

**RETURN BIDS TO:**  
**RETOURNER LES SOUMISSIONS À:**  
**Bid Receiving - PWGSC / Réception des**  
**soumissions - TPSGC**  
**Place du Portage, Phase III**  
**Core OA1\Noyau OA**  
**11 Laurier St.\11, rue Laurier**  
**Gatineau**  
**K1A 0S5**  
**Bid Fax: (613) 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**

<b>Title - Sujet</b> TBIPS - MPMCT PROJECT		
<b>Solicitation No. - N° de l'invitation</b> W8474-14MP22/A		<b>Date</b> 2013-08-02
<b>Client Reference No. - N° de référence du client</b> W8474-14MP22		
<b>GETS Reference No. - N° de référence de SEAG</b> PW-\$\$XE-670-26308		
<b>File No. - N° de dossier</b> 670xe.W8474-14MP22	<b>CCC No./N° CCC - FMS No./N° VME</b>	
<b>Solicitation Closes - L'invitation prend fin</b> <b>at - à 02:00 PM</b> <b>on - le 2013-08-27</b>		<b>Time Zone</b> <b>Fuseau horaire</b> Eastern Daylight Saving Time EDT
<b>F.O.B. - F.A.B.</b> <b>Plant-Usine:</b> <input type="checkbox"/> <b>Destination:</b> <input type="checkbox"/> <b>Other-Autre:</b> <input type="checkbox"/>		
<b>Address Enquiries to: - Adresser toutes questions à:</b> Chapple(XE Div.), Jeremy		<b>Buyer Id - Id de l'acheteur</b> 670xe
<b>Telephone No. - N° de téléphone</b> (819) 956-1004 ( )		<b>FAX No. - N° de FAX</b> (819) 956-8303
<b>Destination - of Goods, Services, and Construction:</b> <b>Destination - des biens, services et construction:</b> <div>Specified Herein Précisé dans les présentes</div>		

**Instructions: See Herein**

**Instructions: Voir aux présentes**

**Vendor/Firm Name and Address**  
**Raison sociale et adresse du**  
**fournisseur/de l'entrepreneur**

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

**Issuing Office - Bureau de distribution**

Business Transformation and Systems Integration  
Service/Division de transformation des opérations et  
d'intégrat  
Special Procurement Initiative Dir  
Dir. des initiatives spéciales  
d'approvisionnement  
11 Laurier, Place du Portage III  
12C1  
Gatineau  
Québec

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**BID SOLICITATION**

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

**MULTIPLE RESOURCE CATEGORIES AND LEVELS**

**FOR**

**THE DEPARTMENT OF NATIONAL DEFENCE**

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Solicitation No. - N° de l'invitation

W8474-14MP22/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur

670xe

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

W8474-14MP22

File No. - N° du dossier

670xeW8474-14MP22

CCC No./N° CCC - FMS No/ N° VME

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**List of Annexes to the Resulting Contract:**

Annex A            Statement of Work

Appendix A to Annex A - Tasking Assessment Procedure

Appendix B to Annex A - Task Authorization (TA) Form (DND 626)

Appendix C to Annex A - Resources Assessment Criteria and Response Table

Appendix D to Annex A - Certifications at the TA stage

Annex B            Basis of Payment

Annex C            Security Requirements Check List

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

- Attachment 3.1: Bid Submission Form

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

- Attachment 4.1: Bid Evaluation Criteria

- Attachment 4.2: Pricing Schedule

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**BID SOLICITATION**

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

**MULTIPLE RESOURCE CATEGORIES AND LEVELS**

**FOR**

**THE DEPARTMENT OF NATIONAL DEFENCE**

**PART 1 - GENERAL INFORMATION**

**1.1 Introduction**

This document states terms and conditions that apply to this bid solicitation W8474-14MP22/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 and The Security Requirements Check List.

The attachments include the Bid Submission Form, the RFP Evaluation Criteria and the Pricing Schedule.

**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 five (5) contracts, one for each Workstream (refer to paragraph (g) below). The period of each contract will be from date of Contract award to July 31,

2014 plus three (3) nine (9) month irrevocable options allowing Canada to extend the term of the contract.

- (c) There is a security requirement associated with this requirement. For additional information, consult Part 6 - Security, Financial and Other Requirements, and Part 7 - Resulting Contract Clauses. Bidders should consult the "Security Requirements on PWGSC Bid Solicitations - Instructions for Bidders" document on the Departmental Standard Procurement Documents (<http://ssi-iss.tpsgc-pwgsc.gc.ca>) Website.
- (d) The requirement is subject to the provisions of the World Trade Organization Agreement on Government Procurement (WTO-AGP), the North American Free Trade Agreement (NAFTA), the Canada-Chile Free Trade Agreement (CCFTA), the Agreement on Internal Trade (AIT), the Canada-Peru Free Trade Agreement (CPFTA), the Canada-Columbia Free Trade Agreement (CColFTA), and the Canada-Panama Free Trade Agreement (CPanFTA).
- (e) This procurement is subject to the Controlled Goods Program.
- (f) Only TBIPS SA Holders currently holding a TBIPS SA for Tier 2 in the the National Capital Region under the EN578-055605/D series of SAs are eligible to compete. The TBIPS SA 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.
- (g) SA Holders that are invited to compete as a joint venture must submit a bid as that joint venture SA Holder, forming no other joint venture to bid. Any joint venture must be already qualified under the SA #EN578-055605/D as that joint venture at the time of bid closing in order to submit a bid.
- (h) For each Workstream, the Resource Categories described below are required on an as and when requested basis in accordance with the TBIPS SA Annex "B".

#### WORKSTREAM 1

RESOURCE CATEGORY	LEVEL OF EXPERTISE	ESTIMATED NUMBER OF RESOURCES REQUIRED
A2. ERP Functional Analyst	Level 2	2
A2. ERP Functional Analyst	Level 3	1

#### WORKSTREAM 2

RESOURCE CATEGORY	LEVEL OF EXPERTISE	ESTIMATED NUMBER OF RESOURCES REQUIRED
A3. ERP Programmer Analyst	Level 3	4

#### WORKSTREAM 3

RESOURCE CATEGORY	LEVEL OF EXPERTISE	ESTIMATED NUMBER OF RESOURCES REQUIRED
A5. ERP Technical Analyst	Level 3	2

**WORKSTREAM 4**

RESOURCE CATEGORY	LEVEL OF EXPERTISE	ESTIMATED NUMBER OF RESOURCES REQUIRED
I1. Data Conversion Specialist	Level 2	2
I2. Database Administrator	Level 2	1

**WORKSTREAM 5**

RESOURCE CATEGORY	LEVEL OF EXPERTISE	ESTIMATED NUMBER OF RESOURCES REQUIRED
A11. Tester	Level 2	3

**1.3 Debriefings**

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

**1.4 Conflict of Interest**

Bidders are advised that in the performance of this Contract the Contractor may have access to information and material which may result in placing it in a real or perceived conflict of interest or confer an unfair advantage upon it in respect of its participation in other future solicitations related to or arising from other contracts for the Military Personnel Management Capability Transformation (MPMCT) Project. The Contractor acknowledges such participation may, at the sole discretion of the Crown, disqualify the Contractor, its affiliated entities, employees, agents or subcontractors from participating in such solicitations.

## 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(s).
- (c) The 2003 (2013-06-01) 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.

The text under subsections 4 and 5 of Section 01 – Code of Conduct and Certifications of 2003 referenced above is replaced by:

4. Bidders who are incorporated or who are a sole proprietorship, including those bidding as a joint venture, have already provided a list of names of all individuals who are directors of the Bidder, or the name of the owner, at the time of submitting an arrangement under the Request for Supply Arrangement (RFSA). These bidders must diligently maintain this list up-to-date by informing Canada in writing of any change occurring during the validity period of the bid as well as during the period of any contract arising from this bid solicitation.

5. Canada may, at any time, request that a Bidder provide properly completed and Signed Consent Forms (*Consent to a Criminal Record Verification form - PWGSC-TPSGC 229*) for any or all individuals aforementioned list within a specified time period. Failure to provide such Consent Forms within the time period provided will result in the bid being declared non-responsive.

### 2.2 Submission of Bids

- (a) Bids must be submitted only to the Public Works and Government Services Canada (PWGSC) Bid Receiving Unit by the date, time and at the PWGSC address indicated at the top right hand corner of page one of the bid solicitation.
- (b) Due to the nature of the bid solicitation, bids transmitted by facsimile or electronic mail to PWGSC will not be accepted

### 2.3 Enquiries - Bid Solicitation

- (a) All enquiries must be submitted in writing to the Contracting Authority no later than ten (10) calendar days before the bid closing date. Enquiries received after that time may not be answered.
- (b) Bidders should reference as accurately as possible the numbered item of the bid solicitation to which the enquiry relates. Care should be taken by bidders to explain each question in sufficient detail in order to enable Canada to provide an accurate answer. Technical enquiries that are of a "proprietary" nature must be clearly marked "proprietary" at each relevant item. Items identified as proprietary will be treated as such except where Canada determines that the enquiry is not of a proprietary nature. Canada may edit the questions or may request that the Bidder do so, so that the proprietary nature of the question is eliminated, and the enquiry can be answered with copies to all bidders. Enquiries not submitted in a form that can be distributed to all bidders may not be answered by Canada.

## 2.4 Applicable Laws

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

**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.*

## 2.5 Improvement of Requirement During Solicitation Period

If 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 data stated for the Estimated Number of Resources Required and the Estimated Number of Days Required 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 service identified in this bid solicitation will be consistent with this data. It is provided purely for information purposes.

## PART 3 - BID PREPARATION INSTRUCTIONS

### Bid Preparation Instructions

- (a) **Copies of Bid:** Canada requests that Bidders provide their bid in separately bound sections as follows:

- (i) Section I: Technical Bid (four (4) hard copies and one (1) soft copy on CD or USB);
- (ii) Section II: Financial Bid (one (1) hard copy and one (1) soft copy on CD or USB);
- (iii) Section III: Certifications not included in the Technical Bid (one (1) hard copy)

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

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

- (b) **Format for Bid:** 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 set aside all bids received from members of that bidding group. A single bid may contain bids to be awarded a contract in one or more Workstreams. However, a bid may not contain a bid for a member of a bidding group to be awarded more than one contract in any given Workstream.
- (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.

(e) **Joint Venture Experience:**

Except where expressly provided otherwise, at least one member of a joint venture Bidder must meet any given mandatory requirement of this bid solicitation. Joint venture members cannot pool their abilities to satisfy any single mandatory requirement of this bid solicitation. Wherever substantiation of a mandatory requirement is required, the Bidder is requested to indicate which joint venture member satisfies the requirement. Any Bidder with questions regarding the way in which a joint venture bid will be evaluated should raise such questions through the Enquiries process as early as possible during the solicitation period.

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

### 3.1 Section I: Technical Bid

The technical bid consists of the following:

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

SECURITY INFORMATION	
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	

If the Bidder has not included the security information in its bid, 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.

- (iii) **Substantiation of Technical Compliance:** The technical bid must substantiate the compliance with the specific articles of Attachment 4.1, which is the requested format for providing the substantiation. The substantiation must not simply be a repetition of the

requirement(s), but must explain and demonstrate how the Bidder will meet the requirements and carry out the required Work. Simply stating that the Bidder or its proposed solution or product complies is not sufficient. Where Canada determines that the substantiation is not complete, the Bidder will be considered non-responsive and disqualified. The substantiation may refer to additional documentation submitted with the bid - this information can be referenced in the "Bidder's Response" column of Attachment 4.1, where Bidders are requested to indicate where in the bid the reference material can be found, including the title of the document, and the page and paragraph numbers; where the reference is not sufficiently precise, Canada may request that the Bidder direct Canada to the appropriate location in the documentation.

- (iv) **For Proposed Resources:** The technical bid must include the number of résumés, per Resource Category, as identified in Attachment 4.1. The same individual must not be proposed for more than one Resource Category or more than one Workstream. 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 or membership throughout the evaluation period and contract period. Where the designation or membership must be demonstrated through a certification, diploma or degree, such document must be current, valid and issued by the entity specified in this solicitation. If the entity is not specified, the issuer must be an accredited or otherwise recognized body, institution or entity.
  - (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 dates (month and year) for the experience claimed (i.e., the start date and end date). Canada will evaluate only the duration that the resource actually worked on a project or projects (from his or her start date to end date), instead of the overall start and end date of a project or a combination of projects in which a resource has participated.
  - (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. In situations in which a proposed resource worked at the same time on more than one project, the duration of any overlapping time period will be counted only once toward any requirements that relate to the individual's length of experience.
- (v) **Customer Reference Contact Information:** When requested by Canada, the Bidder must provide customer references who must each confirm the facts identified in the Bidder's bid, as required by Attachment 4.1. For each customer reference, the Bidder must, at a minimum, provide the name and either the telephone number or e-mail address for a contact person. Bidders are also requested to include the title of the contact

person. If there is a conflict between the information provided by the customer reference and the bid, the information provided by the customer reference will be evaluated instead of the information in the bid. If the named individual is unavailable when required during the evaluation period, the Bidder may provide the name and contact information of an alternate contact from the same customer.

- (vi) **Corporate Profile:** The Bidder is requested to provide a corporate profile, which should include an overview of the Bidder and any subcontractors, and/or authorized agents of the Bidder that would be involved in the performance of the Work on the Bidder's behalf. The Bidder is requested to provide a brief description of its size, corporate structure, years in business, business activities, major customers, number of employees and their geographic presence. This information is requested for information purposes only and will not be evaluated.

### 3.2 Section II: Financial Bid

- (a) **Pricing:** Bidders must submit their Financial Bid in accordance with the Pricing Schedule detailed in Attachment 4.2 of this bid solicitation. The total amount of applicable taxes must be shown separately. Unless otherwise indicated, Bidders must include a single, firm, all-inclusive per diem rate in Canadian dollars in each cell requiring an entry in the pricing tables. The Bidder's proposed firm per diem rates for the 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 Resource Rates By Time Period:** 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) **Variation in Resource Rates By Level:** Where the financial tables provided by Canada allow different firm rates to be charged for different Levels of experience within the same Resource Category and time period, for any such Resource Category and time period
  - (i) the rate bid for Level three must be higher than that bid for Level two, and
  - (ii) the rate bid for Level two must be higher than the rate bid for Level one.
- (d) **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 periods. 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.
- (e) **Blank Prices:** Bidders are requested to insert "\$0.00" for any item for which it does not intend to charge or for items that are already included in other prices set out in the tables. If the Bidder leaves any price blank, Canada will treat the price as "\$0.00" for evaluation purposes and may request that the Bidder confirm that the price is, in fact, \$0.00. No Bidder will be permitted to add or change a price as part of this confirmation. Any Bidder who does not confirm that the price for a blank item is \$0.00 will be declared non-responsive.

### 3.3 Section III: Certifications

Bidders must submit the certifications as required under Part 5 that have not been included in the Technical Bid.

## PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

### 4.1 Evaluation Procedures

- (a) Bids will be evaluated in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria. There are several steps in the evaluation process, which are described below. Even though the evaluation and selection will be conducted in steps, the fact that Canada has proceeded to a later step does not mean that Canada has conclusively determined that the Bidder has successfully passed all the previous steps. Canada may conduct steps of the evaluation in parallel.
- (b) An evaluation team composed of representatives of the Client and PWGSC will evaluate the bids on behalf of Canada. Canada may hire any independent consultant, or use any government resources, to evaluate any bid. Not all members of the evaluation team will necessarily participate in all aspects of the evaluation.
- (c) In addition to any other time periods established in the bid solicitation:
  - (i) **Requests for Clarifications:** If Canada seeks clarification or verification from the Bidder about its bid, the Bidder will have 2 working days (or a longer period if specified in writing by the Contracting Authority) to provide the necessary information to Canada. Failure to meet this deadline will result in the bid being declared non-responsive.
  - (ii) **Requests for Further Information:** If Canada requires additional information in order to do any of the following pursuant to the Section entitled "Conduct of Evaluation" in 2003, Standard Instructions - Goods or Services - Competitive Requirements:
    - (A) verify any or all information provided by the Bidder in its bid; or
    - (B) contact any or all references supplied by the Bidder (e.g., references named in the résumés of individual resources) to verify and validate any information submitted by the Bidder,the Bidder must provide the information requested by Canada within 2 working days of a request by the Contracting Authority (or a longer period if specified in writing by the Contracting Authority).
  - (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 separate technical evaluation will be conducted for each Workstream.

- (a) **Mandatory Technical Criteria:**

Each bid will be reviewed to determine whether it meets the mandatory requirements of the bid solicitation. Any element of the bid solicitation that is identified specifically with the words "must" or "mandatory" is a mandatory requirement. Bids that do not comply with each and every mandatory requirement will be declared non-responsive and be disqualified. The Mandatory evaluation criteria are described in Attachment 4.1 - RFP Evaluation Criteria.
- (b) **Point- Rated Technical Criteria:**

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

**(c) Reference Checks:**

- (i) For reference checks, Canada will conduct the reference check in writing by email. Canada will send all email reference check requests to contacts supplied by all the Bidders on the same day. Canada will not award any points and/or consider a mandatory met unless the response is received within five working days of the date that Canada's email was sent.
- (ii) On the third working day after sending out the reference check request, if Canada has not received a response, Canada will notify the Bidder by email, to allow the Bidder to contact its reference directly to ensure that it responds to Canada within 5 working days. If the individual named by a Bidder is unavailable when required during the evaluation period, the Bidder may provide the name and email address of an alternate contact person from the same customer. Bidders will only be provided with this opportunity once for each customer, and only if the originally named individual is unavailable to respond (i.e., the Bidder will not be provided with an opportunity to submit the name of an alternate contact person if the original contact person indicates that he or she is unwilling or unable to respond). The 5 working days will not be extended to provide additional time for the new contact to respond.
- (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 (1) the reference customer states he or she is unable or unwilling to provide the information requested, or (2) the customer reference 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 or a mandatory met 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 who have not, at that point, been found non-responsive.

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

Only a certain number of resources per Resource Category will be evaluated as part of this bid solicitation as identified in Attachment 4.1. 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, the Article titled "Task Authorization". When a draft Task Authorization 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 to Annex A.

**4.3 Financial Evaluation**

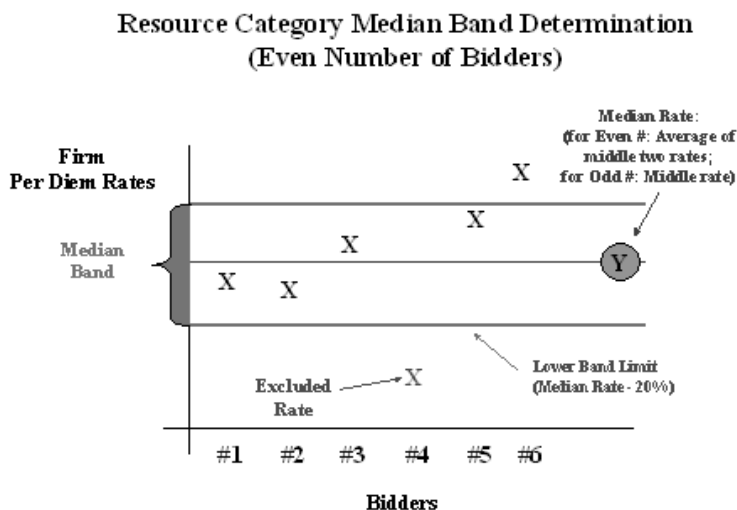
- (a) **Financial Calculation:** The financial evaluation will be conducted using the pricing tables in Attachment 4.2 completed by the bidders and the Firm Per Diem Median Rate Evaluation Method explained below. A financial calculation will occur for each Bidder by multiplying its firm per diem rates for the Initial Contract Period and the option period(s) (or the Lower Median Band Limit, whichever is higher) with the estimated number of days of work for each period, for all the Resource Categories in the Workstream as stated in Annex B - Basis of Payment. The sum of such rates will constitute the Financial Evaluated Price for the Workstream for that Bidder. A separate Financial Evaluated Price will be calculated for each Workstream.

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

(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 Lower Median Band Limit 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 any resulting Contract in all instances.

(ii) **Calculation for both the Initial Contract Period and the Option Period medians:** Using the per diem rate proposed for each individual resource a median rate will be determined for each Resource Category. A median will be used to calculate a median band against which each Bidder's per diem rate will be established for the Initial Contract Period, and another median will be established for each of the option period(s). For each Resource Category, the median band will be calculated using the median function in Microsoft Excel and will represent a range that encompasses the median rate to a value of minus (-) 20% of the median. The Lower Median Band Limit for each Resource Category is set at 80% of the median. If a Bidder bids a firm per diem rate for a Resource Category that is lower than the Lower Median Band Limit, that Bidder's financial evaluation will be conducted using a per diem rate equal to the Lower Median Band Limit for that Resource Category.

(iii) **Example:** The following diagram is a representation of the calculation of the median band for a single Resource Category. This diagram identifies the median band and the included and excluded resource per diem rates.



In this example Resource Category using the firm per diem median rate calculation approach, if the median rate identified as (Y) is \$591.50, then the median band limit would be minus (-) 20% of \$591.50, or \$473.20. The figure \$473.20 would be the Lower Median Band Limit for this Resource Category.

If a Bidder quotes a firm per diem rate for this Resource Category that is lower than \$473.20, the per diem rate of \$473.20 will be used to evaluate that Bidder's bid for this Resource Category.

If that Bidder quoted a firm per diem rate of \$400.00 for that Resource Category, and it is determined to be the winning Contractor, the firm per diem rate of \$400.00 which was quoted originally by the Bidder will be included in the resulting contract.

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

In Canada's experience, bidders will from time to time propose rates at the time of bidding for one or more categories of resources that they later refuse to honour, on the basis that these rates do not allow them to recover their own costs and/or make a profit. When evaluating the rates bid for professional services, Canada may, but will have no obligation to, require price support in accordance with this Article. If Canada requests price support, it will be requested from all otherwise responsive bidders who have proposed a rate that is at least 20% lower than the median rate bid by all responsive bidders for the relevant resource category or categories. If 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 for at least three months within the twelve months before 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 résumé 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 may 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.

**4.4 Basis of Selection**

**Selection Process:** The following selection process will be conducted for each Workstream.

- (a) A bid must comply with the requirements of the bid solicitation, meet all mandatory evaluation criteria and obtain the required pass marks for the point rated criteria identified in this bid solicitation to be declared responsive.
- (b) The responsive bid that obtains the highest Total Bidder Score will be recommended for award of a contract. For any given Bidder, the greatest possible Total Technical Score is 60 while the greatest possible Total Financial Score is 40.
  - (i) Calculation of Total Technical Score: For each Workstream, the Total Technical Score will be computed for each responsive bid by converting the Technical Score

obtained for the point-rated technical criteria using the following formula, rounded to two decimal places:

$$\frac{\text{Technical Score}}{\text{Maximum Technical Points (Bidders, please refer to the maximum technical points for each Workstream in Attachment 4.1)}} \times 60 = \text{Total Technical Score}$$

- (ii) Calculation of Total Financial Score: For each Workstream, the Total Financial Score will be computed for each responsive bid by converting the Financial Score obtained for the financial evaluation using the following formula, rounded to two decimal places:

$$\frac{\text{Lowest Financial Evaluated Price}}{\text{The Bidder's Financial Evaluated Price}} \times 40 = \text{Total Financial Score}$$

- (iii) Calculation of the Total Bidder Score: For each Workstream, the Total Bidder Score will be computed for each responsive bid in accordance with the following formula:

$$\text{Total Technical Score} + \text{Total Financial Score} = \text{Total Bidder Score}$$

- (iv) The table below illustrates an example where the selection of the contractor is determined by a 60/40 ratio of the technical merit and price, respectively.

Basis of Selection - Highest Combined Rating of Technical Merit (60%) and Price (40%)			
Bidder	Bidder 1	Bidder 2	Bidder 3
Overall Technical Score	88	82	92
Bid Evaluated Price	C\$60,000	C\$55,000	C\$50,000
Calculations	Technical Merit Points	Price Points	Total Score**
Bidder 1	$88 / 100 \times 60 = 52.8$	$50,000^* / 60,000 \times 40 = 33.33$	86.13
Bidder 2	$82 / 100 \times 60 = 49.2$	$50,000^* / 55,000 \times 40 = 36.36$	85.56
Bidder 3	$92 / 100 \times 60 = 55.2$	$50,000^* / 50,000 \times 40 = 40.00$	95.20

\* represents the lowest evaluated price

\*\* The maximum possible score is 100

- (c) In the event of identical Total Bidder Scores occurring within a given Workstream, then the bid with the highest Total Technical Score will become the top-ranked bidder.
- (i) In the case of identical Total Technical Scores, the Bidder obtaining the highest score for the first Point Rated Evaluation Criteria, in order of appearance in Attachment 4.1, for the first Resource Category, in order of appearance for each Workstream in Appendix 4.1, will become the top-ranked Bidder.
- ii) When necessary, this process will continue through each point rated criteria, in order of appearance in Attachment 4.1, for each Resource Category in the Workstream, in order of appearance for each Workstream in Appendix 4.1, until all the point rated scores have been used.

- (iii) If two or more Bidders are still tied after (i) and (ii), then a “coin flip” method will be used to determine the top-ranked Bidder.
- (d) A maximum of five (5) contract(s) may be awarded in total as a result of this solicitation.
- (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.

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.

### 5.1 Federal Contractors Program for Employment Equity - Bid Certification

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "FCP Limited Eligibility to Bid" list ([http://publiservice.gc.ca/services/fcp-pcf/inelig\\_e.htm](http://publiservice.gc.ca/services/fcp-pcf/inelig_e.htm)) available from Human Resources and Skills Development Canada (HRSDC) - Labour's website

Canada will have the right to declare a bid non-responsive if the Bidder, or any member of the Bidder if the Bidder is a Joint Venture, appears on the "FCP Limited Eligibility to Bid" list at the time of contract award.

Canada will also have the right to terminate the Contract for default if a Contractor, or any member of the Contractor if the Contractor is a Joint Venture, appears on the "FCP Limited Eligibility to Bid" list during the period of the Contract.

The Bidder must provide the Contracting Authority with a completed annex Federal Contractors Program for Employment Equity - Certification, before contract award. If the Bidder is a Joint Venture, the Bidder must provide the Contracting Authority with a completed annex Federal Contractors Program for Employment Equity - Certification, for each member of the Joint Venture.

### 5.2 Federal Contractors Program - Certification

- (a) The Federal Contractors Program (FCP) requires that some suppliers, including a supplier who is a member of a joint venture, bidding for federal government contracts, valued at \$200,000 or more (including all applicable taxes), make a formal commitment to implement employment equity. This is a condition precedent to contract award. If the Bidder is subject to the FCP, evidence of its commitment must be provided before the award of the Contract.
- (b) Suppliers who have been declared ineligible contractors by Human Resources and Skills Development Canada (HRSDC) are no longer eligible to receive government contracts over the threshold for solicitation of bids as set out in the *Government Contract Regulations*. Suppliers may be declared ineligible contractors either as a result of a finding of non-compliance by HRSDC, or following their voluntary withdrawal from the FCP for a reason other than the

reduction of their workforce to fewer than 100 employees. Any bids from ineligible contractors will be declared non-responsive.

