



SHARED SERVICES CANADA

STRATEGIC ADVISORY SERVICES – SOURCING AND BENCHMARKING

ANNEX A – STATEMENT OF WORK

RFP no.: 10031544/A



STATEMENT OF WORK

1. Objective

Shared Services Canada (SSC) currently supports 485 data centres, 50 wide area networks, and 63 discrete email systems. SSC's mandate is to consolidate and modernize this Information Technology (IT) infrastructure to achieve better value and to provide improved and more secure services to Canadians. SSC's transformation programs aim to achieve efficiencies, reduce costs, minimize risks, and improve service quality of Government of Canada (GC) IT services by establishing a common service delivery model, that includes four key elements: 1) centralized administration; 2) IT infrastructure consolidation; 3) facilities consolidation; and, 4) alternative service delivery provisions that can include outsourcing.

SSC and its 43 mandated departmental partners require the expert services of a world-leading, global firm to support its strategic sourcing, benchmarking activities and to assist in the development and execution of solicitations and negotiations with vendors to achieve the best value for the crown.

The objective of this requirement is to award one contract to acquire expert advice and related services to support ongoing SSC and GC transformation activities on an as and when requested basis.

2. Background

2.1. Creation of Shared Services Canada

The Government of Canada created Shared Services Canada (SSC) on August 4, 2011, to fundamentally transform how the Government manages its information technology (IT) infrastructure. The creation of SSC brought together people, technology resources and assets from the 43 federal departments and agencies to improve the efficiency, reliability and security of the Government's IT infrastructure. A more efficient use of technology will increase productivity across departments and will help build a more modern public service and provide improved and more secure services to Canadians.

SSC is mandated to deliver email, data centre and network/telecom services to 43 Government of Canada (GC) institutions representing 95% of the federal IT infrastructure spending. Although SSC's first obligation is to ensure the sustainability of the IT infrastructure, SSC is also required to transform the existing environment into a consolidated enterprise model for the whole of Government and, 1) realize material cost savings and avoid future costs, 2) match service levels to all partner and GC priorities, and 3) provide a secure environment to meet program needs.

Prior to the establishment of Shared Services Canada, departments and agencies were responsible for the management and operation of their individual data centres, networks, and information technology infrastructure. Although this model provided the maximum flexibility for individual departments and agencies to manage their respective IT infrastructure, the model resulted in the following conditions across the Government of Canada:

- a. Overall Inefficiencies in the management of IT infrastructure;
- b. Aging IT infrastructure;
- c. Due to the diversity of IT Infrastructure, longer implementation times are usually required to meet increasing demand for new program services;
- d. Difficulty to easily interconnect programs and share information between departments;
- e. Inconsistent service delivery to Canadians;
- f. Inconsistent security posture for the protection of Canadian information; and
- g. Escalating capital and ongoing cost for the management and operation of data centres and IT infrastructure.

2.2. Transformation Programs

SSC has launched five (5) transformation programs to exercise its mandate.



Email Transformation Initiative (ETI)

The Email Transformation Initiative will, over the next two years, replace the GC's 63 distinct email systems with one secure, reliable and cost-effective email system. For more information please see <http://www.ssc-spc.gc.ca/pages/ml-crrl-eng.html>.

Data Centre Consolidation (DCC) Program

The DCC program will see the development of strategic sourcing solutions and business architecture for the delivery of transformed data centre services. For more information please see <http://www.ssc-spc.gc.ca/pages/dc-cd-eng.html>.

Telecommunications Transformation Program (TTP)

The TTP will modernize and harmonize the GC's telecommunications infrastructure. In the process, security will be improved and costs will be reduced. SSC's objective is to design and build an integrated telecommunications network to support GC operations from coast to coast and internationally. For more information please see <http://www.ssc-spc.gc.ca/pages/telecomm-eng.html>.

Cyber and Information Technology Security (CITS) Transformation

Cyber and Information Technology Security Transformation is responsible for the development of plans and designs for Government of Canada IT infrastructure, cyber and IT security services and for Government of Canada secret infrastructure, within SSC's mandate. SSC is taking important steps to protect the integrity, accessibility and reliability of the Government of Canada's IT infrastructure, and the personal information of Canadians. For more information please see http://ssc.gc.ca/pages/ibp-pai-2012-2013-eng.html#C4_4.

Managed Workplace Devices (MWD)

The Government of Canada is implementing an enterprise approach to the procurement of end-user devices and related software, including security software, for federal employees. This is a new area of standardization and consolidation that will bring efficiencies and savings while strengthening the security of government information technology. For more information please see <http://www.ssc-spc.gc.ca/pages/devices-appareils-eng.html>

Please refer to the SSC website at <http://www.ssc-spc.gc.ca/pages/ourorg-notreorg-eng.html> for a view of the organizational structure for SSC.

