Relational Databases (Oracle and MS SQL) and the infrastructure that supports other Intranet/Internet server side software and hardware;
- 11.2.10. Perform analysis of test result data, associated reports and technical research;
- 11.2.11. Manage, schedule and perform, as requested, the migration of all related data;
- 11.2.12. Conduct client service support both face-to-face and on telephone, to analyze trouble call data and produce associated reports;
- 11.2.13. Perform installation, configuration and testing of development environment, and related applications on servers and workstations for proposed solutions;
- 11.2.14. Track major milestones and ensure deliverables are completed on schedule;
- 11.2.15. Notify the TA of discrepancies in planning and submit recommendations to resolve these issues;
- 11.2.16. Maintain communications with the deployment team leaders and keep them notified of any related developments;

11.2.17.Track any decisions made regarding requests for changes and outstanding items with regarded tasks;

11.2.18.Maintain knowledge of all vendor products, features, bugs and enhancement requests to assist all members in client delivery;

11.2.19.Prepare technical briefings and make presentations, as requested by the TA;

11.2.20.Resolve any issues or errors during development and implementation;

11.2.21.Document all solutions; and

11.2.22.Perform other similar tasks described in this category as delegated by the TA.

12. P.10 PROJECT SCHEDULER - LEVEL 2

12.1. SCOPE

The Project Scheduler is required to work collaboratively with other team members to provide service for the following activities:

12.1.1. Developing and supporting project schedules and reports;

12.1.2. Providing and maintaining project breakdown for review and approval; and

12.1.3. Assisting in scheduling co-ordination efforts with project stakeholders.

12.2. TASKS AND DELIVERABLES

The Project Scheduler must perform the following tasks to provide project support:

12.2.1. Break down projects into work breakdown structure (WBS);

12.2.2. Enter data and generate reports identifying scheduling and/or dependency issues;

12.2.3. Determine and implement methods to calculate progress;

12.2.4. Monitor project progress and advise Project Manager of deviations;

12.2.5. Control distribution of documentation to project team;

12.2.6. Provide direction with regards to project planning and scheduling;

12.2.7. Participate in the decision making process to optimize the overall project schedule;

12.2.8. Provide support to members of the project team by monitoring, reviewing and analysis of the schedule and project status during all phases of the project;

12.2.9. Conduct and provide critical path analysis; and

12.2.10. Perform other similar tasks described in this category as delegated by the TA.

13. A.6 PROGRAMMER/SOFTWARE DEVELOPER - LEVEL 2

13.1. SCOPE

The Programmer/Software Developer is required to work collaboratively with other team members to provide service for the following activities:

13.1.1. Software development: software application, program analysis, design, development, coding, testing, debugging, documentation, configuration, implementation, problem diagnostics and resolution; and

13.1.2. Data: Data optimization, data modeling, database design, as well as field mapping from the in-service application to the new one.

13.2. TASKS AND DELIVERABLES

The Programmer/Software Developer must perform the following tasks for in-service and new implementations of solutions:

13.2.1. Gather information on requirements;

13.2.2. Liaise with the DND TA to develop prototypes, models, standards and other DND internal requirements in the technical context of systems, application and security;

13.2.3. Perform Quality Assurance (QA) to eliminate cascading problems;

13.2.4. Proactively provide expert advice, guidance and mentoring to other team members;

13.2.5. Develop and document application, specifications and designs;

13.2.6. Manage, schedule and perform migration of all related data;

13.2.7. Conduct client support service, both face-to-face and by phone, to analyze trouble calls and to produce associated documentation;

13.2.8. Perform testing, installation and configuration of the RDM development environment;

13.2.9. Assist in the planning, organizing, leading and monitoring of technical activities relating to implementation and/or in-service support;

13.2.10. Participate in the implementation and in-service installations by troubleshooting, testing, maintaining and supporting the team through new deployments, upgrades, and patches of MS Windows Operating Systems, MS Networking, other desktop and server applications, Relational Databases (Oracle and MS SQL) and the infrastructure that supports other Intranet/Internet server side software and hardware;

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- 13.2.11. Track major milestones and ensure deliverables are completed on schedule;
 - 13.2.12. Participate and conduct application integration and system testing, scheduling and coordination while adhering to change management methodology in the context of a testing environment;
 - 13.2.13. Keep abreast of all vendor products, patches and fixes; and
 - 13.2.14. Perform other similar tasks described in this category as delegated by the TA.

14. A.11 TESTER - LEVEL 2

14.1. SCOPE

The Tester is required to work collaboratively with other team members to provide service for the following activities:

- 14.1.1. On-going in-service support to the departments users;
- 14.1.2. New initiatives; and
- 14.1.3. Research and information gathering.

14.2. TASKS AND DELIVERABLES

Working collaboratively with other team members in direct support of in-service and new implementations the tester must perform the following tasks:

- 14.2.1. Participate in scheduled meetings with the project to gather information and to provide input/feedback with regards to the testing plan and actual testing;
- 14.2.2. Create a high level test plan document of the assigned application based on the business and functional requirements;
- 14.2.3. Create a detailed test case documents based on the test case document created from the test plan and functional requirements documents;
- 14.2.4. Perform performance, integration, and interoperability testing based on the test case document that was created from the test plan and functional requirements document;
- 14.2.5. Perform regression testing using existing test cases on an assigned application to verify current functionality has not been affected by changes to the application;
- 14.2.6. Complete a test iteration report document for each cycle of testing based on the test cases that are run and the defects that were identified;
- 14.2.7. Complete a test synopsis document based on the iteration reports that were created for each cycle of testing;

14.2.8. Complete a test traceability matrix document based on the functional requirements;

14.2.9. Coordinate and schedule defect review meeting with the project team using the iteration report document as a guide to discuss and make changes if required, to the Coordinate and schedule defect review meeting with the project team using the iteration report document as a guide to discuss and make changes if required, to the outstanding defects;

14.2.10. Provide written comments / reports on results of any testing activity;

14.2.11. Provide a bi-weekly status report outlining work in progress, work completed, and work planned using a template that will be provided by the Technical Authority; and

14.2.12. Perform other similar tasks described in this category as delegated by the TA.

15. B.14 TECHNICAL WRITER - LEVEL 2

15.1. SCOPE

The Technical Writer is required to work collaboratively with other team members to provide service for the following activities:

15.1.1. On-going in-service support to the department RDM users;

15.1.2. New RDM initiatives; and

15.1.3. Maintenance of all existing technical documentation.

15.2. TASKS AND DELIVERABLES

Working collaboratively with other team members in direct support of in-service and new implementations the Technical Writer must perform the following tasks:

15.2.1. Conduct functional reviews/studies of DND/CF processes and activities in relation to information management and technology for the development of Information Management (IM) Requirements for integrated IM/IT products, services and processes;

15.2.2. Work closely with DND/CF TA and Project Managers to develop requirements and software specifications documents as per DND/CF standards and guidelines, known as the Software Requirements Specifications;

15.2.3. Produce project related documents such as Software Design Documents and Privacy Impact Assessments, briefing notes and presentations for the Project Manager as required;

15.2.4. Define, acquire, and document information pertaining to client system requirements in the form of a Technical Requirement Specification (TRS);

- 15.2.5. Produce and/or participate in the development of the user communication plans and training manuals with the assistance of the System Owner (Rep) and the users;
- 15.2.6. Maintain communications with the deployment team leaders and notify them of any related developments;
- 15.2.7. Maintain knowledge of all related vendor products, features, bugs and enhancement requests to assist all members in client delivery;
- 15.2.8. Prepare report on the progress of assigned tasks and deliverables to the appropriate Manager on a weekly basis (minimum), using Microsoft Word (2003 or later);
- 15.2.9. Create and/or maintain a variety of technical documents in standard Microsoft Office format which includes but are not limited to the following deliverables:
- System Architecture Design (SAD);
 - Software Requirements Specifications (SRS);
 - Software Design Document (SDD);
 - Privacy Impact Assessment (PIA);
 - Technical Requirements Specifications (TRS);
 - User communication plan; and
- 15.2.10. Perform other similar tasks described in this category as delegated by the TA.