- (c) If the Bidder does not fall within the exceptions enumerated in (d)(i) or (ii) below, or does not have a valid certificate number confirming its adherence to the FCP, the Bidder must fax (819-953-8768) a copy of the signed form LAB 1168, Certificate of Commitment to Implement Employment Equity, to the Labour Branch of HRSDC.
- (d) Each bidder is requested to indicate in its bid whether it is:
  - (i) not subject to FCP, having a workforce of fewer than 100 permanent full or part-time permanent employees, or temporary employees having worked 12 weeks or more in Canada;
  - (ii) not subject to FCP, being a regulated employer under the *Employment Equity Act*, S.C. 1995, c. 44;
  - (iii) subject to the requirements of FCP, because it has a workforce of 100 or more permanent full or part-time permanent employees, or temporary employees having worked 12 weeks or more in Canada, but it has not previously obtained a certificate number from HRSD (because it has not bid before on requirements of \$200,000 or more), in which case a duly signed certificate of commitment is required from the Bidder; or
  - (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.hrsrc.gc.ca/eng/labour/equality/fcp/index.shtml>

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

### 5.3 Former Public Servant Certification

- (a) Contracts with former public servants (FPS) in receipt of a pension or of a lump sum payment must bear the closest public scrutiny and reflect fairness in spending public funds. In order to comply with Treasury Board policies and directives on contracts with FPS, bidders must provide the information required below.
- (b) For the purposes of this clause,
  - (i) **"former public servant"** means a former member of a department as defined in the *Financial Administration Act*, R.S., 1985, c. F-11, a former member of the Canadian Armed Forces or a former member of the Royal Canadian Mounted Police and includes:
    - (A) an individual;
    - (B) an individual who has incorporated;
    - (C) a partnership made of former public servants; or
    - (D) a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.
  - (ii) **"lump sum payment period"** means the period measured in weeks of salary, for which payment has been made to facilitate the transition to retirement or to other employment as a result of the implementation of various programs to reduce the size of the Public Service. The lump sum payment period does not include the period of severance pay, which is measured in a like manner.

- (iii) **"pension"** means, in the context of the fee abatement formula, a pension or annual allowance paid under the *Public Service Superannuation Act* (PSSA), R.S., 1985, c. P-36, and any increases paid pursuant to the *Supplementary Retirement Benefits Act*, R.S. 1985, c. S-24 as it affects the PSSA. It does not include pensions payable pursuant to the *Canadian Forces Superannuation Act*, R.S., 1985, c. C-17, the *Defence Services Pension Continuation Act*, 1970, c. D-3, the *Royal Canadian Mounted Police Pension Continuation Act*, 1970, c. R-10, and the *Royal Canadian Mounted Police Superannuation Act*, R.S., 1985, c. R-11, the *Members of Parliament Retiring Allowances Act*, R.S., 1985, c. M-5, and that portion of pension payable to the *Canadian Pension Plan Act*, R.S., 1985, c. C-8.
- (c) If the Bidder is an FPS in receipt of a pension as defined above, the Bidder must provide the following information:
  - (i) name of former public servant;
  - (ii) date of termination of employment or retirement from the Public Service.

By providing this information, Bidders agree that the successful Bidder's status, with respect to being a former public servant in receipt of a pension, will be reported on departmental websites as part of the published proactive disclosure reports in accordance with Contracting Policy Notice 2012-2 and the Guidelines on Proactive Disclosure of Contracts.
- (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 will be available to perform the Work as required by Canada's representatives and at the time specified in the bid solicitation or agreed to with Canada's representatives. If for reasons beyond its control, the Bidder is unable to provide the services of an individual named in its bid, the Bidder may propose a substitute with similar qualifications and experience. The Bidder must advise the Contracting Authority of the reason for the substitution and provide the name, qualifications and experience of the proposed replacement. For the purposes of this clause, only the following reasons will be considered as

beyond the control of the Bidder: death, sickness, maternity and parental leave, retirement, resignation, dismissal for cause or termination of an agreement for default.

- (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 a Bidder has proposed any individual who is not an employee of the Bidder, by submitting a bid, the Bidder certifies that it has the permission from that individual to propose his/her services in relation to the Work to be performed and to submit his/her résumé to Canada. The Bidder must, upon request from the Contracting Authority, provide a written confirmation, signed by the individual, of the permission given to the Bidder and of his/her availability. Failure to comply with the request may result in the bid being declared non-responsive.

#### **5.5 Certification of Language - English Essential**

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

## **PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS**

### **6.1 Security Requirement**

- (a) At the date of bid closing, the following conditions must be met:
- (i) the Bidder must hold a valid organization security clearance as indicated in Part 7 - Resulting Contract Clauses;
  - (ii) the Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work site(s) must each meet the security requirement as indicated in Part 7 - Resulting Contract Clauses; and
  - (iii) the Bidder must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites.
- (b) For additional information on security requirements, Bidders should consult the "Security Requirements for PWGSC Bid Solicitations - Instructions to Bidders" document on the Departmental Standard Procurement Documents Website.
- (c) 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 (2012-07-16) Financial Capability applies, 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.
- (c) **Reorganization of Client:** The Contractor's obligation to perform the Work will not be affected by (and no additional fees will be payable as a result of) the renaming, reorganization, reconfiguration, or restructuring of any Client. The reorganization, reconfiguration and restructuring of the Client includes the privatization of the Client, its merger with another entity, or its dissolution, where that dissolution is followed by the creation of another entity or entities with mandates similar to the original Client. In connection with any form of reorganization, Canada may designate another department or government body as the Contracting Authority or Technical Authority, as required to reflect the new roles and responsibilities associated with the reorganization.
- (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. A reference to a "local office" of the Contractor means an office having at least one full time employee that is not a shared resource working at that location.

### 7.2 Task Authorization

- (a) **As and When Requested Task Authorizations:** The Work to be performed under the Contract will be on an "as and when requested basis" using a Task Authorization (TA). The Work described in the TA must be in accordance with the scope of the Contract. The Contractor must not commence work until a validly issued TA has been issued by Canada and received by the Contractor. The Contractor acknowledges that any work performed before such issuance and receipt will be done at the Contractor's own risk.
- (b) **Assessment of Resources Proposed at TA Stage:** Processes for issuing, responding to and assessing Task Authorizations are further detailed in Appendices A,B, C and D of Annex A.
- (c) **Form and Content of Task Authorization:**
  - (i) A representative from Director Electronic Systems Procurement 2-7 will provide the Contractor with a description of the task in a draft Task Authorization using the form specified in Appendix B to Annex A.
  - (ii) The draft Task Authorization will contain the details of the activities to be performed, and must also contain the following information, if applicable:
    - (A) the task number;
    - (B) The date by which the Contractor's response must be received (which will appear in the draft Task Authorization, but not the issued Task Authorization);
    - (C) the details of any financial coding to be used;
    - (D) the categories of resources and the number required;

- (E) a description of the work for the task outlining the activities to be performed and identifying any deliverables (such as reports);
  - (F) the start and completion dates;
  - (G) milestone dates for deliverables and payments (if applicable);
  - (H) the number of person-days of effort required;
  - (I) whether the work requires on-site activities and the location;
  - (J) the language profile of the resources required;
  - (K) the level of security clearance required of resources;
  - (L) the price payable to the Contractor for performing the task, the TA must indicate 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
  - (M) any other constraints that might affect the completion of the task.
- (d) **Contractor's Response to Draft Task Authorization:** The Contractor must provide the Technical Authority, within two (2) working days of receiving the draft Task Authorization (or within any longer time period specified in the draft TA), the proposed total price for performing the task and a breakdown of that cost, established in accordance with the Basis of Payment specified in the Contract. The Contractor's quotation must be based on the rates set out in the Contract. The Contractor will not be paid for preparing or providing its response or for providing other information required to prepare and validly issue the TA.
- (e) **Task Authorization Limit and Authorities for Validly Issuing Task Authorizations:**
- (I) To be validly issued, a TA must include the following signatures:
    - (A) for any TA with a value less than or equal to \$400,000.00 (including applicable taxes), the TA must be signed by:
      - (1) the Technical Authority; and
      - (2) a representative from Director Electronic Systems Procurement 2-7 of DND; and
    - (B) for any TA with a value greater than \$400,000.00, a TA must include the following signatures:
      - (1) the Technical Authority; and
      - (2) a representative from Director Electronic Systems Procurement 2-7 of DND; and
      - (3) the Contracting Authority.
  - (II) Any TA that does not bear the appropriate signatures is not validly issued by Canada. Any work performed by the Contractor without receiving a validly issued TA is done at the Contractor's own risk. If the Contractor receives a TA that is not appropriately signed, the Contractor must notify the Contracting Authority. By providing written notice to the Contractor, the Contracting Authority may suspend the Client's ability to issue TAs at any time, or reduce the dollar value threshold described in sub-article (A) above; any suspension or reduction notice is effective upon receipt.

- (f) **Administration of Task Authorization Process for DND:** The administration of the Task Authorization process will be carried out by Director Electronic Systems Procurement 2-7. This process includes monitoring, controlling and reporting on expenditures of the contract with task authorizations to the Contracting Authority.
- (g) **Periodic Usage Reports:**
- (i) The Contractor must compile and maintain records on its provision of services to the federal government under validly issued TAs issued under the Contract. The Contractor must provide this data to Canada in accordance with the reporting requirements detailed below. If any required information is not available, the Contractor must indicate the reason. If services are not provided during a given period, the Contractor must still provide a "NIL" report. The Contractor must submit the periodic usage reports on a quarterly basis to the Contracting Authority. From time to time, the Contracting Authority may also require an interim report during a reporting period.
- (ii) The quarterly periods are defined as follows:
- (A) April 1 to June 30;
  - (B) July 1 to September 30;
  - (C) October 1 to December 31; and
  - (D) January 1 to March 31.
- The data must be submitted to the Contracting Authority no later than twenty (20) calendar days after the end of the reporting period.
- (iii) Each report must contain the following information for each validly issued TA (as amended):
- (A) the Task Authorization number and the Task Authorization Revision number(s), if applicable;
  - (B) a title or a brief description of the task;
  - (C) the name, Resource category and level of each resource involved in performing the TA, as applicable;
  - (D) the total estimated cost specified in the TA (applicable taxes extra);
  - (E) the total amount (applicable taxes extra) expended to date;
  - (F) the start and completion date; and
  - (G) the active status, as applicable (e.g., indicate whether work is in progress or if Canada has cancelled or suspended the TA, etc.).
- (iv) Each report must also contain the following cumulative information for all the validly issued TAs (as amended)
- (A) the amount (applicable taxes extra) specified in the contract (as last amended, if applicable) as Canada's total liability to the contractor for all validly issued TAs; and
  - (B) the total amount, applicable taxes extra, expended to date against all validly issued TA's.
- (h) **Consolidation of TAs for Administrative Purposes:** The Contract may be amended from time to time to reflect all validly issued Task Authorizations to date, to document the Work performed under those TAs for administrative purposes.

### 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 applicable taxes); and
  - (ii) **"Minimum Contract Value"** means 5% of the Maximum Contract Value on the date the contract is first issued.
- (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 sub-article (c), subject to sub-article (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 article 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:**

2035 (2013-06-27), General Conditions - Higher Complexity - Services, apply to and form part of the Contract.

With respect to Article 30 - Termination for Convenience, of General Conditions 2035, Subsection 04 is deleted and replaced with the following Subsections 04, 05 and 06:

4. The total of the amounts, to which the Contractor is entitled to be paid under this section, together with any amounts paid, due or becoming due to the Contractor must not exceed the Contract Price.

5. Where the Contracting Authority terminates the entire Contract and the Articles of Agreement include a Minimum Work Guarantee, the total amount to be paid to the Contractor under the Contract will not exceed the greater of

- (a) the total amount the Contractor may be paid under this section, together with any amounts paid, becoming due other than payable under the Minimum Revenue Guarantee, or due to the Contractor as of the date of termination, or
- (b) the amount payable under the Minimum Work Guarantee, less any amounts paid, due or otherwise becoming due to the Contractor as of the date of termination.

6. The Contractor will have no claim for damages, compensation, loss of profit, allowance arising out of any termination notice given by Canada under this section except to the extent that this section expressly provides. The Contractor agrees to repay immediately to Canada the portion of any advance payment that is unliquidated at the date of the termination.

(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 Non-Disclosure Agreement**

The Contractor must obtain from its employee(s) or subcontractor(s) the completed and signed non-disclosure agreement, attached at Appendix D to Annex A, and provide it to the Technical Authority before they are given access to information by or on behalf of Canada in connection with the Work.

**7.6 Security Requirement**

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

1. The Contractor/Offeror must, at all times during the performance of the Contract/Standing Offer/Supply Arrangement, 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).
2. 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 **RELIABILITY STATUS, CONFIDENTIAL** or **SECRET** as required, granted or approved by CISD/PWGSC.
3. 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.
4. Subcontracts which contain security requirements are **NOT** to be awarded without the prior written permission of CISD/PWGSC.
5. The Contractor/Offeror must comply with the provisions of the:
  - a) Security Requirements Check List and security guide (if applicable), attached at Annex C;
  - b) *Industrial Security Manual* (Latest Edition).

**7.7 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 July 31, 2014; 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 three (3) additional nine (9)-month period(s) 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.

**7.8 Authorities****(a) Contracting Authority**

The Contracting Authority for the Contract is:

Name: Jeremy Chapple  
Title: Supply Specialist  
Public Works and Government Services Canada  
Acquisitions Branch  
Directorate: Special Procurement Initiatives Directorate  
Address: 11 Laurier St., Gatineau, Québec  
Telephone: (819) 956-1004  
Facsimile: (819) 956-8303  
E-mail address: jeremy.chapple@tpsgc-pwgsc.gc.ca

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

**(b) Technical Authority**

The Technical Authority for the Contract is:

Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Organization: \_\_\_\_\_  
Address: \_\_\_\_\_  
Telephone: \_\_\_\_\_  
Facsimile: \_\_\_\_\_  
E-mail address: \_\_\_\_\_

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

**(c) Contractor's Representative**

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

**7.9 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 a validly issued 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, applicable taxes extra. Partial days will be prorated based on actual hours worked based on a 7.5-hour workday.
- (ii) **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.
- (iii) **Professional Services Rates:** In Canada's experience, bidders from time to time propose rates at the time of bidding for one or more Resource Categories 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 the Contractor does not respond or refuses 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 or in part or chooses to exercise any of the rights provided to it under the general conditions, Canada may impose sanctions or take other measures in accordance with the PWGSC Vendor Performance Corrective Measure Policy (or equivalent) then in effect, which measures may include an assessment that results in conditions applied against the Contractor to be fulfilled before doing further business with Canada, or full debarment of the Contractor from bidding on future requirements.
- (iv) **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 for all authorized Task Authorizations (TAs), inclusive of any revisions, must not exceed the sum of \$ \_\_\_\_\_ (**Note to bidder: amount to be inserted at Contract award**). Customs duties are included and Applicable Taxes are extra.
- (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 exceeded before obtaining the written approval of the Contracting Authority. The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum when:
  - (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 validly 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.
  - (ii) 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) **Payment Credits**
  - (i) **Failure to Provide Resource:**
    - (A) If the Contractor does not provide a required professional services resource that has all the required qualifications within the time prescribed by the Contract, the Contractor must credit to Canada an amount equal to the per diem rate (based on a 7.5-hour workday) of the required resource for each day (or partial day) of delay in providing the resource, up to a maximum of ten (10) days.
    - (B) **Corrective Measures:** If credits are payable under this Article for two consecutive months or for three months in any twelve-month period, the Contractor must submit a written action plan describing measures it will implement or actions it will undertake to eliminate the recurrence of the problem. The Contractor will have five (5) working days to deliver the action plan to the Client and the Contracting Authority and twenty (20) working days to rectify the underlying problem.
    - (C) **Termination for Failure to Meet Availability Level:** In addition to any other rights it has under the Contract, Canada may terminate the Contract for default by giving the Contractor three (3) months' written notice of its intent, if :
      - (1) the total amount of credits for a given monthly billing cycle reach a level of 10% of the total billing for that month; or
      - (2) the corrective measures required of the Contractor described above are not met.

This termination will be effective when the three (3) month notice period expires, unless Canada determines that the Contractor has implemented the corrective measures to Canada's satisfaction during those three (3) months.
  - (ii) **Credits Apply during Entire Contract Period:** The Parties agree that the credits apply throughout the Contract Period.
  - (iii) **Credits represent Liquidated Damages:** The Parties agree that the credits are liquidated damages and represent their best pre-estimate of the loss to Canada in the event of the applicable failure. No credit is intended to be, nor will it be construed as, a penalty.

- (iv) **Canada's Right to Obtain Payment:** The Parties agree that these credits are a liquidated debt. To collect the credits, Canada has the right to hold back, draw back, deduct or set off from and against any money Canada owes to the Contractor from time to time.
  - (v) **Canada's Rights & Remedies not Limited:** The Parties agree that nothing in this Article limits any other rights or remedies to which Canada is entitled under the Contract (including the right to terminate the Contract for default) or under the law generally.
  - (vi) **Audit Rights:** The Contractor's calculation of credits under the Contract is subject to verification by government audit, at the Contracting Authority's discretion, before or after payment is made to the Contractor. The Contractor must cooperate fully with Canada during the conduct of any audit by providing Canada with access to any records and systems that Canada considers necessary to ensure that all credits have been accurately credited to Canada in the Contractor's invoices. If an audit demonstrates that past invoices contained errors in the calculation of the credits, the Contractor must pay to Canada the amount the audit reveals was required to be credited to Canada, plus interest, from the date Canada remitted the excess payment until the date of the refund (the interest rate is the Bank of Canada's discount annual rate of interest in effect on the date the credit was first owed to Canada, plus 1.25% per year). If, as a result of conducting an audit, Canada determines that the Contractor's records or systems for identifying, calculating or recording the credits are inadequate, the Contractor must implement any additional measures required by the Contracting Authority.
- (f) **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

#### 7.10 Invoicing Instructions

- (a) Invoices must be submitted in the Contractor's name. The Contractor must submit invoices for each delivery or shipment; invoices must only apply to the Contract. Each invoice must indicate whether it covers partial or final delivery.
- (b) Invoices must show:
  - (i) Company name, address, etc;
  - (ii) Invoice date;
  - (iii) Contract serial number;
  - (iv) Timesheets;
  - (v) Task authorization reference for each charge;
  - (vi) Financial coding;
  - (vii) Period in which services were rendered;
  - (viii) Individual(s) who provided service including name, classification, number of days worked, per diem rate, total dollar amount;
- (c) The Contractor's invoice must include a separate line item for each subparagraph in the Basis of Payment provision.
- (d) Applicable taxes must be specified on all invoices as a separate item. All items that are zero-rated,

exempt or to which applicable taxes do not apply, must be identified as such on all invoices.

- (e) 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.
- (f) The Contractor must provide the original and one (1) copy of each invoice to the Technical Authority, and one (1) copy to the Contracting Authority. The original and one (1) copy of each invoice sent to the Technical Authority via:

- (i) Postage Mail are to be sent to the address indicated below:

National Defence Headquarters  
101 Colonel By Drive  
Ottawa, Ontario  
K1A 0K2  
Attention: Stefanie Lindsay, DES Proc 2-7-2, MPMCT Project

- (ii) Courier are to be sent to the address indicated below:

Department of National Defence  
285 Coventry Road, MPMCT Project  
Ottawa, ON  
K1K 3X6  
Attention: Stefanie Lindsay, DES Proc 2-7-2, MPMCT  
Tel (613) 995-9456

The Contractor must notify DES Proc 2-7-2 prior to sending any invoices via courier by calling (613) 995-9456.

### 7.11 Certifications

Compliance with the certifications provided by the Contractor in its bid or any TA quotation 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 is untrue, whether made knowingly or unknowingly, Canada has the right, under the default provision of the Contract, to terminate the Contract for default.

### 7.12 Federal Contractors Program for Employment Equity - Default by the Contractor

**Note to Bidders:** The following clause will be included in the resulting contract if the Federal Contractors Program for Employment Equity is applicable to the winning bidder. This will be determined at the time of contract award.

The Contractor understands and agrees that, when an Agreement to Implement Employment Equity (AIEE) exists between the Contractor and HRSDC-Labour, the AIEE must remain valid during the entire period of the Contract. If the AIEE becomes invalid, the name of the Contractor will be added to the "FCP Limited Eligibility to Bid" list. The imposition of such a sanction by HRSDC will constitute the Contractor in default as per the terms of the Contract.

### 7.13 Applicable Laws

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

**Note to Bidders:** This clause will be completed at contract award.

**7.14 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 (2013-06-27);
- (d) Annex A, Statement of Work - including its Appendices as follows:
  - (i) Appendix A to Annex A - Tasking Assessment Procedure;
  - (ii) Appendix B to Annex A - Task Authorization (TA) Form;
  - (iii) Appendix C to Annex A - Resource Assessment Criteria and Response Table;
  - (iv) Appendix D to Annex A - Certifications 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/EI (the "Supply Arrangement"); and
- (i) the Contractor's bid dated \_\_\_\_\_, as amended \_\_\_\_\_.

**Note to Bidders:** *The Contractor's bid date and Supply Arrangement Number will be completed with information provided in its bid.*

**7.15 Defence Contract**

- (a) SACC Manual clause A9006C (2012-07-16) Defence Contract

**7.16 Foreign Nationals (Canadian Contractor)**

SACC Manual clause A2000C (2006-06-16) 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.*

**7.16 Foreign Nationals (Foreign Contractor)**

SACC Manual clause A2001C (2006-06-16) Foreign Nationals (Foreign Contractor)

## 7.17 Insurance Requirements

### (A) Compliance with Insurance Requirements

- 1 The Contractor must comply with the insurance requirements specified in this Article. The Contractor must maintain the required insurance coverage for the duration of the Contract. Compliance with the insurance requirements does not release the Contractor from or reduce its liability under the Contract.
- 2 The Contractor is responsible for deciding if additional insurance coverage is necessary to fulfill its obligation under the Contract and to ensure compliance with any applicable law. Any additional insurance coverage is at the Contractor's expense, and for its own benefit and protection.
- 3 The Contractor should forward to the Contracting Authority within ten (10) days after the date of award of the Contract a Certificate of Insurance evidencing the insurance coverage. Coverage must be placed with an Insurer licensed to carry out business in Canada and the Certificate of Insurance must confirm that the insurance policy complying with the requirements is in force. If the Certificate of Insurance has not been completed and submitted as requested, the Contracting Authority will so inform the Contractor and provide the Contractor 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 the time period will constitute a default under the General Conditions. The Contractor must, if requested by the Contracting Authority, forward to Canada a certified true copy of all applicable insurance policies.

### (B) Commercial General Liability Insurance

1. The Contractor must obtain Commercial General Liability Insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature, but for not less than \$2,000,000 per accident or occurrence and in the annual aggregate.
2. The Commercial General Liability policy must include the following:
  - a. Additional Insured: Canada is added as an additional insured, but only with respect to liability arising out of the Contractor's performance of the Contract. The interest of Canada should read as follows: Canada, as represented by Public Works and Government Services Canada.
  - b. Bodily Injury and Property Damage to third parties arising out of the operations of the Contractor.
  - c. Products and Completed Operations: Coverage for bodily injury or property damage arising out of goods or products manufactured, sold, handled, or distributed by the Contractor and/or arising out of operations that have been completed by the Contractor.
  - d. Personal Injury: While not limited to, the coverage must include Violation of Privacy, Libel and Slander, False Arrest, Detention or Imprisonment and Defamation of Character.
  - e. Cross Liability/Separation of Insureds: Without increasing the limit of liability, the policy must protect all insured parties to the full extent of coverage provided. Further, the policy must apply to each Insured in the same manner and to the same extent as if a separate policy had been issued to each.
  - f. Blanket Contractual Liability: The policy must, on a blanket basis or by specific reference to the Contract, extend to assumed liabilities with respect to contractual provisions.
  - g. Employees and, if applicable, Volunteers must be included as Additional Insured.
  - h. Employers' Liability (or confirmation that all employees are covered by Worker's compensation (WSIB) or similar program)

i. Broad Form Property Damage including Completed Operations: Expands the Property Damage coverage to include certain losses that would otherwise be excluded by the standard care, custody or control exclusion found in a standard policy.

j. Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of policy cancellation.

k. If the policy is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.

l. Owners' or Contractors' Protective Liability: Covers the damages that the Contractor becomes legally obligated to pay arising out of the operations of a subcontractor.

m. Advertising Injury: While not limited to, the endorsement must include coverage for piracy or misappropriation of ideas, or infringement of copyright, trademark, title or slogan.

(C) **Errors and Omissions Liability Insurance**

1. The Contractor must obtain Errors and Omissions Liability (a.k.a. Professional Liability) insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature but for not less than \$1,000,000 per loss and in the annual aggregate, inclusive of defence costs.

2. If the Professional Liability insurance is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.

3. The following endorsement must be included:

Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of cancellation.

**7.18 Controlled Goods Program**

SACC Manual Clause A9131C ( 2011-05-16) Controlled Goods Program

**7.19 Limitation of Liability - Information Management/Information Technology**

(a) This section applies despite any other provision of the Contract and replaces the section of the general conditions entitled "Liability". Any reference in this section to damages caused by the Contractor also includes damages caused by its employees, as well as its subcontractors, agents, and representatives, and any of their employees. This section applies regardless of whether the claim is based in contract, tort, or another cause of action. The Contractor is not liable to Canada with respect to the performance of or failure to perform the Contract, except as described in this section and in any section of the Contract pre-establishing any liquidated damages. The Contractor is only liable for indirect, special or consequential damages to the extent described in this Article, even if it has been made aware of the potential for those damages.

(b) **First Party Liability:**

(i) The Contractor is fully liable for all damages to Canada, including indirect, special or consequential damages, caused by the Contractor's performance or failure to perform the Contract that relate to:

- (A) any infringement of intellectual property rights to the extent the Contractor breaches the section of the General Conditions entitled "Intellectual Property Infringement and Royalties";
- (B) physical injury, including death.

- (ii) The Contractor is liable for all direct damages affecting real or tangible personal property owned, possessed, or occupied by Canada.
- (iii) Each of the Parties is liable for all direct damages resulting from any breach of confidentiality under the Contract. Each of the Parties is also liable for all indirect, special or consequential damages in respect of any unauthorized disclosure of the other Party's trade secrets (or trade secrets of a third party provided by one Party to another under the Contract) relating to information technology.
- (iv) The Contractor is liable for all direct damages relating to any encumbrance or claim relating to any portion of the Work for which Canada has made any payment. This does not apply to encumbrances or claims relating to intellectual property rights, which are addressed under (i)(A) above.
- (v) The Contractor is also liable for any other direct damages to Canada caused by the Contractor in any way relating to the Contract, including:
  - (A) any breach of the warranty obligations under the Contract, up to the total amount paid by Canada (including any applicable taxes) for the goods and services affected by the breach of warranty; and
  - (B) Any other direct damages, including all identifiable direct costs to Canada associated with re-procuring the Work from another party if the Contract is terminated either in whole or in part for default, up to an aggregate maximum for this subparagraph (B) of the greater of .75 times the total estimated cost (meaning the dollar amount shown on the first page of the Contract in the cell titled "Total Estimated Cost" or shown on each call-up, purchase order or other document used to order goods or services under this instrument), or \$1,000,000.00.

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

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

(c) **Third Party Claims:**

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

- (iii) The Parties are only liable to one another for damages to third parties to the extent described in this Sub-article (c).

## 7.20 Joint Venture Contractor

- (a) The Contractor confirms that the name of the joint venture is \_\_\_\_\_ and that it is comprised of the following members:
- (b) With respect to the relationship among the members of the joint venture Contractor, each member agrees, represents and warrants (as applicable) that:
- (i) \_\_\_\_\_ has been appointed as the “representative member” of the joint venture Contractor and has fully authority to act as agent for each member regarding all matters relating to the Contract;
  - (ii) by giving notice to the representative member, Canada will be considered to have given notice to all the members of the joint venture Contractor; and
  - (iii) all payments made by Canada to the representative member will act as a release by all the members.
- (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.

## 7.21 Professional Services - General

- (a) The Contractor must provide professional services on request as specified in this Contract. All resources provided by the Contractor must meet the qualifications described in the Contract (including those relating to previous experience, professional designation, education, language proficiency and security clearance) and must be competent to provide the required services by any delivery dates described in the Contract.
- (b) If the Contractor fails to deliver any deliverable (excluding delivery of a specific individual) 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 ten 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.
- (c) In General Conditions 2035, the Article titled “Replacement of Specific Individuals” is deleted and the following applies instead:

### Replacement of Specific Individuals

- (i) If the Contractor is unable to provide the services of any specific individual identified in the Contract or TA (whichever first contains instructions from Canada for that individual to report to the Work site) to perform the services, the Contractor must within five working days of the individual’s departure or failure to commence Work (or, if Canada has requested the

replacement, within ten working days of Canada's notice of the requirement for a replacement) provide to the Contracting Authority:

- (A) the name, qualifications and experience of a proposed replacement immediately available for Work; and
- (B) security information on the proposed replacement as specified by Canada, if applicable.