2.3. Transformation Plan

SSC commissioned an "Options Analysis" which resulted in SSC formulating a three-phased Transformation Plan:

Phase 1 – Establishment of Foundational Infrastructure (2013-14)

Phase 1 will deliver two primary outcomes. First, it will establish the infrastructure that will set the foundation for the target end state data centre delivery model and secondly, it will develop the sourcing strategy for data centre and network services. The key activities of Phase 1 are described separately below.

1. Refurbish and expand Data Centres to operate the IT infrastructure needed to support the delivery of program and administrative systems for the 43 Partner departments and agencies;
2. Contract for space near in a location to be determined to provide redundancy and disaster recovery capabilities for the production data centres;
3. Engage a private sector firm to provide data centre co-location services, to be interconnected with SSC production data centres;



4. Establish a new supply chain for the provisioning of IT infrastructure (servers, storage and associated support services) that are housed in SSC data centres;
5. Procurement of an enterprise network - planned as a separate initiative for the fall 2013 and spring 2014;
6. Develop a sourcing strategy for IT services to explore material opportunities that exists for SSC to consider making greater use of mature private sector offerings in the delivery of data centre services; and
7. The definition of the service delivery model which will align to the data centre facilities, supply chain, and sourcing strategy.

Phase 2 – Implementation of Services Sourcing Strategy (2014-15)

SSC will implement the best fit sourcing strategy, and will proceed with the procurement of services as outlined by the strategy.

During this phase, SSC will commence the migration of Partner programs and administrative systems to the new production data centre in 2014.

In 2014, SSC will begin to connect the 3,580 GC-occupied buildings to a new enterprise network.

Phase 3 – Establishment of Final Data Centre Infrastructure (2015-17)

SSC's establishment of the final data centre infrastructure is not limited to but will include:

- a. The establishment of the final production data centres;
- b. SSC will consider the use of a private-public partnership for the construction of a new production data centre, to be available by 2016-17;
- c. The provisioning of backup capabilities. SSC will establish facilities for backup purposes by contracting for space in an existing private sector data centre located within 110 kilometres of the production facility;
- d. SSC will also uplift the Macdonald Cartier Data Centre in Ottawa to provide additional capacity to support development and testing activities; and
- e. To the extent possible, the migration approach will align with the lifecycle management process already in place in departments to update applications.

2.4. Migration (2013-2020)

The migration of the Partner departments and agencies' programs and administrative systems to consolidated SSC infrastructure was launched in 2011. At this time, the migration of workloads has been based on operational priorities and cost avoidance conditions. For example, instead of replacing expensive facilities equipment in a data centre targeted for closure, the workloads are to be moved to another data centre.

Once the end state production data centres are available, the formal migration plan will commence. This migration will be undertaken in waves based primarily on departmental readiness, application complexity, business cycles, and cost avoidance.



3. Requirement

The Contractor that is successful in this solicitation will have a business model that includes operations in multiple World Trade Organization (WTO) countries, including several “Five Eyes” countries, providing services to national governments or other large public or private sector organizations, under a single international organizational structure, using a proven, common consulting practice. The Contractor will specialize in the development, delivery, and execution of sourcing strategies and benchmarking activities designed to optimize supply, improve IT productivity, and improve value proposition. Expertise and/or resources are to be provided on an as-and-when-requested basis.

The Contractor will be an organization with significant international depth and breadth of experience in the following key areas:

- a. the development of sourcing strategies;
- b. the benchmarking of IT services;
- c. the provisioning of negotiation assistance and expertise for contracting of Goods and Services; and
- d. the provisioning of support in the execution of IT contracts.

These services will be undertaken in support of large, high profile transformation initiatives that include data centre and telecommunications consolidations of substantive size and similar scope and complexity to those described herein.

Recognizing that IT is a global commodity, much like travel, the Contractor will support SSC and other GC departments in the acquisition of goods and services in the IT space. The Contractor must be organized on a global basis and be staffed by individuals with global talent and experience, who understand the complexities of the full sourcing supply chain from component and circuit board manufacturing through to assembly, delivery and logistics. This is especially important to SSC, given its mandate to ensure the integrity of the GC's core IT infrastructure supply chain.

- The Contractor will have demonstrated credibility with the global IT supply chain, having executed engagements, on an even distribution, with firms both in North America and in countries and regions currently engaged in the IT supply chain such as India, China, Vietnam, South Korea, etc.
- The Contractor firm will have a physical presence on a global basis with offices on each developed continent, with offices specifically located in areas of relevance to the IT supply chain.
- The Contractor will have demonstrated credibility in the development and execution of large value sourcing contracts for IT infrastructure (hardware components, software, etc.) and services.