16. B.1 BUSINESS ANALYST - LEVEL 3

16.1. SCOPE

The Business Analyst is required to work collaboratively with other team members to provide service for the following activities:

- 16.1.1. Identifying the critical improvements required to ensure sustainability, availability, and reliability of the current implementations;
- 16.1.2. Implementation of software and its components and in-service support, analysis and development of business processes;
- 16.1.3. Business process renewal;
- 16.1.4. Business process mapping and gathering;
- 16.1.5. Analysis of existing capabilities; and

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- 16.1.6. Designing performance evaluation criteria, procedures, standards and best practices for the management and optimal use of applications.

16.2. TASKS AND DELIVERABLES

Working collaboratively with other team members in direct support of in-service and new implementations the Business Analyst must perform the following tasks:

- 16.2.1. Provide assistance to the Technical Authority for research and information gathering in preparation for development of short term, medium term and long term implementation plans;
- 16.2.2. Develop and maintain a Change Management / Business Transformation framework to support the implementation plan – templates will be provided by DND/CF;
- 16.2.3. Develop a Change Management and Communication Plan – templates will be provided by DND/CF;
- 16.2.4. Provide written advice and documentation for delivery of a governance model and governance program;
- 16.2.5. Provide written advice to senior management, the Business Management Team (BMT) and other team members, explaining the governance function, governance principles, and advocating most effective governance practices;
- 16.2.6. Manage the development and delivery of integrated change realization, communications and coaching plans, strategies, activities and products that support and sustain change;
- 16.2.7. Liaise with training leads to ensure incorporation of change realization concepts and considerations;
- 16.2.8. Assist team leaders in planning, organizing, leading and monitoring the functional activities of the implementation and in-service support team;
- 16.2.9. Present plans and strategies to various management committees, approval groups, and senior management;
- 16.2.10 Solicit and validate user business requirements;
- 16.2.11. Develop business process renewal and migration Standard Operating Procedures (SOPs) to aid in the smooth transition from a manual system to an automated system;
- 16.2.12. Develop workflow templates based on work process mapping;
- 16.2.13. Draft collaboration strategies and business user procedures for the selected solution;
- 16.2.14. Provide a detailed business process analysis report for each organization preparing for roll-out;

16.2.15. Maintain communications with the deployment team leaders and keep them notified of any related developments;

16.2.16. Provide coaching for senior management on change management concepts and implementation;

16.2.17. Provide a bi-weekly status report outlining work in progress, work completed, and work planned using the template / format provided by the TA; and

16.2.18. Perform other related tasks as directed by the TA.

17. PROGRESS REPORTING

17.1. The Contractor will prepare written monthly progress reports of the work performed. One copy will be provided to the TA at the beginning of the month following the work; a second copy will accompany the monthly invoice. At a minimum, each progress report will document the following information:

17.1.1. All significant activities performed under each task during the period covered by the report;

17.1.2. Status of all action/decision items originating from each task, as well as a list of outstanding activities;

17.1.3. A description of any problems encountered which are likely to require attention by the TA; and

17.1.4. Any recommendations relating to the conduct of the work.

18. LANGUAGE

The language of work and correspondence for this Contract is English or French, Should there be a specific language requirement for a given task, it will be specified in an approved Task Authorization.

APPENDIX A TO ANNEX A

TASKING PROCEDURE

1.0 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 by the DND Procurement Representative. 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 DND Procurement Representative;
- (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); and
- (xv) any other constraints that might affect the completion of the task.

2.0 The Contractor's TA Quotation

2.1 Once a TA Form is received the Contractor must submit to the DND Procurement Representative 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).

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- 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, the Canada will only consider educational programmes that were successfully completed by the resource by the time of bid closing.
 - (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, the 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 DND Procurement Representative 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.
- 3.0 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. 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 Technical 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.
- 4.0 Acceptance**
- 4.1** Once the quotation has been accepted by the DND Procurement Representative, 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 DND Procurement Representative/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.

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TASK AUTHORIZATION (TA) FORM

CONTRACTOR		CONTRACT NUMBER:	
COMMITMENT #		FINANCIAL CODING:	
TASK NUMBER (AMENDMENT):		ISSUE DATE:	RESPONSE REQUIRED BY:

CONTRACTOR'S SIGNATURE	
Name, Title and Signature of Individual Authorized to Sign on behalf of Contractor (type or print)	Signature: _____ Date: _____

7. APPROVAL - SIGNING AUTHORITY	
<p align="center">Signatures (Client)</p> Name, Title and Signature of Individual Authorized to sign: Technical Authority: _____ Date: _____	<p align="center">Signatures (PWGSC)</p> Contracting Authority 1: _____ Date: _____

¹ Signature required for projects valued at \$250,000. or more, GST/HST included.
You are requested 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 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 Appendix. 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:

P.9 PROJECT MANAGER, Level 3					
	REQUIREMENT	CRITERIA	MET	NOT MET	REMARKS
M1	Demonstrated experience working as a Project Manager in an IM/IT environment.	Minimum 10 years			
M2	Demonstrated experience working as a Project Manager in a Records and Document Management environment or in a Collaboration environment.	Minimum of 5 years within the last 10 years			
M3	Demonstrated experience in presenting IM/IT related issues to Senior Management.	Minimum of 5 years within the last 10 years			

B.1 BUSINESS ANALYST , LEVEL 3					
	REQUIREMENT	CRITERIA	MET	NOT MET	REMARKS
M1	Demonstrated experience working as a Business Analyst (BA) in an IM/IT environment.	Minimum of 10 years			
M2	Demonstrated experience working as a BA in a Records and Document Management environment or in a Collaboration environment.	Minimum of 5 years within the last 10 years			
M3	Demonstrated experience in presenting IM/IT related issues to Senior Management.	Minimum of 2 years within the last 7 years			
M4	Demonstrated experience with	Minimum of 2 years within			

B.1 BUSINESS ANALYST , LEVEL 3					
	REQUIREMENT	CRITERIA	MET	NOT MET	REMARKS
	writing IM/IT functional specifications.	the last 7 years			

A.8 SYSTEM ANALYST – Level 2					
	REQUIREMENT	CRITERIA	MET	NOT MET	REMARKS
M1	Demonstrated experience working as a System Analyst in an IM/IT environment.	Minimum of 5 years			
M2	Demonstrated experience working as a System Analyst in a Records and Document Management environment or a Collaboration environment.	Minimum of 2 years within the last 5 years			
M3	Demonstrated experience in application design or systems integration.	Minimum of 2 years within the last 5 years			
M4	Demonstrated experience with prototype development, deployment and evaluation.	Minimum of 2 years within the last 5 years			

I.13 TECHNOLOGY ARCHITECT - Level 3					
	REQUIREMENT	CRITERIA	MET	NOT MET	REMARKS
M1	Demonstrated experience working as a Technology Architect (TA) in an IM/IT environment.	Minimum of 10 years			
M2	Demonstrated experience working as a TA in a Records and Document Management environment or a Collaboration environment.	Minimum of 5 years within the last 10 years			
M3	Demonstrated experience developing technical and application architectures.	Minimum of 5 years			
M4	Demonstrated experience analyzing, evaluating and documenting alternative	Minimum of 5 years			

I.13 TECHNOLOGY ARCHITECT - Level 3					
	REQUIREMENT	CRITERIA	MET	NOT MET	REMARKS
	technology solutions to meet business requirements.				