The replacement must have qualifications and experience that meet or exceed those obtained for the original resource.

- (ii) Subject to an Excusable Delay, where Canada becomes aware that a specific individual identified under the Contract or TA to provide services has not been provided or is not performing, the Contracting Authority may elect to:
  - (A) exercise Canada's rights or remedies under the Contract or at law, including terminating the Contract for default under Article titled "Default of the Contractor", or
  - (B) assess the information provided under (c) (i) above or, if it has not yet been provided, require the Contractor propose a replacement to be rated by the Technical Authority. The replacement must have qualifications and experience that meet or exceed those obtained for the original resource and be acceptable to Canada. Upon assessment of the replacement, Canada may accept the replacement, exercise the rights in (ii) (A) above, or require another replacement in accordance with this subarticle (c).

Where an Excusable Delay applies, Canada may require (c) (ii) (B) above instead of terminating under the "Excusable Delay" Article. An Excusable Delay does not include resource unavailability due to allocation of the resource to another Contract or project (including those for the Crown) being performed by the Contractor or any of its affiliates.

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

## **7.22 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.

## **7.23 Representations and Warranties**

The Contractor made statements regarding its own and its proposed resources' experience and expertise in its bid that resulted in the award of the Contract and the issuance of TA's. The Contractor represents and warrants that all those statements are true and acknowledges that Canada relied on those statements in awarding the Contract and adding work to it through TA's. 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.

#### **7.24 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 Basis of Payment and additional security requirements may apply.

#### **7.25 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 five (5) working days to deliver the action plan to the Client and the Contracting Authority, and twenty (20) working days to rectify the underlying problem.
- (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.

#### **7.26 Conflict of Interest**

- (a) To avoid any conflict of interest, appearance of conflict of interest, unfair advantage or appearance of unfair advantage, the Contractor acknowledges and agrees that the Contractor, any of its subcontractors, any of their respective employees or any of their respective former employees who work on the delivery of the Work under this Contract, must:
  - (i) not share or provide any information to any third party concerning the MPMCT Project or the procurement processes for follow on work (including the Solution Integrator (SI) requirement) it or they may have obtained through the performance of the Work under this Contract;
  - (ii) not prepare, participate in, or advise upon the preparation of, any bid in response to a bid solicitation relating to SI services for the MPMCT Project; and
  - (iii) not act or propose to act, as a Contractor itself, member of a Joint-venture or subcontractor to any third party submitting a bid, in relation to the SI services contract required for the MPMCT Project.

- (b) The Contractor agrees to advise all the parties mentioned above of the restrictions set out in this clause. If the Contractor fails to abide by these restrictions, or to ensure that its employees, its subcontractors, any of their respective employees or any of their respective former employees who work on the delivery of the Work under this Contract abide by them, Canada may terminate the Contract for default as per the provisions of SACC 2035 General Conditions -Higher Complexity - Services.

## **ANNEX A**

### **STATEMENT OF WORK**

#### **WORKSTREAM 1**

##### **1. TITLE**

- 1.1 Human Resource Management System (HRMS) Technical Upgrade

##### **2. REQUIREMENT**

- 2.1 The Department of National Defence (DND), Military Personnel Management Capability Transformation (MPMCT) Project requires Task-Based Informatics Professional Services (TBIPS) from the Application Services Stream for the upgrade of Oracle PeopleSoft version 7.5 to Oracle PeopleSoft Human Capital Management (HCM) version 9.1. These professional services will be initiated through Task Authorizations (TA)s, on an “as and when requested” basis.

##### **3. BACKGROUND**

- 3.1 The DND has a requirement to address a range of critical business and operational issues pertaining to the management of Canadian Armed Forces (CAF) personnel and the delivery of core Human Resource (HR) management services. The existing core HR systems are outdated and require modernization.
- 3.2 The Military Personnel Management Capability Transformation (MPMCT) Project is a Chief Military Personnel (CMP) sponsored initiative that was established to deliver an integrated Military Personnel Management (MPM) capability for the CAF, encompassing HR and payroll that will recognize the legislative, regulatory and personnel policy framework and will provide accessible data and information to support operations. Transforming the MPM capability will provide the CAF with the agility needed to serve the evolving needs of those in uniform, achieve further integration of Regular and Reserve Forces, increase operational readiness, as well as eliminate policy and process barriers impeding recruiting, retention, employment, and access to benefits and services. The new MPM capability will be called “Guardian”.
- 3.3 The existing military HR systems are currently based on Oracle PeopleSoft. Oracle PeopleSoft is the core specialized Enterprise Resource Planning (ERP) software that manages the HR systems and processes within DND. The current Oracle PeopleSoft application is version 7.5, which is no longer supported by Oracle and needs to be upgraded. Part of the MPMCT Project’s mandate is to upgrade the military HR systems to bring them to a supported state. This upgrade will be executed as Guardian Release 1 of the MPMCT Project’s overall implementation plan. The MPMCT Project has currently defined Release 1 as the migration of DND’s two existing applications, the military HRMS 7.5 and Canadian Forces Recruiting Information Management (CFRIMS) that are currently operating on Oracle PeopleSoft HRMS version 7.5 to a single instance of Oracle PeopleSoft HCM version 9.1.

##### **4. OBJECTIVE**

- 4.1 The objective of this requirement is limited to delivering Guardian Release 1 of the MPMCT Project, which includes the implementation of Oracle PeopleSoft HCM version 9.1 from the existing Oracle PeopleSoft HRMS version 7.5. This involves the re-application of existing customizations and implementing approved de-customizations in accordance with the MPMCT Project’s baseline scope of Guardian Release 1. The MPMCT Project will leverage and oversee the work which will be performed primarily and under the direction of the Directorate Human Resource Information Management (DHRIM) with the support of the contracted resources.

## 5. SCOPE

### 5.1 Professional Services Resources

The Contractor must provide, on an “as and when requested” basis, and as described in the individual TA, the professional services resource(s) in accordance with the table below:

TBIPS Resource Category	TBIPS Experience Level	Required Security Level
A2. ERP Functional Analyst	2	Enhanced Reliability
A2. ERP Functional Analyst	3	Enhanced Reliability

- 5.2 The ERP Functional Analysts will work with the DHRIM staff to provide Oracle PeopleSoft HCM functional support, including application security support, developing functional documentation, contributing to the development of the testing strategy and high-level test plans, as well as performing other related tasks to ensure the successful planning and upgrading from DND’s customized implementation of Oracle PeopleSoft 7.5, the AS-IS system to Oracle PeopleSoft HCM 9.1, the TO-BE system. All work conducted by these resources will be in compliance with DND processes and procedures, using DND templates to be provided by the Technical Authority at the time work is undertaken.

## 6. TASKS AND DELIVERABLES

Specific tasks and deliverables will be identified in the TA and may include, but are not limited to, those identified below.

### 6.1 The Level 2 ERP Functional Analyst(s) must:

- a. Provide input to the Technical Authority for incorporation into the MPMCT Project work breakdown structure and schedule;
- b. Ensure knowledge transfer, mentoring and training occur on a daily basis or as needed to ensure the transfer of functional and/or technical knowledge to the DND staff through demonstrations, written instructions and documents;
- c. Consult with designated stakeholders to gather, analyze and document functional, data and system requirements;
- d. Analyze existing documented business requirements;
- e. Develop options analysis documents and functional design documentation for all customizations and/or de-customizations to Oracle PeopleSoft HCM, including system configuration, PeopleSoft Object(s), PeopleCode, SQR reports and/or system interface(s) details;
- f. Provide advice on the design and development of approved system changes;
- g. Perform fit-gap analyses of AS-IS and TO-BE business, functional and system processes;
- h. Create and validate functional requirements traceability matrices;
- i. Analyze existing AS-IS system artefacts, develop and execute a plan to update them with the upgraded TO-BE system;
- j. Collaborate on business process re-engineering activities, as applicable; and
- k. Participate in testing activities by:
  - i. Preparing and executing test plans, functional test case scenarios and scripts to test the business processes in the Oracle PeopleSoft HCM;
  - ii. Providing functional test case scenarios and scripts and support to the Quality Assurance (QA) team for the purposes of test automation of Oracle PeopleSoft HCM;
  - iii. Providing functional expertise to the DHRIM Quality Assurance Team in support of integration, regression, and load testing activities; and
  - iv. Participating in performance testing activities as required.

6.2 The Level 3 ERP Functional Analyst must:

- a. Provide input to the Technical Authority for incorporation into the MPMCT Project work breakdown structure and schedule;
- b. Ensure knowledge transfer, mentoring and training occur on a daily basis or as needed to ensure the transfer of functional and/or technical knowledge to the DND staff through demonstrations, written instructions and documents;
- c. Analyze documented security administration business requirements and develop functional, data and system requirements for HR, as applicable;
- d. Create, validate and provide functional requirements traceability matrices;
- e. Perform AS-IS and TO-BE security administration business, functional and system process PeopleSoft fit/gap analyses;
- f. Analyze existing capabilities and requirements, develop and redesign the security framework, and recommend areas for improved capability;
- g. Develop options analysis documents and obtain approval through the DND change management process using approved DND templates for the modification of security administration business processes, de-customization of the security administration business processes in Oracle PeopleSoft HCM, and enhancement of the security administration business processes in Oracle PeopleSoft HCM;
- h. Provide advice on the design and development of approved security administration system changes;
- i. Provide functional design documentation for all modifications and enhancements to Oracle PeopleSoft HCM, including system configuration details, PeopleSoft Objects, PeopleCode, SQR reports and/or interfaces; and
- j. Provide test case scenarios, unit test plans and scripts to test the security administration business processes in the Oracle PeopleSoft HCM.

7. **REPORTING REQUIREMENTS**

Reporting requirements will be specified in individual TAs but will include at a minimum the following:

- (a) Contractor Resources: Each Contractor resource must provide Weekly Status Reports to the Technical Authority in an electronic and/or verbal format (as determined by the Technical Authority), detailing the work performed and completion of assigned tasks. Weekly Status Reports must, at a minimum, include the following for written reports and/or verbal formats:
  - (i) Status of all activities completed and outstanding activities;
  - (ii) Activities finalized to date (final versions of deliverables submitted);
  - (iii) Problems encountered including details if activities are not progressing in accordance with the specific TA; and
  - (iv) Potential issues which are likely to cause problems related to the work required and have an impact on the project schedule, cost, scope and quality.

Weekly Status Reports are not required for any week in which services were not provided.

- (b) Contractor: The Contractor must provide a financial status report, to be included with the monthly invoice, which must contain, at a minimum, the following information:
  - (i) Task Number,
  - (ii) Start Date,
  - (iii) End Date,
  - (iv) GST/HST,
  - (v) Total Spent,
  - (vi) Task Value,
  - (vii) Funds Remaining in the Task,

- (viii) % Complete, and
- (ix) Task Status (Active/Closed).

## **8. FORMAT OF DELIVERABLES AND REPORTS**

- 8.1 Deliverables will be specified within each individual TA and will typically take the form of assessments, recommendations and reports. Deliverables will also include Contractor services to assist or enable an activity. The deliverables and reports specified in the TA must be submitted to the Technical Authority.
- 8.2 All written deliverables and reports must be submitted as requested in one (1) hard copy and one (1) electronic copy in Microsoft Office format (Word, Excel, PowerPoint, Project, or Visio), acceptable to the Technical Authority.
- 8.3 All reports must adhere to DND/CAF reporting formats as identified by the Technical Authority; reporting templates will be provided by the Technical Authority.
- 8.4 Non-classified deliverables and reports may be e-mailed or presented on appropriate storage media. Classified deliverables and reports must be handled in accordance with DND/CAF regulations for classified information.

## **9. INSPECTION AND ACCEPTANCE**

- 9.1 The Technical Authority is the Inspection Authority. All reports, deliverable items, documents, and all services rendered under each Task Authorization (TA) are subject to inspection by the Inspection Authority or representative. Should any report, document, or service not be in accordance with the requirements of the Statement of Work and to the satisfaction of the Inspection Authority, as submitted, the Inspection Authority will have the right to reject it or require its correction at the sole expense of the Contractor before recommending payment.

## **10. TECHNICAL ENVIRONMENT**

- 10.1 The current technical environment within DHRIM includes a mix of system implementations utilizing different technologies. All Contractor personnel must use the Defence Wide Area Network (DWAN) as their primary DND network account, and may be required to use the following technologies while performing their duties:
  - a. Oracle PeopleSoft HRMS 7.5, HCM 8.9 and HCM 9.1;
  - b. PeopleTools 8.51;
  - c. Oracle databases 8i, 10g, 11G and above;
  - d. Structured Query Reporter (SQR);
  - e. Structured Query Language (SQL) Oracle;
  - f. Procedural Language (PL)/SQL;
  - g. Windows;
  - h. UNIX;
  - i.. Linux;
  - j. HP Application Life Cycle Management
  - k. HP Quality Center; and
  - l. HP Quick Test Pro.
- 10.2 Over the duration of the Contract, the technical environments may be upgraded and modified, in line with the DND/CAF and the federal government strategic direction.

**11. CONSTRAINTS**

- 11.1 Access to DND facilities and staff is limited to normal DND working hours between 07:00 and 17:00 Monday through Friday. Contractor resources may be required to work outside of normal working hours in order to meet DND schedules and deadlines. Any work performed outside of normal working hours must be pre-approved by the Technical Authority in writing.
- 11.2 Should a Contractor resource anticipate that the 7.5 hour per diem workday, as stipulated in the Contract, may be exceeded, approval must be obtained from the Technical Authority prior to work being carried out in excess of this time. No overtime charges will be authorized under this Contract. All time worked will be compensated in accordance with the Contract's Basis of Payment.
- 11.3 The Contractor is responsible to perform any activities related to obtaining a Visit Clearance Request (VCR) in order for their personnel to gain access to DND office facilities.

**12. LANGUAGE REQUIREMENTS**

- 12.1 The proposed resource must be fluent in the English language. Fluent means that the individual must be able to communicate orally and in writing without any assistance and with minimal errors.
- 12.2 All reports and deliverables must be submitted in English as specified by the Technical Authority in the specific TA.

**13. LOCATION OF WORK**

- 13.1 All Work will be performed on DND premises within the National Capital Region (NCR). Determination of the exact location of work within the NCR will be at the discretion of the Technical Authority. The work will primarily be at the DND facility currently located at 222 Nepean Street, Ottawa, Ontario.

**14. TRAVEL**

- 14.1 The Contractor's resources will not be required to travel outside the National Capital Region (NCR). Travel may be required from time to time within the NCR. Travel within the NCR will not be reimbursed.

## **WORKSTREAM 2**

### **1. TITLE**

- 1.1 Human Resource Management System (HRMS) Technical Upgrade

### **2. REQUIREMENT**

- 2.1 The Department of National Defence, Military Personnel Management Capability Transformation (MPMCT) Project requires Task-Based Informatics Professional Services (TBIPS) from the Application Services Stream for the upgrade of Oracle PeopleSoft version 7.5 to Oracle PeopleSoft Human Capital Management (HCM) version 9.1. These professional services will be initiated through Task Authorizations (TA)s, on an “as and when requested” basis.

### **3. BACKGROUND**

- 3.1 The DND has a requirement to address a range of critical business and operational issues pertaining to the management of Canadian Armed Forces (CAF) personnel and the delivery of core Human Resource (HR) management services. The existing core HR systems are outdated and require modernization.
- 3.2 The Military Personnel Management Capability Transformation (MPMCT) Project is a Chief Military Personnel (CMP) sponsored initiative that was established to deliver an integrated Military Personnel Management (MPM) capability for the CAF, encompassing HR and payroll that will recognize the legislative, regulatory and personnel policy framework and will provide accessible data and information to support operations. Transforming the MPM capability will provide the CAF with the agility needed to serve the evolving needs of those in uniform, achieve further integration of Regular and Reserve Forces, increase operational readiness, as well as eliminate policy and process barriers impeding recruiting, retention, employment, and access to benefits and services. The new MPM capability will be called “Guardian”.
- 3.3 The existing military HR systems are currently based on Oracle PeopleSoft. Oracle PeopleSoft is the core specialized Enterprise Resource Planning (ERP) software that manages the HR systems and processes within DND. The current Oracle PeopleSoft application is version 7.5, which is no longer supported by Oracle and needs to be upgraded. Part of the MPMCT Project's mandate is to upgrade the military HR systems to bring them to a supported state. This upgrade will be executed as Guardian Release 1 of the MPMCT Project's overall implementation plan. The MPMCT Project has currently defined Release 1 as the migration of DND's two existing applications, the military HRMS 7.5 and Canadian Forces Recruiting Information Management (CFRIMS) that are currently operating on Oracle PeopleSoft HRMS version 7.5 to a single instance of Oracle PeopleSoft HCM version 9.1.

### **4. OBJECTIVE**

- 4.1 The objective of this requirement is limited to delivering Guardian Release 1 of the MPMCT Project, which includes the implementation of Oracle PeopleSoft HCM version 9.1 from the existing Oracle PeopleSoft HRMS version 7.5. This involves the re-application of existing customizations and implementing approved de-customizations in accordance with the MPMCT Project's baseline scope of Guardian Release 1. The MPMCT Project will leverage and oversee the work which will be performed primarily and under the direction of the Directorate Human Resource Information Management (DHRIM) with the support of the contracted resources.

## 5. SCOPE

### 5.1 Professional Services Resources

The Contractor must provide, on an “as and when requested” basis, and as described in the individual TA, the professional services resource(s) in accordance with the table below:

TBIPS Resource Category	TBIPS Experience Level	Required Security Level
A3. ERP Programmer Analyst	3	Enhanced Reliability

- 5.2 The ERP Programmer Analyst(s) will provide PeopleSoft development support in the areas of PeopleSoft development, operations and functional analysis using Oracle PeopleSoft (PeopleTools), as well as performing other related tasks to ensure the successful planning and upgrading from DND's customized implementation of Oracle PeopleSoft 7.5, the AS-IS system to Oracle PeopleSoft HCM 9.1, the TO-BE system.

## 6. TASKS AND DELIVERABLES

Specific tasks and deliverables will be identified in the TA and may include, but are not limited to, those identified below.

### 6.1 The Level 3 ERP Programmer Analyst must:

- a. Provide input to the Technical Authority for incorporation into the MPMCT Project work breakdown structure and schedule;
- b. Ensure knowledge transfer, mentoring and training occur on a daily basis or as needed to ensure the transfer of functional and/or technical knowledge to the DND staff through demonstrations, written instructions and documents;
- c. Develop PeopleSoft modules using Oracle PeopleSoft PeopleTools;
- d. Provide evaluation and consultation for data integration between different HCM applications;
- e. Identify, analyze and document requests for changes and assess the impact of the proposed work to the existing system;
- f. Propose cost-effective solutions to meet functional requirements;
- g. Build prototypes or working models to demonstrate solutions to technical problems or functional requirements;
- h. Provide technical input and consultation for functional fit-gap of business requirements within the existing system and document data fit/gap and options analyses;
- i. Design and implement application security, in accordance with the functional requirements;
- j. Design, develop and implement reports and system interfaces, using a variety of technical solutions including SQR, XML Publisher, PS Query Reports, batches and application engine;
- k. Provide updates to AS-IS documentation and TO-BE system documentation for Release 1, including any diagrams, data flowcharts, system process flow diagrams and data models; and
- l. Develop reports for Data mapping or migration analysis, system requirements and system deficiencies, data quality and data clean-up.

## 7. REPORTING REQUIREMENTS

Reporting requirements will be specified in individual TAs but will include at a minimum the following:

- (a) Contractor Resources: Each Contractor resource must provide Weekly Status Reports to the Technical Authority in an electronic and/or verbal format, detailing the work performed and completion of assigned tasks. Weekly Status Reports must, at a minimum, include the following for written reports and/or verbal formats:

- (i) Status of all activities completed and outstanding activities;
- (ii) Activities finalized to date (final versions of deliverables submitted);
- (iii) Problems encountered including details if activities are not progressing in accordance with the specific TA; and
- (iv) Potential issues which are likely to cause problems related to the work required and have an impact on the project schedule, cost, scope and quality.

Weekly Status Reports are not required for any week in which services were not provided.

- (b) Contractor: The Contractor must provide a financial status report, to be included with the monthly invoice, which must contain, at a minimum, the following information:
  - (i) Task Number,
  - (ii) Start Date,
  - (iii) End Date,
  - (iv) GST/HST,
  - (v) Total Spent,
  - (vi) Task Value,
  - (vii) Funds Remaining in the Task,
  - (viii) % Complete, and
  - (ix) Task Status (Active/Closed).

## **8. FORMAT OF DELIVERABLES AND REPORTS**

- 8.1 Deliverables will be specified within each individual TA and will typically take the form of assessments, recommendations, documentation updates and reports. Deliverables will also include Contractor services to assist or enable an activity. Deliverables and reports must be submitted to the Technical Authority.
- 8.2 All written deliverables and reports must be submitted as requested in one (1) hard copy and one (1) electronic copy in Microsoft Office format (Word, Excel, PowerPoint, Project, or Visio), acceptable to the Technical Authority.
- 8.3 All reports must adhere to DND/CAF reporting formats as identified by the Technical Authority; reporting templates will be provided by the Technical Authority.
- 8.4 Non-classified deliverables and reports may be e-mailed or presented on appropriate storage media. Classified deliverables and reports must be handled in accordance with DND/CAF regulations for classified information.

## **9. INSPECTION AND ACCEPTANCE**

- 9.1 The Technical Authority is the Inspection Authority. All reports, deliverable items, documents, and all services rendered under each Task Authorization (TA) are subject to inspection by the Inspection Authority or representative. Should any report, document, or service not be in accordance with the requirements of the Statement of Work and to the satisfaction of the Inspection Authority, as submitted, the Inspection Authority will have the right to reject it or require its correction at the sole expense of the Contractor before recommending payment.

## **10. TECHNICAL ENVIRONMENT**

- 10.1 The current technical environment within DHRIM includes a mix of system implementations utilizing different technologies. All Contractor personnel must use the Defence Wide Area Network (DWAN) as

their primary DND network account, and may be required to use the following technologies while performing their duties:

- a. Oracle PeopleSoft HRMS 7.5, HCM 8.9 and HCM 9.1;
- b. PeopleTools 8.51;
- c. Oracle databases 8i, 10g, 11G and above;
- d. Structured Query Reporter (SQR);
- e. Structured Query Language (SQL) Oracle;
- f. Procedural Language (PL)/SQL;
- g. Windows;
- h. UNIX;
- i. Linux;
- j. HP Application Life Cycle Management
- k. HP Quality Center; and
- l. HP Quick Test Pro.

- 10.2 Over the duration of the Contract, the technical environments may be upgraded and modified, in line with the DND/CAF and the federal government strategic direction.

## **11. CONSTRAINTS**

- 11.1 Access to DND facilities and staff is limited to normal DND working hours between 07:00 and 17:00 Monday through Friday. Contractor resources may be required to work outside of normal working hours in order to meet DND schedules and deadlines. Any work performed outside of normal working hours must be pre-approved by the Technical Authority in writing.
- 11.2 Should a Contractor resource anticipate that the 7.5 hour per diem workday, as stipulated in the Contract, may be exceeded, approval must be obtained from the Technical Authority prior to work being carried out in excess of this time. No overtime charges will be authorized under this Contract. All time worked will be compensated in accordance with the Contract's Basis of Payment.
- 11.4 The Contractor is responsible to perform any activities related to obtaining a Visit Clearance Request (VCR) in order for their personnel to gain access to DND office facilities.

## **12. LANGUAGE REQUIREMENTS**

- 12.1 The proposed resource must be fluent in the English language. Fluent means that the individual must be able to communicate orally and in writing without any assistance and with minimal errors.
- 12.2 All reports and deliverables must be submitted in English as specified by the Technical Authority in the specific TA.

## **13. LOCATION OF WORK**

- 13.1 All Work will be performed on DND premises within the National Capital Region (NCR). Determination of the exact location of work within the NCR will be at the discretion of the Technical Authority. The work will primarily be at the DND facility currently located at 222 Nepean Street, Ottawa, Ontario.

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Solicitation number: W8474-14MP22/A

**14. TRAVEL**

- 14.1 The Contractor's resources will not be required to travel outside the National Capital Region (NCR). Travel may be required from time to time within the NCR. Travel within the NCR will not be reimbursed.

### **WORKSTREAM 3**

#### **1. TITLE**

- 1.1 Human Resource Management System (HRMS) Technical Upgrade

#### **2. REQUIREMENT**

- 2.1 The Department of National Defence, Military Personnel Management Capability Transformation (MPMCT) Project requires Task-Based Informatics Professional Services (TBIPS) from the Application Services Stream for the upgrade of Oracle PeopleSoft version 7.5 to Oracle PeopleSoft Human Capital Management (HCM) version 9.1. These professional services will be initiated through Task Authorizations (TA)s, on an “as and when requested” basis.

#### **3. BACKGROUND**

- 3.1 The DND has a requirement to address a range of critical business and operational issues pertaining to the management of Canadian Armed Forces (CAF) personnel and the delivery of core Human Resource (HR) management services. The existing core HR systems are outdated and require modernization.
- 3.2 The Military Personnel Management Capability Transformation (MPMCT) Project is a Chief Military Personnel (CMP) sponsored initiative that was established to deliver an integrated Military Personnel Management (MPM) capability for the CAF, encompassing HR and payroll that will recognize the legislative, regulatory and personnel policy framework and will provide accessible data and information to support operations. Transforming the MPM capability will provide the CAF with the agility needed to serve the evolving needs of those in uniform, achieve further integration of Regular and Reserve Forces, increase operational readiness, as well as eliminate policy and process barriers impeding recruiting, retention, employment, and access to benefits and services. The new MPM capability will be called “Guardian”.
- 3.3 The existing military HR systems are currently based on Oracle PeopleSoft. Oracle PeopleSoft is the core specialized Enterprise Resource Planning (ERP) software that manages the HR systems and processes within DND. The current Oracle PeopleSoft application is version 7.5, which is no longer supported by Oracle and needs to be upgraded. Part of the MPMCT Project’s mandate is to upgrade the military HR systems to bring them to a supported state. This upgrade will be executed as Guardian Release 1 of the MPMCT Project’s overall implementation plan. The MPMCT Project has currently defined Release 1 as the migration of DND’s two existing applications, the military HRMS 7.5 and Canadian Forces Recruiting Information Management (CFRIMS) that are currently operating on Oracle PeopleSoft HRMS version 7.5 to a single instance of Oracle PeopleSoft HCM version 9.1.

#### **4. OBJECTIVE**

- 4.1 The objective of this requirement is limited to delivering Guardian Release 1 of the MPMCT Project, which includes the implementation of Oracle PeopleSoft HCM version 9.1 from the existing Oracle PeopleSoft HRMS version 7.5. This involves the re-application of existing customizations and implementing approved de-customizations in accordance with the MPMCT Project’s baseline scope of Guardian Release 1. The MPMCT Project will leverage and oversee the work which will be performed primarily and under the direction of the Directorate Human Resource Information Management (DHRIM) with the support of the contracted resources.

## 5. SCOPE

### 5.1 Professional Services Resources

The Contractor must provide, on an “as and when requested” basis, and as described in the individual TA, the professional services resource(s) in accordance with the table below:

TBIPS Resource Category	TBIPS Experience Level	Required Security Level
A5. ERP Technical Analyst	3	Secret

- 5.2 The Level 3 ERP Technical Analyst(s) will work with the DHRIM operations staff, to provide technical support, advice and guidance in support of the technical upgrade, as well as performing other related tasks to ensure the successful planning and upgrading from DND’s customized implementation of Oracle PeopleSoft 7.5, the AS-IS system to Oracle PeopleSoft HCM 9.1, the TO-BE system.

## 6. TASKS AND DELIVERABLES

Specific tasks and deliverables will be identified in the TA and may include, but are not limited to, those identified below.

