

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

**Bid Receiving - PWGSC / Réception des
soumissions - TPSGC**
11 Laurier St. / 11, rue Laurier
Place du Portage, Phase III
Core 0A1 / Noyau 0A1
Gatineau
Quebec
K1A 0S5
Bid Fax: (819) 997-9776

**REQUEST FOR PROPOSAL
DEMANDE DE PROPOSITION**

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

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

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

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

Comments - Commentaires

Title - Sujet CFHS SUPPORT SERVICES	
Solicitation No. - N° de l'invitation W8474-03BH01/D	Date 2013-12-20
Client Reference No. - N° de référence du client W8474-03BH01	
GETS Reference No. - N° de référence de SEAG PW-\$\$XQ-002-26736	
File No. - N° de dossier 002xq.W8474-03BH01	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2014-01-27	Time Zone Fuseau horaire Eastern Standard Time EST
F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input type="checkbox"/> Other-Autre: <input type="checkbox"/>	
Address Enquiries to: - Adresser toutes questions à: Chevrier, Stephane	Buyer Id - Id de l'acheteur 002xq
Telephone No. - N° de téléphone (819) 956-8224 ()	FAX No. - N° de FAX (819) 956-8303
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction: Specified Herein Précisé dans les présentes	

Instructions: See Herein

Instructions: Voir aux présentes

Vendor/Firm Name and Address

**Raison sociale et adresse du
fournisseur/de l'entrepreneur**

Issuing Office - Bureau de distribution

Information Management/Information Technology -
IM/IT/Gestion de l'Information -Technologie de
l'Information-GI/TI
11 Laurier St. / 11, rue Laurier
12C1, Place du Portage III
Gatineau
Quebec
K1A 0S5

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

Destination Code - Code destinataire	Destination Address - Adresse de la destination	Invoice Code - Code bur.-comptable	Invoice Address - Adresse de facturation
D - 1	NATIONAL DEFENCE HEADQUARTERS MGEN GEORGE R. PEARKES BUILDING 101 COLONEL BY DR. OTTAWA, ON K1A 0K6 CANADA	W8474	DEPARTMENT OF NATIONAL DEFENCE MGEN GEORGE R. PEARKES BLDG. 101 COLONEL BY DRIVE ATTN: JENNIFER PURVES, CARE OF DES PROC 2-6-2-2 OTTAWA Ontario K1A0K2 Canada

Item Article	Description	Dest. Code Dest.	Inv. Code Fact.	Qty Qté	U. of I. U. de D.	Unit Price/Prix unitaire FOB/FAM	Destination	Plant/Usine	Delivery Req. Livraison Req.	Del. Offered Liv. offerte
4	CFHIS - RFI-Draft RFP	D - I	W8474	1	Each	\$	\$		See Herein	

NOTICE OF PROPOSED PROCUREMENT (NPP)**Request for Information No. W8474-03-BH01****Draft Request for Proposal (RFP) on behalf of The Department of National Defence (DND) for the In Service Support of the Canadian Forces Health Information System (CFHIS)****Background:**

The Department of National Defence (DND) has a requirement for the provision of support services for its Canadian Forces Health Information System (CFHIS).

As part of the procurement strategy, PWGSC and DND is conducting an Industry Engagement process, which has included an Industry Day and one-on-one meetings with suppliers in June 2013. This Request for Information (RFI)/Draft Request for Proposal (RFP) is being issued as an element of the Industry Engagement process, and is seeking continued feedback on the requirement and the draft RFP document, prior to developing any final RFP.

Request for Proposal:

The proposed CFHIS requirement consists of:

- 1) In-Service Support (ISS) and Maintenance of the CFHIS system.
- 2) Development and integration of extensions of existing functionality.
- 3) Additional Work Requirements.

A Task Authorization (TA) process will be included in the contract to manage the work described above.

The Draft RFP includes, but is not limited to, the contract terms and conditions, bidder preparation instructions, evaluation procedures and submission tables, the statement of work, pricing tables, security and insurance requirements.

The Draft RFP includes both mandatory and rated requirements as part of the evaluation. The winning bidder will be the bidder with the highest overall score based on 60% technical proposal and 40% financial proposal. Additional information of the evaluation of the bids can be found in this Draft RFP.

This requirement is subject to the provisions of the North American Free Trade Agreement (NAFTA), World Trade Organization-Agreement on Government Procurement (WTO-AGP), and the Agreement on Internal Trade (AIT), the Canada-Chile Free Trade Agreement (CCFTA), the Canada-Peru Free Trade Agreement (CPFTA), the Canada-Columbia Free Trade Agreement (CColFTA), the Canada-Panama Free Trade Agreement (CPanFTA) as applicable.

Contract Period and Options:

The proposed Contract Period will be for 3 years, with Options to extend the Contract Period for up to 4 one year periods.

Security Requirement:

Solicitation No. - N° de l'invitation

W8474-03BH01/D

Amd. No. - N° de la modif.

File No. - N° du dossier

002xqW8474-03BH01

Buyer ID - Id de l'acheteur

002xq

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

W8474-03BH01

CCC No./N° CCC - FMS No/ N° VME

The Contractor will be required to hold a valid Designated Organization Screening (DOS), with approved Document Safeguarding at the level of Secret, issued by the Canadian and International Industrial Security Directorate (CIISD). The Contractor's personnel requiring access to protected information, assets or work site(s) must each hold a valid Enhanced Reliability Status, granted or approved by CIISD. There will also be a requirement for certain resources to be designated as "Secret" for certain support services. Specific resources will be defined in the any final RFP.

Inquiries and Submissions:

Inquiries regarding this RFI/Draft RFP as well as submissions in response to the RFI are to be submitted to the contracting officer listed below.

Suppliers may submit their submissions at any time after the posting date of the RFI up to the closing date of 14H00 Eastern Standard Time (EST) January 27, 2014 to:

Stephane Chevrier
Public Works and Government Services Canada
Special Procurement Initiatives Directorate
Phone Number: 819-956-8224
Fax Number: 819-956-8303
Email: Approvisionnement SISFC.CFHIS Procurement @tpsgc-pwgsc.gc.ca

**CANADIAN FORCES HEALTH
INFORMATION SYSTEM (CFHIS)
SUPPORT SERVICES**

**DEPARTMENT OF NATIONAL
DEFENCE**

W8474-03BH01

**REQUEST FOR INFORMATION
(RFI)**

This Request for Information (RFI) covers a requirement on behalf of the Department of National Defence (DND) for the provision of Support Services for its Canadian Forces Health Information System (CFHIS).

As part of the procurement strategy, PWGSC and DND have been conducting an Industry Engagement process, which to date has included an Industry Day and one-on-one meetings with suppliers in June 2013. This RFI, which includes a draft Request for Proposal (RFP), is issued as an element of the Industry Engagement process, and is seeking continued feedback on the requirement and the draft RFP document, prior to the development and release of any final RFP.

Throughout this Industry Engagement process, DND has consulted with industry partners as well as other government departments. This has allowed DND to complete an options analysis and a risk assessment, the results of which have led to DND's decision to engage a single integrator to provide professional services for follow on support of CFHIS. This strategy best fits DND's current environment and satisfies CFHIS requirements while presenting the lowest associated risk.

This is not a bid solicitation and a contract will not result from this RFI document. Participation in the RFI is not a mandatory requirement for eventual submission of a proposal; industry representatives that do not participate in the consultation process will remain eligible to submit a proposal in response to any future RFP relating to the CFHIS Support Services procurement.

Potential respondents are advised that any information submitted to Canada in response to this RFI may be used by Canada in the development of a subsequent competitive CFHIS RFP. However, the Government is not bound to accept any expression of interest or to consider it further in any associated documents such as an RFP.

The issuance of this RFI does not create an obligation for Canada to issue a subsequent RFP, and does not bind Canada legally or otherwise, to enter into any agreement or to accept any suggestions from organizations. Canada reserves the right to accept or reject any or all comments received.

There will be no short listing of suppliers for purposes of undertaking any future work as a result of this RFI. Similarly, participation in the RFI is not a condition or prerequisite for participation in any RFP(s).

Suppliers participating in this RFI/DRAFT RFP process should identify any submitted information that is to be considered as either company confidential or proprietary.

All enquiries and other communications related to this RFI/DRAFT RFP shall be directed exclusively to the PWGSC Contracting Authority. Changes to the RFI may occur during the posting period. The use of e-mail to communicate with Canada is acceptable

Timeline for Feedback

PWGSC is seeking feedback from Industry in response to this RFI **starting from its posting date until 2 PM Eastern Standard Time (EST) on January 27, 2014.**

It is requested that submissions be made directly to Public Works and Government Services Canada via email to: ApprovisionnementSISFC.CFHISProcurement@tpsgc-pwgsc.gc.ca.

Confidentiality

Canada will handle any material or information provided by Industry in response to this request for input in accordance with the Access to Information Act.

Disclaimer

This document is intended for information purposes only and may be subject to change without notice. Release of this information does not constitute a commitment on the part of the Government of Canada to contract for any of the above-mentioned requirements.