The GC and SSC have sufficient access to reference information provided through various channels, but SSC and the GC is seeking to grow its access to firms that have sourcing execution as the foundation of their business model. Extensive exposure to outsourcing, services-based supply and vendor relationships is critical to SSC.

- The Contractor will have a dominant revenue stream from direct sourcing, negotiation, contracting and operations engagement.
- The Contractor will have a well-developed and trusted practice of IT services benchmarking.

The Contractor must attain Secret level security clearance as indicated in Part 7 of the Contract for both the organization and proposed resources as of the contract start date.

4. Constraints

4.1. National Security Exception

The procurement related to this Statement of Work is subject to National Security Exception and is, therefore, excluded from all of the obligations of the trade agreements.



4.2. Restriction for Future Related Work

The Contractor selected through this procurement will support the planning and development of subsequent competitive procurements for the execution of transformation projects within the scope of the SSC transformation programs, as outlined above. As a result, this Contractor will be given information during the completion of the Contract which would give them an unfair advantage for subsequent competitive procurements.

To remove any possibility for future conflict of interests, the Contractor, parent and affiliated companies, and subcontractors will be disqualified from any future competitive solicitation(s) which are developed under the scope of the resulting Contract.

5. Scope of Work

This requirement deals with the development, delivery, and execution of sourcing strategies and benchmarking activities designed to optimize supply and improve value proposition for the crown. The following describes a range of work that the Contractor may be required to perform. Specific tasks and associated deliverables will be identified in subsequent Task Authorizations which will be issued by SSC and other GC departments on an "as and when requested" basis. These services will be undertaken in support of large, high profile transformation initiatives that include data centre and telecommunications consolidations of substantive size and similar scope and complexity to those described herein. The work will require the Contractor to:

- (a) Understand and support SSC's direction towards the target end state for GC IT Services;
- (b) Share lessons learned in the execution of similar transformation initiatives with other clients;
- (c) Provide SSC and the GC with expert advice on sourcing strategies to achieve the desired outcomes of SSC's and GC's transformation;
- (d) Provide expert guidance on market and vendor intelligence with regard to procurement, transformation and benchmarking activities;
- (e) Support the development of procurement materials, such as Statements of Requirements, Statements of Work, Evaluation Process and Criteria, and Terms and Conditions;
- (f) Provide negotiation assistance and expertise for contracting of Goods and Services; and
- (g) Provide support and expertise for the transition of the sourcing agreements.

5.1. IT Sourcing Advice and Strategies

The Contractor will provide Sourcing advice that will ultimately assist with the determination of who and how goods and/or services will be provided in support of SSC's IT infrastructure. These activities include, but are not limited to the following activities:

- (a) Provision of market and vendor intelligence;
- (b) Development of sourcing strategies to enable SSC to deliver transformed IT services;
- (c) Development of procurement options and strategies for acquisition of hardware, software, professional services, managed services, and outsourced services, taking into consideration emerging technologies, GC core competencies, maturity of markets, maximization of vendor opportunities, packaging and services;
- (d) Analysis to support the appropriate mix of retained and outsourced services at fair market prices, with service levels available to position the GC to deliver its target end state;
- (e) Development of sourcing strategies, approaches and options;
- (f) Reviews of requirements documentation throughout the procurement process with a view to ensuring that documentation has been prepared in a manner conducive to achieving the best value for the GC;



- (g) Support for the development of procurement materials and processes, to include but not limited to (Statements of Requirements, Statements of Work, Evaluation Process and Criteria, and Contract Terms and Conditions) for the acquisition of the goods and services, as defined by the Sourcing Strategy;
- (h) Assist and provide guidance with transfer of knowledge and staff during transitions phases; and
- (i) Support for the transition of the sourcing agreements to assist SSC in dealing with unplanned / unexpected events, dispute resolution, risk mitigation, and other transition related activities.

5.2. IT Benchmarking

The Contractor will provide Benchmarking advice that will assist in determining the standards against which SSC's initiatives to transform the delivery of IT services to the GC will be measured and assessed, and includes but is not limited to the following activities:

- (a) Analysis of the GC's current state with regard to SSC IT transformation strategies, architecture, service delivery, performance metrics, service management, procurement strategies and approaches;
- (b) Preparation of reports that assess SSC IT transformation strategies, architecture, service delivery, performance metrics, service management, procurement strategies and approaches to comparable public and private organizations;
- (c) Development of consumption metrics;
- (d) Utilization of a proven internal knowledge base of market intelligence;
- (e) Analysis of the competitiveness of the GC's current service standards and fees for IT services in relation to the general Canadian marketplace;
- (f) Development of statistics/metrics in relation to vendor agility, innovation, simplification, flexibility and quality;
- (g) Preparation of information and reports to demonstrate the value for services received and the alignment of service with emerging technologies and SSC's vision of the targeted end state, using a database consisting of current metrics for public and private organizations comparable to the GC and its IT transformation and IT services; and,
- (h) Provide long-term IT Benchmarking services.

