



INDEPENDENT REVIEWER SERVICES SUPPLY ARRANGEMENT

REQUEST FOR SERVICES

FOR

THE DEPARTMENT OF NATIONAL DEFENCE

SOLICITATION NO. W8474-14-MP32/B

CLOSING: 16th DECEMBER 2013 @ 14:00 EDT

This RFP is issued against the Independent Reviewer Services Supply Arrangement, PWGSC File No. 24062-080452. All terms and conditions of the SA apply and shall be incorporated into any resulting contract. It is intended to result in the award of **one** (1) contract.



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PART 1 - GENERAL INFORMATION

Reissue of Bid Solicitation

There were no bids received in response to bid solicitation W8474-14-MP32/A. This bid solicitation W8474-12-MP14/B cancels and supersedes previous bid solicitation number W8474-12-MP14/A dated 2013-10-01 with a closing of 2013-10-24 at 2:00 PM.

Some requirements of bid solicitation W8474-14-MP32/A have been changed in bid solicitation W8474-14-MP32/B

1. Security Requirement

There is no security requirement associated with the requirement.

2. Supply Arrangement

This Request for Services (RFS) is issued against the Independent Reviewer Services Supply Arrangement, PWGSC File No. 24062-080452. All terms and conditions of the SA apply and shall be incorporated into any resulting contract. It is intended to result in the award of one (1) contract for a Review Team Leader.

3. Exclusion Clause

The Supplier and the Resource engaged in the Work resulting from any contract awarded under this RFS will be precluded from bidding on or performing any additional or follow-on work related to the project that was reviewed, except for other review work.

4. Statement of Work

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

5. Debriefings

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 in writing, by telephone or in person.

6. Submission Deadline

Proposals must be received by the Contracting Authority no later than 2:00pm EDT on December 16, 2013. All bids received after this time will be deemed as non-compliant.



PART 2 - BIDDER INSTRUCTIONS

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* (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.
- b) Bidders who submit a bid agree to be bound by the instructions, clauses and conditions of the bid solicitation and accept the clauses and conditions of the resulting contract.
- c) The 2003 (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 as follows:

Delete: sixty (60) days
Insert: ninety (90) days

If there is a conflict between the provisions of 2003 and this document, this document prevails.

- d) 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 within the time specified. Failure to provide such Consent Forms within the time period provided will result in the bid being declared non-responsive.

2. Submission of Bids

Bids must be submitted to the Department of National Defence (DND) in electronic mail format, attention to the individual listed below, by the date and time indicated in Part 1 – General Information.

Department of National Defence
101 Colonel By Drive
Ottawa, Ontario
K1A 0K2
Attn: Tu-Quynh Nguyen, DES Proc 2-7
Email: TU-Quynh.Nguyen@forces.gc.ca

Proposals must be received by the Contracting Authority no later than 2:00pm EST on December 16, 2013. All bids received after this time will be deemed as non-compliant.

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



3. Former Public Servant - A3025T (2013-07-10)

- a) Contracts awarded to former public servants (FPS) in receipt of a pension or of a lump sum payment must bear the closest public scrutiny, and reflect fairness in the spending of public funds. In order to comply with Treasury Board policies and directives on contracts with FPS, bidders must provide the information required below before contract award.

b) **Definitions**

For the purposes of this clause, "former public servant" is any former member of a department as defined in the Financial Administration Act, R.S., 1985, c. F-11, a former member of the Canadian Armed Forces or a former member of the Royal Canadian Mounted Police. A former public servant may be:

- i. an individual;
- ii. an individual who has incorporated;
- iii. a partnership made of former public servants; or
- iv. a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.

"lump sum payment period" means the period measured in weeks of salary, for which payment has been made to facilitate the transition to retirement or to other employment as a result of the implementation of various programs to reduce the size of the Public Service. The lump sum payment period does not include the period of severance pay, which is measured in a like manner.