B.11 IT INSTRUCTOR - Level 3					
	REQUIREMENT	CRITERIA	MET	NOT MET	REMARKS
M1	Demonstrated experience working as an IM/IT Instructor.	Minimum of 10 years			
M2	Demonstrated experience working as an IM/IT Instructor in a Records and Document Management environment or a Collaboration environment.	Minimum of 5 years within the last 10 years			
M3	Demonstrated experience developing and maintaining training materials.	Minimum of 5 years			
M4	Demonstrated experience organizing and coordinating training sessions.	Minimum of 3 years			
M5	Demonstrated experience providing one-on-one coaching as an IM/IT Instructor.	Minimum of 3 years			

SYSTEM ADMINISTRATOR Level 3					
	REQUIREMENT	CRITERIA	MET	NOT MET	REMARKS
M1	Demonstrated experience working as a System Administrator (SA) in an IM/IT environment.	Minimum of 10 years			
M2	Demonstrated experience working as a SA in a Records and Document Management environment or a Collaboration environment.	Minimum of 5 years within the last 10 years			
M3	Demonstrated experience performing installations, configurations and testing on servers and workstations.	Minimum of 5 years			
M4	Demonstrated experience	Minimum of 5			

SYSTEM ADMINISTRATOR Level 3					
	REQUIREMENT	CRITERIA	MET	NOT MET	REMARKS
	conducting client service support (both face-to-face and on the telephone), analyzing trouble call data and producing associated reports.	years			

P.10 PROJECT SCHEDULER, Level 2					
	REQUIREMENT	CRITERIA	MET	NOT MET	REMARKS
M1	Demonstrated experience working as a Project Scheduler (PS) in an IM/IT environment	Minimum of 5 years			
M2	Demonstrated experience working as a PS in Records and Documents Management or Collaboration environment.	Minimum of 2 years within the last 5 years			
M3	Experience working with Microsoft Project 2003 or greater versions.	Minimum 2 years			

A.6 PROGRAMMER/SOFTWARE DEVELOPER, Level 2					
	REQUIREMENT	CRITERIA	MET	NOT MET	REMARKS
M1	Demonstrated experience working as a Programmer/Software Developer in an IM/IT environment	Minimum of 5 years			
M2	Demonstrated experience working as a Programmer/Software Developer working in a Records and Document Management environment or a Collaboration environment.	Minimum of 2 years within the last 5 years			
M3	Demonstrated experience working with either Oracle 10g or SQL 2007 databases or higher versions.	Minimum of 2 years			
M4	Demonstrated experience with	Minimum of 2			

A.6 PROGRAMMER/SOFTWARE DEVELOPER, Level 2					
	REQUIREMENT	CRITERIA	MET	NOT MET	REMARKS
	creating, maintaining and reviewing technical documentation.	years			

A.11 TESTER, LEVEL 2					
	REQUIREMENT	CRITERIA	MET	NOT MET	REMARKS
M1	Demonstrated Experience working as a Tester in an IM/IT environment.	Minimum of 5 years			
M2	Demonstrated experience working as a Tester in a Records and Document Management or Collaboration environment.	Minimum of 2 years within the last 5 years			
M3	Demonstrated experience in the development and coordination of test plans.	Minimum of 2 years			
M4	Demonstrated experience conducting Integration and/or Interoperability testing.	Minimum of 2 years			

B.14 TECHNICAL WRITER, LEVEL 2					
	REQUIREMENT	CRITERIA	MET	NOT MET	REMARKS
M1	Demonstrated experience working as a Technical Writer (TW) in a IM/IT environment.	Minimum of 5 years.			
M2	Demonstrated experience working as a TW in a Records and document Management or Collaboration environment.	Minimum of 2 years within the last 5 years			

3.0 Point Rated Assessment Criteria:

P.9 PROJECT MANAGER, Level 3					
	REQUIREMENT	POINTS	MAX SCORE	SCORE	JUSTIFICATION
R1	Demonstrated additional experience working as a Project Manager in a Records and Document Management or Collaboration environment.	1 point - 5+ to 7 years 2 points - 7+ to 9 years 3 points - 9+ to 11 years 4 points - 11+ years	4		
R2	Demonstrated experience in change management / business transformation principles, methodologies, and strategies.	1 point - 1 to 4 years 2 points - 4+ to 7 years 3 points - 7+ to 10 years 4 points - 10+ years	4		
R3	Demonstrated experience in applying Government policy, legislation or directives.	1 point - 1 to 4 years 2 points - 4+ to 7 years 3 points - 7+ to 10 years 4 points - 10+ years	4		
R4	Demonstrated experience in applying policy, legislation and directives in the area of the management of recorded information.	1 point - 1 to 4 years 2 points - 4+ to 7 years 3 points - 7+ to 10 years 4 points - 10+ years	4		
Minimum Pass Mark: 10			16		

B.1 BUSINESS ANALYST , LEVEL 3					
	REQUIREMENT	POINTS	MAX SCORE	SCORE	JUSTIFICATION
R1	Demonstrated additional experience working as a BA in a Records and Document Management or Collaboration environment.	1 point - 5+ to 7 years 2 points - 7+ to 9 years 3 points - 9+ to 11 years 4 points - 11+ years	4		

B.1 BUSINESS ANALYST , LEVEL 3					
	REQUIREMENT	POINTS	MAX SCORE	SCORE	JUSTIFICATION
R2	Demonstrated experience in applying policy, legislation and directives in the area of the management of recorded information.	1 point - 2+ to 5 years 2 points - 5+ to 8 years 3 points - 8+ to 11 years 4 points - 11+ years	4		
R3	Demonstrated experience leading IM/IT focus groups/workshops.	1 point - 2+ to 5 years 2 points - 5+ to 8 years 3 points - 8+ to 11 years 4 points - 11+ years	4		
R4	Demonstrated experience performing Business Process Analysis.	1 point - 2+ to 5 years 2 points - 5+ to 8 years 3 points - 8+ to 11 years 4 points - 11+ years	4		
R5	Demonstrated experience working in a Government information systems environment.	1 point - 2+ to 5 years 2 points - 5+ to 8 years 3 points - 8+ to 11 years 4 points - 11+ years	4		
Minimum Pass Mark: 12			20		