5.3. IT Contract Design and Execution

The Contractor will provide support services for the development of SSC and the GC contracts related to the transformation initiative, which includes but is not limited to the following activities:

- (a) Assist in the design of solicitations to ensure maximum competition and successful result;
- (b) Assist in the preparation of solicitation material (requests for information, qualification, proposals, etc.);
- (c) Assist in the execution of solicitations, including supplier interactions, on behalf of SSC and the GC;
- (d) Assist in the structuring of sourcing contracts, with appropriate terms and conditions, to provide best value to the GC and to facilitate supplier viability;
- (e) Support SSC and the GC in contract negotiations with potential suppliers; and,
- (f) Assist in the resolution / mediation of issues with the Terms and Conditions (T&Cs) after contract award.



6. Categories of Personnel

Completion of the Work described will require the Contractor to provide resources on an as-and-when requested basis. This will be accomplished through the use of Task Authorizations to call up the specific Contractor identified categories of personnel.

The following categories of personnel may be required on an as and when requested basis:

- a. Senior, Intermediate and Junior IT Sourcing Advice and Strategy Specialists
- b. Senior, Intermediate and Junior IT Benchmarking Specialists
- c. Senior, Intermediate and Junior IT Contract Design and Execution Specialists

A Senior Level Specialist is defined as having more than 10 years of applied experience in the specified domain of expertise.

An Intermediate Level Specialist is defined as having more than 6 years of applied experience in the specified domain of expertise.

A Junior Level Specialist is defined as having more than 3 years of applied experience in the specified domain of expertise.

7. Language of Work

The Contractor will provide the Work in the official language, either English or French, in accordance with an approved Task Authorization Form. The work may be conducted in either English or French, depending on the Location of Work.

8. Location of Work

The Contractor may be required to attend meetings, briefings and conduct research at various locations throughout the National Capital Region, in the general area including Ottawa, Ontario and Gatineau, Quebec. In situations where the nature of the work requires access to the SSC network in order to perform their specified tasks, SSC will provide the Contractor's personnel with any required desktop computing devices.

There may be requirements to conduct work outside of the National Capital Region. In these cases, the Location of Work will be stipulated on the Task Authorization Form and subject to the Travel requirements defined below.

9. Travel Requirements

The Contractor must be able to travel and provide Work across Canada as requested in an approved Task Authorization Form. Canada will not pay the Contractor for any travel and/or living expenses associated with performing the Work in the Primary Location of Work (the National Capital Region).

Canada will reimburse the Contractor for its pre-authorized travel and living expenses reasonably and properly incurred in the performance of the Work outside the National Capital Area, at cost, without any allowance for profit and/or administrative overhead, in accordance with the meal, private vehicle and incidental expenses provided in Appendices B, C and D of the Treasury Board Travel Directive, and with the other provisions of the directive referring to "travellers", rather than those referring to "employees". All travel must have the prior authorization of both the Technical Authority and Contracting Authority. All payments are subject to government audit. The Contractor will not be able to charge for time spent travelling at the per diem rates set out in the Contract.

10. Deliverables

Deliverables will be identified in individual Task Authorizations as described in Appendix A – Task Authorization Process.



APPENDIX A TO ANNEX A

TASK AUTHORIZATION PROCEDURES

1. Task Authorization (TA) Request

- (a) Where a requirement for a specific task has been identified and a TA is to be provided to the Contractor in accordance with the methodology described in the Contract Article titled "Task Authorization", a TA Form, as attached at Appendix B to Annex A, will be prepared by the Technical Authority and sent to the Contractor.
- (b) A TA Form will contain the following information, if applicable:
- i. the task number;
 - ii. 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);
 - iii. the details of any financial coding to be used;
 - iv. the categories of resources and the number required;
 - v. a description of the work for the task outlining the activities to be performed and identifying any deliverables (such as reports);
 - vi. the start and completion dates;
 - vii. milestone dates for deliverables and payments (if applicable);
 - viii. the number of person-days of effort required;
 - ix. whether the work requires on-site activities and the location;
 - x. the language profile of the resources required;
 - xi. the level of security clearance required of resources;
 - xii. the price payable to the Contractor for performing the task, with an indication of whether it is a firm price or a maximum TA price (and, for maximum price task authorizations, 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
 - xiii. any other constraints that might affect the completion of the task.