"pension" means a pension or annual allowance paid under the Public Service Superannuation Act (PSSA), R.S., 1985, c.P-36, and any increases paid pursuant to the Supplementary Retirement Benefits Act, R.S., 1985, c.S-24 as it affects the PSSA. It does not include pensions payable pursuant to the Canadian Forces Superannuation Act, R.S., 1985, c.C-17, the Defence Services Pension Continuation Act, 1970, c.D-3, the Royal Canadian Mounted Police Pension Continuation Act, 1970, c.R-10, and the Royal Canadian Mounted Police Superannuation Act, R.S., 1985, c.R-11, the Members of Parliament Retiring Allowances Act, R.S., 1985, c.M-5, and that portion of pension payable to the Canada Pension Plan Act, R.S., 1985, c.C-8.

c) **Former Public Servant in Receipt of a Pension**

As per the above definitions, is the Bidder a FPS in receipt of a pension? Yes () No ()

If so, the Bidder must provide the following information, for all FPS in receipt of a pension, as applicable:

- a) name of former public servant;
- b) date of termination of employment or retirement from the Public Service.

By providing this information, Bidders agree that the successful Bidder's status, with respect to being a former public servant in receipt of a pension, will be reported on departmental websites as part of the published proactive disclosure reports in accordance with Contracting Policy Notice: 2012-2 and the Guidelines on the Proactive Disclosure of Contracts.

d) **Work Force Adjustment Directive**

Is the Bidder a FPS who received a lump sum payment pursuant to the terms of the Work Force Adjustment Directive? Yes () No ()

If so, the Bidder must provide the following information:



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

For all contracts awarded during the lump sum payment period, the total amount of fees that may be paid to a FPS who received a lump sum payment is \$5,000, including Applicable Taxes.

4. Enquiries - Bid Solicitation

- a) All enquiries must be submitted electronically to the Contracting Authority no later than two (2) 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.

5. Applicable Laws

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



PART 3 - BID PREPARATION INSTRUCTIONS

1. Bid Preparation Instructions

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

- Section I: Technical Bid 1 soft copy via email (file size not to exceed 10MB)
- Section II: Financial Bid 1 soft copy via email (file size not to exceed 10MB)
- Section III: Certifications 1 soft copy via email (file size not to exceed 10MB)

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

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

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

Section I: Technical Bid

In their technical bid, Bidders should explain and demonstrate how they propose to meet the requirements and how they will carry out the Work.

Section II: Financial Bid

Bidders must submit their financial bid in accordance with the Basis of Payment contained in 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 Basis of Payment pricing table.

1.1 Exchange Rate Fluctuation

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

Section III: Certifications

Bidders must submit the certifications required under Part 5.



PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

1. Evaluation Procedures

- (a) Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria.
- (b) An evaluation team composed of representatives of Canada will evaluate the bids.
- (c) 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.
- (d) The Contractor must propose one resource and provide one résumé for the category of Review Team Leader.

1.1 Technical Evaluation: Review Team Leader

1.1.1 Mandatory Technical Criteria

	Mandatory Requirements	Met (Yes or No)	Demonstrate HOW the requirement is Met (Cross reference to resource resume as applicable)
M01	The Contractor's proposed resource must have a minimum of five (5) years demonstrated experience as a Project Manager within the Government of Canada.		
M02	The Contractor's proposed resource must have a minimum of seven (7) years demonstrated experience of Information Management (IM)/Information technology (IT) project management experience		
M03	The Contractor's proposed resource must have a minimum of three (3) years demonstrated experience in risk management practices and processes.		
M04	The Contractor's proposed resource must have demonstrated experience in performing at least two (2) independent reviews in accordance with the Treasury Board of Canada Secretariat's Independent Reviewer's Handbook (http://publiservice.tbs-sct.gc.ca/itp-pti/pog-spg/irh-mei/irh-mei00-eng.asp).		