**CANADIAN FORCES HEALTH
INFORMATION SYSTEM (CFHIS)
SUPPORT SERVICES**

**DEPARTMENT OF NATIONAL
DEFENCE**

W8474-03-BH01

**DRAFT REQUEST FOR
PROPOSAL
(RFP)**

DRAFT REQUEST FOR PROPOSAL

TABLE OF CONTENTS

PART 1 - GENERAL INFORMATION

1. Introduction
2. Summary
3. Background Information
4. Procurement Business Number (PBN)
5. Debriefings
6. Conflict of Interest

PART 2 - BIDDER INSTRUCTIONS

1. Standard Instructions, Clauses and Conditions
2. Submission of Bids
3. Enquiries - Bid Solicitation
4. Applicable Laws
5. Improvement of Requirement during Solicitation Period
6. Volumetric Data

PART 3 - BID PREPARATION INSTRUCTIONS

1. Bid Preparation Instructions

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

1. Evaluation Procedures
2. Bidder's Compliance to the Solicitation Requirements and the Evaluation Process
3. Fairness Monitor
4. Information to Evaluate
5. Steps to Conduct the Evaluation
6. Evaluation Experience of Bidder's Teaming Members

PART 5 - CERTIFICATIONS

PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS

1. Security Requirement
2. Financial Capability
3. Insurance Requirements
4. Controlled Goods Program
5. Former Public Servant

PART 7 - RESULTING CONTRACT CLAUSES

1. Requirement
2. Professional Services – General
3. Professional Services – Qualifications and Replacement of Personnel

4. Change Management Procedures
5. Standard Clauses and Conditions
6. Security Requirement
7. Term of Contract
8. Authorities
9. Payment
10. Taxes – Foreign-based Contractors
11. Canadian Customs Duties and Sales Tax – Foreign Based Contractor
12. Price Protection – Most Favoured Customer (New Labour Categories)
13. Invoicing Instructions
14. Certifications
15. Applicable Laws
16. Priority of Documents
17. Defence Contract
18. Insurance Requirements
19. Safeguarding Electronic Media
20. Timely Problem Identification
21. Access to Canada's Property & Facilities
22. Transition Services
23. Dispute Resolution
24. Limitation of Liability - Information Management/Information Technology
25. Joint Venture Contractor
26. Controlled Goods Program
27. Representations and Warranties
28. Identification Protocol of Responsibilities

List of Annexes:

- | | |
|-----------|---|
| Annex "A" | Statement of Work |
| Annex "B" | Basis of Payment |
| Annex "C" | Security Requirements Check List |
| Annex "D" | Federal Contractors Program for Employment Equity - Certification |
| Annex "E" | DND 626, Task Authorization Form |
| Annex "F" | Assessment for Resource Evaluation at Task Authorization |

List of Attachments:

- | | |
|--------------|-------------------------------|
| Attachment A | Technical Evaluation Criteria |
| Attachment B | Bid Submission Form |
| Attachment C | Team Certification |

PART 1.0 - GENERAL INFORMATION

1.1 Introduction

The bid solicitation is divided into seven parts plus attachments and annexes, as follows:

Part 1 General Information: provides a general description of the requirement;

Part 2 Bidder Instructions: provides the instructions, clauses and conditions applicable to the bid solicitation;

Part 3 Bid Preparation Instructions: provides bidders with instructions on how to prepare their bid;

Part 4 Evaluation Procedures and Basis of Selection: indicates how the evaluation will be conducted, the evaluation criteria that must be addressed in the bid, and the basis of selection;

Part 5 Certifications: includes the certifications to be provided;

Part 6 Security, Financial and Other Requirements: includes specific requirements that must be addressed by bidders; and

Part 7 Resulting Contract Clauses: includes the clauses and conditions that will apply to any resulting contract.

The Annexes include the Statement of Work, the Basis of Payment, the Security Requirements Checklist, Federal Contractors Program for Employment Equity – Certification and the Task Authorization DND Form 626.

2.0 SUMMARY

2.1 Canada intends to issue one contract for three years plus four one-year irrevocable options allowing Canada to extend the term of the contract.

2.2 There is a security requirement associated with this requirement. For additional information, consult Part 6 - Security, Financial and Other Requirements, and Part 7 - Resulting Contract Clauses. Bidders should consult the "[Security Requirements for PWGSC Bid Solicitations - Instructions for Bidders](http://www.tpsgc-pwgsc.gc.ca/app-acq/lc-pl/lc-pl-eng.html#a31)" (<http://www.tpsgc-pwgsc.gc.ca/app-acq/lc-pl/lc-pl-eng.html#a31>)

2.3 Bidders must provide a list of names, or other related information as needed, pursuant to section 01 of Standard Instructions 2003.

2.4 Bidders in receipt of a pension or a lump sum payment must provide the required information as detailed in article 5 of Part 6 of the bid solicitation."

2.5 The requirement is subject to the provisions of the World Trade Organization Agreement on Government Procurement (WTO-AGP), the North American Free Trade Agreement (NAFTA), the Canada-Chile Free Trade Agreement (CCFTA), the Agreement on Internal Trade (AIT), the Canada-Peru Free Trade Agreement (CPFTA), the Canada-Columbia Free Trade Agreement (CCoFTA), and the Canada-Panama Free Trade Agreement (CPanFTA) if it is in force at time of posting.

2.6 This procurement is subject to the Controlled Goods Program.

2.7 There is a Federal Contractors Program (FCP) for employment equity requirement associated with this procurement; see Part 5 - Certifications, Part 7 - Resulting Contract Clauses and the annex named Federal Contractors Program for Employment Equity - Certification.

2.8 The resulting Contract is not to be used for deliveries within a Comprehensive Land Claims Settlement Area (CLCSA). All requirements for delivery within a CLCSA are to be submitted to the Department of Public Works and Government Services for individual processing.

3. Background Information

The CFHIS is a modern health information management capability designed to ensure that the health records of all Canadian Armed Forces (CAF) members are effectively and securely managed and stored. The CFHIS consists of a range of software applications that support various functions including: patient registration and scheduling, medical documentation, diagnostic imaging, laboratory, and dental treatment. These applications are seamlessly integrated to create a complete electronic health record for CAF members. CFHIS is also consistent with the emerging electronic health record movement across Canada and brings to the CAF a capability being developed by all of our allies.

At present, the CFHIS has over 4,000 registered users located at 47 sites across Canada and internationally. Continued growth is expected by incorporating other user groups.

The Department of National Defence (DND) has a specific requirement for services to operate, maintain, update and evolve the Canadian Forces Health Information System (CFHIS) and a non-specific requirement to integrate other information systems operating in its business domain of Health Services.

Support Services will be required in support of the CFHIS activities for the following two scope categories:

1. Steady State In-Service Support;
2. Extensions of Existing Functionality; and

At this time, DND does not have approved funding for all of the above-mentioned categories.

Annex A, Statement of Work defines the scope of this procurement.

4. Procurement Business Number

Suppliers are required to have a Procurement Business Number (PBN) before contract award. Suppliers may register for a PBN online at [Supplier Registration Information](#). For non-Internet registration, suppliers may contact the InfoLine at 1-800-811-1148 to obtain the telephone number of the nearest Supplier Registration Agent.

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. Conflict of Interest

Without limiting Canada's rights under Article 18 of 2003 (2013-06-01) Standard Instructions - Goods or Services - Competitive Requirements, the following private sector individuals and non-crown employees have been engaged in the preparation of this solicitation:

- i) *Insert Company and Individual name*

PART 2 - BIDDER INSTRUCTIONS

1. Standard Instructions, Clauses and Conditions

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.

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.

The 2003 (2013-06-01) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

Subsection 5.4 of 2003, Standard Instructions – Goods or Services – Competitive Requirements, is amended as follows:

Delete: sixty (60) days

Insert: two hundred forty days (240) days

2. Submission of Bids

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

3. Enquiries - Bid Solicitation

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

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.

4. Applicable Laws

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

Note to Bidders: 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.

5. Improvement of Requirement during Solicitation Period

Should bidders consider that the specifications or Statement of Work contained in the bid solicitation could be improved technically or technologically, bidders are invited to make suggestions, in writing, to the Contracting Authority named in the bid solicitation. Bidders must clearly outline the suggested improvement as well as the reason for the suggestion. Suggestions that do not restrict the level of competition nor favour a particular bidder will be given consideration provided they are submitted to the Contracting Authority at least 15 days before the bid closing date. Canada will have the right to accept or reject any or all suggestions.

6. Volumetric Data

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

PART 3 - BID PREPARATION INSTRUCTIONS

1. Bid Preparation Instructions

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

Section I: Technical Bid (3 hard copies) and 1 soft copy on CD-ROM

Section II: Financial Bid (2 hard copies) and 1 soft copy on CD-ROM

Section III: Certifications (1 hard copy)

Section IV: Additional Information (1 hard copy)

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

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

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

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

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

- 1) use 8.5 x 11 inch (216 mm x 279 mm) paper containing fibre certified as originating from a sustainably-managed forest and containing minimum 30% recycled content; and
- 2) use an environmentally-preferable format including black and white printing instead of colour printing, printing double sided/duplex, using staples or clips instead of cerlox, duotangs or binders.

Section I: Technical Bid

1.1 Bid Submission Form: Bidders are requested to include the Bid Submission Form - Attachment C with their bids. It provides a common form in which Bidders can provide information required for evaluation and contract award, such as a contact name, the Bidder's Procurement Business Number, the Bidder's status under the Federal Contractors Program for Employment Equity, etc. Using the form to provide this information is not mandatory, but it is recommended. If Canada determines that the information required by the Bid Submission Form is incomplete or requires correction, Canada will provide the Bidder with an opportunity to do so.