2. TA Quotation

- (a) Once it receives the TA Form, the Contractor must submit a quotation to the Contracting Authority, identifying its proposed resources and detailing the cost and time to complete the task(s). The quotation must be based on the rate(s) set out in the Contract. The Contractor will not be paid for providing the quotation or for providing other information required to prepare and issue the TA. The Contractor must provide any information requested by Canada in relation to the preparation of a TA within 2 working days of the request.
- (b) For each proposed resource the Contractor must supply:
- (i) A resume and completed Appendix C to Annex A for the Category(ies) of Personnel and level(s) identified in the TA Form. The Contractor's quotation must demonstrate that each proposed resource meets the mandatory 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.
 - (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. For post-secondary education, Canada will only accept credentials from institutions recognized by the Department of Education of any Canadian province, or for those obtained in a foreign country, by either of the credential assessment organizations listed on the Website: <http://www.cicic.ca/>

- (C) For requirements relating to professional designation or membership, the resource must have the required designation or membership by the time of bid closing and must continue, where applicable, to be a member in good standing of the profession's governing body throughout the evaluation and Contract Period.
- (D) For work experience, Canada will not consider experience gained as part of an educational programme, except for experience gained through a formal co-operative programme at a post-secondary institution.
- (E) For any requirements that specify a particular time period (e.g., 2 years) of work experience, Canada will disregard any information about experience if the individual's resume does not include the relevant dates for the experience claimed (i.e., the start date and end date).
- (F) For work experience to be considered by Canada, the Contractor's response 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, only one project will be counted toward any requirements that relate to the individual's length of experience.

(ii) The following security information:

SECURITY INFORMATION	CONTRACTOR TO INSERT DATA
Name of individual as it appears on security clearance application form	
Level of security clearance obtained	
Validity period of security clearance obtained	
Security Screening Certificate and Briefing Form file number	

(iii) Certifications at Appendix D to Annex A (as applicable).

- (c) The quotation must be submitted to the Contracting Authority within the time for response identified in the TA Form. The Contractor will be given a minimum of 48 hours turnaround time to submit a quotation.

3. Resource Assessment

- (a) Each proposed resource will be assessed for compliance with the mandatory requirements identified in Appendix C to Annex A applicable to that Category of Personnel. Proposed resources that do not comply with each and every mandatory criteria will not be accepted.
- (b) Canada reserves the right to request references from the Contractor to conduct a reference check to verify the accuracy of the information provided. If references are requested, Canada will conduct the reference check in writing by e-mail (unless the contact at the reference is only available by telephone). A Contractor will not be responsive to a mandatory requirement unless the response is received to an e-mail reference check request 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 evaluated. The mandatory requirement will not be considered 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 the mandatory requirement be 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. TA Acceptance

- (a) Once the Contractor's quotation has been accepted by the Contracting Authority, the TA Form will be signed by Canada and provided to the Contractor for signature. Whether or not to approve or issue a TA is entirely within Canada's discretion.
- (b) The TA Form must be appropriately signed by Canada prior to commencement of any work. The Contractor must not commence work until a fully signed TA Form has been received, and any work performed in its absence is done at the Contractor's own risk.



**Appendix B to Annex A -
EXAMPLE: Task Authorization Request and Acceptance Form
Sigma Task Authorization form will be accepted as well.**

TASK AUTHORIZATION			
Contractor: _____		Contract Number: _____	
Contractor PBN: _____			
Commitment Number: _____		Financial Coding: _____	
Task Number: _____		Date: _____	
TA Request (For completion by Technical Authority)			
<p>1. Description of Work to be Performed</p> <p align="center">Statement of Work</p> <p align="center">Description of any Deliverable(s) required (including the required format and media)</p> <p>Any reporting obligations and deadlines for submitting the reports as they will apply to the resulting Contract will be described here.</p>			
2. PERIOD OF SERVICES	From:	_____	To: _____
3. Work Location	_____		
4. Travel Requirements	<input type="checkbox"/> Yes <input type="checkbox"/> No		Specify:
5. Other Conditions/ Restrictions	<input type="checkbox"/> Yes <input type="checkbox"/> No		Specify:
6. Task Proposal (insert rows as required) Check <input type="checkbox"/> :	Estimated Cost <input type="checkbox"/>	Fixed Price <input type="checkbox"/>	\$ _____
7. LEVEL OF SECURITY CLEARANCE REQUIRED FOR THE CONTRACTOR'S PERSONNEL			
<input type="checkbox"/> Reliability Status	<input type="checkbox"/> Secret	<input type="checkbox"/> Top Secret	<input type="checkbox"/> Other
8. BILINGUALISM (if applicable)			
<input type="checkbox"/> English and French <input type="checkbox"/> French <input type="checkbox"/> English If both, the categories of personnel requiring bilingualism include:			