A.8 SYSTEM ANALYST - Level 2					
	REQUIREMENT	POINTS	MAX SCORE	SCORE	JUSTIFICATION
R1	Demonstrated additional experience working as a SA in a Records and Document Management or Collaboration environment.	1 point - 2+ to 5 years 2 points - 5+ to 6 years 3 points - 6+ to 8 years 4 points - 8+ years	4		
R2	Demonstrated experience working with Web based programming language c# or scripting language PowerShell.	1 point - 1 to 3 years 2 points - 3+ to 5 years 3 points - 5+ to 8 years 4 points - 8+ years	4		
R3	Demonstrated experience working in a Government information systems environment.	1 point - 1 to 3 years 2 points - 3+ to 5 years 3 points - 5+ to 8 years 4 points - 8+ years	4		

A.8 SYSTEM ANALYST - Level 2					
	REQUIREMENT	POINTS	MAX SCORE	SCORE	JUSTIFICATION
R4	Demonstrated experience reviewing, creating and maintaining technical documentation.	1 point - 1 to 3 years 2 points - 3+ to 5 years 3 points - 5+ to 8 years 4 points - 8+ years	4		
R5	Demonstrated experience working with either Oracle 10g or SQL 2007 databases or higher versions.	1 point - 1 to 3 years 2 points - 3+ to 5 years 3 points - 5+ to 8 years 4 points - 8+ years	4		
Minimum Pass Mark: 12			20		

I.13 TECHNOLOGY ARCHITECT - Level 3					
	REQUIREMENT	POINTS	MAX SCORE	SCORE	JUSTIFICATION
R1	Demonstrated additional experience working as a TA in a Records and Document Management or Collaboration environment.	1 point - 5+ to 7 years 2 points - 7+ to 9 years 3 points - 9+ to 11 years 4 points - 11+ years	4		
R2	Demonstrated experience with application analysis, design, development, testing, and capacity planning.	1 point - 1 to 4 years 2 points - 4+ to 7 years 3 points - 7+ to 10 years 4 points - 10+ years	4		
R3	Demonstrated experience working in a Government information systems environment	1 point - 1 to 4 years 2 points - 4+ to 7 years 3 points - 7+ to 10 years 4 points - 10+ years	4		
R4	Demonstrated experience working with either Oracle 10g or SQL 2007 databases or higher versions.	1 point - 1 to 4 years 2 points - 4+ to 7 years 3 points - 7+ to 10 years 4 points - 10+ years	4		
Minimum Pass Mark: 10			16		

B.11 IT INSTRUCTOR - Level 3					
	REQUIREMENT	POINTS	MAX SCORE	SCORE	JUSTIFICATION
R1	Demonstrated additional experience working as an IM/IT Instructor in a Records and Document Management or Collaboration environment.	1 point - 5+ to 7 years 2 points - 7+ to 9 years 3 points - 9+ to 11 years 4 points - 11+ years	4		
R2	Demonstrated experience developing Computer Based Training (CBT) material.	1 point - 1 to 4 years 2 points - 4+ to 7 years 3 points - 7+ to 10 years 4 points - 10+ years	4		
R3	Demonstrated experience providing real-time online training as an IM/IT Instructor.	1 point - 1 to 4 years 2 points - 4+ to 7 years 3 points - 7+ to 10 years 4 points - 10+ years	4		
R4	Demonstrated experience working in a Government information systems environment.	1 point - 1 to 4 years 2 points - 4+ to 7 years 3 points - 7+ to 10 years 4 points - 10+ years	4		
Minimum Pass Mark: 10			16		

SYSTEM ADMINISTRATOR Level 3					
	REQUIREMENT	POINTS	MAX SCORE	SCORE	JUSTIFICATION
R1	Demonstrated additional experience working as a SA in a Records and Document Management or Collaboration environment.	1 point - 5+ to 7 years 2 points - 7+ to 9 years 3 points - 9+ to 11 years 4 points - 11+ years	4		
R2	Demonstrated experience working with Web based programming language c# or scripting language PowerShell.	1 point - 1 to 4 years 2 points - 4+ to 7 years 3 points - 7+ to 10 years 4 points - 10+ years	4		

SYSTEM ADMINISTRATOR Level 3					
	REQUIREMENT	POINTS	MAX SCORE	SCORE	JUSTIFICATION
R3	Demonstrated experience working with either Oracle 10g or SQL 2007 databases or higher versions.	1 point - 1 to 4 years 2 points - 4+ to 7 years 3 points - 7+ to 10 years 4 points - 10+ years	4		
R4	Demonstrated experience working in a Government information systems environment.	1 point - 1 to 4 years 2 points - 4+ to 7 years 3 points - 7+ to 10 years 4 points - 10+ years	4		
Minimum Pass Mark: 10			16		

P.10 PROJECT SCHEDULER, Level 2					
	REQUIREMENT	POINTS	MAX SCORE	SCORE	JUSTIFICATION
R1	Demonstrated additional experience working as a PS in Records and Documents Management or Collaboration environment.	1 point - 2+ to 5 years 2 points - 5+ to 6 years 3 points - 6+ to 8 years 4 points - 8+ years	4		
R2	Demonstrated experience working in a Government information systems environment.	1 point - 1 to 3 years 2 points - 3+ to 5 years 3 points - 5+ to 8 years 4 points - 8+ years	4		
Minimum Pass Mark: 5			8		

A.6 PROGRAMMER/SOFTWARE DEVELOPER, Level 2					
	REQUIREMENT	POINTS	MAX SCORE	SCORE	JUSTIFICATION
R1	Demonstrated additional experience as a Programmer/Software Developer working in a Records and Document Management or Collaboration environment.	1 point - 2+ to 5 years 2 points - 5+ to 6 years 3 points - 6+ to 8 years 4 points - 8+ years	4		

A.6 PROGRAMMER/SOFTWARE DEVELOPER, Level 2					
	REQUIREMENT	POINTS	MAX SCORE	SCORE	JUSTIFICATION
R2	Demonstrated experience working with Web based programming language c# or scripting language PowerShell.	1 point - 1 to 3 years 2 points - 3+ to 5 years 3 points - 5+ to 8 years 4 points - 8+ years	4		
R3	Demonstrated experience working in a Government information systems environment.	1 point - 1 to 3 years 2 points - 3+ to 5 years 3 points - 5+ to 8 years 4 points - 8+ years	4		
Minimum Pass Mark: 7			12		

A.11 TESTER, LEVEL 2					
	REQUIREMENT	POINTS	MAX SCORE	SCORE	JUSTIFICATION
R1	Demonstrated additional experience working as a Tester in a Records and Document Management or Collaboration environment.	1 point - 2+ to 5 years 2 points - 5+ to 8 years 3 points - 8+ to 11 years 4 points - 11+ years	4		
R2	Demonstrated experience in conducting Performance Testing.	1 point - 2+ to 5 years 2 points - 5+ to 8 years 3 points - 8+ to 11 years 4 points - 11+ years	4		
R3	Demonstrated experience working in a Government information systems environment.	1 point - 2+ to 5 years 2 points - 5+ to 8 years 3 points - 8+ to 11 years 4 points - 11+ years	4		
Minimum Pass Mark: 7			12		

B.14 TECHNICAL WRITER, LEVEL 2					
	REQUIREMENT	POINTS	MAX SCORE	SCORE	JUSTIFICATION
R1	Demonstrated additional experience working as a TW in a Records and Document	1 point - 2+ to 5 years 2 points - 5+ to 8 years 3 points - 8+ to 11 years 4 points - 11+ years	4		

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B.14 TECHNICAL WRITER, LEVEL 2					
	REQUIREMENT	POINTS	MAX SCORE	SCORE	JUSTIFICATION
	Management or Collaboration environment.				
R2	Demonstrated experience within a Government information systems environment.	1 point - 2+ to 5 years 2 points - 5+ to 8 years 3 points - 8+ to 11 years 4 points - 11+ years	4		
Minimum Pass Mark: 5			8		

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3. CERTIFICATION OF LANGUAGE - **[English or Bilingual or French]**

The Contractor certifies that the proposed resources in response to this Task Authorization are

[Option 1 - Unilingual English] fluent in English. The individual proposed must be able to communicate orally and in writing without any assistance and with minimal errors.