### 6.2 The Level 3 ERP Technical Analyst must:

- a. Provide input to the Technical Authority for incorporation into the MPMCT Project work breakdown structure and schedule;
- b. Ensure knowledge transfer, mentoring and training occur on a daily basis or as needed to ensure the transfer of functional and/or technical knowledge to the DND staff through demonstrations, written instructions and documents;
- c. Configure all the components, such as application server, web server, process scheduler, integration broker;
- d. Apply fixes, patches, updates and upgrades to the PeopleSoft application and propagate these changes across different environments;
- e. Perform capacity planning, performance monitoring and tuning of systems, including SQL and PeopleCode;
- f. Identify and consult in the implementation of hardware, operating system and software enhancements for improving the reliability, performance and availability of the applications;
- g. Administer PeopleSoft in a mixed Unix/Windows environment;
- h. Implement application architecture solutions, considering cost, reliability, performance and long-term strategy;
- i. Perform the systems configuration for high availability and satisfactory response time;
- j. Provide technical design documentation for all modifications and enhancements to Oracle PeopleSoft HCM, including configuration documentation, PeopleCode/SQL reports, patches/updates to system(s); and
- k. Develop and deliver system configuration documentation and/or collaborate in business process re-engineering activities.

## 7. REPORTING REQUIREMENTS

Reporting requirements will be specified in individual TAs but will include at a minimum the following:

- (a) Contractor Resources: Each Contractor resource must provide Weekly Status Reports to the Technical Authority in an electronic and/or verbal format, detailing the work performed and completion of assigned tasks. Weekly Status Reports must, at a minimum, include the following for written reports and/or verbal formats:

- (i) Status of all activities completed and outstanding activities;
- (ii) Activities finalized to date (final versions of deliverables submitted);
- (iii) Problems encountered including details if activities are not progressing in accordance with the specific TA; and
- (iv) Potential issues which are likely to cause problems related to the work required and have an impact on the project schedule, cost, scope and quality.

Weekly Status Reports are not required for any week in which services were not provided.

- (b) Contractor: The Contractor must provide a financial status report, to be included with the monthly invoice, which must contain, at a minimum, the following information:

- (i) Task Number,
- (ii) Start Date,
- (iii) End Date,
- (iv) GST/HST,
- (v) Total Spent,
- (vi) Task Value,
- (vii) Funds Remaining in the Task,
- (viii) % Complete, and
- (ix) Task Status (Active/Closed).

## **8. FORMAT OF DELIVERABLES AND REPORTS**

- 8.1 Deliverables will be specified within each individual TA and will typically take the form of assessments, recommendations, documentation and reports. Deliverables will also include Contractor services to assist or enable an activity. Deliverables and reports must be submitted to the Technical Authority.
- 8.2 All written deliverables and reports must be submitted as requested in one (1) hard copy and one (1) electronic copy in Microsoft Office format (Word, Excel, PowerPoint, Project, or Visio), acceptable to the Technical Authority.
- 8.3 All reports must adhere to DND/CAF reporting formats as identified by the Technical Authority; reporting templates will be provided by the Technical Authority.
- 8.4 Non-classified deliverables and reports may be e-mailed or presented on appropriate storage media. Classified deliverables and reports must be handled in accordance with DND/CAF regulations for classified information.

## **9. INSPECTION AND ACCEPTANCE**

- 9.1 The Technical Authority is the Inspection Authority. All reports, deliverable items, documents, and all services rendered under each Task Authorization (TA) are subject to inspection by the Inspection Authority or representative. Should any report, document, or service not be in accordance with the requirements of the Statement of Work and to the satisfaction of the Inspection Authority, as submitted, the Inspection Authority will have the right to reject it or require its correction at the sole expense of the Contractor before recommending payment.

## **10. TECHNICAL ENVIRONMENT**

- 10.1 The current technical environment within DHRIM includes a mix of system implementations utilizing different technologies. All Contractor personnel must use the Defence Wide Area Network (DWAN) as

their primary DND network account, and may be required to use the following technologies while performing their duties:

- a. Oracle PeopleSoft HRMS 7.5, HCM 8.9 and HCM 9.1;
- b. PeopleTools 8.51;
- c. Oracle databases 8i, 10g, 11G and above;
- d. Structured Query Reporter (SQR);
- e. Structured Query Language (SQL) Oracle;
- f. Procedural Language (PL)/SQL;
- g. Windows;
- h. UNIX;
- i. Linux;
- j. HP Application Life Cycle Management
- k. HP Quality Center; and
- l. HP Quick Test Pro.

- 10.2 Over the duration of the Contract, the technical environments may be upgraded and modified, in line with the DND/CAF and the federal government strategic direction.

## **11. CONSTRAINTS**

- 11.1 Access to DND facilities and staff is limited to normal DND working hours between 07:00 and 17:00 Monday through Friday. Contractor resources may be required to work outside of normal working hours in order to meet DND schedules and deadlines. Any work performed outside of normal working hours must be pre-approved by the Technical Authority in writing.
- 11.2 Should a Contractor resource anticipate that the 7.5 hour per diem workday, as stipulated in the Contract, may be exceeded, approval must be obtained from the Technical Authority prior to work being carried out in excess of this time. No overtime charges will be authorized under this Contract. All time worked will be compensated in accordance with the Contract's Basis of Payment.
- 11.5 The Contractor is responsible to perform any activities related to obtaining a Visit Clearance Request (VCR) in order for their personnel to gain access to DND office facilities.

## **12. LANGUAGE REQUIREMENTS**

- 12.1 The proposed resource must be fluent in the English language. Fluent means that the individual must be able to communicate orally and in writing without any assistance and with minimal errors.
- 12.2 All reports and deliverables must be submitted in English as specified by the Technical Authority in the specific TA.

## **13. LOCATION OF WORK**

- 13.1 All Work will be performed on DND premises within the National Capital Region (NCR). Determination of the exact location of work within the NCR will be at the discretion of the Technical Authority. The work will primarily be at the DND facility currently located at 222 Nepean Street, Ottawa, Ontario.

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**14. TRAVEL**

- 14.1 The Contractor's resources will not be required to travel outside the National Capital Region (NCR). Travel may be required from time to time within the NCR. Travel within the NCR will not be reimbursed.

## **WORKSTREAM 4**

### **1. TITLE**

- 1.1 Human Resource Management System (HRMS) Technical Upgrade

### **2. REQUIREMENT**

- 2.1 The Department of National Defence, Military Personnel Management Capability Transformation (MPMCT) Project requires Task-Based Informatics Professional Services (TBIPS) from the Information Management/Information Technology Services Stream for the upgrade of Oracle PeopleSoft version 7.5 to Oracle PeopleSoft Human Capital Management (HCM) version 9.1. These professional services will be initiated through Task Authorizations (TA)s, on an “as and when requested” basis.

### **3. BACKGROUND**

- 3.1 The DND has a requirement to address a range of critical business and operational issues pertaining to the management of Canadian Armed Forces (CAF) personnel and the delivery of core Human Resource (HR) management services. The existing core HR systems are outdated and require modernization.
- 3.4 The Military Personnel Management Capability Transformation (MPMCT) Project is a Chief Military Personnel (CMP) sponsored initiative that was established to deliver an integrated Military Personnel Management (MPM) capability for the CAF, encompassing HR and payroll that will recognize the legislative, regulatory and personnel policy framework and will provide accessible data and information to support operations. Transforming the MPM capability will provide the CAF with the agility needed to serve the evolving needs of those in uniform, achieve further integration of Regular and Reserve Forces, increase operational readiness, as well as eliminate policy and process barriers impeding recruiting, retention, employment, and access to benefits and services. The new MPM capability will be called “Guardian”.
- 3.5 The existing military HR systems are currently based on Oracle PeopleSoft. Oracle PeopleSoft is the core specialized Enterprise Resource Planning (ERP) software that manages the HR systems and processes within DND. The current Oracle PeopleSoft application is version 7.5, which is no longer supported by Oracle and needs to be upgraded. Part of the MPMCT Project’s mandate is to upgrade the military HR systems to bring them to a supported state. This upgrade will be executed as Guardian Release 1 of the MPMCT Project’s overall implementation plan. The MPMCT Project has currently defined Release 1 as the migration of DND’s two existing applications, the military HRMS 7.5 and Canadian Forces Recruiting Information Management (CFRIMS) that are currently operating on Oracle PeopleSoft HRMS version 7.5 to a single instance of Oracle PeopleSoft HCM version 9.1.

### **4. OBJECTIVE**

- 4.1 The objective of this requirement is limited to delivering Guardian Release 1 of the MPMCT Project, which includes the implementation of Oracle PeopleSoft HCM version 9.1 from the existing Oracle PeopleSoft HRMS version 7.5. This involves the re-application of existing customizations and implementing approved de-customizations in accordance with the MPMCT Project’s baseline scope of Guardian Release 1. The MPMCT Project will leverage and oversee the work which will be performed primarily and under the direction of the Directorate Human Resource Information Management (DHRIM) with the support of the contracted resources.

### **5. SCOPE**

## 5.1 Professional Services Resources

The Contractor must provide, on an “as and when requested” basis, and as described in the individual TA, the professional services resource(s) in accordance with the table below:

<b>TBIPS Resource Category</b>	<b>TBIPS Experience Level</b>	<b>Required Security Level</b>
I1. Data Conversion Specialist	2	Enhanced Reliability
I2. Database Administrator	2	Secret

- 5.2 The Level 2 Data Conversion Specialist will provide PeopleSoft data architecture support to the DHRIM technical and functional staff, including conducting data analysis, data mapping, and data conversion preparation activities. The Level 2 Data Conversion Specialist will provide expertise and guidance for application set-up and configuration, application workflow, integrated module functionality, PeopleSoft processes, interfaces and integration broker and work with DHRIM staff to determine solutions to ensure that business requirements are supported by the architecture.

The Level 2 Database Administrator will work with the DRHIM application services team to provide technical support, advice and guidance on the database administration tasks as part of the planning and development phases of the technical upgrade. The Level 2 Database Administrator may be required to work with the Shared Services Canada (SSC) server administration team.

## 6. TASKS AND DELIVERABLES

Specific tasks and deliverables will be identified in the TA and may include, but are not limited to, those identified below.

- 6.1 The Level 2 Data Conversion Specialist must:

- a. Provide input to the Technical Authority for incorporation into the MPMCT Project work breakdown structure and schedule;
- b. Ensure knowledge transfer, mentoring and training occur on a daily basis or as needed to ensure the transfer of functional and/or technical knowledge to the DND staff through demonstrations, written instructions and documents;
- c. Participate directly in all aspects of the data conversion preparation process;
- d. Analyze functional specifications and prepare data conversion roadmaps;
- e. Provide advice and recommendations and produce reports on data quality activities, including data sampling and cleanup activities prior to system migration(s);
- f. Translate functional and business requirements into data conversion specifications;
- g. Analyze existing data models and recommend alternative options to facilitate data conversion or to improve data quality;
- h. Develop data fit/gap and option analysis report(s) including process efficiencies reports;
- i. Update AS-IS documentation and TO-BE system documentation for Release 1, including any diagrams, data flowcharts, system process flow diagrams and data models;
- j. Develop data mapping and migration analysis report(s) between the AS-IS and TO-BE systems for data conversion and migration;
- k. Analyze existing system interfaces and ensure that data exchange and sharing requirements are fully captured and reflected in the implementation of Guardian Release 1;
- l. Conduct impact analyses on existing systems and subsystems, in order to identify upgrade and data migration challenges;
- m. Produce system documentation, including flow charts, diagrams, system process flow diagrams, data models, system requirement and system deficiency, and system option analysis reports, as required; and

- n. Propose and recommend solutions to ensure that business requirements are supported by the architecture.

6.2 The Level 2 Database Administrator must:

- a. Provide input to the Technical Authority for incorporation into the MPMCT Project work breakdown structure and schedule;
- b. Ensure knowledge transfer, mentoring and training occur on a daily basis or as needed to ensure the transfer of functional and/or technical knowledge to the DND staff through demonstrations, written instructions and documents;
- c. Import and analyze data from heterogeneous platforms for rationalization and integration purposes;
- d. Analyze existing data models, and recommend alternative options to facilitate data conversion or to improve data quality;
- e. Conduct impact analysis on existing systems and subsystems, in order to identify upgrade and data migration challenges;
- f. Provide services as part of the creation of prototypes, proof of concept (POC) and interfaces, in order to demonstrate technical, functional and security capabilities that could be gained;
- g. Produce system documentation, including flow charts, diagrams, system process flow diagrams, data models and system option analysis reports, as required;
- h. Monitor database performance; and
- i. Trouble-shoot database-related issues and make recommendations on how to improve database performance and sustainability

## 7. REPORTING REQUIREMENTS

Reporting requirements will be specified in individual TAs but will include at a minimum the following:

- (a) Contractor Resources: Each Contractor resource must provide Weekly Status Reports to the Technical Authority in an electronic and/or verbal format, detailing the work performed and completion of assigned tasks. Weekly Status Reports must, at a minimum, include the following for written reports and/or verbal formats:
  - (i) Status of all activities completed and outstanding activities;
  - (ii) Activities finalized to date (final versions of deliverables submitted);
  - (iii) Problems encountered including details if activities are not progressing in accordance with the specific TA; and
  - (iv) Potential issues which are likely to cause problems related to the work required and have an impact on the project schedule, cost, scope and quality.

Weekly Status Reports are not required for any week in which services were not provided.

- (b) Contractor: The Contractor must provide a financial status report, to be included with the monthly invoice, which must contain, at a minimum, the following information:
  - (x) Task Number,
  - (xi) Start Date,
  - (xii) End Date,
  - (xiii) GST/HST,
  - (xiv) Total Spent,
  - (xv) Task Value,
  - (xvi) Funds Remaining in the Task,
  - (xvii) % Complete, and
  - (xviii) Task Status (Active/Closed).

## **8. FORMAT OF DELIVERABLES AND REPORTS**

- 8.1 Deliverables will be specified within each individual TA and will typically take the form of assessments, recommendations, documentation, and reports. Deliverables will also include Contractor services to assist or enable an activity. Deliverables and reports must be submitted to the Technical Authority.
- 8.2 All written deliverables and reports must be submitted as requested in one (1) hard copy and one (1) electronic copy in Microsoft Office format (Word, Excel, PowerPoint, Project, or Visio), acceptable to the Technical Authority.
- 8.3 All reports must adhere to DND/CAF reporting formats as identified by the Technical Authority; reporting templates will be provided by the Technical Authority.
- 8.4 Non-classified deliverables and reports may be e-mailed or presented on appropriate storage media. Classified deliverables and reports must be handled in accordance with DND/CAF regulations for classified information.

## **9. INSPECTION AND ACCEPTANCE**

- 9.1 The Technical Authority is the Inspection Authority. All reports, deliverable items, documents, and all services rendered under each Task Authorization (TA) are subject to inspection by the Inspection Authority or representative. Should any report, document, or service not be in accordance with the requirements of the Statement of Work and to the satisfaction of the Inspection Authority, as submitted, the Inspection Authority will have the right to reject it or require its correction at the sole expense of the Contractor before recommending payment.

## **10. TECHNICAL ENVIRONMENT**

- 10.1 The current technical environment within DHRIM includes a mix of system implementations utilizing different technologies. All Contractor personnel must use the Defence Wide Area Network (DWAN) as their primary DND network account, and may be required to use the following technologies while performing their duties:
  - a. Oracle PeopleSoft HRMS 7.5, HCM 8.9 and HCM 9.1;
  - b. PeopleTools 8.51;
  - c. Oracle databases 8i, 10g, 11G and above;
  - d. Structured Query Reporter (SQR);
  - e. Structured Query Language (SQL) Oracle;
  - f. Procedural Language (PL)/SQL;
  - g. Windows;
  - h. UNIX;
  - i. Linux;
  - j. HP Application Life Cycle Management
  - k. HP Quality Center; and
  - l. HP Quick Test Pro.

- 10.2 Over the duration of the Contract, the technical environments may be upgraded and modified, in line with the DND/CAF and the federal government strategic direction.

## **11. CONSTRAINTS**

- 11.1 Access to DND facilities and staff is limited to normal DND working hours between 07:00 and 17:00 Monday through Friday. Contractor resources may be required to work outside of normal working hours

in order to meet DND schedules and deadlines. Any work performed outside of normal working hours must be pre-approved by the Technical Authority in writing.

- 11.2 Should a Contractor resource anticipate that the 7.5 hour per diem workday, as stipulated in the Contract, may be exceeded, approval must be obtained from the Technical Authority prior to work being carried out in excess of this time. No overtime charges will be authorized under this Contract. All time worked will be compensated in accordance with the Contract's Basis of Payment.
- 11.6 The Contractor is responsible to perform any activities related to obtaining a Visit Clearance Request (VCR) in order for their personnel to gain access to DND office facilities.

## **12. LANGUAGE REQUIREMENTS**

- 12.1 The proposed resource must be fluent in the English language. Fluent means that the individual must be able to communicate orally and in writing without any assistance and with minimal errors.
- 12.2 All reports and deliverables must be submitted in English as specified by the Technical Authority in the specific TA.

## **13. LOCATION OF WORK**

- 13.1 All Work will be performed on DND premises within the National Capital Region (NCR). Determination of the exact location of work within the NCR will be at the discretion of the Technical Authority. The work will primarily be at the DND facility currently located at 222 Nepean Street, Ottawa, Ontario.

## **14. TRAVEL**

- 14.1 The Contractor's resources will not be required to travel outside the National Capital Region (NCR). Travel may be required from time to time within the NCR. Travel within the NCR will not be reimbursed.

## **WORKSTREAM 5**

### **1. TITLE**

- 1.1 Human Resource Management System (HRMS) Technical Upgrade

### **2. REQUIREMENT**

- 2.1 The Department of National Defence, Military Personnel Management Capability Transformation (MPMCT) Project requires Task-Based Informatics Professional Services (TBIPS) from the Application Services Stream for the upgrade of Oracle PeopleSoft version 7.5 to Oracle PeopleSoft Human Capital Management (HCM) version 9.1. These professional services will be initiated through Task Authorizations (TA)s, on an “as and when requested” basis.

### **3. BACKGROUND**

- 3.1 The DND has a requirement to address a range of critical business and operational issues pertaining to the management of Canadian Armed Forces (CAF) personnel and the delivery of core Human Resource (HR) management services. The existing core HR systems are outdated and require modernization.
- 3.6 The Military Personnel Management Capability Transformation (MPMCT) Project is a Chief Military Personnel (CMP) sponsored initiative that was established to deliver an integrated Military Personnel Management (MPM) capability for the CAF, encompassing HR and payroll that will recognize the legislative, regulatory and personnel policy framework and will provide accessible data and information to support operations. Transforming the MPM capability will provide the CAF with the agility needed to serve the evolving needs of those in uniform, achieve further integration of Regular and Reserve Forces, increase operational readiness, as well as eliminate policy and process barriers impeding recruiting, retention, employment, and access to benefits and services. The new MPM capability will be called “Guardian”.
- 3.7 The existing military HR systems are currently based on Oracle PeopleSoft. Oracle PeopleSoft is the core specialized Enterprise Resource Planning (ERP) software that manages the HR systems and processes within DND. The current Oracle PeopleSoft application is version 7.5, which is no longer supported by Oracle and needs to be upgraded. Part of the MPMCT Project’s mandate is to upgrade the military HR systems to bring them to a supported state. This upgrade will be executed as Guardian Release 1 of the MPMCT Project’s overall implementation plan. The MPMCT Project has currently defined Release 1 as the migration of DND’s two existing applications, the military HRMS 7.5 and Canadian Forces Recruiting Information Management (CFRIMS) that are currently operating on Oracle PeopleSoft HRMS version 7.5 to a single instance of Oracle PeopleSoft HCM version 9.1.

### **4. OBJECTIVE**

- 4.1 The objective of this requirement is limited to delivering Guardian Release 1 of the MPMCT Project, which includes the implementation of Oracle PeopleSoft HCM version 9.1 from the existing Oracle PeopleSoft HRMS version 7.5. This involves the re-application of existing customizations and implementing approved de-customizations in accordance with the MPMCT Project’s baseline scope of Guardian Release 1. The MPMCT Project will leverage and oversee the work which will be performed primarily and under the direction of the Directorate Human Resource Information Management (DHRIM) with the support of the contracted resources.

## 5. SCOPE

### 5.1 Professional Services Resources

The Contractor must provide, on an “as and when requested” basis, and as described in the individual TA, the professional services resource(s) in accordance with the table below:

TBIPS Resource Category	TBIPS Experience Level	Required Security Level
A11. Tester	2	Enhanced Reliability

- 5.2 The Level 2 Tester will support the coordination of test planning, develop, deliver and review test requirements, test plans and detailed test cases to ensure the successful planning and upgrading from DND’s customized implementation of Oracle PeopleSoft 7.5, the AS-IS system to Oracle PeopleSoft HCM 9.1, the TO-BE system.

## 6. TASKS AND DELIVERABLES

Specific tasks and deliverables will be identified in the TA and may include, but are not limited to, those identified below.

### 6.1 The Level 2 Tester must:

- a. Provide input to the Technical Authority for incorporation into the MPMCT Project work breakdown structure and schedule;
- b. Ensure knowledge transfer, mentoring and training occur on a daily basis or as needed to ensure the transfer of functional and/or technical knowledge to the DND staff through demonstrations, written instructions and documents;
- c. Review and provide written comments on business, system and functional requirements, as required;
- d. Develop, review and provide test requirements;
- e. Develop and document test plans using system requirements documentation and existing test plans;
- f. Develop and document detailed test cases based on documented software requirements and existing test cases;
- g. Execute detailed test cases, in accordance with standard DND manual and automated testing processes to be provided by the Technical Authority, and report on any defects found or issues with the system;
- h. Provide recommendations to and update existing software testing procedures for unit test, integration testing and regression testing with emphasis on automating the testing scripts; and
- i. Develop test reports on completion of each test execution run.

## 7. REPORTING REQUIREMENTS

Reporting requirements will be specified in individual TAs but will include at a minimum the following:

- (a) Contractor Resources: Each Contractor resource must provide Weekly Status Reports to the Technical Authority in an electronic and/or verbal format, detailing the work performed and completion of assigned tasks. Weekly Status Reports must, at a minimum, include the following for written reports and/or verbal formats:

- (i) Status of all activities completed and outstanding activities;
- (ii) Activities finalized to date (final versions of deliverables submitted);
- (iii) Problems encountered including details if activities are not progressing in accordance with the specific TA; and
- (iv) Potential issues which are likely to cause problems related to the work required and have an impact on the project schedule, cost, scope and quality.

Weekly Status Reports are not required for any week in which services were not provided.

- (b) Contractor: The Contractor must provide a financial status report, to be included with the monthly invoice, which must contain, at a minimum, the following information:

- (i) Task Number,
- (ii) Start Date,
- (iii) End Date,
- (iv) GST/HST,
- (v) Total Spent,
- (vi) Task Value,
- (vii) Funds Remaining in the Task,
- (viii) % Complete, and
- (ix) Task Status (Active/Closed).

## **8. FORMAT OF DELIVERABLES AND REPORTS**

- 8.1 Deliverables will be specified within each individual TA and will typically take the form of assessments, recommendations, documentation, and reports. Deliverables will also include Contractor services to assist or enable an activity. Deliverables and reports must be submitted to the Technical Authority.
- 8.2 All written deliverables and reports must be submitted as requested in one (1) hard copy and one (1) electronic copy in Microsoft Office format (Word, Excel, PowerPoint, Project, or Visio), acceptable to the Technical Authority.
- 8.3 All reports must adhere to DND/CAF reporting formats as identified by the Technical Authority; reporting templates will be provided by the Technical Authority.
- 8.4 Non-classified deliverables and reports may be e-mailed or presented on appropriate storage media. Classified deliverables and reports must be handled in accordance with DND/CAF regulations for classified information.

## **9. INSPECTION AND ACCEPTANCE**

- 9.1 The Technical Authority is the Inspection Authority. All reports, deliverable items, documents, and all services rendered under each Task Authorization (TA) are subject to inspection by the Inspection Authority or representative. Should any report, document, or service not be in accordance with the requirements of the Statement of Work and to the satisfaction of the Inspection Authority, as submitted, the Inspection Authority will have the right to reject it or require its correction at the sole expense of the Contractor before recommending payment.

## **10. TECHNICAL ENVIRONMENT**

- 10.1 The current technical environment within DHRIM includes a mix of system implementations utilizing different technologies. All Contractor personnel must use the Defence Wide Area Network (DWAN) as their primary DND network account, and may be required to use the following technologies while performing their duties:

- a. Oracle PeopleSoft HRMS 7.5, HCM 8.9 and HCM 9.1;
- b. PeopleTools 8.51;
- c. Oracle databases 8i, 10g, 11G and above;
- d. Structured Query Reporter (SQR);
- e. Structured Query Language (SQL) Oracle;
- f. Procedural Language (PL)/SQL;
- g. Windows;
- h. UNIX;
- i. Linux;
- j. HP Application Life Cycle Management
- k. HP Quality Center; and
- l. HP Quick Test Pro.

- 10.2 Over the duration of the Contract, the technical environments may be upgraded and modified, in line with the DND/CAF and the federal government strategic direction.

## **11. CONSTRAINTS**

- 11.1 Access to DND facilities and staff is limited to normal DND working hours between 07:00 and 17:00 Monday through Friday. Contractor resources may be required to work outside of normal working hours in order to meet DND schedules and deadlines. Any work performed outside of normal working hours must be pre-approved by the Technical Authority in writing.
- 11.2 Should a Contractor resource anticipate that the 7.5 hour per diem workday, as stipulated in the Contract, may be exceeded, approval must be obtained from the Technical Authority prior to work being carried out in excess of this time. No overtime charges will be authorized under this Contract. All time worked will be compensated in accordance with the Contract's Basis of Payment.
- 11.7 The Contractor is responsible to perform any activities related to obtaining a Visit Clearance Request (VCR) in order for their personnel to gain access to DND office facilities.

## **12. LANGUAGE REQUIREMENTS**

- 12.1 The proposed resource must be fluent in the English language. Fluent means that the individual must be able to communicate orally and in writing without any assistance and with minimal errors.
- 12.2 All reports and deliverables must be submitted in English as specified by the Technical Authority in the specific TA.

## **13. LOCATION OF WORK**

- 13.1 All Work will be performed on DND premises within the National Capital Region (NCR). Determination of the exact location of work within the NCR will be at the discretion of the Technical Authority. The work will primarily be at the DND facility currently located at 222 Nepean Street, Ottawa, Ontario.

## **14. TRAVEL**

- 14.1 The Contractor's resources will not be required to travel outside the National Capital Region (NCR). Travel may be required from time to time within the NCR. Travel within the NCR will not be reimbursed.

**APPENDIX A TO ANNEX A****TASKING ASSESSMENT PROCEDURE**

1. Where a requirement for a specific task is identified, a draft Task Authorization Form (TA Form) as attached at Appendix B to Annex A will be provided to the Contractor in accordance with the allocation methodology stated in the Contract Article titled "Task Authorization". Once a draft TA Form is received the Contractor must submit to the Technical Authority a quotation of rates to supply the requested Resource Categories based on the information identified in the TA Form. The quotation must be signed and submitted to Canada 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.
2. For each proposed resource the Contractor must supply a résumé, the requested security clearance information and must complete the Response Tables at Appendix C of Annex A applicable to the Resource Categories identified in the draft TA. The same individual must not be proposed for more than one Resource Category. The résumés 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 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).
  - (B) For educational requirements for a particular degree, designation or certificate, Canada will only consider educational programmes that were successfully completed by the resource before the date the draft TA was first issued to the Contractor.
  - (C) For requirements relating to professional designation or membership, the resource must have the required designation or membership by the time of draft TA issuance and must continue, where applicable, to be a member in good standing of the profession or membership throughout the assessment period and Contract Period. Where the designation or membership must be demonstrated through a certification, the certification must be current, valid and issued by the entity specified in this Contract or if the entity is not specified an accredited or otherwise recognized body, institution or entity.
  - (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 résumé does not include the relevant dates (month and year) for the experience claimed (i.e., the start date and end date). Canada will evaluate only the duration that the resource actually worked on a project or projects (from his or her start date to end date), instead of the overall start and end date of a project or a combination of projects in which a resource has participated.
  - (F) 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, the duration of any overlapping time period will be counted only once toward any requirements that relate to the individual's length of experience.