TA Proposal [For completion by Contractor]			
9. Estimated Cost Contract			
Category (Level) and Name of Proposed Resource	Firm Per Diem Rate	Estimated # of Days	Total cost
Professional services estimated cost	Total		
Applicable Taxes			
Grand Total			\$ _____

Travel & Living	Estimated Cost	
Applicable Taxes		
Total Travel & Living Cost		
Grand Total for Labour and Travel		

TA Approval			
10. Signing Authorities			
Authorized Individual to sign on Behalf of Contractor :	Name and Title	Signature	Date
Technical Authority :			
Contracting Authority :			
11. Basis of Payment & Invoicing			
<p>In Accordance with the article entitled "Basis of Payment" in the Contract.</p> <p>Payment to be made based on receipt of detailed monthly invoices for services rendered, subject to full acceptance by the Technical Authority. Total of payments not to exceed the grand total.</p> <p>Original invoices shall be sent to the Technical Authority. One copy of each invoice, together with attachments, shall be sent to the Contracting Authority.</p>			



DELIVERABLE ACCEPTANCE
Task Authorization Number: _____
Contract Authority: _____
Date Submitted: [YYYY-MM-DD]
DESCRIPTION OF DELIVERABLE(S)
[A description of the deliverables accepted will be detailed here]
Name of the individual who accepted the deliverable: _____
Title of the individual who accepted the deliverable: _____
Date accepted: [YYYY-MM-DD]
Signature of the individual who accepted the deliverable: _____
Comments:



Appendix C to Annex A

Resource Assessment Criteria and Response Tables

1. IT Sourcing Advice and Strategy Specialist

<p>Name of proposed resource: _____</p> <p>The Contractor MUST demonstrate that the proposed IT Sourcing Advice and Strategy Specialist has:</p> <p>* Not a mandatory requirement being assessed. **Extensive means more than 10 years. ***Significant means more than 5 years.</p>					
Category	Requirement			Contractor's Response	
	Senior	Intermediate	Junior	Demonstrated Experience	Insert Page # of Resume
Criteria	<p>A minimum number of years of experience as an IT Sourcing Advice and Strategy Specialist providing advice, support and consultation in relation to the development of sourcing and/or transformation strategies, which include at a minimum the following activities:</p> <ul style="list-style-type: none"> - Analysis of current state organizational structure, delivery model, and asset inventory; - Analysis of sourcing options, covering at least scope, cost, and risk elements; - Development of detailed sourcing strategies as an outcome of options analysis; - Definition of end state organizational structure and delivery model, incorporating new 	<p>A minimum number of years of experience as an IT Sourcing Advice and Strategy Specialist providing advice, support and consultation in relation to the development of sourcing and/or transformation strategies, which include at a minimum the following activities:</p> <ul style="list-style-type: none"> - Analysis of current state organizational structure, delivery model, and asset inventory; - Analysis of sourcing options, covering at least scope, cost, and risk elements; - Development of detailed sourcing strategies as an outcome of options analysis; - Definition of end state organizational structure and delivery model, incorporating new 	<p>A minimum number of years of experience as an IT Sourcing Advice and Strategy Specialist providing advice, support and consultation in relation to the development of sourcing and/or transformation strategies, which include at a minimum the following activities:</p> <ul style="list-style-type: none"> - Analysis of current state organizational structure, delivery model, and asset inventory; - Analysis of sourcing options, covering at least scope, cost, and risk elements; - Development of detailed sourcing strategies as an outcome of options analysis; - Definition of end state organizational structure and delivery model, incorporating new 		