1.2 Financial Evaluation

SACC Manual Clause A0220T (2013-04-25), Evaluation of Price

Resource Category	Name of Proposed Resource	Estimated Level of Effort	Firm Per Diem Rate	Total Evaluated Cost
Review Team Leader		45 days	\$	\$
Total Estimated Cost				\$

2. Basis of Selection – Mandatory Technical Criteria

- 2.1 To be declared responsive, a bid must:
- a. comply with all the requirements of the bid solicitation; and
 - b. meet all mandatory technical evaluation criteria; and
- 2.2 Bids not meeting 2.1 (a) or (b) will be declared non-responsive. The responsive bid with the lowest evaluated price will be recommended for award of a contract.
- 2.3 Where two or more proposals achieve the identical lowest price, then the names of all such first ranked Bidders will be placed in a hat and the winner will be the first name drawn from it. All first ranked Bidders will be invited to witness the event.
- 2.4 One contract will be awarded in total as a result of this bid solicitation. 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

- a) Bidders must provide the required certifications and documentation to be awarded a contract.
- b) The certifications provided by bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default, if any certification made by the Bidder is found to be untrue whether during the bid evaluation period or during the contract period.
- c) The Contracting Authority will have the right to ask for additional information to verify the Bidder's certifications. Failure to comply with this request will also render the bid non-responsive or will constitute a default under the Contract.

1. Mandatory Certifications Required Precedent to Contract Award

1.1 Code of Conduct and Certifications - Related documentation

By submitting a bid, the Bidder certifies that the Bidder and its affiliates are in compliance with the provisions as stated in Section 01 Code of Conduct and Certifications - Bid of Standard Instructions 2003. The related documentation therein required will assist Canada in confirming that the certifications are true.

1.2 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](http://www.labour.gc.ca/eng/standards_equality/eq/emp/fcp/list/inelig.shtml)" list (http://www.labour.gc.ca/eng/standards_equality/eq/emp/fcp/list/inelig.shtml) available from [Human Resources and Skills Development Canada \(HRSDC\) - Labour's](http://www.hrsdc.gc.ca) 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](http://www.labour.gc.ca/eng/standards_equality/eq/emp/fcp/list/inelig.shtml)" list at the time of contract award.

1.3 Former Public Servant Certification

SACC Manual clause A3025T (2013-07-10) Former Public Servant Certification

1.4 Status and Availability of Resources

SACC Manual clause A3005T (2010-08-16) Status and Availability of Resources

1.5 Education and Experience

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

1.6 Non-Disclosure Agreement

A9126C (2010-08-16), See Annex B for Non-Disclosure Agreement. The Contractor must obtain from its employee(s) or subcontractor(s) the completed and signed non-disclosure agreement, attached at Annex B, 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.



1.7 Exclusion Clause

The Contractor must obtain from its employee(s) or subcontractor(s) the completed and signed **exclusion** agreement, attached at Annex "C", and provide it to the Contracting Authority before they are given access to information by or on behalf of Canada in connection with the Work.

1.8 Certification of Language - English Essential

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



PART 6 - RESULTING CONTRACT CLAUSES

1. Security Requirement

There is no security requirement applicable to this Contract.

2. Statement of Work

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

3. Standard Clauses and Conditions

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

3.1 General Conditions

2010B (2013-06-27), General Conditions - Professional Services (Medium Complexity) apply to and form part of the Contract.

3.2 Supplemental General Conditions

4006 (2010-08-16), Contractor to Own Intellectual Property Rights in Foreground Information

4. Term of Contract

4.1 Period of the Contract

The period of the Contract is from the date of Contract award to 28 March 2013 inclusive.

5. Authorities

5.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: Tu-Quynh Nguyen
Title: Procurement Manager
Department of National Defence
Directorate: DES Proc 2-7
Address: 101 Colonel By Drive, Ottawa, ON K1A 0K2

Telephone: 613-947-5929
Facsimile: 613-995-2371
E-mail address: Tu-Quynh.Nguyen@forces.gc.ca



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

5.2 Technical Authority (available at contract award)

The Technical Authority for the Contract is:

Name: _____
Title: _____
Organization: _____
Address: _____

Telephone : _____
Facsimile: _____
E-mail address: _____

The Technical Authority named above 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.