3. The qualifications and experience of the proposed resources will be assessed against the requirements set out in Appendix C to Annex A to determine each proposed resource's compliance with the mandatory and rated criteria. Canada may request proof of successful completion of formal training, as well as reference information. Canada may conduct reference checks to verify the accuracy of the information provided. If reference checks are done, they will be conducted in writing by e-mail (unless the contact at the reference is only available by telephone). Canada will not assess any points or consider a mandatory criteria met unless the response is received within 5 working days. On the third working day after sending out the e-mails, if Canada has not received a response, Canada will notify the Contractor by e-mail, to allow the Contractor to contact its reference directly to ensure that it responds to Canada within 5 working days. Wherever information provided by a reference differs from the information supplied by the Contractor, the information supplied by the reference will be the information assessed. Points will not be allocated or a mandatory criteria considered as met if the reference customer is not a customer of the Contractor itself (for example, the customer cannot be the customer of an affiliate of the Contractor). Nor will points be allocated or a mandatory criteria considered as met if the customer is itself an affiliate or other entity that does not deal at arm's length with the Contractor. Crown references will be accepted.
4. During the assessment of the resources proposed, should the references for two or more resources required under that TA either be unavailable or fail to substantiate the required qualifications of the proposed resources to perform the required services, the Contracting Authority may find the quotation to be non-responsive.
5. 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.
6. Once the quotation has been accepted by the Technical Authority, the TA Form will be signed by Canada and provided to the Contractor for signature. The TA Form must be appropriately signed by Canada prior to commencement of any work. The Contractor must not commence work until a validly issued 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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**APPENDIX B TO ANNEX A - (DND 626)**



**TASK AUTHORIZATION  
AUTORISATION DE TÂCHES**

ALL INVOICES/PROGRESS CLAIMS MUST SHOW THE REFERENCE CONTRACT AND TASK NUMBERS  TOUTES LES FACTURES DOIVENT INDIQUER LES NUMÉROS DU CONTRAT ET DE LA TÂCHE		Contract no. - N° du contrat	
		Task no. - N° de la tâche	
Amendment no. - N° de la modification <b>ORIGINAL</b>		Increase/Decrease – Augmentation/Réduction <b>\$</b>	
Financial Coding : CC: Fund: GL: PO:		Previous Value – Valeur précédente <b>\$</b>	
Expenditure Limit Services HST: Travel:		<b>TO THE CONTRACTOR:</b>  You are requested to supply the following materiel/services in accordance with the terms of the above referenced contract. Each delivery shall be accompanied by a packing note or delivery slip.  Please advise the undersigned if the delivery date cannot be met. Invoices shall be prepared in accordance with the instructions set out in the contract.	
<b>Total including HST:</b>			
<b>TO – À</b>			
<b>DELIVER TO - EXPÉDIEZ À</b>		<b>À L'ENTREPRENEUR:</b>  Vous êtes prié de fournir le matériel ou les services suivants en conformité des termes du contrat mentionné ci-dessus. Seuls le matériel ou les services mentionnés dans le contrat doivent être fournis l'appui de cette demande.  Chaque livraison doit être accompagnée d'un bordereau d'emballage ou de livraison. Prière d'aviser le signataire si la livraison ne peut se faire dans les délais prescrits. Les factures doivent être établies selon les instructions énoncées dans le contrat.	
<b>DELIVERY DATE - DATE DE LIVRAISON</b>			
Date		For the Department of National Defence Pour le ministère de la Défense nationale	
Contract Item No N° d'article du contrat	Services		Cost Prix
<p><b>A. THE PROCUREMENT AUTHORITY HEREBY APPROVES THE TASK AUTHORIZATION IDENTIFIED ABOVE:</b></p> <div style="display: flex; justify-content: space-between; margin-top: 20px;"> <div style="width: 45%;"> <p>_____ Name (type or print)</p> <p>_____ Signature:</p> </div> <div style="width: 45%;"> <p>_____ Title (type or print)</p> <p>_____ Date</p> </div> </div> <p><b>B. THE CONTRACTOR HEREBY ACCEPTS THE TASK AUTHORIZATION IDENTIFIED ABOVE:</b></p> <div style="display: flex; justify-content: space-between; margin-top: 20px;"> <div style="width: 45%;"> <p>_____ Name (type or print)</p> <p>_____ Signature:</p> </div> <div style="width: 45%;"> <p>_____ Title (type or print)</p> <p>_____ Date</p> </div> </div>			
<b>GST/HST</b>			
<b>Total</b>			
<p><b>APPLICABLE ONLY TO PWGSC CONTRACTS:</b> The Contracting Authority signature is required when the total value of the DND 626 exceeds the threshold specified in the contract.</p> <p><b>NE S'APPLIQUE QU'AUX CONTRATS DE TPSGC :</b> La signature de l'autorité contractante est requise lorsque la valeur totale du formulaire DND 626 est supérieure au seuil précisé dans le contrat.</p>			
<p>_____ for the Department of Public Works and Government Services pour le ministère des Travaux publics et services gouvernementaux</p>			

## APPENDIX C TO ANNEX A

### RESOURCES ASSESSMENT CRITERIA AND RESPONSE TABLE

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

#### 1. DEFINITIONS

The following definitions apply only to the Mandatory and Point-Rated Technical Proposal Submission Requirements and Evaluation Criteria for this RFP:

- (i) **Greater version:**
  - a. For FA2.M2, FA3.M2, FA2.R2, FA2.R3, FA2.R6, FA2.R7, FA3.R2, FA3.R3, FA3.R4, FA3.R7, FA3. R8, DCS2.M1, DCS2.M3, DCS2.R2, DCS2.R3, DCS2.R4, DCS2.R5, Greater version - means a version of PeopleSoft that was released after version 8.9.
  - b. For TA3.M6, Greater version – means a version of PeopleSoft that was released after version 8.0.
  - c. For TA3.R4 Greater version – means a version of AIX that was released after version 5L.
- (ii) **Instance:** is a technical term that relates to a holistic environment of PeopleSoft. For example, a production installation of PeopleSoft and its data is an Instance of PeopleSoft and is separate from a testing environment of the same technology.
- (i) **Aggregate time:** is the cumulative sum of the total quantity of experience gained based on the duration of all work experience submitted for the Contractor's proposed resource for each project reference, as determined by the proposed resource's start and end date on a project. Overlapping periods of experience across projects will only be counted once.

#### 2. EVALUATION CRITERIA

##### WORKSTREAM 1

##### (a) Contractor's Proposed Resources

The Contractor must propose one resource and provide one résumé (that should include references that can substantiate the work) for each of the following Resource Categories:

- (ii) Level 2 ERP Functional Analyst
- (ii) Level 3 ERP Functional Analyst

##### (b) Mandatory Technical Evaluation Criteria

- (i) Level 2 ERP Functional Analyst

The Contractor MUST demonstrate that its proposed Level 2 ERP Functional Analyst has:			
Criteria ID	Requirement	Contractor's Response	
		Substantiation of Technical Compliance	Reference to Additional Documentation within the Response
FA2.M1	<p>A minimum of 5 years experience as an Enterprise Resource Planning (ERP) Functional Analyst.</p> <p>The experience must have been acquired within the 10 years preceding the start date stated in the draft Task Authorization.</p>		
FA2.M2	<p>A minimum of 4 years experience as an ERP Functional Analyst in a development or operational environment, working with PeopleSoft HRMS version 8.9 or PeopleSoft HCM version 8.9, or a Greater version of either.</p> <p>The experience must have been acquired within the 6 years preceding the start date stated in the draft Task Authorization.</p>		

## (ii) Level 3 ERP Functional Analyst

The Contractor MUST demonstrate that its proposed Level 3 Functional Analyst has:			
Criteria ID	Requirement	Contractor's Response	
		Substantiation of Technical Compliance	Reference to Additional Documentation within the Response
FA3.M1	<p>A minimum of 10 years experience as an Enterprise Resource Planning (ERP) Functional Analyst.</p> <p>The experience must have been acquired within the 15 years preceding the start date stated in the draft Task Authorization.</p>		

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FA3.M2	<p>A minimum of 6 years experience as an ERP Functional Analyst in a development or operational environment, working with PeopleSoft HRMS version 8.9 or PeopleSoft HCM version 8.9, or a Greater version of either.</p> <p>The experience must have been acquired within the 8 years preceding the start date stated in the draft Task Authorization.</p>		
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(c) **Point-Rated Technical Evaluation Criteria**

(i) Level 2 ERP Functional Analyst

The Contractor <b>SHOULD</b> demonstrate that each proposed Level 2 ERP Functional Analyst has:				
CRITERIA			CONTRACTOR'S RESPONSE	
Criteria ID	Requirement	Evaluation	Substantiation of Technical Compliance	Reference to Additional Documentation within the Response
FA2.R1	<p>Experience performing all of the following tasks within the same project:</p> <p>1) Conducting fit/gap analysis of Human Resource (HR) processes using PeopleSoft HCM 8.9 or a Greater version as the target;</p> <p>And</p> <p>2) Documenting changes and recommending options to resolve gaps between HR process requirements and PeopleSoft HCM 8.9 or a greater version;</p> <p>And</p> <p>3) Presenting recommended options for approval and implementation.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>Less than 1 year demonstrated experience = 0 points</p> <p>1 year to 2 years demonstrated experience = 1 point</p> <p>More than 2 years to 3 years demonstrated experience = 2 points</p> <p>More than 3 years to 4 years demonstrated experience = 3 points</p>		.

	<p>Multiple projects can be submitted.</p> <p>In order to demonstrate this criterion, the Contractor's response must demonstrate the tasks completed by its proposed resource, including how its proposed resource conducted a fit/gap analysis, the type of documentation and recommendations that were provided as a result of the fit/gap analysis, and the type and format of options that were presented for approval.</p>	<p>More than 4 years to 5 years demonstrated experience = 4 points</p> <p>More than 5 years demonstrated experience = 5 points</p> <p>Maximum of 5 points</p>		
FA2.R2	<p>A certificate of completion for the following formal Oracle PeopleSoft training courses:</p> <p>1. Oracle PeopleTools I; or 2. PS Query; or</p> <p>A minimum of 5 years demonstrated experience working with Oracle PeopleTools I or PS Query.</p> <p>A combination of demonstrated work experience and certification, as applicable, will be accepted.</p> <p>To receive points for completion of a training course, Contractors must include a copy of each certificate with their Response. Only certificates from training institutions authorized by the software publisher will be accepted.</p> <p>Multiple projects can be submitted.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>10 points for 5 years demonstrated work experience using PeopleTools I.</p> <p>10 points for 5 years demonstrated work experience using PS Query.</p> <p>10 points for each valid certificate of course completion provided with the Response.</p> <p>Maximum 20 points</p>	.	

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FA2.R3	<p>Experience conducting business process re-engineering to *HR business processes where the target was PeopleSoft HCM 8.9 or a Greater version.</p> <p>The experience must have been gained within the 10 years preceding the start date stated in the draft Task Authorization.</p> <p>*For the purpose of this criterion, Contractors must identify the name of the HR business processes that were re-engineered by the proposed resource in their responses.</p> <p>Multiple projects can be submitted.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>Less than 1 year demonstrated experience = 0 points</p> <p>1 year demonstrated experience to 2 years demonstrated experience = 1 point</p> <p>More than 2 years demonstrated experience to 3 years demonstrated experience = 2 points</p> <p>More than 3 years demonstrated experience to 4 years demonstrated experience = 3 points</p> <p>More than 4 years demonstrated experience to 5 years demonstrated experience = 4 points</p> <p>More than 5 years demonstrated experience = 5 points</p> <p>Maximum of 5 points</p>		
FA2.R4	Experience using PeopleTools Application Designer.	The Aggregate time of all demonstrated		

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FA2.R5	<p>Experience developing HR Business Process requirements and Functional Specifications for HR applications within the 10 years preceding the start date stated in the draft Task Authorization.</p> <p>This experience can be demonstrated over multiple projects.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>Less than 1 year demonstrated experience = 0 points</p> <p>1 year demonstrated experience to 2 years demonstrated experience = 1 point</p> <p>More than 2 years demonstrated experience to 3</p>		

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		<p>years demonstrated experience = 2 points</p> <p>More than 3 years demonstrated experience to 4 years demonstrated experience = 3 points</p> <p>More then 4 years demonstrated experience = 4 points</p> <p>Maximum of 4 points</p> <p>If the Contractor fails to demonstrate experience in both HR Business Process requirements and Functional Specifications for HR applications, the total score for FA2.R5 will be 0 points.</p>		
FA2.R6	<p>Experience developing test plans, and writing and executing test scripts for the testing of PeopleSoft HRMS modules in PeopleSoft HCM 8.9 or a Greater version.</p> <p>To receive points the Contractor must indicate the type of HRMS module that was tested in its response.</p> <p>This experience can be demonstrated over multiple projects</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>Less than 1 year demonstrated experience = 0 points</p> <p>1 year demonstrated experience to 2 years demonstrated experience = 1 point</p> <p>More than 2 years</p>		

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		<p>demonstrated experience to 3 years demonstrated experience = 2 points</p> <p>More than 3 years demonstrated experience = 3 points</p> <p>Maximum of 3 points</p> <p>If the Contractor fails to demonstrate experience in all of the required tasks in FA2.R6, the total score for the criterion will be 0 points.</p>		
FA2.R7	<p>Experience working as an ERP functional analyst through the analysis, design and development phases for the implementation of a new functionality or during the upgrade of a PeopleSoft HRMS or PeopleSoft HCM.</p> <p>The new functionality or upgrade must have been on PeopleSoft HRMS 8.9 or PeopleSoft HCM 8.9 or a Greater version.</p> <p>Multiple projects can be submitted.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>Less than 1 year demonstrated experience= 0 points</p> <p>1 year demonstrated experience to 2 years demonstrated experience = 1 point</p> <p>More than 2 years demonstrated experience to 3 years demonstrated experience = 2 points</p> <p>More than 3 years demonstrated experience to 4</p>		

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		<p>years demonstrated experience = 3 points</p> <p>More than 4 years demonstrated experience to 5 years demonstrated experience = 4 points</p> <p>More than 5 years demonstrated experience = 5 points</p> <p>Maximum of 5 points</p>		
FA2.R8	<p>Experience providing mentoring and training to functional analysis support teams.</p> <p>This experience can be demonstrated over multiple projects</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>Less than 1 year demonstrated experience = 0 points</p> <p>1 year demonstrated experience to 2 years demonstrated experience = 1 point</p> <p>More than 2 years demonstrated experience to 3 years demonstrated experience = 2 points</p> <p>More than 3 years demonstrated experience = 3 points</p> <p>Maximum of 3</p>		

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		points  If the Contractor fails to demonstrate experience providing both mentoring and training, the total score for FA2.R8 will be 0 points.		
<b>MAXIMUM TECHNICAL POINTS</b>			<b>48</b>	
<b>MINIMUM PASS MARK</b>			<b>34</b>	

(ii) Level 3 ERP Functional Analyst

The Contractor SHOULD demonstrate that each proposed Level 3 ERP Functional Analyst has:				
CRITERIA			CONTRACTOR'S RESPONSE	
Criteria ID	Requirement	Evaluation	Substantiation of Technical Compliance	Reference to Additional Documentation within the Response
FA3.R1	<p>Experience performing all of the following tasks within the same project:</p> <p>1) Conducting fit/gap analysis of Human Resource (HR) processes using PeopleSoft HCM 8.9 or a Greater version as the target;</p> <p>And</p> <p>2) Documenting changes and recommending options to resolve gaps between HR process requirements and PeopleSoft HCM 8.9 or a Greater version;</p> <p>And</p> <p>3) Presenting recommended options for approval and implementation.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>Less than 1 year demonstrated experience = 0 points</p> <p>1 year to 2 years demonstrated experience = 1 point</p> <p>More than 2 years to 3 years demonstrated experience = 2 points</p> <p>More than 3 years to 4 years demonstrated experience = 3</p>		

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	<p>Multiple projects can be submitted.</p> <p>In order to demonstrate this criterion, the Contractor's response must demonstrate the tasks completed by its proposed resource, including how its proposed resource conducted a fit/gap analysis, the type of documentation and recommendations that were provided as a result of the fit/gap analysis, and the type and format of options that were presented for approval.</p>	<p>points</p> <p>More than 4 years to 5 years demonstrated experience = 4 points</p> <p>More than 5 years demonstrated experience = 5 points</p> <p>Maximum of 5 points</p>		
FA3.R2	<p>A certificate of completion for the following formal Oracle PeopleSoft training courses:</p> <p>1. Oracle PeopleTools I; or 2. PS Query;</p> <p>or</p> <p>A minimum of 5 years demonstrated experience working with Oracle PeopleTools I or PS Query.</p> <p>A combination of demonstrated work experience and certification, as applicable, will be accepted.</p> <p>To receive points for completion of a training course, Contractors must include a copy of each certificate with their Response. Only certificates from training institutions authorized by the software publisher will be accepted.</p> <p>Multiple projects can be submitted.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>10 points for 5 years demonstrated work experience using PeopleTools I.</p> <p>10 points for 5 years demonstrated work experience using PS Query.</p> <p>10 points for each valid certificate of course completion provided with the Response.</p> <p>Maximum 20 points</p>		

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FA3.R3	<p>Experience analyzing, designing, developing and documenting End User Security Administration including roles and permission lists, using PeopleSoft HCM 8.9 or a Greater version.</p> <p>This experience can be demonstrated over multiple projects.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>Less than 1 year demonstrated experience = 0 points</p> <p>1 year demonstrated experience to 2 years demonstrated experience = 1 point</p> <p>More than 2 years demonstrated experience to 3 years demonstrated experience = 2 points</p> <p>More than 3 years demonstrated experience to 4 years demonstrated experience = 3 points</p> <p>More than 4 years demonstrated experience to 5 years demonstrated experience = 4 points</p> <p>More than 5 years demonstrated experience = 5 points</p> <p>Maximum of 5 points</p> <p>If the Contractor fails to demonstrate</p>		
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		experience in all of the required tasks in FA3.R3, the total score for the criterion will be 0 points.		
FA3.R4	<p>Experience conducting business process re-engineering to **HR business processes where the target was PeopleSoft HCM 8.9 or a Greater version.</p> <p>The experience must have been gained within the 10 years preceding the start date stated in the draft Task Authorization.</p> <p>*For the purpose of this criterion, Contractors must identify the name of the HR business processes that were re-engineered by the proposed resource in their responses.</p> <p>Multiple projects can be submitted.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>Less than 1 year demonstrated experience = 0 points</p> <p>1 year demonstrated experience to 2 years demonstrated experience = 1 point</p> <p>More than 2 years demonstrated experience to 3 years demonstrated experience = 2 points</p> <p>More than 3 years demonstrated experience to 4 years demonstrated experience = 3 points</p> <p>More than 4 years demonstrated experience to 5 years demonstrated experience = 4 points</p>		

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		<p>More than 5 years demonstrated experience = 5 points</p> <p>Maximum of 5 points</p>		
FA3.R5	<p>Experience using PeopleTools Application Designer.</p> <p>Multiple projects can be submitted.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>Less than 1 year demonstrated experience = 0 points</p> <p>1 year demonstrated experience to 2 years demonstrated experience = 1 point</p> <p>More than 2 years demonstrated experience to 3 years demonstrated experience = 2 points</p> <p>More than 3 years combined demonstrated experience = 3 points</p> <p>Maximum of 3 points</p>		
FA3.R6	<p>Experience developing HR Business Process requirements and Functional Specifications for HR applications within the 10 years preceding the start date stated in the draft Task Authorization.</p> <p>This experience can be</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>Less than 1 year demonstrated experience = 0</p>		

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	demonstrated across multiple projects.	<p>points</p> <p>1 year demonstrated experience to 2 years demonstrated experience = 1 point</p> <p>More than 2 years demonstrated experience to 3 years demonstrated experience = 2 points</p> <p>More than 3 years demonstrated experience to 4 years demonstrated experience = 3 points</p> <p>More then 4 years combined demonstrated experience = 4 points</p> <p>Maximum of 4 points</p> <p>If the Contractor fails to demonstrate experience in both HR Business Process requirements and Functional Specifications for HR applications, the total score for FA3.R6 will be 0 points.</p>		
FA3.R7	Experience developing test plans, and writing and executing test scripts for the testing of PeopleSoft HRMS modules in PeopleSoft HCM 8.9 or a Greater version.	The Aggregate time of all demonstrated experience will be evaluated as follows:		

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	<p>To receive points the Contractor must indicate the type of HRMS module that was tested in its response.</p> <p>This experience can be demonstrated across multiple projects.</p>	<p>Less than 1 year demonstrated experience = 0 points</p> <p>1 year demonstrated experience to 2 years demonstrated experience = 1 point</p> <p>More than 2 years demonstrated experience to 3 years demonstrated experience = 2 points</p> <p>More than 3 years demonstrated experience = 3 points</p> <p>Maximum of 3 points</p> <p>If the Contractor fails to demonstrate experience in all of the required tasks in FA3.R7 the total score for the criterion will be 0 points.</p>		
FA3.R8	<p>Experience working as an ERP functional analyst through the analysis, design and development phases for the implementation of a new functionality or during the upgrade of a PeopleSoft HRMS or PeopleSoft HCM.</p> <p>The new functionality or upgrade must have been on PeopleSoft HRMS 8.9 or PeopleSoft HCM 8.9 or a Greater version.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>Less than 1 year demonstrated experience = 0 points</p> <p>1 year demonstrated experience to 2 years</p>		

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	Multiple projects can be submitted.	<p>demonstrated experience = 1 point</p> <p>More than 2 years demonstrated experience to 3 years demonstrated experience = 2 points</p> <p>More than 3 years demonstrated experience to 4 years demonstrated experience = 3 points</p> <p>More than 4 years demonstrated experience to 5 years demonstrated experience = 4 points</p> <p>More than 5 years demonstrated experience = 5 points</p> <p>Maximum of 5 points</p>		
FA3.R9	<p>Experience providing mentoring and training to functional analysis support teams.</p> <p>This experience can be demonstrated across multiple projects.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>Less than 1 year demonstrated experience = 0 points</p> <p>1 year demonstrated experience to 2 years demonstrated experience = 1 point</p> <p>More than 2 years</p>		

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		<p>demonstrated experience to 3 years demonstrated experience = 2 points</p> <p>More than 3 years demonstrated experience = 3 points</p> <p>Maximum of 3 points</p> <p>If the Contractor fails to demonstrate experience providing both mentoring and training, the total score for FA3.R9 will be 0 points.</p>		
<b>MAXIMUM TECHNICAL POINTS</b>			<b>53</b>	
<b>MINIMUM PASS MARK</b>			<b>37</b>	

**WORKSTREAM 2****(a) Contractor's Proposed Resources**

The Contractor must propose one resource (that should include references that can substantiate the work) and provide one résumé for the following Resource Category:

- (i) Level 3 ERP Programmer Analyst

**(b) Mandatory Technical Evaluation Criteria**

- (i) Level 3 ERP Programmer Analyst

<b>The Contractor MUST demonstrate that its proposed Level 3 ERP Programmer Analyst has:</b>			
<b>Criteria ID</b>	<b>Requirement</b>	<b>Contractor's Response</b>	
		<b>Substantiation of Technical Compliance</b>	<b>Reference to Additional Documentation within the Response</b>
PA3.M1	A minimum of 10 years experience developing PeopleSoft Human Resource (HR) applications.		
PA3.M2	Experience as an ERP Programmer Analyst, analyzing and developing PeopleCode to customize/re-work a minimum of four (4) PeopleSoft maintenance packs or bundles in the last eight (8) years preceding the start date stated in the draft Task Authorization.  The Contractor must identify the versions of the maintenance packs or bundles for the experience identified in its response.		
PA3.M3	A minimum 1 year of combined demonstrated experience writing SQL (Structured Query Language) or SQR (Structured Query Report) or PeopleCode using data from more than one database using Oracle database links, schemas, or other Oracle supported methods.  The experience must have been acquired in the 10 years preceding the start date stated in the draft Task Authorization.  This experience can be demonstrated across multiple projects.		