	<p>sourcing strategies;</p> <ul style="list-style-type: none"> - Development of transition plans to support the sourcing strategies; and - Elaboration of business cases to support sourcing strategies. <p>10+ years of applied experience providing at least 50% of the Work identified in SOW Section 5.1.</p>	<p>sourcing strategies;</p> <ul style="list-style-type: none"> - Development of transition plans to support the sourcing strategies; and - Elaboration of business cases to support sourcing strategies. <p>6+ years of applied experience providing at least 50% of the Work identified in SOW Section 5.1.</p>	<p>sourcing strategies;</p> <ul style="list-style-type: none"> - Development of transition plans to support the sourcing strategies; and - Elaboration of business cases to support sourcing strategies. <p>3+ years of applied experience providing at least 50% of the Work identified in SOW Section 5.1.</p>		
Education	<p>Master's or bachelor's degree in fields of supply chain, engineering, or manufacturing, or sciences with an emphasis in Supply Management or Operations.</p> <p>*MBA preferred in alternative to the above requirement</p>	<p>Bachelor's degree in related field</p>	<p>Bachelor or college degree</p>		
Licensing	<p>*CPM or CPIM certification preferred.</p>	<p>*CPM or CPIM certification preferred.</p>	<p>n/a</p>		
Experience	<p>More than ten (10) years' experience in the development of sourcing strategies, involving multiple stakeholders and suppliers.</p>	<p>Six (6) to ten (10) years' experience in the development of sourcing strategies, involving multiple stakeholders and suppliers.</p>	<p>Three (3) to five (5) years' experience in the development of sourcing strategies, involving multiple stakeholders and suppliers.</p>		
	<p>**Extensive experience in sourcing activities including contract negotiations, commodity based materials management, project management, and commercial analysis</p>	<p>***Significant experience in sourcing activities including contract negotiations, commodity based materials management, project management, and commercial analysis</p>	<p>Experience in sourcing activities including contract negotiations, commodity based materials management, project management, and commercial analysis</p>		
Skills	<p>Excellent negotiation, relationship and analytical skills in dealing with client management as well as internal stakeholders</p>	<p>Excellent negotiation, relationship and analytical skills in dealing with client management as well as internal stakeholders</p>	<p>Excellent negotiation, relationship and analytical skills in dealing with client management as well as internal stakeholders</p>		



2. IT Benchmarking Specialist

Name of proposed resource: _____

The Contractor MUST demonstrate that the proposed IT Benchmarking Specialist has:

* Not a mandatory requirement being assessed.

**Extensive means more than 10 years.

***Significant means more than 5 years.

Category	Requirement			Contractor's Response	
	Senior	Intermediate	Junior	Demonstrated Experience	Insert Page # of Resume
Criteria	<p>A minimum number of years of experience as an IT Benchmarking Specialist providing advice, support and consultation in relation to analysing, determining, measuring, and assessing metrics in relation to IT transformation initiatives, which include at a minimum the following activities:</p> <ul style="list-style-type: none"> - Comparison of human resource, asset, and service delivery costs and metrics to comparable industry benchmarks in the field of IT infrastructure service delivery; - Development of specific comparable case studies, with emphasis on comparing human resource, asset, and service delivery costs and metrics; and - Analysis of trends and forecasts in the field of IT infrastructure commodity pricing. 	<p>A minimum number of years of experience as an IT Benchmarking Specialist providing advice, support and consultation in relation analysing, determining, measuring, and assessing metrics in relation to IT transformation initiatives, which include at a minimum the following activities:</p> <ul style="list-style-type: none"> - Comparison of human resource, asset, and service delivery costs and metrics to comparable industry benchmarks in the field of IT infrastructure service delivery; - Development of specific comparable case studies, with emphasis on comparing human resource, asset, and service delivery costs and metrics; and - Analysis of trends and forecasts in the field of IT infrastructure commodity pricing. 	<p>A minimum number of years of experience as an IT Benchmarking Specialist providing advice, support and consultation in relation to analysing, determining, measuring, and assessing metrics in relation to IT transformation initiatives, which include at a minimum the following activities:</p> <ul style="list-style-type: none"> - Comparison of human resource, asset, and service delivery costs and metrics to comparable industry benchmarks in the field of IT infrastructure service delivery; - Development of specific comparable case studies, with emphasis on comparing human resource, asset, and service delivery costs and metrics; and - Analysis of trends and forecasts in the field of IT infrastructure commodity pricing. 		



	10+ years of applied experience providing at least 50% of the Work identified in SOW Section 5.2.	6+ years of applied experience providing at least 50% of the Work identified in SOW Section 5.2.	3+ years of applied experience providing at least 50% of the Work identified in SOW Section 5.2.		
Education	<p>Master's or bachelor's degree in fields of supply chain, engineering, or manufacturing, or sciences with an emphasis in Supply Management or Operations.</p> <p>*MBA preferred in alternative to the above requirement</p>	Bachelor's degree in related field	Bachelor or college degree		
Licensing	*CPM or CPIM certification preferred.	*CPM or CPIM certification preferred.	n/a		
Experience	More than ten (10) years' experience in benchmarking of IT infrastructure, or relevant commodity goods and services.	Six (6) to ten (10) years' experience in benchmarking of IT infrastructure, or relevant commodity goods and services.	Three (3) to five (5) years' experience in benchmarking of IT infrastructure, or relevant commodity goods and services.		
Skills	Excellent ability to understand IT cost metrics, and synthesize them into comparable units	Excellent ability to understand IT cost metrics, and synthesize them into comparable units	Excellent ability to understand IT cost metrics, and synthesize them into comparable units		



3. IT Contract Design and Execution Specialist

Name of proposed resource: _____

The Contractor **MUST** demonstrate that the proposed IT Contract Design and Execution Specialist has:

* Not a mandatory requirement being assessed.