[Option 2 - Bilingual] fluent in both official languages of Canada (French and English). The individual proposed must be able to communicate orally and in writing without any assistance and with minimal errors.

[Option 3 - Unilingual French] fluent in French. The individual proposed must be able to communicate orally and in writing without any assistance and with minimal errors.

Print name of authorized individual & sign above

Date

ANNEX B**BASIS OF PAYMENT**

In respect of the "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.

	Initial contract Period (Year 1)					
	(B)	(C*)	(D)	(E)	(F*)	(G)
Category of Personnel	Level of Expertise	Estimated Number of Days	SA Per Diem Rate	% Discount	Firm Per Diem Rate	Total Cost [CxF]
A.6 Programmer/Software Developer	2	400				
A.8 System Analyst	2	1200				
A.11 Tester	2	400				
B.1 Business Analyst	3	1200				
B.11 IT Instructor	3	1200				
B.14 Technical Writer	2	200				
I.9 System Administrator	3	1200				
I.11 Technology Architect	3	600				
P.9 Project Manager	3	400				
P.10 Project Scheduler	2	200				
Total Estimated Contract Period (Yr1) Cost:						\$ <TBD>

	Initial contract Period (Year 2)					
	(B)	(C*)	(D)	(E)	(F*)	(G)
Category of Personnel	Level of Expertise	Estimated Number of Days	SA Per Diem Rate	% Discount	Firm Per Diem Rate	Total Cost [CxF]
A.6 Programmer/Software Developer	2	400				
A.8 System Analyst	2	1200				
A.11 Tester	2	400				
B.1 Business Analyst	3	1200				
B.11 IT Instructor	3	1200				

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B.14 Technical Writer	2	200				
I.9 System Administrator	3	1200				
I.11 Technology Architect	3	600				
P.9 Project Manager	3	400				
P.10 Project Scheduler	2	200				
Total Estimated Contract Period (Yr2) Cost:						\$ <TBD>

Category of Personnel	(B) Level of Expertise	(C*) Estimated Number of Days	Initial contract Period (Year 3)			
			(D) SA Per Diem Rate	(E) % Discount	(F*) Firm Per Diem Rate	(G) Total Cost [CxF]
A.6 Programmer/Software Developer	2	400				
A.8 System Analyst	2	1200				
A.11 Tester	2	400				
B.1 Business Analyst	3	1200				
B.11 IT Instructor	3	1200				
B.14 Technical Writer	2	200				
I.9 System Administrator	3	1200				
I.11 Technology Architect	3	600				
P.9 Project Manager	3	400				
P.10 Project Scheduler	2	200				
Total Estimated Contract Period (Yr3) Cost:						\$ <TBD>

Category of Personnel	(B) Level of Expertise	(C*) Estimated Number of Days	Option Period One (Year 4)			
			(D) SA Per Diem Rate	(E) % Discount	(F*) Firm Per Diem Rate	(G) Total Cost [CxF]
A.6 Programmer/Software Developer	2	400				
A.8 System Analyst	2	1200				
A.11 Tester	2	400				
B.1 Business Analyst	3	1200				

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B.11 IT Instructor	3	1200				
B.14 Technical Writer	2	200				
I.9 System Administrator	3	1200				
I.11 Technology Architect	3	600				
P.9 Project Manager	3	400				
P.10 Project Scheduler	2	200				
Total Estimated Option Period One (Yr4) Cost:						\$ <TBD>

Category of Personnel	(B) Level of Expertise	(C*) Estimated Number of Days	Option Period Two (Year 5)			
			(D) SA Per Diem Rate	(E) % Discount	(F*) Firm Per Diem Rate	(G) Total Cost [CxF]
A.6 Programmer/Software Developer	2	400				
A.8 System Analyst	2	1200				
A.11 Tester	2	400				
B.1 Business Analyst	3	1200				
B.11 IT Instructor	3	1200				
B.14 Technical Writer	2	200				
I.9 System Administrator	3	1200				
I.11 Technology Architect	3	600				
P.9 Project Manager	3	400				
P.10 Project Scheduler	2	200				
Total Estimated Option Period Two (Yr5) Cost:						\$ <TBD>

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ANNEX C

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

ANNEX D EVALUATION CRITERIA

Definitions:

For the collaborative environment, experience with one of the following Enterprise Collaboration Software products will be accepted:

1. Microsoft Share Point 2010
2. Microsoft Office SharePoint Server 2007 (MOSS 2007)
3. Windows SharePoint Services (WSS)

For the Records and Document Management (RDM) environment, experience with one of the following Open Text Enterprise Content Management products will be accepted:

1. OpenText eDocs
2. OpenText Content Server

Categories Required:

1. P.9 Project Manager Level 3
2. B.1 Business Analyst Level 3
3. A.8 System Analyst, Level 2
4. I.13 Technology Architect Level 3
5. B.11 IT Instructor Level 3
6. I.9 System Administrator Level 3
7. P.10 Project Scheduler, Level 2
8. A.6 Programmer/Software Developer Level 2
9. A.11 Tester, Level 2
10. B.14 Technical Writer, Level 2

Note: The bidder must provide one up-to-date résumé for each category required above, and must not propose the same person more than once in response to this solicitation.

EVALUATION CRITERIA - BIDDER

	REQUIREMENT	MET	NOT MET	REMARKS
M1	<p>The Bidder must provide two references for two individual IM/IT contracts (one reference for each contract) managed within the last five years. The references must include the name of the organization, the contract number, a short description of the services provided, the name, title, e-mail address and telephone number of the organization's responsible manager, as well as the duration and dollar value of each contract. It is the bidder's responsibility to ensure that any information divulged has the permission of the references provided. For each contract identified:</p> <p style="padding-left: 40px;">The value must be at least of \$5M;</p> <p style="padding-left: 40px;">The duration must be at least three years;</p> <p style="padding-left: 40px;">Services must have been provided using Task Authorizations;</p> <p style="padding-left: 40px;">The bidder must have provided at least 10 resources simultaneously for a period of at least 12 consecutive months; and</p> <p style="padding-left: 40px;">The bidder must have acted as the Prime Contractor. Identifying contracts from the bidder's organization (i.e. internal or subcontractor contracts) will not be considered.</p>			