1.2 Substantiation of Technical Compliance: In their technical bid, bidders should demonstrate their understanding of the requirements contained in the bid solicitation and explain how they will meet these requirements. Bidders should demonstrate their capability in a thorough, concise and clear manner for carrying out the work.

The technical bid should address clearly and in sufficient depth the points that are subject to the evaluation criteria against which the bid will be evaluated. Simply repeating the statement contained in the bid solicitation is not sufficient. In order to facilitate the evaluation of the bid, Canada requests that bidders address and present topics in the order of the evaluation criteria under the same headings. To avoid duplication, bidders may refer to different sections of their bids by identifying the specific paragraph and page number where the subject topic has already been addressed.

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

Section II: Financial Bid

- 1.1 Pricing:** Bidders must submit their financial bid in accordance with the Pricing Schedule detailed in the "Basis of Payment in Annex "B". The total amount of Applicable Taxes must be shown separately, if applicable. Unless otherwise indicated, Bidders must include a single, firm, all-inclusive per diem rate in Canadian dollars in each cell requiring an entry in the pricing tables.
- 1.2 Variation in Resource Rates By Time Period:** For any given Resource Category, where the financial tables provided by Canada allow different firm rates to be charged for a resource category during different time periods:
- (i) the rate bid must not increase by more than 5% from one time period to the next, and
 - (ii) the rate bid for the same Resource Category during any subsequent time period must not be lower than the rate bid for the time period that includes the first month of the Initial Contract Period.
- 1.3 All Costs to be Included:** The financial bid must include all costs for the requirement described in the bid solicitation for the entire Contract Period, including any option periods. The identification of all necessary equipment, software, peripherals, cabling and components required to meet the requirements of the bid solicitation and the associated costs of these items is the sole responsibility of the Bidder.
- 1.4 Blank Prices:** Bidders are requested to insert "\$0.00" for any item for which it does not intend to charge or for items that are already included in other prices set out in the tables. If the Bidder leaves any price blank, Canada will treat the price as "\$0.00" for evaluation purposes and may request that the Bidder confirm that the price is, in fact, \$0.00. No Bidder will be permitted to add or change a price as part of this confirmation. Any Bidder who does not confirm that the price for a blank item is \$0.00 will be declared non-responsive.
- 1.5 Exchange Rate Fluctuation:** C3011T (2013-11-06), Exchange Rate Fluctuation

Section III: Certifications

Bidders must submit the certifications required under Part 5.

Section IV: Additional Information

1.1 Bidder's Proposed Site or Premises Requiring Safeguard Measures

As indicated in Part 6 under Security Requirement, the Bidder must provide the required information below, on the Bidder's proposed site or premises for which safeguard measures are required for Work Performance.

Address:

Street Number / Street Name, Unit / Suite / Apartment Number

City, Province, Territory / State

Postal Code / Zip Code

Country

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

1. Evaluation Procedures

- (a) Bids will be evaluated in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria. There are several steps in the evaluation process, which are described below. Even though the evaluation and selection will be conducted in steps, the fact that Canada has proceeded to a later step does not mean that Canada has conclusively determined that the Bidder has successfully passed all the previous steps. Canada may conduct steps of the evaluation in parallel.
- (b) An evaluation team composed of representatives of the Client and PWGSC will evaluate the bids on behalf of Canada. Canada may hire any independent consultant, or use any government resources, to evaluate any bid. Not all members of the evaluation team will necessarily participate in all aspects of the evaluation.
- (c) In addition to any other time periods established in the bid solicitation:

(i) Requests for Clarifications: If Canada seeks clarification or verification from the Bidder about its bid, the Bidder will have 3 working days (or a longer period if specified in writing by the Contracting Authority) to provide the necessary information to Canada. Failure to meet this deadline will result in the bid being declared non-responsive.

(ii) Requests for Interviews: If Canada wishes to interview the Bidder and/or any or all of the resources proposed by the Bidder to fulfill the requirements of the bid solicitation, the Bidder will have 5 working days following notice by the Contracting Authority to make any necessary arrangements (at the Bidder's sole cost) for the interview to take place at PWGSC in Gatineau, Québec.

(iii) Requests for Further Information: If Canada requires information in order to do any of the following pursuant to the Section entitled "Conduct of Evaluation" in 2003, Standard Instructions - Goods or Services - Competitive Requirements:

(A) verify any or all information provided by the Bidder in its bid; or

(B) contact any or all references supplied by the Bidder (e.g., references named in the résumés of individual resources) to verify and validate any information submitted by the Bidder;

(C) the Bidder must provide the information requested by Canada within three (3) working days of a request by the Contracting Authority.

(iv) Extension of Time: If additional time is required by the Bidder, the Contracting Authority may grant an extension at his or her sole discretion.

2. Bidder's Compliance to the Solicitation Requirements and the Evaluation Process

By submitting a proposal, the Bidder agrees:

1. to comply with all the mandatory requirements in the solicitation including the Statement of Work and all its appendices, the terms and conditions of the solicitation, and the terms and conditions specified that will be in any resulting contract; and
2. to be bound by the process set out in this solicitation regarding the conduct of the evaluation process and that it will comply with all requirements specified in evaluation procedures.

3. Fairness Monitor

PWGSC has engaged Samson & Associates located in Gatineau, Quebec as a fairness monitor for this procurement. The fairness monitor will not be part of the evaluation team, but will observe the evaluation process described in this solicitation.

4. Information to Evaluate

Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria.

The following information will be used to evaluate the bids received:

- (a) All information provided in the Bidder's proposal to the stated requirements as defined in this RFP;
- (b) Clarifications obtained from references of an otherwise compliant Bidder by the Evaluation Team;
- (c) Clarifications from the Bidders, which may be requested and provided during the evaluation process.

5. Steps to Conduct the Evaluation

The Evaluation Team will be conducting the evaluation in several steps. The following is a list of the steps, which are described in more detail in the sections following.

The following is a list of the steps, which are described in more detail in the sections following.

- Step 1: Evaluation of the Bidder's Response - Compliance to the Mandatory Requirements
- Step 2: Evaluation of the Technical Bid - Rated Requirements
- Step 3: Reference Validation
- Step 4: Evaluation of the Financial Bids
- Step 5: Determination of Combined Rating Technical Merit and Price and Ranking of Bidders
- Step 6: Selection of Successful Bidder for Recommendation

If a Bidder fails to meet any mandatory requirement in the solicitation, the bid will not receive any further consideration.

While in most instances a bid will be given no further consideration in the first instance that it is evaluated as non-compliant, the Evaluation Team may, at its discretion, proceed with the evaluation of any given bid while it further considers a final decision concerning any potential non-compliance of the Bid.

Step 1: Compliance to the Mandatory Requirements

Each bid will be reviewed for compliance with the mandatory requirements of this solicitation. The Technical evaluation mandatory requirements are specified in Attachment A to this RFP. All elements of the bid solicitation that are mandatory requirements are identified specifically with the words "must" or "mandatory". Bids that do not comply with each and every mandatory requirement will be considered non-responsive and be disqualified.

Where specified, Bidders must substantiate their compliance with the evaluation mandatory requirements by providing specific information or supporting documentation. Canada will not consider information from external references e.g. web pages, books, standards, etc. Where so required, Bidders must substantiate compliance with the mandatory requirement by completing the Technical Proposal Evaluation and Submission Table (Attachment A to the RFP). In cases where specific documentation is required to

substantiate the ability to comply with the requirement, failure to provide the required documentation will render the Bidder's response as non-compliant and the Bidder will be disqualified.

Proposals meeting all the mandatory requirements will advance to Step 2.

Step 2: Evaluation of the Rated Requirements

Each bid will be evaluated by assigning a score to the rated requirements, which are identified in the bid solicitation by the word "rated", "should" or by reference to a score. Bidders who fail to provide complete bids with all the information requested by this bid solicitation will be assessed accordingly. The rated requirements are described in Attachment A to the RFP.

Number of Resources Evaluated: For other than the key resources specified in section entitled "Contractor Resource Categories" of Annex A, Statement of Work, all other proposed resources will only be assessed after contract award once specific tasks are requested of the Contractor. After contract award, the Task Authorization process will be in accordance with Part 7 - Resulting Contract Clauses, the Article titled "Task Authorization". When a Task Authorization Form (TA Form) is issued, the Contractor will be requested to propose a resource(s) to satisfy the specific requirement based on the TA Form's Statement of Work. The proposed resource(s) will then be assessed against the Evaluation Criteria specified in Annex F, Resource Technical Evaluation Criteria attached to and forming a part of the Contract.

Each requirement will be scored individually and the score will be determined through a consensus process. The maximum allowable points for each rated requirement are indicated in Attachment A to the RFP.

Step 3: Reference Validation

Canada may conduct reference validations on all the Bidders who have met all the mandatory requirements in Step 1 and may contact the references provided by the Bidder for clarification purposes as specified below.

The Bidder's RFP Point of Contact identified in its Proposal will act as an intermediary between Canada and the client references for the purpose of arranging follow-up communications between the Evaluation Team and the client reference as required. The Bidder's RFP Point of Contact must make every reasonable effort to arrange for such communication with the subject project reference in a timely and professional manner so as to reasonably accommodate Canada's review and evaluation schedule. Canada will act reasonably to accommodate the business and operational requirements of the project reference and will provide the Bidder's Contact no less than three (3) business days written notice of its intention to initiate contact.