5.3 Contractor's Representative
(Fill in or delete as applicable)

6. Proactive Disclosure of Contracts with Former Public Servants

By providing information on its status, with respect to being a former public servant in receipt of a [Public Service Superannuation Act](#) (PSSA) pension, the Contractor has agreed that this information will be reported on departmental websites as part of the published proactive disclosure reports, in accordance with [Contracting Policy Notice: 2012-2](#) of the Treasury Board Secretariat of Canada.

7. Payment

7.1 Basis of Payment

The Contractor shall be paid a firm all inclusive per diem rate for the services provided in accordance to the Statement of Work at Annex A contained herein, GST/HST extra as follows:

Requirement	Resource Name	Estimated Number of Working Days	Firm all-inclusive per diem rate (Cdn)	Total Estimated Cost
One (1) Team Lead Reviewer		45	\$	
Total Labour Price (GST/HST Excluded):				\$



Total Estimated Cost to a Limitation of Expenditure: \$ (GST/HST included)

7.1.1 Travel and Living Expenses

No travel outside of the NCR is expected to occur. Travel within the NCR will not be reimbursed.

7.1.2 Definition of a day/proration

A day is defined as 7.5 hours exclusive of meal breaks.

Payment will be for days actually worked with no provision for annual leave, statutory holidays and sick leave. Time worked which is more or less than a day will be prorated to reflect actual time worked in accordance with the following formula:

$$\text{Hours worked} \times \text{fixed per diem rate}$$

7.1.3 Overtime Work

All proposed personnel must be available to work outside normal office hours during the duration of the contract. No overtime charges will be authorized under this Contract. All time worked will be compensated according to para.7.1.2 above.

7.1.4 GST/HST

The estimated GST or HST of \$ _____ is included in the total estimated cost. GST or HST, to the extent applicable, will be incorporated into all invoices and progress claims and shown as a separate item on invoices and progress claims. All items that are zero-rated, exempt or to which the GST or HST does not apply, are to be identified as such on all invoices. The Contractor agrees to remit to Canada Customs and Revenue Agency any amounts of GST and HST paid or due.

7.2 Limitation of Expenditure

7.2.1 Canada's total liability to the Contractor under the Contract must not exceed \$ _____. Customs duties are _____ (*insert "included", "excluded" or "subject to exemption"*) and Applicable Taxes are extra.

7.2.2 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:

- a. when it is 75 percent committed, or
- b. four (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.



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

7.3 Method of Payment - Monthly

- 7.3.1 Canada will pay the Contractor no more frequently than once a month for work performed during the month covered by the invoice in accordance with the payment provisions of the Contract if:

- a. an accurate and complete invoice and any other documents required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- b. all such documents have been verified by Canada;
- c. the Work delivered has been accepted by Canada.

- 7.3.2 The Contractor must submit time sheets for each resource showing the days and hours worked to support the charges claimed in the invoice.

8. Invoicing Instructions

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

Each invoice must be supported by:

- a. a copy of time sheets to support the time claimed;
- b. a copy of the release document and any other documents as specified in the Contract; and
- c. a copy of Task 5 - Post Mortem Deliverables.

- 8.2 Invoices must be distributed as follows:

The original and one (1) copy must be forwarded to the Contracting Authority identified under the section entitled "Authorities" of the Contract.