EVALUATION CRITERIA - RESOURCES

P.9 PROJECT MANAGER, Level 3					
	REQUIREMENT	CRITERIA	MET	NOT MET	REMARKS
M1	Demonstrated experience working as a Project Manager in an IM/IT environment.	Minimum 10 years			
M2	Demonstrated experience working as a Project Manager in a Records and Document Management environment or in a Collaboration environment.	Minimum of 5 years within the last 10 years			
M3	Demonstrated experience in presenting IM/IT related issues to Senior Management.	Minimum of 5 years within the last 10 years			

P.9 PROJECT MANAGER, Level 3					
	REQUIREMENT	POINTS	MAX SCORE	SCORE	JUSTIFICATION
R1	Demonstrated additional experience working as a Project Manager in a Records and Document Management or Collaboration environment.	1 point - 5+ to 7 years 2 points - 7+ to 9 years 3 points - 9+ to 11 years 4 points - 11+ years	4		
R2	Demonstrated experience in change management / business transformation principles, methodologies, and strategies.	1 point - 1 to 4 years 2 points - 4+ to 7 years 3 points - 7+ to 10 years 4 points - 10+ years	4		
R3	Demonstrated experience in applying Government policy, legislation or directives.	1 point - 1 to 4 years 2 points - 4+ to 7 years 3 points - 7+ to 10 years 4 points - 10+ years	4		

P.9 PROJECT MANAGER, Level 3					
	REQUIREMENT	POINTS	MAX SCORE	SCORE	JUSTIFICATION
R4	Demonstrated experience in applying policy, legislation and directives in the area of the management of recorded information.	1 point - 1 to 4 years 2 points - 4+ to 7 years 3 points - 7+ to 10 years 4 points - 10+ years	4		
Minimum Pass Mark: 10			16		

B.1 BUSINESS ANALYST , LEVEL 3					
	REQUIREMENT	CRITERIA	MET	NOT MET	REMARKS
M1	Demonstrated experience working as a Business Analyst (BA) in an IM/IT environment.	Minimum of 10 years			
M2	Demonstrated experience working as a BA in a Records and Document Management environment or in a Collaboration environment.	Minimum of 5 years within the last 10 years			
M3	Demonstrated experience in presenting IM/IT related issues to Senior Management.	Minimum of 2 years within the last 7 years			
M4	Demonstrated experience with writing IM/IT functional specifications.	Minimum of 2 years within the last 7 years			

B.1 BUSINESS ANALYST , LEVEL 3					
	REQUIREMENT	POINTS	MAX SCORE	SCORE	JUSTIFICATION
R1	Demonstrated additional experience working as a BA in a Records and Document Management or Collaboration environment.	1 point - 5+ to 7 years 2 points - 7+ to 9 years 3 points - 9+ to 11 years 4 points - 11+ years	4		
R2	Demonstrated experience in applying policy, legislation and directives in the area	1 point - 2+ to 5 years 2 points - 5+ to 8 years 3 points - 8+ to 11 years 4 points - 11+ years	4		

B.1 BUSINESS ANALYST , LEVEL 3					
	REQUIREMENT	POINTS	MAX SCORE	SCORE	JUSTIFICATION
	of the management of recorded information.				
R3	Demonstrated experience leading IM/IT focus groups/workshops.	1 point - 2+ to 5 years 2 points - 5+ to 8 years 3 points - 8+ to 11 years 4 points - 11+ years	4		
R4	Demonstrated experience performing Business Process Analysis.	1 point - 2+ to 5 years 2 points - 5+ to 8 years 3 points - 8+ to 11 years 4 points - 11+ years	4		
R5	Demonstrated experience working in a Government information systems environment.	1 point - 2+ to 5 years 2 points - 5+ to 8 years 3 points - 8+ to 11 years 4 points - 11+ years	4		
Minimum Pass Mark: 12			20		

A.8 SYSTEM ANALYST – Level 2					
	REQUIREMENT	CRITERIA	MET	NOT MET	REMARKS
M1	Demonstrated experience working as a System Analyst in an IM/IT environment.	Minimum of 5 years			
M2	Demonstrated experience working as a System Analyst in a Records and Document Management environment or a Collaboration environment.	Minimum of 2 years within the last 5 years			
M3	Demonstrated experience in application design or systems integration.	Minimum of 2 years within the last 5 years			
M4	Demonstrated experience with prototype development, deployment and evaluation.	Minimum of 2 years within the last 5 years			

A.8 SYSTEM ANALYST - Level 2					
	REQUIREMENT	POINTS	MAX SCORE	SCORE	JUSTIFICATION
R1	Demonstrated additional experience working as a SA in a Records and Document Management or Collaboration environment.	1 point - 2+ to 5 years 2 points - 5+ to 6 years 3 points - 6+ to 8 years 4 points - 8+ years	4		
R2	Demonstrated experience working with Web based programming language c# or scripting language PowerShell.	1 point - 1 to 3 years 2 points - 3+ to 5 years 3 points - 5+ to 8 years 4 points - 8+ years	4		
R3	Demonstrated experience working in a Government information systems environment.	1 point - 1 to 3 years 2 points - 3+ to 5 years 3 points - 5+ to 8 years 4 points - 8+ years	4		
R4	Demonstrated experience reviewing, creating and maintaining technical documentation.	1 point - 1 to 3 years 2 points - 3+ to 5 years 3 points - 5+ to 8 years 4 points - 8+ years	4		
R5	Demonstrated experience working with either Oracle 10g or SQL 2007 databases or higher versions.	1 point - 1 to 3 years 2 points - 3+ to 5 years 3 points - 5+ to 8 years 4 points - 8+ years	4		
Minimum Pass Mark: 12			20		

I.13 TECHNOLOGY ARCHITECT - Level 3					
	REQUIREMENT	CRITERIA	MET	NOT MET	REMARKS
M1	Demonstrated experience working as a Technology Architect (TA) in an IM/IT environment.	Minimum of 10 years			
M2	Demonstrated experience working as a TA in a Records and Document Management environment or a Collaboration environment.	Minimum of 5 years within the last 10 years			

I.13 TECHNOLOGY ARCHITECT - Level 3					
	REQUIREMENT	CRITERIA	MET	NOT MET	REMARKS
M3	Demonstrated experience developing technical and application architectures.	Minimum of 5 years			
M4	Demonstrated experience analyzing, evaluating and documenting alternative technology solutions to meet business requirements.	Minimum of 5 years			

I.13 TECHNOLOGY ARCHITECT - Level 3					
	REQUIREMENT	POINTS	MAX SCORE	SCORE	JUSTIFICATION
R1	Demonstrated additional experience working as a TA in a Records and Document Management or Collaboration environment.	1 point - 5+ to 7 years 2 points - 7+ to 9 years 3 points - 9+ to 11 years 4 points - 11+ years	4		
R2	Demonstrated experience with application analysis, design, development, testing, and capacity planning.	1 point - 1 to 4 years 2 points - 4+ to 7 years 3 points - 7+ to 10 years 4 points - 10+ years	4		
R3	Demonstrated experience working in a Government information systems environment	1 point - 1 to 4 years 2 points - 4+ to 7 years 3 points - 7+ to 10 years 4 points - 10+ years	4		
R4	Demonstrated experience working with either Oracle 10g or SQL 2007 databases or higher versions.	1 point - 1 to 4 years 2 points - 4+ to 7 years 3 points - 7+ to 10 years 4 points - 10+ years	4		
Minimum Pass Mark: 10			16		