The purpose of the reference validations is to allow the Evaluation Team to confirm and validate information provided by the Bidder in its proposal. Any of the information provided by the Bidder with respect to the reference projects may be verified through the reference validation process.

Canada may contact the references for clarification purposes in writing by e-mail (unless the contact at the reference is only available by telephone). These communications will be conducted in both official languages of Canada, English or French, at the preference of the client contact. If Canada is unable to contact the named client contact during the evaluation period, the Bidder will be given an opportunity to submit the name and contact information of an alternate contact from the same client. If the Bidder submits more than the stipulated maximum number of reference projects, only the maximum number will be evaluated in the order presented in the Bidder's proposal.

If there is any inconsistency or conflict between the Bidder's experience qualifications as indicated in the Bidder's proposal and the Bidder's experience qualifications as expressed by a client contact during the

reference validation process, then Canada will re-evaluate the Bidder experience using the information provided by the client contact.

There will be no points assigned in this step of the evaluation process. Once the reference validations have been completed, the information obtained through this process will be used to either confirm if mandatory requirements have been met, or validate the scoring assigned to the Bidder during Step 2 (Evaluation of Rated Requirements) of the evaluation process in accordance with the published evaluation criteria.

In the event that, once the reference information is taken into account, the Bidder is unable, or only partially able, to demonstrate or substantiate the accuracy of its response and its ability to fulfill a mandatory requirement as stated in its bid, its bid will be evaluated as non-compliant and will receive no further consideration.

In the event that, once the reference information is taken into account, the Bidder is unable, or only partially able, to demonstrate or substantiate the accuracy of its response and its ability to fulfill a rated requirement as stated in its bid, depending on the nature and degree of the discrepancy, the score for that specific rated requirement may be adjusted downwards. In no case will the scoring be adjusted upwards when the information obtained through the reference validation process is assessed.

Step 4: Evaluation of Financial Bids

As part of the evaluation process, the financial bids of those Bidders that are considered compliant after Step 3 will be evaluated.

PWGSC will independently assess the financial bids of all technically compliant bids. For each bid under consideration, a **Total Bid Evaluation Price** will be calculated as specified in Attachment B to the RFP using the information that the Bidder provided in its Financial Proposal in response to the Pricing Tables at Annex B to the RFP.

Calculation of Total Bid Evaluation Price: The financial evaluation will be conducted by calculating the Total Bid Evaluation Price: There are two possible financial evaluation methods for this requirement. The first method will be used if three or more bids are determined responsive (see (a) Financial Evaluation - Method A below). The second method will be used if fewer than three bids are determined responsive (see (b) Financial Evaluation - Method B below).

- (a) **Financial Evaluation - Method A:** The following financial evaluation method will be used if three or more bids are determined responsive:
- (i) *Financial Calculation:* The financial evaluation will be conducted using the pricing tables completed by the bidders and the Per Diem Median Rate Evaluation Method explained below. A financial calculation will occur for each Bidder by multiplying its firm per diem rates for the Initial Contract Period and the option period(s) (or the median, whichever is higher) with the estimated number of days of work for each period (as stated in Annex A – Statement of Work), for all the Resource Categories stated in Annex B - Basis of Payment. The sum of such rate calculations will constitute the Total Bid Evaluation Price for that Bidder.
 - (ii) *Per Diem Median Rate Evaluation:*
 - (A) Use: The per diem median rate calculation will apply to modify the rate to be assessed in the financial evaluation of a Bidder, where that Bidder submits a firm per diem rate for a resource category that is lower than the median as calculated below. The per diem median rate calculation is for evaluation purposes only, and the actual submitted per diem rate will be used in any resulting contract in all instances.

- (B) Calculation: Using the firm per diem rate proposed for each individual resource by the technically responsive Bidders, a median rate will be determined for each Resource Category and Initial Contract Period and Option Period(s). The median will be calculated using the median function in Microsoft Excel. If a Bidder bids a firm per diem rate for a Resource Category that is lower than the median, that Bidder's financial evaluation will be conducted using a per diem rate equal to the median for that Resource Category and Period.
- (b) **Financial Evaluation - Method B:** The following financial evaluation method will be used if less than three bids are determined responsive:
- (i) Financial Calculation: The financial evaluation will be conducted using the pricing tables completed by the Bidders. A financial calculation will occur for each Bidder by multiplying its firm per diem rates for the Initial Contract Period and the option period(s) with the estimated number of days of work for each period, for all the Resource Categories stated in Annex A - Statement of Work. The sum of such rate calculations will constitute the Total Bid Evaluation Price for that Bidder.
- (c) **Substantiation of Professional Services Rates**

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

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

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

Once Canada requests substantiation of the rates bid for any resource category, it is the sole responsibility of the Bidder to submit information (as described above and as otherwise may be requested by Canada, including information that would allow Canada to verify information with the resource proposed) that will allow Canada to determine whether it can rely, with confidence, on the Bidder's ability to provide the required services at the rates bid. If Canada determines that the information provided by the Bidder does not adequately substantiate the unreasonably low rates, the bid will be declared non-responsive.

(d) **Formulae in Pricing Tables**

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

Step 5: Determination of Combined Rating Technical Merit and Price and Ranking of Bidders

PWGSC will independently determine each compliant Bidder's **Combined Rating Technical Merit and Price** as follows:

- Technical Bid - Total Technical Score (maximum 60 points)
- Financial Bid - Total Financial Bid Score (maximum 40 points)
- Combined Rating Technical Merit and Price (maximum 100 points)

(a) For each bid:

- (i) Calculation of Total Technical Score: The Total Technical Score will be computed for each responsive Bidder by converting the Technical Score for the point-rated technical criteria, using the following formula and rounded to two decimal places:

$$\frac{\text{Technical Score}}{\text{Maximum Technical Points (2,554 pts)}} \times 60 \text{ points} = \text{Total Technical Score (max. of 60 points)}$$

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

$$\frac{\text{Lowest Total Bid Evaluation Price}}{\text{The Bidder's Total Bid Evaluation Price}} \times 40 \text{ points} = \text{Total Financial Bid Score (max. of 40 points)}$$

- (iii) Calculation of the Combined Rating Technical Merit and Price: Combined Rating Technical Merit and Price will be computed for each responsive Bidder using the following formula, and rounded to two decimal places:

Total Technical Score + Total Financial Bid Score = Combined Rating Technical Merit and Price

- (b) 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.

- (c) **The table below illustrates an example** where all three bids are responsive and the selection of the contractor is determined by a 60/40 ratio of technical merit and price, respectively. The total available points for technical score equal 135 and for price, 45 points, based on the lowest evaluated price of \$45,000.

Basis of Selection - Highest Combined Rating Technical Merit (60%) and Price (40%)

		Bidder 1	Bidder 2	Bidder 3
Overall Technical Score		115/135	89/135	92/135
Evaluated Total Bid Price		\$55,000.00	\$50,000.00	\$45,000.00
Calculations	Technical Merit Score	115/135 x 60 = 51.11	89/135 x 60 = 39.55	92/135 x 60 = 40.89
	Pricing Score	45/55 x 40 = 32.73	45/50 x 40 = 36.00	45/45 x 40 = 40.00
Combined Rating		83.84	75.55	80.89
Overall Rating		1st	3rd	2nd

Step 6: Selection of Successful Bidder for Recommendation

To be declared responsive, a bid must:

- (a) comply with all the requirements of the bid solicitation; and
- (b) meet all mandatory technical evaluation requirements.

Bids not meeting (a) or (b) will be declared non-responsive.

The Bidder that submits the compliant proposal achieving the highest Overall Proposal Score (i.e. Combined Rating Technical Merit and Price) will be recommended for Contract award. In the event of a tie, the compliant proposal with the higher/highest Total Financial Bid score will prevail. Canada will evaluate the first-ranked Bidder's financial capability, to ensure its capability to undertake the project and deliver within the expected Contract framework and time frame.

Bidder financial capability is a mandatory condition precedent to Contract award. If the first ranked Bidder does not pass this evaluation, the Bidder's bid will be declared non-responsive, and a revised ranking will be established in accordance with the procedures herein. Whether any bid is recommended for contract award depends on all the provisions of this bid solicitation (for example, the vendor performance provisions of Standard Instructions 2003 would affect whether an otherwise responsive bid was recommended for award, as would factors such as financial capability).

One contract may be awarded in total as result of this 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.

6. Evaluation of Experience of Bidder's Teaming Members

In the Bidder's response to each requirement where corporate or key personnel experience is being evaluated, the Bidder should specify the name of the entity whose experience is being submitted for evaluation (i.e., whether the experience is that of the Bidder, the parent organization, a Joint Venture partner, etc.). In addition, in the event that the Bidder is using the experience of a parent, an affiliated organization, any subsidiary organization or any major first-tier subcontractors, the Bidder should clearly indicate under each requirement, as applicable, that it has a teaming agreement or contract with this entity, as per the certification provided below following this section.

For the purpose of this solicitation, a Team Member is any entity that the Bidder is proposing to perform any part of the work and whose experience is being used to meet an evaluation requirement. Team Members under this solicitation can ONLY include the following:

(a) For **corporate** experience, except where otherwise expressly specified, only the experience of joint venture partners, a parent organization, an affiliated organization, any subsidiary organization and any major first-tier subcontractor;

(b) For **key personnel** experience, the experience of an individual from a joint venture partner, a parent organization, an affiliated organization, any subsidiary organization or any major first-tier subcontractor.