**Extensive means more than 10 years.

***Significant means more than 5 years.

Category	Requirement			Contractor's Response	
	Senior	Intermediate	Junior	Demonstrated Experience	Insert Page # of Resume
Criteria	<p>A minimum number of years of experience as an IT Contract Design and Execution Specialist providing support services for the contracting of transformation initiatives, which include at a minimum the following activities:</p> <ul style="list-style-type: none"> - Development of Requests for Information and Requests for Proposals for the provisioning of IT infrastructure goods and services; - Evaluation of bidder proposals for the provisioning of IT infrastructure goods and services; - Development and negotiation of contracts for the provisioning of IT infrastructure goods and services; and - Support for the transition and execution of contracts for the provisioning of IT infrastructure goods and 	<p>A minimum number of years of experience as an IT Contract Design and Execution Specialist providing support services for the contracting of transformation initiatives, which include at a minimum the following activities:</p> <ul style="list-style-type: none"> - Development of Requests for Information and Requests for Proposals for the provisioning of IT infrastructure goods and services; - Evaluation of bidder proposals for the provisioning of IT infrastructure goods and services; - Development and negotiation of contracts for the provisioning of IT infrastructure goods and services; and - Support for the transition and execution of contracts for the provisioning of IT infrastructure goods and 	<p>A minimum number of years of experience as an IT Contract Design and Execution Specialist providing support services for the contracting of transformation initiatives, which include at a minimum the following activities:</p> <ul style="list-style-type: none"> - Development of Requests for Information and Requests for Proposals for the provisioning of IT infrastructure goods and services; - Evaluation of bidder proposals for the provisioning of IT infrastructure goods and services; - Development and negotiation of contracts for the provisioning of IT infrastructure goods and services; and - Support for the transition and execution of contracts for the provisioning of IT infrastructure goods and 		



	services. 10+ years of applied experience providing at least 50% of the Work identified in SOW Section 5.3.	services. 6+ years of applied experience providing at least 50% of the Work identified in SOW Section 5.3.	services. 3+ years of applied experience providing at least 50% of the Work identified in SOW Section 5.3.		
Education	Master's or bachelor's degree in fields of supply chain, engineering, or manufacturing, or sciences with an emphasis in Supply Management or Operations. *MBA preferred in alternative to the above requirement	Bachelor's degree in related field	Bachelor or college degree		
Licensing	*CPM or CPIM certification preferred.	*CPM or CPIM certification preferred.	n/a		
Experience	More than ten (10) years experience in Purchasing / Sourcing, or other business experience requiring strong negotiating skills.	Six (6) to ten (10) years experience in Purchasing / Sourcing, or other business experience requiring strong negotiating skills.	Three (3) to five (5) years experience in Purchasing / Sourcing, or other business experience requiring strong negotiating skills.		
	Extensive experience in sourcing activities including contract negotiations, commodity based materials management, project management, and commercial analysis	*Significant experience in sourcing activities including contract negotiations, commodity based materials management, project management, and commercial analysis	Experience in sourcing activities including contract negotiations, commodity based materials management, project management, and commercial analysis		
Skills	Excellent negotiation, relationship and analytical skills in dealing with suppliers as well as internal stakeholders	Excellent negotiation, relationship and analytical skills in dealing with suppliers as well as internal stakeholders	Excellent negotiation, relationship and analytical skills in dealing with suppliers as well as internal stakeholders		



APPENDIX D TO ANNEX A

CERTIFICATIONS AT THE TASK AUTHORIZATION STAGE

1. Education and Experience

The Contractor certifies that all the information provided in the resume(s) and supporting material submitted, 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 the individual(s) proposed is capable of performing the Work described in the Contract. Canada reserves the right to verify any information provided in this regard, and untrue statements may result in the TA response being declared non-responsive or another action the Minister may consider appropriate.

Print name of authorized individual & sign above

Date

2. Status of Personnel

If the Contractor has proposed any individual in fulfillment of this Contract who is not an employee of the Contractor, the Contractor hereby certifies that it has written permission from such person (or the employer of such person) to propose the services of such person in relation to the work performed in fulfillment of this Contract and to submit such person's resume to Canada. The Contractor must, upon request from the Contracting Authority, provide a written confirmation, signed by the individual, of the permission given to the Contractor.

Print name of authorized individual & sign above

Date

3. Availability of Personnel

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

Print name of authorized individual & sign above

Date

4. Certification of Language

The Contractor certifies that the proposed resource(s) in response to this TA is/are fluent in either English or French, as requested on the TA. The individual(s) proposed is/are able to communicate orally and in writing without any assistance and with minimal errors in English.

Print name of authorized individual & sign above

Date