9. Certifications

9.1 Compliance

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

10. Applicable Laws



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

11. Priority of Documents

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

- (a) the Articles of Agreement, including any individual SACC clauses is incorporated by reference in these Articles of Agreement;
- (b) the supplemental general conditions 4006 (2010-08-16);
- (c) the general conditions 2010B (2013-06-27);
- (d) Annex A, Statement of Work;
- (c) PWGSC Supply Arrangement 24062-080452/xxx/EL.
- (e) the Contractor's bid dated _____ (*insert date of bid*) (*If the bid was clarified or amended, insert at the time of contract award: “, as clarified on _____” or “, as amended on _____” and insert date(s) of clarification(s) or amendment(s)*)

12. Defence Contract

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

13. Publicity

- 13.1 The Contractor must not make any public announcement nor disclosure regarding this Contract or the Work performed or to be performed under the Contract without obtaining prior formal written permission for such publicity from the Department of National Defence.
- 13.2 The Contractor's primary contact for the approval process regarding any publicity related to this Contract is the Technical Authority.
- 13.3 Notwithstanding paragraph 1 above, where the Contractor is a publicly traded company, and in accordance with laws and regulations applying to publicly traded companies, the Contractor may make the necessary disclosures regarding the award of this Contract, or the award of any amendment thereof. The Contractor must submit the proposed text of any proposed public announcement concerning the award of this Contract, or any amendment thereof, to the Technical Authority complete with information copies to the Contracting Authority, in advance of any public announcement. The content of the public announcement and the schedule for its release will be agreed to between the Contractor and the Technical Authority in advance of the public announcement.



ANNEX "A"

STATEMENT OF WORK

1. OBJECTIVE

- 1.1. The purpose of this Statement of Work (SOW) is to acquire the services of an Independent Project Review (IPR) team to conduct a third party Treasury Board Secretariat (TBS) Full Gate 5 review of the Department of National Defence's (DND) Military Personnel Management Capability Transformation (MPMCT) project.

2. BACKGROUND

- 2.1. The Department of National Defence (DND) has a requirement for the implementation of a modern, flexible and integrated Military Personnel Management (MPM) capability, encompassing Human Resources (HR) and Payroll for the Canadian Armed Forces (CAF). This requirement flows from the Canada First Defence Strategy and involves developing a modern regulatory and policy framework, transforming MPM business processes and implementing a modern, integrated Information Management system based on the Commercial Off-The-Shelf Enterprise Resource Planning (ERP) software, Oracle PeopleSoft.
- 2.2. The MPMCT Project has been established to manage this implementation. The MPMCT Project is using a cyclical project delivery methodology that allows for a continuing program of project reviews, with status and performance assessments (and Go/No Go decision points) at the end of each cycle or gate.
- 2.3. The MPMCT Project scope is defined as the delivery of an integrated MPM Solution for HR and payroll, including:
 - a. Transformation of DND/CAF business that supports the delivery of military HR and military payroll services, including: policy transformation; business process re-engineering and training in support of operational readiness and excellence for the forces;
 - b. Configuration and implementation of Oracle PeopleSoft;
 - c. Modernization of supporting Information Technology (IT) infrastructure (in conjunction with Shared Services Canada (SSC));
 - d. Migration of data from legacy applications into the MPM Solution; and
 - e. Development and integration of interfaces between the MPM Solution and other Canadian Government Departments that require CAF HR and payroll information.

3. SCOPE OF WORK

- 3.1. The review is for a Full Gate 5 - Detailed project plan and functional specifications review of the MPMCT project in accordance with the Treasury Board of Canada Secretariat (TBS) Chief Information Officer Branch (CIO) "The Independent Reviewer's Handbook" and the "Review Topics for Enquiry" documentation. The objectives of the review are:



- 3.1.1. To reaffirm the Departmental understanding and support for the MPMCT project and solution by:
 - o Determine if the Stakeholders and the Sponsor group are aware of and in agreement with the current scope of MPMCT project deliverables;
 - o Confirm business outcomes, measures of business outcomes, accountability for business outcomes and completeness of outcomes management plan; and
 - o Determine the extent of support and commitment for the MPMCT project and outcomes.
- 3.1.2. Confirm the completeness and feasibility of the MPMCT project plan and definition of project requirements;
- 3.1.3. Identify and research all major project unknowns in order to provide assurance that high-impact risks have been effectively mitigated; and
- 3.2. The review should provide assurance to Government stakeholders that all major unknowns have been sufficiently researched such that high impact risks have been effectively mitigated, cost estimates are within 15%, and that the project is organized to succeed.