Eligible Work Experience: as applicable, the following will apply in assessing the Bidder's response to the mandatory or rated requirements.

(A) For Both Corporate and Key Personnel Experience

- (i) Experience listed without providing any supporting data to describe where, how and by whom such experience was obtained will result in the experience not being included for evaluation purposes.
- (ii) Except where otherwise expressly provided, Corporate Team Members or Key Personnel cannot pool their abilities to satisfy any single point-rated requirement of this solicitation. Wherever substantiation of a point-rated requirement is required, the Bidder is requested to indicate which team member or individual satisfies the requirement.
- (iii) Experience listed must include the month and year for both the start and finish dates and should also include the day. If the day is not provided, it will be evaluated as the last day of the month in the case of the start date and the first day of the month in the case of the finish date.
- (iv) For a month of experience to be considered, the experience must be for at least 12 working days in the month.

Example:

A bidder is a joint venture consisting of members X, Y and Z. If a solicitation requires: (a) that the bidder have 3 years of experience providing maintenance services, and (b) that the bidder have 2 years of experience integrating hardware with complex networks, then each of these two requirements can be met by a different member of the joint venture. However, for a single requirement, such as the requirement for 3 years of experience providing maintenance services, the bidder cannot indicate that each of members X, Y and Z has one year of experience, totalling 3 years. Such a response would be declared non-compliant. (Note: this example is not specific to this solicitation and does not relate to the requirements of this solicitation - it is provided only for illustrative purposes.)

(B) For Corporate Experience

- (i) The corporate experience identified by the Bidder to meet specific criteria must be work for which the Bidder was directly responsible. Corporate experience, as a result of work carried out by a parent organization, any affiliated organization and/or any subsidiary organization that may be associated with the Bidder or joint venture member or general partner of the Bidder, as applicable will only be considered if the experience is accessible to the Bidder and the Bidder can rely upon and use the experience of the Team Member throughout the performance of any resulting Contract. The Bidder is required to demonstrate this accessibility through the certification provided under Attachment D - Team Certification. This certification is required to include the name(s) of the entity whose experience is being presented for evaluation or the experience will not be considered by the Evaluation Team. The Bidder is requested to provide this certification with its proposal at bid closing.
- (ii) The Bidder may, however, consist of several firms putting one bid together as a joint venture. In the case of such a joint venture, except as otherwise specified, the experience of the firms forming the joint venture will be considered in determining the Bidder's compliance with the criteria.

(C) For Key Personnel Experience

For any of the Bidder's proposed personnel, the month(s) of experience listed for a project whose time frame overlaps that of another referenced project will only be counted once. For example: Project 1 time frame is July 2001 to December 2001; Project 2 time frame is October 2001 to January 2002; the total months of experience for these two project references is seven (7).

Canada believes that there is a strong correlation between the success of an initiative and a Contractor with well-established relationships with its team members (joint venture partners, partners, parent organization, affiliated organization, any subsidiary organization and major tier-one subcontractors).

PART 5 - CERTIFICATIONS

Bidders must provide the required certifications and documentation to be awarded a contract. 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.

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_equity/eq/emp/fcp/list/inelig.shtml)" list (http://www.labour.gc.ca/eng/standards_equity/eq/emp/fcp/list/inelig.shtml) available from [Human Resources and Skills Development Canada \(HRSDC\) - Labour's website](#)

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

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

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

2. Additional certifications precedent to contract award

The certifications listed below should be completed and submitted with the bid, but may be submitted afterwards. If any of these required certifications is not completed and submitted as requested, the Contracting Authority will so inform the Bidder and provide the Bidder with a time frame within which to meet the requirement. Failure to comply with the request of the Contracting Authority and meet the requirement within that time period will render the bid non-responsive.

2.1 Education and Experience

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

The Bidder certifies that all the information provided in the résumés and supporting material submitted with its bid, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Bidder to be true and accurate. Furthermore, the Bidder warrants that every individual proposed by the Bidder for the requirement is capable of performing the Work described in the resulting contract.

2.2 Status and Availability of Resources

(a) The Bidder certifies that, should it be awarded a contract as a result of the bid solicitation, every individual proposed in its bid will be available to perform the Work as required by Canada's representatives and at the time specified in the bid solicitation or agreed to with Canada's representatives. If for reasons beyond its control, the Bidder is unable to provide the services of an individual named in its bid, the Bidder must propose a substitute with similar qualifications and experience. The Bidder must advise the Contracting Authority of the reason for the substitution and provide the name, qualifications and experience of the proposed replacement. For the purposes of this clause, only the following reasons will be considered as beyond the control of the Bidder: death, sickness, maternity and parental leave, retirement, resignation, dismissal for cause or termination of an agreement for default.

(b) The Bidder certifies that, should it be awarded a contract as a result of the bid solicitation, the bidder will provide additional resources in accordance with the TA process detailed in the Contract to perform the Work as required by Canada's representatives and at the time agreed to with Canada's representatives.

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

PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS

1. Security Requirement

- 1.1 Before award of a contract, the following conditions must be met:
- (a) the Bidder must hold a valid organization security clearance as indicated in Part 7 - Resulting Contract Clauses;
 - (b) the Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work site(s) must meet the security requirement as indicated in Part 7 - Resulting Contract Clauses;
 - (c) the Bidder must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites;
 - (d) the Bidder's proposed location of work performance or document safeguarding must meet the security requirement as indicated in Part 7 - Resulting Contract Clauses;
 - (e) the Bidder must provide the address(es) of proposed location(s) of work performance or document safeguarding as indicated in Part 3 - Section IV Additional Information.
- 1.2 Bidders are reminded to obtain the required security clearance promptly. Any delay in the award of a contract to allow the successful bidder to obtain the required clearance will be at the entire discretion of the Contracting Authority.
- 1.3 For additional information on security requirements, bidders should consult the "Security Requirements for PWGSC Bid Solicitations - Instructions for Bidders" (<http://www.tpsgc-pwgsc.gc.ca/app-acq/lc-pl/lc-pl-eng.html#a31>) document on the [Departmental Standard Procurement Documents](#) website.

2. Financial Capability

A9033T (2012-07-16) Financial Capability applies.

2.1 Financial Capability Requirement: The Bidder must have the financial capability to fulfill this requirement. To determine the Bidder's financial capability, the Contracting Authority may, by written notice to the Bidder, require the submission of some or all of the financial information detailed below during the evaluation of bids. The Bidder must provide the following information to the Contracting Authority within fifteen (15) working days of the request or as specified by the Contracting Authority in the notice:

- (a) Audited financial statements, if available, or the unaudited financial statements (prepared by the Bidder's outside accounting firm, if available, or prepared in-house if no external statements have been prepared) for the Bidder's last three fiscal years, or for the years that the Bidder has been in business if this is less than three years (including, as a minimum, the Balance Sheet, the Statement of Retained Earnings, the Income Statement and any notes to the statements).
- (b) If the date of the financial statements in (a) above is more than five months before the date of the request for information by the Contracting Authority, the Bidder must also provide, unless this is prohibited by legislation for public companies, the last quarterly financial statements (consisting of a Balance Sheet and a year-to-date Income Statement), as of two months before the date on which the Contracting Authority requests this information.

(c) If the Bidder has not been in business for at least one full fiscal year, the following must be provided:

- (i) the opening Balance Sheet on commencement of business (in the case of a corporation, the date of incorporation); and
- (ii) the last quarterly financial statements (consisting of a Balance Sheet and a year-to-date Income Statement) as of two months before the date on which the Contracting Authority requests this information.

A certification from the Chief Financial Officer or an authorized signing officer of the Bidder that the financial information provided is complete and accurate.

(d) A confirmation letter from all of the financial institution(s) that have provided short-term financing to the Bidder outlining the total of lines of credit granted to the Bidder and the amount of credit that remains available and not drawn upon as of one month prior to the date on which the Contracting Authority requests this information.

(e) A detailed monthly Cash Flow Statement covering all the Bidder's activities (including the requirement) for the first two years of the requirement that is the subject of the bid solicitation, unless this is prohibited by legislation. This statement must detail the Bidder's major sources and amounts of cash and the major items of cash expenditures on a monthly basis, for all the Bidder's activities. All assumptions made should be explained as well as details of how cash shortfalls will be financed.

(f) A detailed monthly Project Cash Flow Statement covering the first two years of the requirement that is the subject of the bid solicitation, unless this is prohibited by legislation. This statement must detail the Bidder's major sources and amounts of cash and the major items of cash expenditures, for the requirement, on a monthly basis. All assumptions made should be explained as well as details of how cash shortfalls will be financed.

2.2 If the Bidder is a joint venture, the financial information required by the Contracting Authority must be provided by each member of the joint venture.

2.3 If the Bidder is a subsidiary of another company, then any financial information in 1. (a) to (f) above required by the Contracting Authority must be provided by the ultimate parent company. Provision of parent company financial information does not by itself satisfy the requirement for the provision of the financial information of the Bidder, and the financial capability of a parent cannot be substituted for the financial capability of the Bidder itself unless an agreement by the parent company to sign a Parental Guarantee, as drawn up by Public Works and Government Services Canada (PWGSC), is provided with the required information.