**(c) Point-Rated Technical Evaluation Criteria****(i) Level 3 ERP Programmer Analyst**

<b>The Contractor SHOULD demonstrate that each proposed Level 3 ERP Programmer Analyst has:</b>				
<b>CRITERIA</b>			<b>CONTRACTOR'S RESPONSE</b>	
<b>Criteria ID</b>	<b>Requirement</b>	<b>Evaluation</b>	<b>Substantiation of Technical Compliance</b>	<b>Reference to Additional Documentation within the Response</b>
PA3.R1	<p>Experience writing SQL and PeopleCode for an HR database on an Oracle platform where there is a minimum of 5,000 active employee records.</p> <p>The experience must have been acquired in the 10 years preceding the start date stated in the draft Task Authorization.</p> <p>Demonstrated experience with multiple Instances will be accepted.</p>	<p>Points will be allocated for each year of demonstrated experience supporting the PeopleSoft (PS) Instance.</p> <p>Each demonstrated PS Instance, based on the number of employees in an active PS employment, will be evaluated as follows:</p> <p>Up to 4,999 employees = 0 point per year of demonstrated experience</p> <p>From 5,000 employees to 14,999 employees = 1 point per year of demonstrated experience</p> <p>From 15,000 employees to 29,999 employees = 2 points per year of demonstrated experience</p>		

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		<p>More than 30,000 employees = 3 points per year of demonstrated experience</p> <p>Maximum of 30 points</p>		
PA3.R2	<p>Experience preparing and providing technical analysis, impact assessments and technical specifications during a PeopleSoft version upgrade using a supported PeopleSoft upgrade path.</p> <p>(For example: upgrading from PeopleSoft HCM 8.9 to PeopleSoft HCM 9.1.)</p> <p>This experience must have been acquired within the same project and must have been acquired in the 10 years preceding the start date stated in the draft Task Authorization.</p> <p>Multiple projects can be submitted.</p>	<p>Each PeopleSoft Upgrade reference project that demonstrated the required experience and used a supported PeopleSoft upgrade path = 1 point</p> <p>Maximum of 5 points</p>		
PA3.R3	<p>Experience preparing and providing technical analysis, impact assessments and technical specifications during a PeopleSoft upgrade or new PeopleSoft implementations where a supported PeopleSoft upgrade path was not available.</p> <p>(For example: upgrading from PeopleSoft HRMS 7.5 to PeopleSoft HCM 8.9 or 9.1, or migrating from a custom HR application to PeopleSoft 8.9.)</p> <p>This experience must have been acquired within the same project and must have been acquired in the</p>	<p>Each PeopleSoft Upgrade reference project that demonstrated the required experience and where no supported PeopleSoft upgrade path was available = 3 points.</p> <p>Maximum of 15 points</p>		

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	<p>10 years preceding the start date stated in the draft Task Authorization.</p> <p>Multiple projects can be submitted</p>			
PA3.R4	<p>Experience writing SQL or SQR or PeopleCode using data from more than one database using Oracle database links, schemas, or other Oracle supported methods.</p> <p>The experience must have been acquired in the 10 years preceding the start date stated in the draft Task Authorization.</p> <p>This experience can be demonstrated across multiple projects.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>Up to 1 year demonstrated experience = 0 points</p> <p>More than 1 year demonstrated experience to 2 years demonstrated experience = 1 point</p> <p>More than 2 years demonstrated experience to 3 years demonstrated experience = 2 points</p> <p>More than 3 years demonstrated experience = 3 points</p> <p>Maximum of 3 points</p>		
<b>MAXIMUM TECHNICAL POINTS</b>		<b>53</b>		
<b>MINIMUM PASS MARK</b>		<b>16</b>		

**WORKSTREAM 3****(a) Contractor's Proposed Resources**

The Contractor must propose one resource and provide one résumé (that should include references that can substantiate the work) for the following Resource Category:

- (i) Level 3 ERP Technical Analyst

**(b) Mandatory Technical Evaluation Criteria**

- (i) Level 3 ERP Technical Analyst

<b>The Contractor MUST demonstrate that its proposed Level 3 ERP Technical Analyst has:</b>			
<b>Criteria ID</b>	<b>Requirement</b>	<b>Contractor's Response</b>	
		<b>Substantiation of Technical Compliance</b>	<b>Reference to Additional Documentation within the Response</b>
TA3.M1	A minimum of 5 years experience installing, configuring and using Integration Broker as a Technical Analyst.		
TA3.M2	A minimum of 10 years experience within the 15 years preceding the closing date of this solicitation, researching, managing, downloading, and applying both PeopleSoft application and PeopleTools patches in PeopleSoft development and production environments.  This experience can be demonstrated across multiple projects.		
TA3.M3	A minimum of 10 years experience within the 15 years preceding the closing date of this solicitation, migrating PeopleSoft projects in PeopleSoft development and production environments:  This experience can be demonstrated across multiple projects.		
TA3.M4	A minimum of 5 years experience in the 15 years preceding the closing date of this solicitation, installing, configuring and administering application servers or web servers on Windows.  This experience can be demonstrated across multiple projects.		
TA3.M5	A minimum of 5 years experience in the 15		

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	<p>years preceding the closing date of this solicitation, installing, configuring and administering application servers or web servers on Unix.</p> <p>This experience can be demonstrated across multiple projects.</p> <p>For the purpose of this criterion, projects referenced in TA3.M4 can be used.</p>		
TA3. M6	<p>Experience as a PeopleSoft Application Technical Administrator in the development, testing, user acceptance and implementation phases of a PeopleSoft HR system upgrade to a Greater version than PeopleSoft HCM 8.0.</p> <p>The PeopleSoft HR system upgrade to a Greater version than PeopleSoft HCM 8.0 must have successfully been implemented through to a production environment.</p> <p>This experience must have been acquired within the same project.</p>		

**(c) Point-Rated Technical Evaluation Criteria**

**(i) Level 3 ERP Technical Analyst**

The Contractor <b>SHOULD</b> demonstrate that each proposed Level 3 ERP Programmer Analyst has:				
CRITERIA			CONTRACTOR'S RESPONSE	
Criteria ID	Requirement	Evaluation	Substantiation of Technical Compliance	Reference to Additional Documentation within the Response
TA3.R1	<p>Experience in applying Oracle PeopleSoft Service Packs, Maintenance Packs, Bundles or Patches using Change Assistant.</p> <p>This experience can be demonstrated across multiple projects.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>1 point will be awarded for each year of demonstrated experience.</p>		

		Maximum of 10 points		
TA3.R2	<p>Experience setting-up and configuring XML Publisher as a Technical Analyst.</p> <p>This experience can be demonstrated across multiple projects.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>1 point will be awarded for each year of demonstrated experience.</p> <p>Maximum of 10 points</p> <p>If the Contractor fails to demonstrate experience in all of the required tasks in TA3. R2 the total score for the criterion will be 0 points.</p>		
TA3.R3	<p>Experience analyzing, debugging, and writing SQL scripts for an Oracle environment.</p> <p>This experience can be demonstrated across multiple projects.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>1 point per year of combined demonstrated experience.</p> <p>Maximum of 5 points.</p> <p>If the Contractor fails to demonstrate experience in all of the required tasks in TA3. R3 the total score for the criterion will be 0 points.</p>		

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TA3.R4	<p>Experience working in an AIX environment at version 5L or a Greater version.</p> <p>Multiple projects can be submitted.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>1 point per year of combined demonstrated experience.</p> <p>Maximum of 5 points.</p>		
<b>MAXIMUM TECHNICAL POINTS</b>		<b>30</b>		
<b>MINIMUM PASS MARK</b>		<b>10</b>		

**WORKSTREAM 4****(a) Contractor's Proposed Resources**

The Contractor must propose one resource and provide one résumé (that should include references that can substantiate the work) for each of the following Resource Categories:

- (ii) Level 2 Data Conversion Specialist
- (iii) Level 2 Database Administrator

**(b) Mandatory Technical Evaluation Criteria**

- (i) Level 2 Data Conversion Specialist

The Contractor MUST demonstrate that its proposed Level 2 Data Conversion Specialist has:			
Criteria ID	Requirement	Contractor's Response	
		Substantiation of Technical Compliance	Reference to Additional Documentation within the Response
DCS2.M1	<p>A minimum of 6 years of combined demonstrated experience performing 2 or more of the following tasks with Oracle PeopleSoft HCM version 8.9 or PeopleSoft HRMS version 8.9 or a Greater version of either :</p> <ol style="list-style-type: none"> <li>1. Data models;</li> <li>2. Data mapping;</li> <li>3. Data conversion specifications;</li> <li>4. Data quality activities, including data sampling and cleanup activities; or</li> <li>5. PeopleSoft integration</li> </ol> <p>This experience can be demonstrated across multiple projects.</p>		
DCS2.M2	<p>Experience developing work plans and documenting work plans within the same project for either data migration or data conversion.</p> <p>A minimum of 3 separate projects demonstrating this experience must be submitted.</p>		
DCS2.M3	<p>Experience performing <u>all</u> of the following tasks for at least one version upgrade where the target version was Oracle PeopleSoft HCM version 8.9 or a Greater version:</p> <ol style="list-style-type: none"> <li>1. Data models;</li> </ol>		

	2. Data mapping between the "As-Is" and "To-Be" systems for data conversion and migration;  3. Data conversion specifications, and roadmaps; and  4. Data quality activities, including data sampling and clean-up activities prior to system migration(s).		
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## (ii) Level 2 Database Administrator

The Contractor MUST demonstrate that its proposed Level 2 Database Administrator has:			
Criteria ID	Requirement	Contractor's Response	
		Substantiation of Technical Compliance	Reference to Additional Documentation within the Response
DBA2.M1	<p>A minimum of 5 years combined demonstrated experience, within the last 7 years preceding the start date stated in the draft Task Authorization, performing each of the following In-Service Support database administration functions for Oracle databases:</p> <ul style="list-style-type: none"> <li>• Designing;</li> <li>• Creating;</li> <li>• Maintaining;</li> <li>• Performance Monitoring;</li> <li>• Performance Tuning; and</li> <li>• Back-up and recovery using Oracle Recovery Manager (RMAN).</li> </ul> <p>This experience can be demonstrated across multiple projects.</p>		
DBA2.M2	A minimum of 5 years of Database Administrator experience, within the 7 years preceding the start date stated in the draft Task Authorization, in working with Enterprise Resource Planning (ERP)		

	applications (e.g., PeopleSoft, SAP) implemented with an Oracle database.		
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**(c) Point-Rated Technical Evaluation Criteria****(i) Level 2 Data Conversion Specialist**

The Contractor <b>SHOULD</b> demonstrate that each proposed Level 2 Data Conversion Specialist has:				
CRITERIA			CONTRACTOR'S RESPONSE	
Criteria ID	Requirement	Evaluation	Substantiation of Technical Compliance	Reference to Additional Documentation within the Response
DCS2.R1	<p>Experience performing 1 or more of the following tasks for an upgrade of Oracle PeopleSoft from any version of HRMS 7.x or HCM 8.x to PeopleSoft HCM version 9.x.</p> <ol style="list-style-type: none"> <li>1. Data models;</li> <li>2. Data mapping;</li> <li>3. Data conversion specifications; and</li> <li>4. Data quality activities, including data sampling and cleanup activities.</li> </ol> <p>This experience can be demonstrated across multiple projects.</p>	<p>Points will be awarded for the cumulative experience of each task demonstrated as follows:</p> <p>Less than 1 month demonstrated experience = 0 points</p> <p>1 month demonstrated experience to 3 months demonstrated experience = 1 point</p> <p>More than 3 months demonstrated experience = 2 points</p> <p>Maximum of 8 points</p>		
DCS2.R2	<p>Experience developing Data Models for an Oracle PeopleSoft HCM version 8.9 environment or a Greater version.</p> <p>Multiple projects can be</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p>		

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	submitted.	<p>Less than 6 months demonstrated experience = 1 point</p> <p>From 6 months demonstrated experience to 1 year demonstrated experience = 2 points</p> <p>More than 1 year demonstrated experience to 2 years demonstrated experience = 4 points</p> <p>More than 2 years demonstrated experience to 3 years demonstrated experience = 6 points</p> <p>More than 3 years demonstrated experience to 4 years demonstrated experience = 8 points</p> <p>More than 4 years demonstrated experience = 10 points</p> <p>Maximum of 10 points</p>		
DCS2.R3	<p>Experience developing Data mapping between the "As-Is" and "To-Be" systems for data conversion and data migration to an Oracle PeopleSoft HCM version 8.9 environment or a Greater version.</p> <p>Both data conversion and</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>Up to 1 year demonstrated experience = 1 point</p>		

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	<p>data migration must have been done within the same project.</p> <p>Multiple projects can be submitted.</p>	<p>More than 1 year demonstrated experience to 2 years demonstrated experience = 2 points</p> <p>More than 2 years demonstrated experience to 3 years demonstrated experience = 4 points</p> <p>More than 3 years to 4 years = 6 points</p> <p>More than 4 years demonstrated experience to 5 years demonstrated experience = 8 points</p> <p>More than 5 years demonstrated experience = 10 points</p> <p>Maximum of 10 points</p>		
DCS2.R4	<p>Experience preparing both data conversion specifications and roadmaps for at least one version upgrade where the target version was Oracle PeopleSoft HCM version 8.9 or a Greater version.</p> <p>Both data conversion specifications and roadmaps must have been done within the same project.</p> <p>Multiple projects can be submitted.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>Up to 1 year demonstrated experience = 1 point</p> <p>More than 1 year demonstrated experience to 2 years demonstrated experience = 2 points</p>		

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		<p>More than 2 years demonstrated experience to 3 years demonstrated experience = 4 points</p> <p>More than 3 years demonstrated experience to 4 years demonstrated experience = 6 points</p> <p>More than 4 years demonstrated experience to 5 years demonstrated experience = 8 points</p> <p>More than 5 years demonstrated experience = 10 points</p> <p>Maximum of 10 points</p>		
DCS2.R5	<p>Experience conducting data quality activities, including both data sampling and data cleanup activities, prior to system migration(s) for at least one version upgrade where the target version was Oracle PeopleSoft HCM version 8.9 or a Greater version.</p> <p>Both data sampling and data cleanup activities must have been done within the same project.</p> <p>Multiple projects can be submitted.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>Up to 1 year demonstrated experience = 1 point</p> <p>More than 1 year demonstrated experience to 2 years demonstrated experience = 2 points</p> <p>More than 2 years demonstrated</p>		

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		<p>experience to 3 years demonstrated experience = 4 points</p> <p>More than 3 years demonstrated experience to 4 years demonstrated experience = 6 points</p> <p>More than 4 years demonstrated experience to 5 years demonstrated experience = 8 points</p> <p>More than 5 years demonstrated experience = 10 points</p> <p>Maximum of 10 points</p>		
<b>MAXIMUM TECHNICAL POINTS</b>			<b>48</b>	
<b>MINIMUM PASS MARK</b>			<b>24</b>	

(ii) Level 2 Database Administrator

The Contractor SHOULD demonstrate that each proposed Level 2 Data Conversion Specialist has:				
CRITERIA			CONTRACTOR'S RESPONSE	
Criteria ID	Requirement	Evaluation	Substantiation of Technical Compliance	Reference to Additional Documentation within the Response
DBA2.R1	<p>Experience performing each of the following In-Service Support database administration functions for Oracle databases:</p> <ul style="list-style-type: none"> <li>Designing;</li> </ul>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>0 to 5 years demonstrated</p>		

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	<ul style="list-style-type: none"> <li>• Creating;</li> <li>• Maintaining;</li> <li>• Performance Monitoring;</li> <li>• Performance Tuning; and</li> <li>• Back-up and recovery using Oracle Recovery Manager (RMAN).</li> </ul> <p>This experience can be demonstrated across multiple projects.</p>	<p>experience = 0 points</p> <p>More than 5 years to 6 years demonstrated experience = 1 point</p> <p>More than 6 years to 7 years demonstrated experience = 2 points</p> <p>More than 7 years demonstrated experience = 3 points</p> <p>Maximum of 3 points</p> <p>If the Contractor fails to demonstrate experience in all of the required tasks in DBA2.R1 the total score for the criteria will be 0 points.</p>		
DBA2.R2	<p>Experience evaluating, testing, and implementing an upgrade from a previous version of Oracle to Oracle RDBMS 11g software.</p>	<p>1 upgrade = 1 point</p> <p>2 upgrades = 2 points</p> <p>More than 3 upgrades = 3 points</p> <p>Maximum of 3 points</p> <p>If the Contractor fails to demonstrate experience in all of the required tasks in DBA2.R2 the total score for the criteria will be 0 points.</p>		

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DBA2.R3	<p>Experience in supporting PeopleSoft HRMS or PeopleSoft HCM implemented in an Oracle database environment.</p> <p>Multiple projects can be submitted.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>Less than 1 year demonstrated experience = 0 points</p> <p>1 year demonstrated experience to 2 years demonstrated experience = 1 point</p> <p>More than 2 years demonstrated experience to 3 years demonstrated experience = 2 points</p> <p>More than 3 years demonstrated experience to 4 years demonstrated experience = 3 points</p> <p>More than 4 years demonstrated experience to 5 years demonstrated experience = 4 points</p> <p>More than 5 years demonstrated experience = 5 points</p> <p>Maximum of 5 points</p>		
DBA2.R4	<p>Experience in the production support of Oracle databases implemented in a Unix</p>	<p>The Aggregate time of all demonstrated experience will be</p>		

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	<p>environment.</p> <p>Multiple projects can be submitted.</p>	<p>evaluated as follows:</p> <p>Less than 1 year demonstrated experience = 0 points</p> <p>1 year demonstrated experience to 2 years demonstrated experience = 1 point</p> <p>More than 2 years demonstrated experience = 2 points</p> <p>Maximum of 2 points</p>		
DBA2.R5	<p>Experience administering a large-scale Online Transaction Processing (OLTP) Oracle database environment where a single database size is greater than 20 gigabytes.</p> <p>This experience must have been acquired for a single database.</p>	<p>NOTE: Single database size is determined as cumulative size of all uncompressed data files on disk.</p> <p>GB = Gigabytes</p> <p>0 GB to 20 GB = 0 points</p> <p>More than 20 GB to 100 GB = 1 points</p> <p>More than 100 GB to 200 GB = 2 points</p> <p>More than 200 GB = 3 points</p> <p>Maximum of 3 points</p>		
<b>MAXIMUM TECHNICAL POINTS</b>		<b>16</b>		
<b>MINIMUM PASS MARK</b>		<b>8</b>		

**WORKSTREAM 5****(a) Contractor's Proposed Resources**

The Contractor must propose one resource and provide one résumé (that should include references that can substantiate the work) for the following Resource Category:

- (i) Level 2 Tester

**(b) Mandatory Technical Evaluation Criteria**

- (i) Level 2 Tester

The Contractor MUST demonstrate that its proposed Level 2 Tester has:			
Criteria ID	Requirement	Contractor's Response	
		Substantiation of Technical Compliance	Reference to Additional Documentation within the Response
T2.M1	<p>A minimum of 5 years experience within the 10 years preceding the start date stated in the draft Task Authorization, performing all of the following tasks within the same project:</p> <ul style="list-style-type: none"> <li>• developing test scripts (manual or automated);</li> <li>• executing test runs;</li> <li>• analyzing test results; and</li> <li>• identifying and documenting defects.</li> </ul> <p>Multiple projects may be submitted.</p>		
T2.M2	<p>A minimum of 1 year testing experience using either HP Application Lifecycle Management (ALM) or HP Quality Center or Mercury Quality Center.</p> <p>This experience can be demonstrated across multiple projects.</p>		

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T2.M3	<p>A minimum of 1 year testing experience using HP QuickTest Pro or Mercury QuickTest Pro.</p> <p>This experience can be demonstrated across multiple projects.</p>		
T2.M4	<p>A minimum of 1 year experience within the last 5 years preceding the start date stated in the draft Task Authorization, working with SQL to create queries and manipulate data in an Oracle environment.</p> <p>This experience can be demonstrated across multiple projects.</p>		

**(c) Point-Rated Technical Evaluation Criteria**

(i) Level 2 Tester

The Contractor <b>SHOULD</b> demonstrate that each proposed Level 2 Tester has:				
CRITERIA			CONTRACTOR'S RESPONSE	
Criteria ID	Requirement	Evaluation	Substantiation of Technical Compliance	Reference to Additional Documentation within the Response
T2.R1	<p>Experience performing all of the following tasks within the same project within the 10 years preceding the start date stated in the draft Task Authorization:</p> <ul style="list-style-type: none"> <li>developing test scripts (manual or automated);</li> <li>executing test runs; and</li> <li>analyzing test results.</li> <li>identifying and documenting defects</li> </ul> <p>Multiple projects can be submitted.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>0 to 5 years demonstrated experience = 0 points.</p> <p>More than 5 years demonstrated experience to 7 years combined demonstrated experience = 2 points</p> <p>More than 7 years</p>		

HUMAN RESOURCES MANAGEMENT SYSTEM (HRMS) TECHNICAL UPGRADE

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		<p>demonstrated experience = 3 points</p> <p>Maximum of 3 points</p>		
T2.R2	<p>Testing experience in creating, verifying and updating checkpoints and records with valid automated test scripts within the 10 years preceding the start date stated in the draft Task Authorization.</p> <p>This experience must have been acquired within the same reference project.</p> <p>Multiple projects can be submitted.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>0 to 3 years demonstrated experience = 0 points.</p> <p>More than 3 years demonstrated experience to 5 years demonstrated experience = 2 points</p> <p>More than 5 years demonstrated experience = 3 points</p> <p>Maximum of 3 points</p>		
T2.R3	<p>Testing experience using either HP Application Lifecycle Management (ALM) or HP Quality Center or Mercury Quality Center.</p> <p>Multiple projects can be submitted.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>0 to 1 year demonstrated experience = 0 points</p> <p>More than 1 year demonstrated experience to 3 years demonstrated experience = 1 point</p> <p>More than 3 years demonstrated</p>		

Appendix C to Annex A

## HUMAN RESOURCES MANAGEMENT SYSTEM (HRMS) TECHNICAL UPGRADE

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		<p>experience to 5 years demonstrated experience = 2 points</p> <p>More than 5 years demonstrated experience = 3 points</p> <p>Maximum of 3 points</p>		
T2.R4	<p>Testing experience using HP QuickTest Pro or Mercury QuickTest Pro.</p> <p>Multiple projects can be submitted.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>0 to 1 year demonstrated experience = 0 points</p> <p>More than 1 year demonstrated experience to 3 years demonstrated experience = 1 point</p> <p>More than 3 years demonstrated experience to 5 years demonstrated experience = 2 points</p> <p>More than 5 years demonstrated experience = 3 points</p> <p>Maximum of 3 points</p>		
T2.R5	<p>Experience working with SQL to create queries and manipulate data in an Oracle environment within the 10 years preceding the start date stated in the draft Task Authorization.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>0 to 1 year</p>		

Appendix C to Annex A

HUMAN RESOURCES MANAGEMENT SYSTEM (HRMS) TECHNICAL UPGRADE

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	Multiple projects can be submitted.	<p>demonstrated experience = 0 points</p> <p>More than 1 year demonstrated experience to 3 years demonstrated experience = 1 point</p> <p>More than 3 years demonstrated experience to 5 years demonstrated experience = 2 points</p> <p>More than 5 years demonstrated experience = 3 points</p> <p>Maximum of 3 points</p>		
<b>MAXIMUM TECHNICAL POINTS</b>		<b>15</b>		
<b>MINIMUM PASS MARK</b>		<b>7</b>		

## **APPENDIX D TO ANNEX A**

### **CERTIFICATIONS AT THE TA STAGE**

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

#### **1. CERTIFICATION OF EDUCATION AND EXPERIENCE**

The Contractor certifies that all the information provided in the résumés and supporting material proposed for completing the subject work, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Contractor to be true and accurate. Furthermore, the Contractor warrants that every individual proposed by the Contractor for the requirement is capable of performing the Work described in the Task Authorization.

\_\_\_\_\_  
Print name of authorized individual & sign above

\_\_\_\_\_  
Date

#### **2. CERTIFICATION OF AVAILABILITY OF PERSONNEL**

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

\_\_\_\_\_  
Print name of authorized individual & sign above

\_\_\_\_\_  
Date

#### **3. CERTIFICATION OF STATUS OF PERSONNEL**

If the Contractor has proposed any individual who is not an employee of the Contractor, the Contractor certifies that it has permission from that individual to propose his/her services in relation to the Work to be performed under this TA and to submit his/her résumé to Canada. At any time during the Contract the Contractor must, upon request from the Contracting Authority, provide the written confirmation, signed by the individual, of the permission that was given to the Contractor of his/her availability. Failure to comply with the request may result in a default under the Contract in accordance with the General Conditions.

\_\_\_\_\_  
Print name of authorized individual & sign above

\_\_\_\_\_  
Date

**4. CERTIFICATION OF LANGUAGE - English**

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

\_\_\_\_\_  
Print name of authorized individual & sign above

\_\_\_\_\_  
Date

**5. NON-DISCLOSURE**

The Contractor undertakes, as of the effective date of this Contract, to have any of its employees engaged in the course of performing work under this Contract to sign a Non-Disclosure Agreement certifying that in the course of executing any tasking called for under this Contract, and even after the expiry of this Contract, its employees shall not reproduce, duplicate, in whole or in part, use, divulge, release or disclose in whatever way or form to any third party, without the prior written consent of the Minister of National Defence, any information, data, drawings, specifications, materials any other documents issued, used or disclosed in connection with this Contract and that its employees shall govern themselves accordingly.

The Contractor must obtain from its employee(s) or subcontractor(s) the completed and signed Non-Disclosure Agreement, below, and provide it to the Technical Authority before they are given access to information by or on behalf of Canada in connection with the Work.

In the performance of this Contract, the Contractor may have access to information and material which may result in placing it in a real or perceived conflict of interest or confer an unfair advantage upon it in respect of its participation in other future solicitations. The Contractor acknowledges such participation may, at the sole discretion of the Crown, disqualify the Contractor, its affiliated entities, employees, agents or subcontractors from participating in such solicitations.

**Non-Disclosure Agreement:**

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

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

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

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the case may be.

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

\_\_\_\_\_

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

***Note to Bidders:*** The Contract Serial No. will be added at contract award.

**ANNEX B****BASIS OF PAYMENT**

**Note to Bidders:** A combination of WorkStreams 1, 2, 3, 4 or 5 (based on whether the bidder is successful for Workstreams 1, 2, 3, 4 or 5) will be included, as applicable, in any resulting contract. The tables will be completed at contract award.

**WORKSTREAM 1****INITIAL CONTRACT PERIOD:**

Initial Contract Period (Date of Contract Award to July 31, 2014)		
Resource Category	Level of Expertise	Firm Per Diem Rate
A2. ERP Functional Analyst	Level 2	\$
A2. ERP Functional Analyst	Level 3	\$

**OPTION PERIODS:**

Option Period 1 (August 1, 2014 to April 30, 2015)		
Resource Category	Level of Expertise	Firm Per Diem Rate
A2. ERP Functional Analyst	Level 2	\$
A2. ERP Functional Analyst	Level 3	\$

Option Period 2 (May 1, 2015 to January 31, 2016)		
Resource Category	Level of Expertise	Firm Per Diem Rate
A2. ERP Functional Analyst	Level 2	\$
A2. ERP Functional Analyst	Level 3	\$

Option Period 3 (February 1, 2016 to October 31, 2016)		
Resource Category	Level of Expertise	Firm Per Diem Rate
A2. ERP Functional Analyst	Level 2	\$
A2. ERP Functional Analyst	Level 3	\$

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**WORKSTREAM 2**

**INITIAL CONTRACT PERIOD:**

Initial Contract Period (Date of Contract Award to July 31, 2014)		
Resource Category	Level of Expertise	Firm Per Diem Rate
A3. ERP Programmer Analyst	Level 3	\$

**OPTION PERIODS:**

Option Period 1 (August 1, 2014 to April 30, 2015)		
Resource Category	Level of Expertise	Firm Per Diem Rate
A3. ERP Programmer Analyst	Level 3	\$

Option Period 2 (May 1, 2015 to January 31, 2016)		
Resource Category	Level of Expertise	Firm Per Diem Rate
A3. ERP Programmer Analyst	Level 3	\$

Option Period 3 (February 1, 2016 to October 31, 2016)		
Resource Category	Level of Expertise	Firm Per Diem Rate
A3. ERP Programmer Analyst	Level 3	\$

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**WORKSTREAM 3**

**INITIAL CONTRACT PERIOD:**

Initial Contract Period (Date of Contract Award to July 31, 2014)		
Resource Category	Level of Expertise	Firm Per Diem Rate
A5. ERP Technical Analyst	Level 3	\$

**OPTION PERIODS:**

Option Period 1 (August 1, 2014 to April 30, 2015)		
Resource Category	Level of Expertise	Firm Per Diem Rate
A5. ERP Technical Analyst	Level 3	\$

Option Period 2 (May 1, 2015 to January 31, 2016)		
Resource Category	Level of Expertise	Firm Per Diem Rate
A5. ERP Technical Analyst	Level 3	\$

Option Period 3 (February 1, 2016 to October 31, 2016)		
Resource Category	Level of Expertise	Firm Per Diem Rate
A5. ERP Technical Analyst	Level 3	\$

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**WORKSTREAM 4**

**INITIAL CONTRACT PERIOD:**

<b>Initial Contract Period (Date of Contract Award to July 31, 2014)</b>		
<b>Resource Category</b>	<b>Level of Expertise</b>	<b>Firm Per Diem Rate</b>
I1. Data Conversion Specialist	Level 2	\$
I2. Database Administrator	Level 2	\$

**OPTION PERIODS:**

<b>Option Period 1 (August 1, 2014 to April 30, 2015)</b>		
<b>Resource Category</b>	<b>Level of Expertise</b>	<b>Firm Per Diem Rate</b>
I1. Data Conversion Specialist	Level 2	\$
I2. Database Administrator	Level 2	\$

<b>Option Period 2 (May 1, 2015 to January 31, 2016)</b>		
<b>Resource Category</b>	<b>Level of Expertise</b>	<b>Firm Per Diem Rate</b>
I1. Data Conversion Specialist	Level #2	\$
I2. Database Administrator	Level #2	\$

<b>Option Period 3 (February 1, 2016 to October 31, 2016)</b>		
<b>Resource Category</b>	<b>Level of Expertise</b>	<b>Firm Per Diem Rate</b>
I1. Data Conversion Specialist	Level 2	\$
I2. Database Administrator	Level 2	\$

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**WORKSTREAM 5**

**INITIAL CONTRACT PERIOD:**

Initial Contract Period (Date of Contract Award to July 31, 2014)		
Resource Category	Level of Expertise	Firm Per Diem Rate
A11. Tester	Level 2	\$

**OPTION PERIODS:**

Option Period 1 (August 1, 2014 to April 30, 2015)		
Resource Category	Level of Expertise	Firm Per Diem Rate
A11. Tester	Level 2	\$

Option Period 2 (May 1, 2015 to January 31, 2016)		
Resource Category	Level of Expertise	Firm Per Diem Rate
A11. Tester	Level 2	\$

Option Period 3 (February 1, 2016 to October 31, 2016)		
Resource Category	Level of Expertise	Firm Per Diem Rate
A11. Tester	Level 2	\$

## ANNEX C

## SECURITY REQUIREMENTS CHECK LIST



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Gouvernement du Canada

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UNCLASSIFIED

## SECURITY REQUIREMENTS CHECK LIST (SRCL)

## LISTE DE VÉRIFICATION DES EXIGENCES RELATIVES À LA SÉCURITÉ (LVERS)

PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE	
1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine	Public Works and Government Services Canada
2. Branch or Directorate / Direction générale ou Direction	Acquisitions Branch
3. a) Subcontract Number / Numéro du contrat de sous-traitance	3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant
4. Brief Description of Work / Brève description du travail Professional Services - Standing Offers and Supply Arrangements	
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 commerciale sans entreposage de nuit? <input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui	
7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès	
Canada <input checked="" type="checkbox"/>	NATO / OTAN <input type="checkbox"/>
Foreign / Étranger <input type="checkbox"/>	
7. b) Release restrictions / Restrictions relatives à la diffusion	
No release restrictions Aucune restriction relative à la diffusion <input checked="" type="checkbox"/>	All NATO countries Tous les pays de l'OTAN <input type="checkbox"/>
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:
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 B PROTÉGÉ B <input checked="" type="checkbox"/>	NATO RESTRICTED NATO DIFFUSION RESTREINTE <input type="checkbox"/>
PROTECTED C PROTÉGÉ C <input checked="" type="checkbox"/>	NATO CONFIDENTIAL NATO CONFIDENTIEL <input type="checkbox"/>
CONFIDENTIAL CONFIDENTIEL <input checked="" type="checkbox"/>	NATO SECRET NATO SECRET <input type="checkbox"/>
SECRET SECRET <input checked="" type="checkbox"/>	COSMIC TOP SECRET COSMIC TRÈS SECRET <input type="checkbox"/>
TOP SECRET TRÈS SECRET <input type="checkbox"/>	
TOP SECRET (SIGINT) TRÈS SECRET (SIGINT) <input type="checkbox"/>	
	PROTECTED A PROTÉGÉ A <input type="checkbox"/>
	PROTECTED B PROTÉGÉ B <input type="checkbox"/>
	PROTECTED C PROTÉGÉ C <input type="checkbox"/>
	CONFIDENTIAL CONFIDENTIEL <input type="checkbox"/>
	SECRET SECRET <input type="checkbox"/>
	TOP SECRET TRÈS SECRET <input type="checkbox"/>
	TOP SECRET (SIGINT) TRÈS SECRET (SIGINT) <input type="checkbox"/>

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité  
UNCLASSIFIED

# ANNEX C

## SECURITY REQUIREMENTS CHECK LIST



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### PART A (continued) / PARTIE A (suite)

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

If Yes, indicate the level of sensitivity:

Dans l'affirmative, indiquer le niveau de sensibilité :

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

Short Title(s) of material / Titre(s) abrégé(s) du matériel :

Document Number / Numéro du document :

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

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

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

Special comments:

Commentaires spéciaux :

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

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

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

If Yes, will unscreened personnel be escorted?