B.11 IT INSTRUCTOR - Level 3					
	REQUIREMENT	CRITERIA	MET	NOT MET	REMARKS
M1	Demonstrated experience working as an IM/IT Instructor.	Minimum of 10 years			
M2	Demonstrated experience working as an IM/IT Instructor in a Records and Document Management environment or a Collaboration environment.	Minimum of 5 years within the last 10 years			
M3	Demonstrated experience developing and maintaining training materials.	Minimum of 5 years			
M4	Demonstrated experience organizing and coordinating training sessions.	Minimum of 3 years			
M5	Demonstrated experience providing one-on-one coaching as an IM/IT Instructor.	Minimum of 3 years			

B.11 IT INSTRUCTOR - Level 3					
	REQUIREMENT	POINTS	MAX SCORE	SCORE	JUSTIFICATION
R1	Demonstrated additional experience working as an IM/IT Instructor in a Records and Document Management or Collaboration environment.	1 point - 5+ to 7 years 2 points - 7+ to 9 years 3 points - 9+ to 11 years 4 points - 11+ years	4		
R2	Demonstrated experience developing Computer Based Training (CBT) material.	1 point - 1 to 4 years 2 points - 4+ to 7 years 3 points - 7+ to 10 years 4 points - 10+ years	4		
R3	Demonstrated experience providing real-time online training as an IM/IT Instructor.	1 point - 1 to 4 years 2 points - 4+ to 7 years 3 points - 7+ to 10 years 4 points - 10+ years	4		
R4	Demonstrated experience working in a Government information systems environment.	1 point - 1 to 4 years 2 points - 4+ to 7 years 3 points - 7+ to 10 years 4 points - 10+ years	4		
Minimum Pass Mark: 10			16		

SYSTEM ADMINISTRATOR Level 3					
	REQUIREMENT	CRITERIA	MET	NOT MET	REMARKS
M1	Demonstrated experience working as a System Administrator (SA) in an IM/IT environment.	Minimum of 10 years			
M2	Demonstrated experience working as a SA in a Records and Document Management environment or a Collaboration environment.	Minimum of 5 years within the last 10 years			
M3	Demonstrated experience performing installations, configurations and testing on servers and workstations.	Minimum of 5 years			
M4	Demonstrated experience conducting client service support (both face-to-face and on the telephone), analyzing trouble call data and producing associated reports.	Minimum of 5 years			

SYSTEM ADMINISTRATOR Level 3					
	REQUIREMENT	POINTS	MAX SCORE	SCORE	JUSTIFICATION
R1	Demonstrated additional experience working as a SA in a Records and Document Management or Collaboration environment.	1 point - 5+ to 7 years 2 points - 7+ to 9 years 3 points - 9+ to 11 years 4 points - 11+ years	4		
R2	Demonstrated experience working with Web based programming language c# or scripting language PowerShell.	1 point - 1 to 4 years 2 points - 4+ to 7 years 3 points - 7+ to 10 years 4 points - 10+ years	4		
R3	Demonstrated experience working with either Oracle 10g or SQL 2007 databases or higher versions.	1 point - 1 to 4 years 2 points - 4+ to 7 years 3 points - 7+ to 10 years 4 points - 10+ years	4		

SYSTEM ADMINISTRATOR Level 3					
	REQUIREMENT	POINTS	MAX SCORE	SCORE	JUSTIFICATION
R4	Demonstrated experience working in a Government information systems environment.	1 point - 1 to 4 years 2 points - 4+ to 7 years 3 points - 7+ to 10 years 4 points - 10+ years	4		
Minimum Pass Mark: 10			16		

P.10 PROJECT SCHEDULER, Level 2					
	REQUIREMENT	CRITERIA	MET	NOT MET	REMARKS
M1	Demonstrated experience working as a Project Scheduler (PS) In anIM/IT environment.	Minimum of 5 years			
M2	Demonstrated experience working as a PS in Records and Documents Management or Collaboration environment.	Minimum of 2 years within the last 5 years			
M3	Experience working with Microsoft Project 2003 or greater versions.	Minimum 2 years			

P.10 PROJECT SCHEDULER, Level 2					
	REQUIREMENT	POINTS	MAX SCORE	SCORE	JUSTIFICATION
R1	Demonstrated additional experience working as a PS in Records and Documents Management or Collaboration environment.	1 point - 2+ to 5 years 2 points - 5+ to 6 years 3 points - 6+ to 8 years 4 points - 8+ years	4		
R2	Demonstrated experience working in a Government information systems environment.	1 point - 1 to 3 years 2 points - 3+ to 5 years 3 points - 5+ to 8 years 4 points - 8+ years	4		
Minimum Pass Mark: 5			8		

A.6 PROGRAMMER/SOFTWARE DEVELOPER, Level 2					
	REQUIREMENT	CRITERIA	MET	NOT MET	REMARKS
M1	Demonstrated experience working as a Programmer/Software Developer In anIM/IT environment.	Minimum of 5 years			
M2	Demonstrated experience working as a Programmer/Software Developer working in a Records and Document Management environment or a Collaboration environment.	Minimum of 2 years within the last 5 years			
M3	Demonstrated experience working with either Oracle 10g or SQL 2007 databases or higher versions.	Minimum of 2 years			
M4	Demonstrated experience with creating, maintaining and reviewing technical documentation.	Minimum of 2 years			

A.6 PROGRAMMER/SOFTWARE DEVELOPER, Level 2					
	REQUIREMENT	POINTS	MAX SCORE	SCORE	JUSTIFICATION
R1	Demonstrated additional experience as a Programmer/Software Developer working in a Records and Document Management or Collaboration environment.	1 point - 2+ to 5 years 2 points - 5+ to 6 years 3 points - 6+ to 8 years 4 points - 8+ years	4		
R2	Demonstrated experience working with Web based programming language c# or scripting language PowerShell.	1 point - 1 to 3 years 2 points - 3+ to 5 years 3 points - 5+ to 8 years 4 points - 8+ years	4		

A.6 PROGRAMMER/SOFTWARE DEVELOPER, Level 2					
	REQUIREMENT	POINTS	MAX SCORE	SCORE	JUSTIFICATION
R3	Demonstrated experience working in a Government information systems environment.	1 point - 1 to 3 years 2 points - 3+ to 5 years 3 points - 5+ to 8 years 4 points - 8+ years	4		
Minimum Pass Mark: 7			12		

A.11 TESTER, LEVEL 2					
	REQUIREMENT	CRITERIA	MET	NOT MET	REMARKS
M1	Demonstrated Experience working as a Tester in an IM/IT environment.	Minimum of 5 years			
M2	Demonstrated experience working as a Tester in a Records and Document Management or Collaboration environment.	Minimum of 2 years within the last 5 years			
M3	Demonstrated experience in the development and coordination of test plans.	Minimum of 2 years			
M4	Demonstrated experience conducting Integration and/or Interoperability testing.	Minimum of 2 years			

A.11 TESTER, LEVEL 2					
	REQUIREMENT	POINTS	MAX SCORE	SCORE	JUSTIFICATION
R1	Demonstrated additional experience working as a Tester in a Records and Document Management or Collaboration environment.	1 point - 2+ to 5 years 2 points - 5+ to 8 years 3 points - 8+ to 11 years 4 points - 11+ years	4		
R2	Demonstrated experience in conducting Performance Testing.	1 point - 2+ to 5 years 2 points - 5+ to 8 years 3 points - 8+ to 11 years 4 points - 11+ years	4		