4. TASKS

- 4.1. The Independent Reviewer’s Handbook covers in detail the review issues, core review items for this gate, and expected results. The tasks and activities for the Review Team Leader, and duration for the Gate 5 review are described below:

Task 1 – Review Set-up and Launch Phase	
Activities and Deliverables	Estimated Level of Effort and Duration
<u>Activities</u> <ul style="list-style-type: none"> • Attend Kick-off Meeting; • Develops a detailed draft review work plan; • Meet with the DND TA to: <ul style="list-style-type: none"> o determine documentation to review; o develop a list of primary interviewees and interviews to be scheduled; o create interview plans and an interview schedule; and o establish logistical arrangements. • Create a list of general topics for interviews, plus a list of presentations/demonstrations for the project group to prepare. <u>Deliverables</u> <ul style="list-style-type: none"> • Work plan; • List of interviewees and list of general and specific topics for interviews; • Interview plans; • List of project group presentations or demonstrations required; • Schedule of interviews, presentations, or demonstrations; and • Communication to project group (ensure that the 	<p><u>Task must be completed in 5 business days</u></p>



sponsor sends this out).	
Task 2 – Discovery Phase	
Activities and Deliverables	Estimated Level of Effort and Duration
<u>Activities</u> <ul style="list-style-type: none"> • Read all project documentation; • Outline presentations to address areas that require the interaction of multiple project group members; • Identify demonstrations (e.g., prototypes, proofs of concept) to explain the legacy system or current status of the system being developed; • Identify demonstrations (e.g., prototypes, proofs of concept) to explain the design approach, design and development process, architecture standards, capacity planning, disaster recovery approach, and progress against plan; and • Conduct all interviews. <u>Deliverables</u> <ul style="list-style-type: none"> • Categorize and document summary of findings; and • Tentative conclusions for each category. 	<u>Task must be completed in 15 business days</u>
Task 3 – Analysis Phase	
Activities and Deliverables	Estimated Level of Effort and Duration
<u>Activities</u> <ul style="list-style-type: none"> • Analyze findings from the discovery phase. If there are gaps or conflicts in any information, team members may have to acquire additional documentation or conduct more interviews; • Summarize findings under categories and develop tentative conclusions for each category. These will be validated in discussions with the DND TA and key members of the project management team, and should be reassessed as necessary, with errors being corrected; • State findings and conclusions in final form and develops tentative recommendations; and • Discuss the viability of recommendations with the DND TA, and reassessed and revised as appropriate; and • Develop an interim report of findings to date; content of the interim report is to be discussed and agreed upon with the DND TA at kick-off meeting. <u>Deliverables</u> <ul style="list-style-type: none"> • Interim Report, due no later than 22 January 2014; • Final findings and conclusions; • Final recommendations; and • Table of findings. 	<u>Task must be completed in 10 business days</u>



Task 4 – Reporting Phase	
Activities and Deliverables	Estimated Level of Effort and Duration
<p><u>Activities</u></p> <ul style="list-style-type: none"> Develop a draft review presentation and submit to the DND TA for review; and Deliver final review presentation to the DND TA, project sponsors, stakeholders, and management. <p><u>Deliverables</u></p> <ul style="list-style-type: none"> Final review presentation; and Executive summary presentation. 	<p><u>Task must be completed in 10 business days</u></p>
Task 5 – Post Mortem	
Activities and Deliverables	Estimated Level of Effort and Duration
<p><u>Activities</u></p> <ul style="list-style-type: none"> Conduct a post-mortem analysis, which should include: <ul style="list-style-type: none"> a meeting with the DND TA, key project management personnel, and stakeholders; and a meeting of the review team. Prepare minutes from feedback meetings; Feedback on methodology for CIOB. <p><u>Deliverables</u></p> <ul style="list-style-type: none"> Copies of meeting minutes; Lessons learned session with project team, Feedback report for CIOB. 	<p><u>Task must be completed in 5 business days</u></p>

Deliverable Format: All reports must be in MS Word format and all presentations in MS PowerPoint (version 2003 or later). The Contractor must provide all deliverables under the Contractor's letterhead.