Dans l'affirmative, le personnel en question sera-t-il escorté? ☒ No ☐ Yes  
Non Oui

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

#### INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

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

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

#### PRODUCTION

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

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

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

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

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité

UNCLASSIFIED

Canada

# ANNEX C SECURITY REQUIREMENTS CHECK LIST



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

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

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

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

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

### SUMMARY CHART / TABLEAU RÉCAPITULATIF

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

12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED?

La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE?

☒ No ☐ Yes  
Non Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification".

Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire.

12. b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED?

La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE?

☒ No ☐ Yes  
Non Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification" and indicate with attachments (e.g. SECRET with Attachments).

Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire et indiquer qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).

## ANNEX C

## SECURITY REQUIREMENTS CHECK LIST



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UNCLASSIFIED

## PART D - AUTHORIZATION / PARTIE D - AUTORISATION

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

Name (print) - Nom (en lettres moulées)

Title - Titre

Signature

Centralized Professional Services System, CPSS

Professional Services - Methods of Supply

Telephone No. - N° de téléphone  
000-000-0000

Facsimile No. - N° de télécopieur  
000-000-0000

E-mail address - Adresse courriel  
SSPC.CPSS@tpsgc-pwgsc.gc.ca

Date  
2012/03/13

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

Name (print) - Nom (en lettres moulées)

Title - Titre

Signature

Charron, Annick

SO

Telephone No. - N° de téléphone  
819-956-0615

Facsimile No. - N° de télécopieur  
819-934-1449

E-mail address - Adresse courriel  
annick.charron@tpsgc-pwgsc.gc.ca

Date  
March 20, 2012

## 15. Are there additional instructions (e.g. Security Guide, Security Classification Guide) attached?

Des instructions supplémentaires (p. ex. Guide de sécurité, Guide de classification de la sécurité) sont-elles jointes?

☐ No  
Non

☐ Yes  
Oui

## 16. Procurement Officer / Agent d'approvisionnement

Name (print) - Nom (en lettres moulées)

Title - Titre

Signature

Telephone No. - N° de téléphone

Facsimile No. - N° de télécopieur

E-mail address - Adresse courriel

Date

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

Name (print) - Nom (en lettres moulées)

Title - Titre

Signature

Telephone No. - N° de téléphone

Facsimile No. - N° de télécopieur

E-mail address - Adresse courriel

Date

28-MARCH-2012

Jacques Saumur  
Contract Security Officer, Contract Security Division  
Jacques.Saumur@tpsgc-pwgsc.gc.ca  
Tel/Tél - 613-948-1732 / Fax/Téléc - 613-954-4171

HUMAN RESOURCES MANAGEMENT SYSTEM (HRMS) TECHNICAL UPGRADE

Solicitation number: W8474-14MP22/A

## ATTACHMENT 3.1

### BIDDER FORMS

BID SUBMISSION FORM	
<b>Bidder's full legal name</b>	
<b>Authorized Representative of Bidder for evaluation purposes (e.g., clarifications)</b>	Name
	Title
	Address
	Telephone #
	Fax #
	Email
<b>Bidder's Procurement Business Number (PBN)</b> <i>[see the Standard Instructions 2003]</i>	
<b>Jurisdiction of Contract:</b> Province in Canada the bidder wishes to be the legal jurisdiction applicable to any resulting contract (if other than as specified in solicitation)	
<b>Former Public Servants</b>  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"

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<b>Federal Contractors Program for Employment Equity (FCP EE) Certification:</b>	On behalf of the bidder, by signing below, I also confirm that the bidder <i>[check the box that applies]</i> :	
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:	(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;	
(a) submit to the Department of HRSD form LAB 1168, Certificate of Commitment to Implement Employment Equity, DULY SIGNED; or (b) submit a valid Certificate number confirming its adherence to the FCP-EE.	(b) is not subject to FCP-EE, because it is a regulated employer under the <i>Employment Equity Act</i> ;	
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.	(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	
For joint ventures, be sure to provide this information for each of the members of the joint venture.	(d) is subject to FCP-EE, and has a valid certification number as follows: _____ (and has not been declared an Ineligible Contractor by HRSD).	
<b>Number of FTEs</b> [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.]		
<b>Security Clearance Level of Bidder</b> <i>[include both the level and the date it was granted]</i>		
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: 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.		
<b>Signature of Authorized Representative of Bidder</b>		

## ATTACHMENT 4.1

### BID EVALUATION CRITERIA

#### 1. DEFINITIONS

The following definitions apply only to the Mandatory and Point-Rated Technical Proposal Submission Requirements and Evaluation Criteria for this RFP:

- (i) **Greater version:**
  - a. For FA2.M2, FA3.M2, FA2.R2, FA2.R3, FA2.R6, FA2.R7, FA3.R2, FA3.R3, FA3.R4, FA3.R7, FA3. R8, DCS2.M1, DCS2.M3, DCS2.R2, DCS2.R3, DCS2.R4, DCS2.R5, Greater version - means a version of PeopleSoft that was released after version 8.9.
  - b. For TA3.M6, Greater version – means a version of PeopleSoft that was released after version 8.0.
  - c. For TA3.R4 Greater version – means a version of AIX that was released after version 5L.
- (ii) **Instance:** is a technical term that relates to a holistic environment of PeopleSoft. For example, a production installation of PeopleSoft and its data is an Instance of PeopleSoft and is separate from a testing environment of the same technology.
- (i) **Aggregate time:** is the cumulative sum of the total quantity of experience gained based on the duration of all work experience submitted for the Bidder's proposed resource for each project reference, as determined by the proposed resource's start and end date on a project. Overlapping periods of experience across projects will only be counted once.

#### 2. EVALUATION CRITERIA

##### WORKSTREAM 1

##### (a) Bidder's Proposed Resources

The Bidder must propose one resource and provide one résumé (that should include references that can substantiate the work) for each of the following Resource Categories:

- (ii) Level 2 ERP Functional Analyst
- (ii) Level 3 ERP Functional Analyst

##### (b) Mandatory Technical Evaluation Criteria

- (i) Level 2 ERP Functional Analyst

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The Bidder MUST demonstrate that its proposed Level 2 ERP Functional Analyst has:			
Criteria ID	Requirement	Bidder's Response	
		Substantiation of Technical Compliance	Reference to Additional Documentation within the Bid
FA2.M1	<p>A minimum of 5 years experience as an Enterprise Resource Planning (ERP) Functional Analyst.</p> <p>The experience must have been acquired within the 10 years preceding the closing date of this bid solicitation.</p>		
FA2.M2	<p>A minimum of 4 years experience as an ERP Functional Analyst in a development or operational environment, working with PeopleSoft HRMS version 8.9 or PeopleSoft HCM version 8.9, or a Greater version of either.</p> <p>The experience must have been acquired within the 6 years preceding the closing date of this bid solicitation.</p>		

(ii) Level 3 ERP Functional Analyst

The Bidder MUST demonstrate that its proposed Level 3 Functional Analyst has:			
Criteria ID	Requirement	Bidder's Response	
		Substantiation of Technical Compliance	Reference to Additional Documentation within the Bid
FA3.M1	<p>A minimum of 10 years experience as an Enterprise Resource Planning (ERP) Functional Analyst.</p> <p>The experience must have been acquired within the 15 years preceding the closing date of this bid solicitation.</p>		
FA3.M2	<p>A minimum of 6 years experience as an ERP Functional Analyst in a development or operational environment, working with PeopleSoft HRMS version 8.9 or PeopleSoft HCM version 8.9, or a Greater version of either.</p>		

	The experience must have been acquired within the 8 years preceding the closing date of this bid solicitation.		
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**(c) Point-Rated Technical Evaluation Criteria****(i) Level 2 ERP Functional Analyst**

The Bidder <b>SHOULD</b> demonstrate that each proposed Level 2 ERP Functional Analyst has:				
CRITERIA			BIDDER'S RESPONSE	
Criteria ID	Requirement	Evaluation	Substantiation of Technical Compliance	Reference to Additional Documentation within the Bid
FA2.R1	<p>Experience performing all of the following tasks within the same project:</p> <p>1) Conducting fit/gap analysis of Human Resource (HR) processes using PeopleSoft HCM 8.9 or a Greater version as the target;</p> <p>And</p> <p>2) Documenting changes and recommending options to resolve gaps between HR process requirements and PeopleSoft HCM 8.9 or a greater version;</p> <p>And</p> <p>3) Presenting recommended options for approval and implementation.</p> <p>Multiple projects can be submitted.</p> <p>In order to demonstrate this criterion, the Bidder's response must demonstrate the tasks</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>Less than 1 year demonstrated experience = 0 points</p> <p>1 year to 2 years demonstrated experience = 1 point</p> <p>More than 2 years to 3 years demonstrated experience = 2 points</p> <p>More than 3 years to 4 years demonstrated experience = 3 points</p> <p>More than 4 years to 5 years demonstrated experience = 4 points</p>		

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	completed by its proposed resource, including how its proposed resource conducted a fit/gap analysis, the type of documentation and recommendations that were provided as a result of the fit/gap analysis, and the type and format of options that were presented for approval.	More than 5 years demonstrated experience = 5 points  Maximum of 5 points		
FA2.R2	<p>A certificate of completion for the following formal Oracle PeopleSoft training courses:</p> <p>1. Oracle PeopleTools I; or 2. PS Query; or</p> <p>A minimum of 5 years demonstrated experience working with Oracle PeopleTools I or PS Query.</p> <p>A combination of demonstrated work experience and certification, as applicable, will be accepted.</p> <p>To receive points for completion of a training course, bidders must include a copy of each certificate with their bid. Only certificates from training institutions authorized by the software publisher will be accepted.</p> <p>Multiple projects can be submitted.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>10 points for 5 years demonstrated work experience using PeopleTools I.</p> <p>10 points for 5 years demonstrated work experience using PS Query.</p> <p>10 points for each valid certificate of course completion provided with the bid.</p> <p>Maximum 20 points</p>	.	
FA2.R3	Experience conducting	The Aggregate		

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	<p>business process re-engineering to *HR business processes where the target was PeopleSoft HCM 8.9 or a Greater version.</p> <p>The experience must have been gained within the 10 years preceding the closing date of this bid solicitation.</p> <p>*For the purpose of this criterion, Bidders must identify the name of the HR business processes that were re-engineered by the proposed resource in their responses.</p> <p>Multiple projects can be submitted.</p>	<p>time of all demonstrated experience will be evaluated as follows:</p> <p>Less than 1 year demonstrated experience = 0 points</p> <p>1 year demonstrated experience to 2 years demonstrated experience = 1 point</p> <p>More than 2 years demonstrated experience to 3 years demonstrated experience = 2 points</p> <p>More than 3 years demonstrated experience to 4 years demonstrated experience = 3 points</p> <p>More than 4 years demonstrated experience to 5 years demonstrated experience = 4 points</p> <p>More than 5 years demonstrated experience = 5 points</p> <p>Maximum of 5 points</p>		
FA2.R4	Experience using PeopleTools Application Designer.	The Aggregate time of all demonstrated experience will be		

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	Multiple projects can be submitted.	<p>evaluated as follows:</p> <p>Less than 1 year demonstrated experience = 0 points</p> <p>1 year demonstrated experience to 2 years demonstrated experience = 1 point</p> <p>More than 2 years demonstrated experience to 3 years demonstrated experience = 2 points</p> <p>More than 3 years demonstrated experience = 3 points</p> <p>Maximum of 3 points</p>		
FA2.R5	<p>Experience developing HR Business Process requirements and Functional Specifications for HR applications within the 10 years preceding the closing date of this bid solicitation.</p> <p>This experience can be demonstrated over multiple projects.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>Less than 1 year demonstrated experience = 0 points</p> <p>1 year demonstrated experience to 2 years demonstrated experience = 1 point</p> <p>More than 2 years demonstrated experience to 3 years</p>		

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		<p>demonstrated experience = 2 points</p> <p>More than 3 years demonstrated experience to 4 years demonstrated experience = 3 points</p> <p>More then 4 years demonstrated experience = 4 points</p> <p>Maximum of 4 points</p> <p>If the Bidder fails to demonstrate experience in both HR Business Process requirements and Functional Specifications for HR applications, the total score for FA2.R5 will be 0 points.</p>		
FA2.R6	<p>Experience developing test plans, and writing and executing test scripts for the testing of PeopleSoft HRMS modules in PeopleSoft HCM 8.9 or a Greater version.</p> <p>To receive points the Bidder must indicate the type of HRMS module that was tested in its response.</p> <p>This experience can be demonstrated over multiple projects</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>Less than 1 year demonstrated experience = 0 points</p> <p>1 year demonstrated experience to 2 years demonstrated experience = 1 point</p> <p>More than 2 years demonstrated experience to 3</p>		

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		<p>years demonstrated experience = 2 points</p> <p>More than 3 years demonstrated experience = 3 points</p> <p>Maximum of 3 points</p> <p>If the Bidder fails to demonstrate experience in all of the required tasks in FA2.R6, the total score for the criterion will be 0 points.</p>		
FA2.R7	<p>Experience working as an ERP functional analyst through the analysis, design and development phases for the implementation of a new functionality or during the upgrade of a PeopleSoft HRMS or PeopleSoft HCM.</p> <p>The new functionality or upgrade must have been on PeopleSoft HRMS 8.9 or PeopleSoft HCM 8.9 or a Greater version.</p> <p>Multiple projects can be submitted.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>Less than 1 year demonstrated experience= 0 points</p> <p>1 year demonstrated experience to 2 years demonstrated experience = 1 point</p> <p>More than 2 years demonstrated experience to 3 years demonstrated experience = 2 points</p> <p>More than 3 years demonstrated experience to 4 years demonstrated experience = 3</p>		

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		<p>points</p> <p>More than 4 years demonstrated experience to 5 years demonstrated experience = 4 points</p> <p>More than 5 years demonstrated experience = 5 points</p> <p>Maximum of 5 points</p>		
FA2.R8	<p>Experience providing mentoring and training to functional analysis support teams.</p> <p>This experience can be demonstrated over multiple projects</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>Less than 1 year demonstrated experience = 0 points</p> <p>1 year demonstrated experience to 2 years demonstrated experience = 1 point</p> <p>More than 2 years demonstrated experience to 3 years demonstrated experience = 2 points</p> <p>More than 3 years demonstrated experience = 3 points</p> <p>Maximum of 3 points</p> <p>If the Bidder fails</p>		

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		to demonstrate experience providing both mentoring and training, the total score for FA2.R8 will be 0 points.		
<b>MAXIMUM TECHNICAL POINTS</b>			<b>48</b>	
<b>MINIMUM PASS MARK</b>			<b>34</b>	

(ii) Level 3 ERP Functional Analyst

The Bidder <b>SHOULD</b> demonstrate that each proposed Level 3 ERP Functional Analyst has:				
CRITERIA			BIDDER'S RESPONSE	
Criteria ID	Requirement	Evaluation	Substantiation of Technical Compliance	Reference to Additional Documentation within the Bid
FA3.R1	<p>Experience performing all of the following tasks within the same project:</p> <p>1) Conducting fit/gap analysis of Human Resource (HR) processes using PeopleSoft HCM 8.9 or a Greater version as the target;</p> <p>And</p> <p>2) Documenting changes and recommending options to resolve gaps between HR process requirements and PeopleSoft HCM 8.9 or a Greater version;</p> <p>And</p> <p>3) Presenting recommended options for approval and implementation.</p> <p>Multiple projects can be submitted.</p> <p>In order to demonstrate this criterion, the Bidder's</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>Less than 1 year demonstrated experience = 0 points</p> <p>1 year to 2 years demonstrated experience = 1 point</p> <p>More than 2 years to 3 years demonstrated experience = 2 points</p> <p>More than 3 years to 4 years demonstrated experience = 3 points</p> <p>More than 4 years to 5 years demonstrated</p>		

Attachment 4.1

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	<p>response must demonstrate the tasks completed by its proposed resource, including how its proposed resource conducted a fit/gap analysis, the type of documentation and recommendations that were provided as a result of the fit/gap analysis, and the type and format of options that were presented for approval.</p>	<p>experience = 4 points</p> <p>More than 5 years demonstrated experience = 5 points</p> <p>Maximum of 5 points</p>		
FA3.R2	<p>A certificate of completion for the following formal Oracle PeopleSoft training courses:</p> <p>1. Oracle PeopleTools I; or 2. PS Query;</p> <p>or</p> <p>A minimum of 5 years demonstrated experience working with Oracle PeopleTools I or PS Query.</p> <p>A combination of demonstrated work experience and certification, as applicable, will be accepted.</p> <p>To receive points for completion of a training course, bidders must include a copy of each certificate with their bid. Only certificates from training institutions authorized by the software publisher will be accepted.</p> <p>Multiple projects can be submitted.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>10 points for 5 years demonstrated work experience using PeopleTools I.</p> <p>10 points for 5 years demonstrated work experience using PS Query.</p> <p>10 points for each valid certificate of course completion provided with the bid.</p> <p>Maximum 20 points</p>		

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FA3.R3	<p>Experience analyzing, designing, developing and documenting End User Security Administration including roles and permission lists, using PeopleSoft HCM 8.9 or a Greater version.</p> <p>This experience can be demonstrated over multiple projects.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>Less than 1 year demonstrated experience = 0 points</p> <p>1 year demonstrated experience to 2 years demonstrated experience = 1 point</p> <p>More than 2 years demonstrated experience to 3 years demonstrated experience = 2 points</p> <p>More than 3 years demonstrated experience to 4 years demonstrated experience = 3 points</p> <p>More than 4 years demonstrated experience to 5 years demonstrated experience = 4 points</p> <p>More than 5 years demonstrated experience = 5 points</p> <p>Maximum of 5 points</p> <p>If the Bidder fails to demonstrate experience in all</p>		
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HUMAN RESOURCES MANAGEMENT SYSTEM (HRMS) TECHNICAL UPGRADE

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		of the required tasks in FA3.R3, the total score for the criterion will be 0 points.		
FA3.R4	<p>Experience conducting business process re-engineering to **HR business processes where the target was PeopleSoft HCM 8.9 or a Greater version.</p> <p>The experience must have been gained within the 10 years preceding the closing date of this bid solicitation.</p> <p>*For the purpose of this criterion, Bidders must identify the name of the HR business processes that were re-engineered by the proposed resource in their responses.</p> <p>Multiple projects can be submitted.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>Less than 1 year demonstrated experience = 0 points</p> <p>1 year demonstrated experience to 2 years demonstrated experience = 1 point</p> <p>More than 2 years demonstrated experience to 3 years demonstrated experience = 2 points</p> <p>More than 3 years demonstrated experience to 4 years demonstrated experience = 3 points</p> <p>More than 4 years demonstrated experience to 5 years demonstrated experience = 4 points</p>		

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		<p>More than 5 years demonstrated experience = 5 points</p> <p>Maximum of 5 points</p>		
FA3.R5	<p>Experience using PeopleTools Application Designer.</p> <p>Multiple projects can be submitted.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>Less than 1 year demonstrated experience = 0 points</p> <p>1 year demonstrated experience to 2 years demonstrated experience = 1 point</p> <p>More than 2 years demonstrated experience to 3 years demonstrated experience = 2 points</p> <p>More than 3 years combined demonstrated experience = 3 points</p> <p>Maximum of 3 points</p>		
FA3.R6	<p>Experience developing HR Business Process requirements and Functional Specifications for HR applications within the 10 years preceding the closing date of this bid solicitation.</p> <p>This experience can be</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>Less than 1 year demonstrated experience = 0</p>		

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	demonstrated across multiple projects.	<p>points</p> <p>1 year demonstrated experience to 2 years demonstrated experience = 1 point</p> <p>More than 2 years demonstrated experience to 3 years demonstrated experience = 2 points</p> <p>More than 3 years demonstrated experience to 4 years demonstrated experience = 3 points</p> <p>More then 4 years combined demonstrated experience = 4 points</p> <p>Maximum of 4 points</p> <p>If the Bidder fails to demonstrate experience in both HR Business Process requirements and Functional Specifications for HR applications, the total score for FA3.R6 will be 0 points.</p>		
FA3.R7	Experience developing test plans, and writing and executing test scripts for the testing of PeopleSoft HRMS modules in PeopleSoft HCM 8.9 or a Greater version.	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>Less than 1 year</p>		

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	<p>To receive points the Bidder must indicate the type of HRMS module that was tested in its response.</p> <p>This experience can be demonstrated across multiple projects.</p>	<p>demonstrated experience = 0 points</p> <p>1 year demonstrated experience to 2 years demonstrated experience = 1 point</p> <p>More than 2 years demonstrated experience to 3 years demonstrated experience = 2 points</p> <p>More than 3 years demonstrated experience = 3 points</p> <p>Maximum of 3 points</p> <p>If the Bidder fails to demonstrate experience in all of the required tasks in FA3.R7 the total score for the criterion will be 0 points.</p>		
FA3.R8	<p>Experience working as an ERP functional analyst through the analysis, design and development phases for the implementation of a new functionality or during the upgrade of a PeopleSoft HRMS or PeopleSoft HCM.</p> <p>The new functionality or upgrade must have been on PeopleSoft HRMS 8.9 or PeopleSoft HCM 8.9 or a Greater version.</p> <p>Multiple projects can be submitted.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>Less than 1 year demonstrated experience = 0 points</p> <p>1 year demonstrated experience to 2 years demonstrated experience = 1</p>		

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		<p>point</p> <p>More than 2 years demonstrated experience to 3 years demonstrated experience = 2 points</p> <p>More than 3 years demonstrated experience to 4 years demonstrated experience = 3 points</p> <p>More than 4 years demonstrated experience to 5 years demonstrated experience = 4 points</p> <p>More than 5 years demonstrated experience = 5 points</p> <p>Maximum of 5 points</p>		
FA3.R9	<p>Experience providing mentoring and training to functional analysis support teams.</p> <p>This experience can be demonstrated across multiple projects.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>Less than 1 year demonstrated experience = 0 points</p> <p>1 year demonstrated experience to 2 years demonstrated experience = 1 point</p> <p>More than 2 years demonstrated experience to 3</p>		

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		<p>years demonstrated experience = 2 points</p> <p>More than 3 years demonstrated experience = 3 points</p> <p>Maximum of 3 points</p> <p>If the Bidder fails to demonstrate experience providing both mentoring and training, the total score for FA3.R9 will be 0 points.</p>		
<b>MAXIMUM TECHNICAL POINTS</b>			<b>53</b>	
<b>MINIMUM PASS MARK</b>			<b>37</b>	

**WORKSTREAM 2****(a) Bidder's Proposed Resources**

The Bidder must propose one resource (that should include references that can substantiate the work) and provide one résumé for the following Resource Category:

- (i) Level 3 ERP Programmer Analyst

**(b) Mandatory Technical Evaluation Criteria**

- (i) Level 3 ERP Programmer Analyst

<b>The Bidder MUST demonstrate that its proposed Level 3 ERP Programmer Analyst has:</b>			
<b>Criteria ID</b>	<b>Requirement</b>	<b>Bidder's Response</b>	
		<b>Substantiation of Technical Compliance</b>	<b>Reference to Additional Documentation within the Bid</b>
PA3.M1	A minimum of 10 years experience developing PeopleSoft Human Resource (HR) applications.		
PA3.M2	Experience as an ERP Programmer Analyst, analyzing and developing PeopleCode to customize/re-work a minimum of four (4) PeopleSoft maintenance packs or bundles in the last eight (8) years preceding the closing date of this bid solicitation.  The Bidder must identify the versions of the maintenance packs or bundles for the experience identified in its response.		
PA3.M3	A minimum 1 year of combined demonstrated experience writing SQL (Structured Query Language) or SQR (Structured Query Report) or PeopleCode using data from more than one database using Oracle database links, schemas, or other Oracle supported methods.  The experience must have been acquired in the 10 years preceding the closing date of this bid solicitation.  This experience can be demonstrated across multiple projects.		