2.4 Financial Information Already Provided to PWGSC: The Bidder is not required to resubmit any financial information requested by the Contracting Authority that is already on file at PWGSC with the Contract Cost Analysis, Audit and Policy Directorate of the Policy, Risk, Integrity and Strategic Management Sector, provided that within the above-noted time frame:

- (a) the Bidder identifies to the Contracting Authority in writing the specific information that is on file and the requirement for which this information was provided; and
- (b) the Bidder authorizes the use of the information for this requirement.

It is the Bidder's responsibility to confirm with the Contracting Authority that this information is still on file with PWGSC.

2.5 Other Information: Canada reserves the right to request from the Bidder any other information that Canada requires to conduct a complete financial capability assessment of the Bidder.

2.6 Confidentiality: If the Bidder provides the information required above to Canada in confidence while indicating that the disclosed information is confidential, then Canada will treat the information in a confidential manner as permitted by the [Access to Information Act](#), R.S., 1985, c.c. A-1, Section 20(1) (b) and (c).

2.7 Security: In determining the Bidder's financial capability to fulfill this requirement, Canada may consider any security the Bidder is capable of providing, at the Bidder's sole expense (for example, an irrevocable letter of credit from a registered financial institution drawn in favour of Canada, a performance guarantee from a third party or some other form of security, as determined by Canada).

3. Insurance Requirements

The Bidder must provide a letter from an insurance broker or an insurance company licensed to operate in Canada stating that the Bidder, if awarded a contract as a result of the bid solicitation, can be insured in accordance with the Insurance Requirements specified in Part 7 of the RFP.

If the information is not provided in the bid, the Contracting Authority will so inform the Bidder and provide the Bidder with a time frame within which to meet the requirement. Failure to comply with the request of the Contracting Authority and meet the requirement within that time period will render the bid non-responsive.

4. Controlled Goods Program

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

5. Former Public Servant

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 awarded to FPS, bidders must provide in writing before contract award for each question below, the answer and, as applicable, the information required.

If the answer to the question and, as applicable, the information required have not been received by the Contracting Authority by the time the evaluation of bids is completed, Canada will inform the Bidder of a time frame within which to provide the answer and, as applicable, the information required. Failure to comply with Canada's request and meet the requirement within the prescribed time frame will render the bid non-responsive.

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:

- (a) an individual;

- (b) an individual who has incorporated;
- (c) a partnership made of former public servants; or
- (d) a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.

"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.

Bidder is requested to use the Bid Submission Form to provide the information below, if required.

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; and
- (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](#).

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; and
- g) number and amount (professional fees) of other contracts subject to the restrictions of a work force reduction 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.

PART 7 - RESULTING CONTRACT CLAUSES

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

1.1 Requirement

- (a) The Contractor agrees to supply to the Client the services described in the Contract, including the Statement of Work, in accordance with, and at the prices set out in, the Contract.
- (b) **Client:** Under the Contract, the "**Client**" is the Department of National Defence.
- (c) **Reorganization of Client:** The Contractor's obligation to perform the Work will not be affected by (and no additional fees will be payable as a result of) the renaming, reorganization, reconfiguration, or restructuring of any Client. The reorganization, reconfiguration and restructuring of the Client includes the privatization of the Client, its merger with another entity, or its dissolution, where that dissolution is followed by the creation of another entity or entities with mandates similar to the original Client. In connection with any form of reorganization, Canada may designate another department or government body as the Contracting Authority or Technical Authority, as required to reflect the new roles and responsibilities associated with the organization.
- (d) **Defined Terms:** Words and expressions defined in the General Conditions or Supplemental General Conditions and used in the Contract have the meanings given to them in the General Conditions or Supplemental General Conditions. Any reference to an Identified User in the Supply Arrangement is a reference to the Client. Also, any reference to a "deliverable" or "deliverables" includes all documentation outlined in this Contract. A reference to a "local office" of the Contractor means an office having at least one full time employee that is not a shared resource working at that location.

1.2 Task Authorization

The Work or a portion of the Work to be performed under the Contract will be authorized using a Task Authorization (TA) as defined herein. The Work described in the TA must be in accordance with the scope of the Contract.

1.2.1 Task Authorization Process

The Task Authorization (TA) will contain the details of the activities to be performed, a description of the deliverables, and a schedule indicating completion dates for the major activities or submission dates for the deliverables. The TA will also include the applicable basis (bases) and methods of payment as specified in the Contract.

As and when required the Contractor will assist DND, through a Task Authorization, in developing measurable performance standards that could be applied to any work to be performed under the Contract and/or in identifying potential areas of work to be performed under a managed service approach in the future.

If a requirement for a specific task is identified, a "statement of task" will be prepared by the DND Technical Authority and will be sent to the DND Procurement Representative, and may be forwarded to the Contracting Authority, as applicable. The DND Procurement Representative will send the Task Authorization to the Contractor. Once it receives the statement of task, the Contractor must submit a quotation detailing the cost and time to complete the task to the DND Procurement Representative and the Contracting Authority.

(a) The Contractor's quotation must be based on the rates 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 12 working days of the request.

(b) Approval Process: If Canada approves the Contractor's task quotation, Canada (by its authorized representative, as described in this Article) will issue the TA by forwarding a signed copy of the final TA form to the Contractor. Whether or not to approve or issue a TA is entirely within Canada's discretion.

(c) Form and Content of Task Authorization:

- (i) The DND Procurement Representative will provide the Contractor with a description of the task using the DND 626, Task Authorization Form in Annex E.
- (ii) The Task Authorization will contain the details of the activities to be performed, a description of the deliverables, and a schedule indicating completion dates for the major activities or submission dates for the deliverables. The TA will also include the applicable basis (bases) and methods of payment as specified in the Contract.
- (iii) A Task Authorization must also contain the following information, if applicable:
 - (A) the task number;
 - (B) the date by which the Contractor's response must be received (which will appear in the draft Task Authorization, but not the issued Task Authorization);
 - (C) the details of any financial coding to be used;
 - (D) the categories of resources and the number required;
 - (E) a description of the work for the task outlining the activities to be performed and identifying any deliverables (such as reports);
 - (F) the start and completion dates;
 - (G) milestone dates for deliverables and payments (if applicable);
 - (H) the number of person-days of effort required;
 - (I) whether the work requires on-site activities and the location;
 - (J) the language profile of the resources required;
 - (K) the level of security clearance required of resources;
 - (L) the price payable to the Contractor for performing the task, 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 task, by submitting time sheets filled in at the time of the work by the individual resources to support the charges); and
 - (M) any other constraints that might affect the completion of the task.
 - (N) with each quotation, the Contractor must provide the following certification:

The Contractor certifies the price quoted:

- (i) is not in excess of the lowest price charged anyone else, including the Contractor's most favoured customer, for the like quality and quantity of the goods, services or both;
- (ii) does not include an element of profit on the sale in excess of that normally obtained by the Contractor on the sale of goods, services or both of like quality and quantity; and
- (iii) does not include any provision for discounts to selling agents.

(d) Contractor's Response to Draft Task Authorization: The Contractor must provide the DND Procurement Representative, within 12 working days of receiving the draft Task Authorization (or within any longer time period specified in the draft TA), the proposed total estimated cost for performing the task and a breakdown of that cost, established in accordance with the Basis of Payment specified in the Contract. The Contractor's quotation must be based on the rates set out in the Contract. The Contractor will not be paid for preparing or providing its response or for providing other information required to prepare and issue the TA.

Resources proposed by the Contractor in response to a TA, will be evaluated by the Technical Authority, in accordance with Annex F Assessment for Resource Evaluation at Task Authorization, attached hereto, for acceptance by the Technical Authority. Should any proposed resource not meet the evaluation criteria, the Contractor shall propose an alternate resource.

(e) Task Authorization Limit and Authorities for Validly Issuing Task Authorizations:

To be validly issued, a TA must include the following signatures:

- (A) the Technical Authority and the DND Procurement Representative; and
- (B) the Contracting Authority.

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

(f) Administration of Task Authorization Process for DND: The administration of the Task Authorization process will be carried out by the DND Procurement Representative. This process includes monitoring, controlling and reporting on expenditures of the contract with task authorizations to the Contracting Authority.

(g) Periodic Usage Reports :

- (i) The Contractor must compile and maintain records on its provision of services to the federal government under authorized TAs issued under the Contract. The Contractor must provide this data to Canada in accordance with the reporting requirements detailed below. If any required information is not available, the Contractor must indicate the reason. If services are not provided during a given period, the Contractor must still provide a "NIL" report. The Contractor must submit the periodic usage reports on a quarterly basis to the Contracting Authority. From time to time, the Contracting Authority may also require an interim report during a reporting period.
- (ii) The quarterly periods are defined as follows:
 - April 1 to June 30;
 - July 1 to September 30;
 - October 1 to December 31; and
 - January 1 to March 31.

The data must be submitted to the Contracting Authority no later than 14 calendar days after the end of the reporting period.

- (iii) Each report must contain the following information for each validly issued TA (as amended):
 - (A) the Task Authorization number and the Task Authorization Revision number(s), if applicable;
 - (B) a title or a brief description of the task;
 - (C) the name, Category of Personnel and level of each resource involved in performing the TA, as applicable;
 - (D) the total estimated cost specified in the TA (applicable taxes extra);
 - (E) the total amount (applicable taxes extra) expended to date;
 - (F) the start and completion date; and
 - (G) the active status, as applicable (e.g., indicate whether work is in progress or if Canada has cancelled or suspended the TA, etc.).
- (iv) Each report must also contain the following cumulative information for all the validly issued TAs (as amended):
 - (A) the amount (applicable taxes extra) specified in the contract (as last amended, if applicable) as Canada's total liability to the contractor for all authorized TAs; and
 - (B) the total amount, (applicable taxes extra), expended to date against all validly issued tasks.