A.11 TESTER, LEVEL 2					
	REQUIREMENT	POINTS	MAX SCORE	SCORE	JUSTIFICATION
R3	Demonstrated experience working in a Government information systems environment.	1 point - 2+ to 5 years 2 points - 5+ to 8 years 3 points - 8+ to 11 years 4 points - 11+ years	4		
Minimum Pass Mark: 7			12		

B.14 TECHNICAL WRITER, LEVEL 2					
	REQUIREMENT	CRITERIA	MET	NOT MET	REMARKS
M1	Demonstrated experience working as a Technical Writer (TW) in an IM/IT environment.	Minimum of 5 years.			
M2	Demonstrated experience working as a TW in a Records and Document Management or Collaboration environment.	Minimum of 2 years within the last 5 years			

B.14 TECHNICAL WRITER, LEVEL 2					
	REQUIREMENT	POINTS	MAX SCORE	SCORE	JUSTIFICATION
R1	Demonstrated additional experience working as a TW in a Records and Document Management or Collaboration environment.	1 point - 2+ to 5 years 2 points - 5+ to 8 years 3 points - 8+ to 11 years 4 points - 11+ years	4		
R2	Demonstrated experience within a Government information systems environment.	1 point - 2+ to 5 years 2 points - 5+ to 8 years 3 points - 8+ to 11 years 4 points - 11+ years	4		
Minimum Pass Mark: 5			8		

Solicitation No. - N° de l'invitation

W6369-10P5BZ/A

Amd. No. - N° de la modif.

File No. - N° du dossier

608zmW6369-10P5BZ

Buyer ID - Id de l'acheteur

608zm

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

W6369-10P5BZ

CCC No./N° CCC - FMS No/ N° VME

ANNEX E BID SUBMISSION FORM

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 Not Applicable - Intentionally deleted from this requirement.	

<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> <table border="1"> <tr> <td data-bbox="821 407 1300 562">(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;</td> <td data-bbox="1307 407 1417 562"></td> </tr> <tr> <td data-bbox="821 571 1300 674">(b) is not subject to FCP-EE, because it is a regulated employer under the <i>Employment Equity Act</i>;</td> <td data-bbox="1307 571 1417 674"></td> </tr> <tr> <td data-bbox="821 682 1300 930">(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</td> <td data-bbox="1307 682 1417 930"></td> </tr> <tr> <td data-bbox="821 938 1300 1079">(d) is subject to FCP-EE, and has a valid certification number as follows: _____ (and has not been declared an Ineligible Contractor by HRSD).</td> <td data-bbox="1307 938 1417 1079"></td> </tr> </table>	(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;		(b) is not subject to FCP-EE, because it is a regulated employer under the <i>Employment Equity Act</i> ;		(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		(d) is subject to FCP-EE, and has a valid certification number as follows: _____ (and has not been declared an Ineligible Contractor by HRSD).	
(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;									
(b) is not subject to FCP-EE, because it is a regulated employer under the <i>Employment Equity Act</i> ;									
(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									
(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>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>Security Clearance Level of Bidder</p> <p><i>[include both the level and the date it was granted]</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> <ol style="list-style-type: none"> 1. The Bidder considers itself and its products able to meet all the mandatory requirements described in the bid solicitation; 2. This bid is valid for the period requested in the bid solicitation; 3. All the information provided in the bid is complete, true and accurate; and 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>Signature of Authorized Representative of Bidder</p>									



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 Department of National Defence		2. Branch or Directorate / Direction générale ou Direction Information Management	
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/Supply Arrangement 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 type="checkbox"/> No Non	<input checked="" type="checkbox"/> Yes Oui
5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques?		<input checked="" type="checkbox"/> No Non	<input type="checkbox"/> Yes Oui
6. Indicate the type of access required - Indiquer le type d'accès requis			
6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? (Specify the level of access using the chart in Question 7. c) (Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c)		<input type="checkbox"/> No Non	<input checked="" type="checkbox"/> Yes Oui
6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. Le fournisseur et ses employés (p.ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé.		<input checked="" type="checkbox"/> No Non	<input type="checkbox"/> Yes Oui
6. c) Is this a commercial courier or delivery requirement with no overnight storage? S'agit-il d'un contrat de messagerie ou de livraison commerciales 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"/>
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 type="checkbox"/>		NATO CONFIDENTIAL NATO CONFIDENTIEL <input type="checkbox"/>	PROTECTED C PROTÉGÉ C <input type="checkbox"/>
CONFIDENTIAL CONFIDENTIEL <input checked="" 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?
If Yes, indicate the level of sensitivity:
Dans l'affirmative, indiquer le niveau de sensibilité :

No / Non Yes / Oui

9. Will the supplier require access to extremely sensitive INFOSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate?
Short Title(s) of material / Titre(s) abrégé(s) du matériel :
Document Number / Numéro du document :

No / Non Yes / Oui

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

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

<input 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?
If Yes, will unscreened personnel be escorted?
Dans l'affirmative, le personnel en question sera-t-il escorté?

No / Non Yes / Oui
 No / Non Yes / Oui

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

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

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

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

PRODUCTION

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

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

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

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



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 / Confidentiel	Secret	Top Secret / Très Secret	
											A	B	C				
Information / Assets / Renseignements / Biens	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Production	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IT Media / Support TI	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IT Link / Lien électronique	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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.
12. b) Will the document 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 indiquer qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).



Contract Number / Numéro du contrat EN578-055605-J
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) Colonel C. Noble	Title - Titre Director IM Comptroller and Business Management	Signature
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Telephone no. - N° de téléphone (613) 945-7018	Facsimile - Télécopieur (613) 995-2189	E-mail address - Adresse courriel Christina.Noble@forces.gc.ca	Date 2008-09-09
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14. Organization Security Authority / Responsable de la sécurité de l'organisme

Name (print) - Nom (en lettres moulées) Robert Wattie - Senior Security Analyst	Title - Titre Senior Security Analyst	Signature
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Telephone no. - N° de téléphone Tel: (613) 949-1032 / Fax: (613) 949-1069	Facsimile - Télécopieur E-Mail: wattie.rc@forces.gc.ca	E-mail address - Adresse courriel	Date OCT 17 2008
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15. Are there additional instructions (e.g. Security Guide, Security Classification Guide) attached? / Des instructions supplémentaires (p. ex. Guide de sécurité, Guide de classification de la sécurité) sont-elles jointes? No / Non Yes / Oui

16. Procurement Officer / Agent d'approvisionnement

Name (print) - Nom (en lettres moulées)	Title - Titre	Signature
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Telephone no. - N° de téléphone	Facsimile - Télécopieur	E-mail address - Adresse courriel	Date
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17. Contracting Security Authority / Autorisé contractante en matière de sécurité

Name (print) - Nom (en lettres moulées) SHERRY CAMPBELL	Title - Titre CONTRACT SECURITY ANALYST	Signature
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Telephone no. - N° de téléphone 613-948-1646	Facsimile - Télécopieur 613-954-4171	E-mail address - Adresse courriel sherry-campbell@pwgsc.gc.ca	Date NOVEMBER 13, 2008
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Security Classification / Classification de sécurité UNCLASSIFIED