5. LANGUAGE REQUIREMENTS

5.1. All work must be completed in English, spoken and written.

6. APPLICABLE DOCUMENTS / REFERENCES

6.1. The following documentations will be made available to the Contractor at the outset of the review:

- MPMCT Business Case;
- MPMCT Project Approval Documentation;
- Op Guardian Decision Brief;
- Project Complexity and Risk Assessment (PCRA);
- Project Operational Risk Assessment (PORA);
- Project Management Plan;
- Cost Estimates;
- Procurement Strategy;
- Statement of Requirements (SOR);
- Project Charter;
- Minutes of Governance meetings;



- Sample of status reports;
- Executive dashboards;
- Project Schedule and Work Packages;
- Risk management plan and corresponding risk register;
- MPMCT IPR report of the findings dated September 2010; and

6.2. The Contractor IPR resource may identify and request other relevant project documentation. All requests by the Contractor IPR resources for additional documentation will be sent to the DND Technical Authority (DND TA), who in turn will deliver them securely to the Contractor.

6.3. All documentation provided to the Contractor IPR resource must be returned to the DND TA upon completion of the IPR.

7. REPORTING AND COMMUNICATION

7.1. The Contractor IPR resource must report to the DND TA on an “as and when required” basis. Communication is acceptable via telephone, email, or in person.

7.2. The DND TA for this requirement will be the primary point of contact for the Review Team Leader, as required, and will be identified in the Contract award documentation.

7.3. All reports, deliverables, documentation, and services rendered by the Contractor IPR resource will be subject to inspection and acceptance by the DND TA or his/her designated representative(s). All reports, deliverables, documentation, and services will be evaluated on the basis of suitability, quality and adherence to this SOW.

8. ADMINISTRATIVE LOGISTICS

8.1. The DND TA will escort the Contractor IPR resource to the workshops/interviews and provide each resource with a working space/meeting room on DND premises. If the DND TA is not available, the Contractor resource will contact his/her delegated representative to coordinate DND site access.

8.2. The DND TA will provide electronic versions of documentation at the start of the review. Printed versions of the documentation may also be provided upon request by the Contractor IPR resource to the DND TA.

8.3. The DND TA will arrange timely access to interviewees, as required.

8.4. The DND TA will be responsible for the translation and dissemination of review deliverables, as required.

8.5. The DND TA will provide information and guidance to the Contractor IPR resource and assist in resolving any issues that arise, as required.

9. REVIEW SCHEDULE AND LEVEL OF EFFORT

9.1. The IPR will be performed over the period starting on the date identified in the Request for Services (RFS).

9.2. The duration of the review expressed above (lapse time or continuous time) will be confirmed by the DND TA with the Contractor IPR resource at the kick-off meeting.



- 9.3. Any extension to the contract date must be requested in writing through the Contracting Authority. No extensions will be authorized without a formal contract amendment.

10. WORK LOCATION AND TRAVEL

- 10.1. The Contractor IPR resource will not be required to travel outside the National Capital Region (NCR), but travel may be required from time to time within the NCR. Travel within the NCR will not be reimbursed.



ANNEX "B"

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. **W8474-14MP32** between Her Majesty the Queen in right of Canada, represented by the Minister of Public Works and Government Services and 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 the case may be.

I agree that the obligation of this agreement will survive the completion of the Contract Serial No.: **W8474-14MP32**.

Signature

Date



ANNEX "C"

EXCLUSION CLAUSE

I, (insert name) of (insert company name), acknowledge and accept the following which will form part of any issuing contract:

"The Supplier and the Resources engaged in the Work resulting from any contract awarded under this RFP, W8474-14-MP32, will be precluded from bidding on or performing any additional or follow-on work related to the project that was reviewed, except for other review work."

Signature

Date