(h) Consolidation of TAs for Administrative Purposes : The Contract may be amended from time to time to reflect all Task Authorizations issued and approved by the Contracting Authority to date, to document the Work performed under those TAs for Administrative purposes.

2. Professional Services – General

- 2.1** The Contractor must provide, as and when requested by Canada using a TA, professional services as described in Annex A. Once a requirement for a resource is identified by Canada (including any resources required under the Contract to be available immediately following award or once a TA is issued), the Contractor must make the resource available to Canada within 10 working days. If an individual resource is named in this Contract with respect to any portion of the work, the Contractor must provide that resource, except to the extent that a replacement is permitted under the General Conditions (in which case the replacement must be provided within the time period described above). This obligation applies despite any changes that Canada may have made to any hardware, software or any other aspect of the Client's operating environment.
- 2.2** If the Contractor fails to meet any of its obligations under this Article and Article 3 below, or fails to deliver any deliverable or complete any task described in the Contract on time, in addition to any other rights or remedies available to Canada under the Contract or the law, Canada may notify the Contractor of the deficiency, in which case the Contractor must submit a written plan to the Technical Authority within the turnaround time expressed in the TA detailing the actions that the Contractor will undertake to remedy the deficiency. The Contractor must prepare and implement the plan at its own expense.

3. Professional Services – Qualifications & Replacement of Personnel

3.1 Qualifications of Personnel: The Contractor must ensure that all personnel assigned to perform the Work under this Contract meet the level of competence required to perform the work described in the SOW and are acceptable to the Technical Authority.

Resources proposed by the Contractor in response to a TA will be evaluated for acceptability by Canada in accordance with Annex F, Assessment for Resource Evaluation at Task Authorization).

3.2 Contractor to Ensure Performance: The Contractor must monitor its employees to ensure that performance is maintained to the satisfaction of the Technical Authority.

3.3 Specific Individuals: When specific persons have been named in the Contract as the persons who must perform the Work, the Contractor must provide the services of the persons so named unless the Contractor is unable to do so for reasons beyond its control. For the purposes of this provision, "reasons beyond its control" does not include the re-assignment of the individual to other projects being handled by the Contractor. Canada may require a statutory declaration from the Contractor in respect of any personnel removed for reasons beyond the Contractor's control.

i) If the Contractor must replace an individual named in the Contract, for reasons beyond its control, the replacement must meet the minimum qualifications listed in the SOW, Annex A. In the case of project key personnel in the SOW, the replacement must also have similar qualifications and experience as the person named in the Contract.

ii) Named Resources:

Note: The following have been identified as key resources by the Contractor.

Named Positions (to be completed for contract)

Name	Resource Category

3.4 Back-up Resources: The Contractor undertakes to supply competent back-up staff so that in the event of any cause which renders the personnel unavailable to the assignment for which service was requested, such occurrence does not extend the completion date specified in this contract unless such extension has been accepted by the Technical Authority and incorporated into the Contract or TA in the form of an amendment to the Contract or the TA approved by the Technical Authority.

3.5 Replacement and Knowledge Transfer: If it is necessary to replace personnel, the Contractor must give at least ten (10) working days notice in writing to the Project Authority, but thirty days would be preferable. The replacement must possess qualifications acceptable to the Technical Authority and be approved by the Technical Authority prior to replacement. Any replacement will be assigned to shadow the "to be replaced" resource (or a DND resource when appropriate) for knowledge transfer, for a period of up to a maximum of ten (10) working days to be determined with the Technical Authority, at the Contractor's own expense. This shall also apply to Contractor

personnel replaced at the request of the Technical Authority as not being suitable. The Technical Authority reserves the right to interview (at no cost to Canada) the personnel assigned to the Project.

- 3.6 Resources with Different or Additional Skills:** To the extent that the performance of the work in accordance with this Contract requires professional services from individuals with different or additional skills from those described in the Statement of Work, the Contractor must provide individuals capable of performing such Work at prices to be agreed upon by the parties.
- 3.7 Competitive Award:** The Contractor acknowledges that the Contract has been awarded as a result of a competitive process. No additional charges will be allowed to compensate for errors, oversights, misconceptions or underestimates made by the Contractor when bidding for the Contract.
- 3.8 Purpose of Estimates:** All estimated costs contained in the Contract are included solely for the administrative purposes of Canada and do not represent a commitment on the part of Canada to purchase goods or services in these amounts. Any commitment to purchase specific amounts or values of goods or services are described elsewhere in the Contract.

4. Change Management Procedures

- 4.1** Without in any way diminishing or restricting limitation, any of the responsibilities of the Contractor, the Technical Authority may, by giving notice to the Contractor, at any time and from time to time, request changes in the Work described in the Contract or in any approved TA(s). Conversely, the Contractor may wish to propose a change to the Work described in the Contract or changes in any approved TA(s).
- 4.2** Where the Technical Authority requests a change or modification, the Technical Authority will request a written Change Proposal from the Contractor for consideration. Where the Contractor wishes to propose a change or a modification, the Contractor will submit a written Change Proposal to the Technical Authority for consideration.
- 4.3** All changes, whether there is a cost or not, will require formal authorization through a TA or a Contract amendment.
- 4.4** As soon as reasonably possible and no later than 10 working days after receipt of the request, the Contractor must either:
- (i) give notice to the Technical Authority that the proposed modification is not sufficiently defined; or
 - (ii) submit to the Technical Authority a completed Change Proposal which must contain the following:
 - (A) a description of the change(s);
 - (B) the decrease or increase, if any, which the proposed change will cause to the Contract or TA price;
 - (C) change(s) in delivery dates, if any, for any part of the Work affected by the directed or proposed changes;
 - (D) the anticipated effect of the change(s) on the performance of the Work;
 - (E) the plan or plans to minimize the effect of the change(s) on the performance of the Work;
 - (F) recommended plan or plans for the completion of the Work;
 - (G) any other change in the provisions of the TA or this Contract; and
 - (H) such additional information as may be reasonably required by the Project

Authority.

If the Contractor's Proposal is accepted, the Technical Authority and the Contractor agree to commence negotiations with respect to changes in the Work described in the Contractor's Proposal as soon as practicable.

- 4.5 All proposed changes by the Contractor to any previously approved deliverable will require the revised deliverable to be resubmitted by the Contractor to the Technical Authority for acceptance in accordance with this Contract.
- 4.6 No change in the Work, or in price, in the Contract or any resulting TA, resulting from changes in the Work, will be recognized under this Contract or any resulting TA(s), except in accordance with the provisions described in this Article. No one other than the Contracting Authority has the authority to approve any amendments or changes to this Contract or any resulting TA(s).
- 4.7 If any directed change or changes approved after consideration of the Proposal, causes an increase or decrease in the price of the Contract or any resulting TA or the time for performance, then the price of the respective TA, the time for performance and other affected provisions of the Contract or the respective TA must be adjusted accordingly, provided that, at no time, must the Contractor be entitled compensation for any loss of anticipated profits. The Contractor must not carry out any Work arising from a change proposed by the Contractor or requested by the Technical Authority until negotiations between the Contractor and Canada are completed to a mutual agreement, and the Contractor is in receipt of written authorization to proceed with the change as received from the Contracting Authority.
- (a) It is the responsibility of the Contractor to verify with the Technical Authority and the Contracting Authority whether the Work activity falls within the scope of the Contract or any approved TA(s), in the event that any uncertainty exists.
- (b) If preparation of a Change Proposal requires significant effort (10 working days or more) on the part of the Contractor, the Contractor will notify the Technical Authority and the Contracting Authority of the Contractor's costs to prepare any such Change Proposal, that is, the "Estimated Cost". In such event, the Contracting Authority will:
- (c) withdraw the request for the Change Proposal response; or
- (d) authorize the Contractor to proceed to prepare the Change Proposal through the issuance of a TA, in which event Canada will be liable for the Contractor's costs to prepare the Change Proposal up to an amount not to exceed the Estimated Cost.
- 4.8 If the number of Change Proposals that the Contractor is required to prepare in any month will, in the aggregate, require significant effort on the part of the Contractor, the Contractor's Representative will give notice thereof to the Contracting Authority and the Technical Authority. In such event, the parties will meet promptly to:
- (i) identify the Change Proposal requests that may be withdrawn and prioritize those remaining; or
- (ii) identify the Estimated Cost to prepare the change proposals, and Canada must then authorize or withdraw the change requests in a similar manner as described in sub-article j) above.
- 4.9 The costs of any changes pursuant to this Article will be negotiated based on pricing contained in the Contract.

5. 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.

5.1 General Conditions

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

5.2 Supplemental General Conditions

The following Supplemental General Conditions apply to and form part of the Contract:

4002, dated 2010-08-16 Software Development or Modification Services;

4004, dated 2013-04-25 Maintenance and Support Services for Licensed Software; and

4006, dated 2010-08-16 Contractor to Own Intellectual Property Rights in Foreground Information;

4008, dated 2008-12-12 Personal Information.