**(c) Point-Rated Technical Evaluation Criteria****(i) Level 3 ERP Programmer Analyst**

<b>The Bidder SHOULD demonstrate that each proposed Level 3 ERP Programmer Analyst has:</b>				
<b>CRITERIA</b>			<b>BIDDER'S RESPONSE</b>	
<b>Criteria ID</b>	<b>Requirement</b>	<b>Evaluation</b>	<b>Substantiation of Technical Compliance</b>	<b>Reference to Additional Documentation within the Bid</b>
PA3.R1	<p>Experience writing SQL and PeopleCode for an HR database on an Oracle platform where there is a minimum of 5,000 active employee records.</p> <p>The experience must have been acquired in the 10 years preceding the closing date of this bid solicitation.</p> <p>Demonstrated experience with multiple Instances will be accepted.</p>	<p>Points will be allocated for each year of demonstrated experience supporting the PeopleSoft (PS) Instance.</p> <p>Each demonstrated PS Instance, based on the number of employees in an active PS employment, will be evaluated as follows:</p> <p>Up to 4,999 employees = 0 point per year of demonstrated experience</p> <p>From 5,000 employees to 14,999 employees = 1 point per year of demonstrated experience</p> <p>From 15,000 employees to 29,999 employees = 2 points per year of demonstrated experience</p> <p>More than 30,000 employees = 3</p>		

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		<p>points per year of demonstrated experience</p> <p>Maximum of 30 points</p>		
PA3.R2	<p>Experience preparing and providing technical analysis, impact assessments and technical specifications during a PeopleSoft version upgrade using a supported PeopleSoft upgrade path.</p> <p>(For example: upgrading from PeopleSoft HCM 8.9 to PeopleSoft HCM 9.1.)</p> <p>This experience must have been acquired within the same project and must have been acquired in the 10 years preceding the closing date of this bid solicitation.</p> <p>Multiple projects can be submitted.</p>	<p>Each PeopleSoft Upgrade reference project that demonstrated the required experience and used a supported PeopleSoft upgrade path = 1 point</p> <p>Maximum of 5 points</p>		
PA3.R3	<p>Experience preparing and providing technical analysis, impact assessments and technical specifications during a PeopleSoft upgrade or new PeopleSoft implementations where a supported PeopleSoft upgrade path was not available.</p> <p>(For example: upgrading from PeopleSoft HRMS 7.5 to PeopleSoft HCM 8.9 or 9.1, or migrating from a custom HR application to PeopleSoft 8.9.)</p> <p>This experience must have been acquired within the same project and must have been acquired in the 10 years preceding the closing date of this bid</p>	<p>Each PeopleSoft Upgrade reference project that demonstrated the required experience and where no supported PeopleSoft upgrade path was available = 3 points.</p> <p>Maximum of 15 points</p>		

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	solicitation.  Multiple projects can be submitted			
PA3.R4	<p>Experience writing SQL or SQR or PeopleCode using data from more than one database using Oracle database links, schemas, or other Oracle supported methods.</p> <p>The experience must have been acquired in the 10 years preceding the closing date of this bid solicitation.</p> <p>This experience can be demonstrated across multiple projects.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>Up to 1 year demonstrated experience = 0 points</p> <p>More than 1 year demonstrated experience to 2 years demonstrated experience = 1 point</p> <p>More than 2 years demonstrated experience to 3 years demonstrated experience = 2 points</p> <p>More than 3 years demonstrated experience = 3 points</p> <p>Maximum of 3 points</p>		
<b>MAXIMUM TECHNICAL POINTS</b>		<b>53</b>		
<b>MINIMUM PASS MARK</b>		<b>16</b>		

**WORKSTREAM 3****(a) Bidder's Proposed Resources**

The Bidder must propose one resource and provide one résumé (that should include references that can substantiate the work) for the following Resource Category:

- (i) Level 3 ERP Technical Analyst

**(b) Mandatory Technical Evaluation Criteria**

- (i) Level 3 ERP Technical Analyst

<b>The Bidder MUST demonstrate that its proposed Level 3 ERP Technical Analyst has:</b>			
<b>Criteria ID</b>	<b>Requirement</b>	<b>Bidder's Response</b>	
		<b>Substantiation of Technical Compliance</b>	<b>Reference to Additional Documentation within the Bid</b>
TA3.M1	A minimum of 5 years experience installing, configuring and using Integration Broker as a Technical Analyst.		
TA3.M2	A minimum of 10 years experience within the 15 years preceding the closing date of this solicitation, researching, managing, downloading, and applying both PeopleSoft application and PeopleTools patches in PeopleSoft development and production environments.  This experience can be demonstrated across multiple projects.		
TA3.M3	A minimum of 10 years experience within the 15 years preceding the closing date of this solicitation, migrating PeopleSoft projects in PeopleSoft development and production environments:  This experience can be demonstrated across multiple projects.		
TA3.M4	A minimum of 5 years experience in the 15 years preceding the closing date of this solicitation, installing, configuring and administering application servers or web servers on Windows.  This experience can be demonstrated across multiple projects.		
TA3.M5	A minimum of 5 years experience in the 15 years preceding the closing date of this		

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	<p>solicitation, installing, configuring and administering application servers or web servers on Unix.</p> <p>This experience can be demonstrated across multiple projects.</p> <p>For the purpose of this criterion, projects referenced in TA3.M4 can be used.</p>		
TA3. M6	<p>Experience as a PeopleSoft Application Technical Administrator in the development, testing, user acceptance and implementation phases of a PeopleSoft HR system upgrade to a Greater version than PeopleSoft HCM 8.0.</p> <p>The PeopleSoft HR system upgrade to a Greater version than PeopleSoft HCM 8.0 must have successfully been implemented through to a production environment.</p> <p>This experience must have been acquired within the same project.</p>		

**(c) Point-Rated Technical Evaluation Criteria**

**(i) Level 3 ERP Technical Analyst**

The Bidder SHOULD demonstrate that each proposed Level 3 ERP Programmer Analyst has:				
CRITERIA			BIDDER'S RESPONSE	
Criteria ID	Requirement	Evaluation	Substantiation of Technical Compliance	Reference to Additional Documentation within the Bid
TA3.R1	<p>Experience in applying Oracle PeopleSoft Service Packs, Maintenance Packs, Bundles or Patches using Change Assistant.</p> <p>This experience can be demonstrated across multiple projects.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>1 point will be awarded for each year of demonstrated experience.</p> <p>Maximum of 10 points</p>		

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TA3.R2	<p>Experience setting-up and configuring XML Publisher as a Technical Analyst.</p> <p>This experience can be demonstrated across multiple projects.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>1 point will be awarded for each year of demonstrated experience.</p> <p>Maximum of 10 points</p> <p>If the Bidder fails to demonstrate experience in all of the required tasks in TA3. R2 the total score for the criterion will be 0 points.</p>		
TA3.R3	<p>Experience analyzing, debugging, and writing SQL scripts for an Oracle environment.</p> <p>This experience can be demonstrated across multiple projects.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>1 point per year of combined demonstrated experience.</p> <p>Maximum of 5 points.</p> <p>If the Bidder fails to demonstrate experience in all of the required tasks in TA3. R3 the total score for the criterion will be 0 points.</p>		
TA3.R4	<p>Experience working in an AIX environment at version 5L or a Greater version.</p> <p>Multiple projects can be</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as</p>		

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	submitted.	follows:  1 point per year of combined demonstrated experience.  Maximum of 5 points.		
<b>MAXIMUM TECHNICAL POINTS</b>		<b>30</b>		
<b>MINIMUM PASS MARK</b>		<b>10</b>		

**WORKSTREAM 4****(a) Bidder's Proposed Resources**

The Bidder must propose one resource and provide one résumé (that should include references that can substantiate the work) for each of the following Resource Categories:

- (ii) Level 2 Data Conversion Specialist
- (iii) Level 2 Database Administrator

**(b) Mandatory Technical Evaluation Criteria**

- (i) Level 2 Data Conversion Specialist

The Bidder <b>MUST</b> demonstrate that its proposed Level 2 Data Conversion Specialist has:			
Criteria ID	Requirement	Bidder's Response	
		Substantiation of Technical Compliance	Reference to Additional Documentation within the Bid
DCS2.M1	<p>A minimum of 6 years of combined demonstrated experience performing 2 or more of the following tasks with Oracle PeopleSoft HCM version 8.9 or PeopleSoft HRMS version 8.9 or a Greater version of either :</p> <ol style="list-style-type: none"> <li>1. Data models;</li> <li>2. Data mapping;</li> <li>3. Data conversion specifications;</li> <li>4. Data quality activities, including data sampling and cleanup activities; or</li> <li>5. PeopleSoft integration</li> </ol> <p>This experience can be demonstrated across multiple projects.</p>		
DCS2.M2	<p>Experience developing work plans and documenting work plans within the same project for either data migration or data conversion.</p> <p>A minimum of 3 separate projects demonstrating this experience must be submitted.</p>		
DCS2.M3	<p>Experience performing <u>all</u> of the following tasks for at least one version upgrade where the target version was Oracle PeopleSoft HCM version 8.9 or a Greater version:</p> <ol style="list-style-type: none"> <li>1. Data models;</li> </ol>		

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	<p>2. Data mapping between the "As-Is" and "To-Be" systems for data conversion and migration;</p> <p>3. Data conversion specifications, and roadmaps; and</p> <p>4. Data quality activities, including data sampling and clean-up activities prior to system migration(s).</p>		
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(ii) Level 2 Database Administrator

The Bidder MUST demonstrate that its proposed Level 2 Database Administrator has:			
Criteria ID	Requirement	Bidder's Response	
		Substantiation of Technical Compliance	Reference to Additional Documentation within the Bid
DBA2.M1	<p>A minimum of 5 years combined demonstrated experience, within the last 7 years preceding the closing date of this bid solicitation, performing each of the following In-Service Support database administration functions for Oracle databases:</p> <ul style="list-style-type: none"> <li>• Designing;</li> <li>• Creating;</li> <li>• Maintaining;</li> <li>• Performance Monitoring;</li> <li>• Performance Tuning; and</li> <li>• Back-up and recovery using Oracle Recovery Manager (RMAN).</li> </ul> <p>This experience can be demonstrated across multiple projects.</p>		
DBA2.M2	<p>A minimum of 5 years of Database Administrator experience, within the 7 years preceding the closing date of this bid solicitation, in working with Enterprise Resource Planning (ERP) applications (e.g., PeopleSoft, SAP) implemented with an Oracle database.</p>		

**(c) Point-Rated Technical Evaluation Criteria****(i) Level 2 Data Conversion Specialist**

<b>The Bidder SHOULD demonstrate that each proposed Level 2 Data Conversion Specialist has:</b>				
<b>CRITERIA</b>			<b>BIDDER'S RESPONSE</b>	
<b>Criteria ID</b>	<b>Requirement</b>	<b>Evaluation</b>	<b>Substantiation of Technical Compliance</b>	<b>Reference to Additional Documentation within the Bid</b>
DCS2.R1	<p>Experience performing 1 or more of the following tasks for an upgrade of Oracle PeopleSoft from any version of HRMS 7.x or HCM 8.x to PeopleSoft HCM version 9.x.</p> <ol style="list-style-type: none"> <li>1. Data models;</li> <li>2. Data mapping;</li> <li>3. Data conversion specifications; and</li> <li>4. Data quality activities, including data sampling and cleanup activities.</li> </ol> <p>This experience can be demonstrated across multiple projects.</p>	<p>Points will be awarded for the cumulative experience of each task demonstrated as follows:</p> <p>Less than 1 month demonstrated experience = 0 points</p> <p>1 month demonstrated experience to 3 months demonstrated experience = 1 point</p> <p>More than 3 months demonstrated experience = 2 points</p> <p>Maximum of 8 points</p>		
DCS2.R2	<p>Experience developing Data Models for an Oracle PeopleSoft HCM version 8.9 environment or a Greater version.</p> <p>Multiple projects can be submitted.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>Less than 6 months demonstrated experience = 1 point</p>		

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		<p>From 6 months demonstrated experience to 1 year demonstrated experience = 2 points</p> <p>More than 1 year demonstrated experience to 2 years demonstrated experience = 4 points</p> <p>More than 2 years demonstrated experience to 3 years demonstrated experience = 6 points</p> <p>More than 3 years demonstrated experience to 4 years demonstrated experience = 8 points</p> <p>More than 4 years demonstrated experience = 10 points</p> <p>Maximum of 10 points</p>		
DCS2.R3	<p>Experience developing Data mapping between the "As-Is" and "To-Be" systems for data conversion and data migration to an Oracle PeopleSoft HCM version 8.9 environment or a Greater version.</p> <p>Both data conversion and data migration must have been done within the same project.</p> <p>Multiple projects can be submitted.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>Up to 1 year demonstrated experience = 1 point</p> <p>More than 1 year demonstrated experience to 2 years demonstrated</p>		

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		<p>experience = 2 points</p> <p>More than 2 years demonstrated experience to 3 years demonstrated experience = 4 points</p> <p>More than 3 years to 4 years = 6 points</p> <p>More than 4 years demonstrated experience to 5 years demonstrated experience = 8 points</p> <p>More than 5 years demonstrated experience = 10 points</p> <p>Maximum of 10 points</p>		
DCS2.R4	<p>Experience preparing both data conversion specifications and roadmaps for at least one version upgrade where the target version was Oracle PeopleSoft HCM version 8.9 or a Greater version.</p> <p>Both data conversion specifications and roadmaps must have been done within the same project.</p> <p>Multiple projects can be submitted.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>Up to 1 year demonstrated experience = 1 point</p> <p>More than 1 year demonstrated experience to 2 years demonstrated experience = 2 points</p> <p>More than 2 years demonstrated experience to 3 years demonstrated</p>		

HUMAN RESOURCES MANAGEMENT SYSTEM (HRMS) TECHNICAL UPGRADE

Solicitation number: W8474-14MP22/A

		<p>experience = 4 points</p> <p>More than 3 years demonstrated experience to 4 years demonstrated experience = 6 points</p> <p>More than 4 years demonstrated experience to 5 years demonstrated experience = 8 points</p> <p>More than 5 years demonstrated experience = 10 points</p> <p>Maximum of 10 points</p>		
DCS2.R5	<p>Experience conducting data quality activities, including both data sampling and data cleanup activities, prior to system migration(s) for at least one version upgrade where the target version was Oracle PeopleSoft HCM version 8.9 or a Greater version.</p> <p>Both data sampling and data cleanup activities must have been done within the same project.</p> <p>Multiple projects can be submitted.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>Up to 1 year demonstrated experience = 1 point</p> <p>More than 1 year demonstrated experience to 2 years demonstrated experience = 2 points</p> <p>More than 2 years demonstrated experience to 3 years demonstrated experience = 4 points</p>		

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		<p>More than 3 years demonstrated experience to 4 years demonstrated experience = 6 points</p> <p>More than 4 years demonstrated experience to 5 years demonstrated experience = 8 points</p> <p>More than 5 years demonstrated experience = 10 points</p> <p>Maximum of 10 points</p>		
<b>MAXIMUM TECHNICAL POINTS</b>			<b>48</b>	
<b>MINIMUM PASS MARK</b>			<b>24</b>	

(ii) Level 2 Database Administrator

The Bidder SHOULD demonstrate that each proposed Level 2 Data Conversion Specialist has:				
CRITERIA			BIDDER'S RESPONSE	
Criteria ID	Requirement	Evaluation	Substantiation of Technical Compliance	Reference to Additional Documentation within the Bid
DBA2.R1	<p>Experience performing each of the following In-Service Support database administration functions for Oracle databases:</p> <ul style="list-style-type: none"> <li>Designing;</li> <li>Creating;</li> <li>Maintaining;</li> <li>Performance Monitoring;</li> <li>Performance</li> </ul>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>0 to 5 years demonstrated experience = 0 points</p> <p>More than 5 years to 6 years demonstrated experience = 1 point</p>		

Attachment 4.1

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	<p>Tuning; and</p> <ul style="list-style-type: none"> <li>Back-up and recovery using Oracle Recovery Manager (RMAN).</li> </ul> <p>This experience can be demonstrated across multiple projects.</p>	<p>More than 6 years to 7 years demonstrated experience = 2 points</p> <p>More than 7 years demonstrated experience = 3 points</p> <p>Maximum of 3 points</p> <p>If the Bidder fails to demonstrate experience in all of the required tasks in DBA2.R1 the total score for the criteria will be 0 points.</p>		
DBA2.R2	<p>Experience evaluating, testing, and implementing an upgrade from a previous version of Oracle to Oracle RDBMS 11g software.</p>	<p>1 upgrade = 1 point</p> <p>2 upgrades = 2 points</p> <p>More than 3 upgrades = 3 points</p> <p>Maximum of 3 points</p> <p>If the Bidder fails to demonstrate experience in all of the required tasks in DBA2.R2 the total score for the criteria will be 0 points.</p>		
DBA2.R3	<p>Experience in supporting PeopleSoft HRMS or PeopleSoft HCM implemented in an Oracle database environment.</p> <p>Multiple projects can be submitted.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>Less than 1 year demonstrated experience = 0</p>		

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		<p>points</p> <p>1 year demonstrated experience to 2 years demonstrated experience = 1 point</p> <p>More than 2 years demonstrated experience to 3 years demonstrated experience = 2 points</p> <p>More than 3 years demonstrated experience to 4 years demonstrated experience = 3 points</p> <p>More than 4 years demonstrated experience to 5 years demonstrated experience = 4 points</p> <p>More than 5 years demonstrated experience = 5 points</p> <p>Maximum of 5 points</p>		
DBA2.R4	<p>Experience in the production support of Oracle databases implemented in a Unix environment.</p> <p>Multiple projects can be submitted.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>Less than 1 year demonstrated experience = 0 points</p> <p>1 year demonstrated</p>		

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		<p>experience to 2 years demonstrated experience = 1 point</p> <p>More than 2 years demonstrated experience = 2 points</p> <p>Maximum of 2 points</p>		
DBA2.R5	<p>Experience administering a large-scale Online Transaction Processing (OLTP) Oracle database environment where a single database size is greater than 20 gigabytes.</p> <p>This experience must have been acquired for a single database.</p>	<p>NOTE: Single database size is determined as cumulative size of all uncompressed data files on disk.</p> <p>GB = Gigabytes</p> <p>0 GB to 20 GB = 0 points</p> <p>More than 20 GB to 100 GB = 1 points</p> <p>More than 100 GB to 200 GB = 2 points</p> <p>More than 200 GB = 3 points</p> <p>Maximum of 3 points</p>		
<b>MAXIMUM TECHNICAL POINTS</b>			<b>16</b>	
<b>MINIMUM PASS MARK</b>			<b>8</b>	

**WORKSTREAM 5****(a) Bidder's Proposed Resources**

The Bidder must propose one resource and provide one résumé (that should include references that can substantiate the work) for the following Resource Category:

- (i) Level 2 Tester

**(b) Mandatory Technical Evaluation Criteria**

- (i) Level 2 Tester

<b>The Bidder MUST demonstrate that its proposed Level 2 Tester has:</b>			
<b>Criteria ID</b>	<b>Requirement</b>	<b>Bidder's Response</b>	
		<b>Substantiation of Technical Compliance</b>	<b>Reference to Additional Documentation within the Bid</b>
T2.M1	<p>A minimum of 5 years experience within the 10 years preceding the closing date of this bid solicitation, performing all of the following tasks within the same project:</p> <ul style="list-style-type: none"> <li>• developing test scripts (manual or automated);</li> <li>• executing test runs;</li> <li>• analyzing test results; and</li> <li>• identifying and documenting defects.</li> </ul> <p>Multiple projects may be submitted.</p>		
T2.M2	<p>A minimum of 1 year testing experience using either HP Application Lifecycle Management (ALM) or HP Quality Center or Mercury Quality Center.</p> <p>This experience can be demonstrated across multiple projects.</p>		
T2.M3	<p>A minimum of 1 year testing experience using HP QuickTest Pro or Mercury QuickTest Pro.</p> <p>This experience can be demonstrated across multiple projects.</p>		
T2.M4	<p>A minimum of 1 year experience within the last 5 years preceding the closing date of this bid solicitation, working with SQL to create queries and manipulate data in an Oracle environment.</p>		

	This experience can be demonstrated across multiple projects.		
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**(c) Point-Rated Technical Evaluation Criteria****(i) Level 2 Tester**

The Bidder SHOULD demonstrate that each proposed Level 2 Tester has:				
CRITERIA			BIDDER'S RESPONSE	
Criteria ID	Requirement	Evaluation	Substantiation of Technical Compliance	Reference to Additional Documentation within the Bid
T2.R1	<p>Experience performing all of the following tasks within the same project within the 10 years preceding the closing date of this bid solicitation:</p> <ul style="list-style-type: none"> <li>developing test scripts (manual or automated);</li> <li>executing test runs; and</li> <li>analyzing test results.</li> <li>identifying and documenting defects</li> </ul> <p>Multiple projects can be submitted.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>0 to 5 years demonstrated experience = 0 points.</p> <p>More than 5 years demonstrated experience to 7 years combined demonstrated experience = 2 points</p> <p>More than 7 years demonstrated experience = 3 points</p> <p>Maximum of 3 points</p>		
T2.R2	<p>Testing experience in creating, verifying and updating checkpoints and records with valid automated test scripts within the 10 years preceding the closing date of this bid solicitation.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>0 to 3 years</p>		

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	<p>This experience must have been acquired within the same reference project.</p> <p>Multiple projects can be submitted.</p>	<p>demonstrated experience = 0 points.</p> <p>More than 3 years demonstrated experience to 5 years demonstrated experience = 2 points</p> <p>More than 5 years demonstrated experience = 3 points</p> <p>Maximum of 3 points</p>		
T2.R3	<p>Testing experience using either HP Application Lifecycle Management (ALM) or HP Quality Center or Mercury Quality Center.</p> <p>Multiple projects can be submitted.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>0 to 1 year demonstrated experience = 0 points</p> <p>More than 1 year demonstrated experience to 3 years demonstrated experience = 1 point</p> <p>More than 3 years demonstrated experience to 5 years demonstrated experience = 2 points</p> <p>More than 5 years demonstrated experience = 3 points</p> <p>Maximum of 3 points</p>		

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T2.R4	<p>Testing experience using HP QuickTest Pro or Mercury QuickTest Pro.</p> <p>Multiple projects can be submitted.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>0 to 1 year demonstrated experience = 0 points</p> <p>More than 1 year demonstrated experience to 3 years demonstrated experience = 1 point</p> <p>More than 3 years demonstrated experience to 5 years demonstrated experience = 2 points</p> <p>More than 5 years demonstrated experience = 3 points</p> <p>Maximum of 3 points</p>		
T2.R5	<p>Experience working with SQL to create queries and manipulate data in an Oracle environment within the 10 years preceding the closing date of this bid solicitation.</p> <p>Multiple projects can be submitted.</p>	<p>The Aggregate time of all demonstrated experience will be evaluated as follows:</p> <p>0 to 1 year demonstrated experience = 0 points</p> <p>More than 1 year demonstrated experience to 3 years demonstrated experience = 1 point</p> <p>More than 3 years</p>		

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		<p>demonstrated experience to 5 years demonstrated experience = 2 points</p> <p>More than 5 years demonstrated experience = 3 points</p> <p>Maximum of 3 points</p>		
<b>MAXIMUM TECHNICAL POINTS</b>		<b>15</b>		
<b>MINIMUM PASS MARK</b>		<b>7</b>		

**ATTACHMENT 4.2****PRICING SCHEDULE**

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

**WORKSTREAM 1****INITIAL CONTRACT PERIOD:**

Initial Contract Period (Date of Contract Award to July 31, 2014)			
	(B)	(C*)	(D)
Resource Category	Level of Expertise	Estimated Number of Days	Proposed Firm Per Diem Rate
A2. ERP Functional Analyst	Level 2	400	\$
A2. ERP Functional Analyst	Level 3	200	\$

**OPTION PERIODS:**

Option Period 1 (August 1, 2014 to April 30, 2015)			
	(B)	(C*)	(D)
Resource Category	Level of Expertise	Estimated Number of Days	Proposed Firm Per Diem Rate
A2. ERP Functional Analyst	Level 2	360	\$
A2. ERP Functional Analyst	Level 3	200	\$

Option Period 2 (May 1, 2015 to January 31, 2016)			
	(B)	(C*)	(D)
Resource Category	Level of Expertise	Estimated Number of Days	Proposed Firm Per Diem Rate
A2. ERP Functional Analyst	Level 2	360	\$
A2. ERP Functional Analyst	Level 3	200	\$

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Option Period 3 (February 1, 2016 to October 31, 2016)			
	(B)	(C*)	(D)
Resource Category	Level of Expertise	Estimated Number of Days	Proposed Firm Per Diem Rate
A2. ERP Functional Analyst	Level 2	360	\$
A2. ERP Functional Analyst	Level 3	200	\$

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**WORKSTREAM 2**

**INITIAL CONTRACT PERIOD:**

Initial Contract Period (Date of Contract Award to July 31, 2014)			
	(B)	(C*)	(D)
Resource Category	Level of Expertise	Estimated Number of Days	Proposed Firm Per Diem Rate
A3. ERP Programmer Analyst	Level 3	750	\$

**OPTION PERIODS:**

Option Period 1 (August 1, 2014 to April 30, 2015)			
	(B)	(C*)	(D)
Resource Category	Level of Expertise	Estimated Number of Days	Proposed Firm Per Diem Rate
A3. ERP Programmer Analyst	Level 3	720	\$

Option Period 2 (May 1, 2015 to January 31, 2016)			
	(B)	(C*)	(D)
Resource Category	Level of Expertise	Estimated Number of Days	Proposed Firm Per Diem Rate
A3. ERP Programmer Analyst	Level 3	720	\$

Option Period 3 (February 1, 2016 to October 31, 2016)			
	(B)	(C*)	(D)
Resource Category	Level of Expertise	Estimated Number of Days	Proposed Firm Per Diem Rate
A3. ERP Programmer Analyst	Level 3	720	\$

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**WORKSTREAM 3**

**INITIAL CONTRACT PERIOD:**

Initial Contract Period (Date of Contract Award to July 31, 2014)			
	(B)	(C*)	(D)
Resource Category	Level of Expertise	Estimated Number of Days	Proposed Firm Per Diem Rate
A5. ERP Technical Analyst	Level 3	400	\$

**OPTION PERIODS:**

Option Period 1 (August 1, 2014 to April 30, 2015)			
	(B)	(C*)	(D)
Resource Category	Level of Expertise	Estimated Number of Days	Proposed Firm Per Diem Rate
A3. ERP Programmer Analyst	Level 3	360	\$

Option Period 2 (May 1, 2015 to January 31, 2016)			
	(B)	(C*)	(D)
Resource Category	Level of Expertise	Estimated Number of Days	Proposed Firm Per Diem Rate
A3. ERP Programmer Analyst	Level 3	360	\$

Option Period 3 (February 1, 2016 to October 31, 2016)			
	(B)	(C*)	(D)
Resource Category	Level of Expertise	Estimated Number of Days	Proposed Firm Per Diem Rate
A3. ERP Programmer Analyst	Level 3	360	\$

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**WORKSTREAM 4**

**INITIAL CONTRACT PERIOD:**

Initial Contract Period (Date of Contract Award to July 31, 2014)			
	(B)	(C*)	(D)
Resource Category	Level of Expertise	Estimated Number of Days	Proposed Firm Per Diem Rate
I1. Data Conversion Specialist	Level 2	400	\$
I2. Database Administrator	Level 2	80	\$

**OPTION PERIODS:**

Option Period 1 (August 1, 2014 to April 30, 2015)			
	(B)	(C*)	(D)
Resource Category	Level of Expertise	Estimated Number of Days	Proposed Firm Per Diem Rate
I1. Data Conversion Specialist	Level 2	360	\$
I2. Database Administrator	Level 2	80	\$

Option Period 2 (May 1, 2015 to January 31, 2016)			
	(B)	(C*)	(D)
Resource Category	Level of Expertise	Estimated Number of Days	Proposed Firm Per Diem Rate
I1. Data Conversion Specialist	Level 2	360	\$
I2. Database Administrator	Level 2	80	\$

Option Period 3 (February 1, 2016 to October 31, 2016)			
	(B)	(C*)	(D)
Resource Category	Level of Expertise	Estimated Number of Days	Proposed Firm Per Diem Rate
I1. Data Conversion Specialist	Level 2	360	\$
I2. Database Administrator	Level 2	80	\$

HUMAN RESOURCES MANAGEMENT SYSTEM (HRMS) TECHNICAL UPGRADE

Solicitation number: W8474-14MP22/A

**WORKSTREAM 5**

**INITIAL CONTRACT PERIOD:**

Initial Contract Period (Date of Contract Award to July 31, 2014)			
	(B)	(C*)	(D)
Resource Category	Level of Expertise	Estimated Number of Days	Proposed Firm Per Diem Rate
A11. Tester	Level 2	580	\$

**OPTION PERIODS:**

Option Period 1 (August 1, 2014 to April 30, 2015)			
	(B)	(C*)	(D)
Resource Category	Level of Expertise	Estimated Number of Days	Proposed Firm Per Diem Rate
A11. Tester	Level 2	540	\$

Option Period 2 (May 1, 2015 to January 31, 2016)			
	(B)	(C*)	(D)
Resource Category	Level of Expertise	Estimated Number of Days	Proposed Firm Per Diem Rate
A11. Tester	Level 2	540	\$

Option Period 3 (February 1, 2016 to October 31, 2016)			
	(B)	(C*)	(D)
Resource Category	Level of Expertise	Estimated Number of Days	Proposed Firm Per Diem Rate
A11. Tester	Level 2	540	\$