6. Security Requirement

6.1 The following security requirement (SRCL and related clauses) applies and form part of the Contract.

Note: The designated level of security is Enhanced Reliability. There will also be a requirement for some resources to be designated as Secret for certain support services. Specific resources will be defined in any resultant Final RFP.

6.2 Contractor’s Site or Premises Requiring Safeguard Measures

The Contractor must diligently maintain up-to-date, the information related to the Contractor’s site or premises, where safeguard measures are required in the performance of the Work, for the following addresses:

Address:
Street Number / Street Name, Unit / Suite / Apartment Number
City, Province, Territory / State
Postal Code / Zip Code
Country

7. Term of Contract

7.1 Period of the Contract

The period of the Contract is from _____ to _____ inclusive.

7.2 Option to Extend the Contract

The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to four (4) additional one-year period(s) under the same conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions as set out in the Basis of Payment.

Canada may exercise this option at any time by sending a written notice to the Contractor at least 15 calendar days before the expiry date of the Contract. The option may only be exercised by the Contracting Authority, and will be evidenced for administrative purposes only, through a contract amendment.

8. Authorities

8.1 Contracting Authority

The Contracting Authority for the Contract is:

Public Works and Government Services Canada
Acquisitions Branch
Special Projects Initiatives Directorate (SPID)
Address: 11 Laurier Street, Gatineau (QC), K1A 0S5

Telephone: 819-956-8224
Facsimile: 819-956-8303
E-mail address: ApprovisionnementSISFC.CFHISProcurement@tpsgc-pwgsc.gc.ca

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

8.2 DND Procurement Representative:

The DND Procurement Representative for the Contract is:

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

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

The DND Procurement Representative is the representative of the department or agency for whom the Work is being carried out under the Contract and is responsible for matters concerning the administration aspects of the Work under the Contract, communication with the Contracting Authority on all matters concerning the Contract, procurement initiation authority, providing PWGSC with reports on Contract utilization, management of Contract cash flow and FAA Section 34 approval and processing of all invoices. Technical matters may be discussed with the DND Procurement Representative, however the DND Procurement Representative has no authority to authorize changes to the scope of the Work. Changes to the scope of the Work can only be made through a contract amendment issued by the Contracting Authority.

8.3 Technical Authority

The Technical Authority for the Contract is:

Name: _____
Title: _____
Organization: _____

Address: _____

Telephone: ____-____-_____

Facsimile: ____-____-_____

E-mail address: _____

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

8.4 Contractor's Representative

Name: _____

Title: _____

Organization: _____

Address: _____

Telephone: ____-____-_____

Facsimile: ____-____-_____

E-mail address: _____

9. Payment

(a) Basis of Payment

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

Estimated Cost: \$ _____

(ii) Pre-Authorized Travel and Living Expenses

Canada will reimburse the Contractor for its pre-authorized travel and living expenses reasonably and properly incurred in the performance of the Work outside the National Capital Region, 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 National Joint Council Travel Directive, and with the other provisions of the directive referring to "travellers", rather than those referring to "employees". All travel must have the prior authorization of the Technical Authority. The Contractor will not be able to charge for time spent travelling at the per diem/hourly rates set out in the Contract.

All payments are subject to government audit.

Estimated Cost: \$ _____

(iii) Applicable taxes:

Estimated Cost: \$ _____

- (iv) **Competitive Award:** The Contractor acknowledges that the Contract has been awarded as a result of a competitive process. No additional charges will be allowed to compensate for errors, oversights, misconceptions or underestimates made by the Contractor when bidding for the Contract.
- (v) **Professional Services Rates:** In Canada's experience, bidders from time to time propose rates at the time of bidding for one or more Resource Categories that they later refuse to honour, on the basis that these rates do not allow them to recover their own costs and/or make a profit. This denies Canada of the benefit of the awarded contract. If the Contractor does not respond or refuses to provide an individual with the qualifications described in the Contract within the time described in the Contract (or proposes instead to provide someone from an alternate category at a different rate), whether or not Canada terminates the Contract as a whole or in part or chooses to exercise any of the rights provided to it under the general conditions, Canada may impose sanctions or take other measures in accordance with the PWGSC Vendor Performance Corrective Measure Policy (or equivalent) then in effect, which measures may include an assessment that results in conditions applied against the Contractor to be fulfilled before doing further business with Canada, or full debarment of the Contractor from bidding on future requirements.
- (vi) **Purpose of Estimates:** All estimated costs contained in the Contract are included solely for the administrative purposes of Canada and do not represent a commitment on the part of Canada to purchase goods or services in these amounts. Any commitment to purchase specific amounts or values of goods or services are described elsewhere in the Contract.
- (b) **Limitation of Expenditure:** Canada's total liability to the Contractor under the Contract must not exceed the amount set out on page one of the Contract, less any applicable taxes extra. With respect to the amount set out on page one of the Contract, Customs duties are included, and applicable taxes are included, if applicable. Any commitments to purchase specific amounts or values of goods or services are described elsewhere in the Contract.
- No increase in the total liability of Canada or in the price of the Work resulting from any design changes, modifications or interpretations of the Work, will be authorized or paid to the Contractor unless these design changes, modifications or interpretations have been approved, in writing, by the Contracting Authority before their incorporation into the Work. The Contractor must not perform any work or provide any service that would result in Canada's total liability being exceed before obtaining the written approval of the Contracting Authority. The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum when:
- (A) it is 75 percent committed, or
 - (B) 4 months before the Contract expiry date, or
 - (C) as soon as the Contractor considers that the contract funds provided are inadequate for the completion of the Work,
- whichever comes first.
- If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority a written estimate for the additional funds required. Providing this information does not increase Canada's liability.
- (c) **For the Work described in the Statement of Work and its appendices subject to a validly issued Task Authorization (TA),** one of the following types of basis of payment will form part of the approved TA.
- (i) *Firm Price TA*

In consideration of the Contractor satisfactorily competing all of its obligations under the approved TA, the Contractor will be paid the firm price stipulated in the TA, as determined in accordance with the Pricing Tables in Annex B. Customs duties are included and applicable taxes are extra, if applicable.

Canada will not pay the Contractor for any design changes, modifications or interpretations of the Work unless they have been approved, in writing, by the Technical Authority before their incorporation into the Work.

(ii) TAs subject to a Limitation of Expenditure

The Contractor will be reimbursed for the costs reasonably and properly incurred in the performance of the Work in the approved TA, as determined in accordance with the Pricing Tables in Annex B, to the limitation of expenditure specified in the approved TA.

Canada's total liability to the Contractor under the approved TA must not exceed the limitation of expenditure specified in the approved TA. Customs duties are included and applicable taxes are extra, if applicable.

No increase in the liability of Canada or in the price of the Work specified in the approved TA 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 TA Approval Authority before their incorporation into the Work. The Contractor must not perform any work or provide any service that would result in Canada's liability being exceeded before obtaining the written approval of the Technical Authority.

The Contractor must notify the TA Approval Authority in writing as to the adequacy of the sum:

- (A) when it is 75 percent committed, or
- (B) four (4) months before the final delivery date specified in the TA, or
- (C) as soon as the Contractor considers that the funds provided are inadequate for the completion of the Work, whichever comes first.

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

(iii) TAs that are Cost Reimbursable to a Ceiling Price:

For TAs that are cost reimbursable to a Ceiling Price, the Ceiling Price specified in the approved TA is the Ceiling Price and is subject to downward adjustment so as not to exceed the actual charges and costs reasonably incurred in the performance of the Work and computed in accordance with the pricing breakdown in the approved TA. The requirements of the TA shall be completed in accordance with the terms and conditions of this Contract and subject to the Ceiling Price. No additional funds shall be made available.

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

- (i) Canada will pay the Contractor no more frequently than once a month in accordance with the Basis of Payment. The Contractor must submit time sheets for each resource showing the days and hours worked to support the charges claimed in the invoice.
- (ii) Once Canada has paid the maximum TA price, Canada will not be required to make any further payment, but the Contractor must complete all the Work described in the TA, all of which is required to be performed for the maximum TA price. If the Work described in

the TA is completed in less time than anticipated, and the actual time worked (as supported by the time sheets) at the rates set out in the Contract is less than the maximum TA price, Canada is only required to pay for the time spent performing the work related to that TA.

(e) Time Verification

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

(f) Discretionary Audit

C0101C (2010-01-11) [Discretionary Audit - Non-commercial Goods and/or Services](#) .

The estimated amount of profit included in the Contractor's price or rate certification is subject to audit by Canada, before or after payment is made to the Contractor under the conditions of the Contract. The purpose of the audit would be to determine whether the actual profit earned on a single contract if only one exists, or the aggregate of actual profit earned by the Contractor on a series of negotiated firm price and fixed-time rate contracts performed during a particular period selected, is reasonable and justifiable based on the estimated amount of profit included in earlier price or rate certification(s).

If the audit demonstrates that the actual profit is not reasonable and justifiable, as defined above, the Contractor must repay Canada the amount found to be in excess.

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

(i) Where the Contractor, its employees, subcontractors, or agents are providing services on government premises under the Contract and those premises are inaccessible because of the evacuation or closure of government offices, and as a result no work is performed, Canada is not responsible for paying the Contractor for work that otherwise would have been performed if there had been no evacuation or closure.

(ii) If, as a result of any strike or lock-out, the Contractor or its employees, subcontractors or agents cannot obtain access to government premises and, as a result, no work is performed, Canada is not responsible for paying the Contractor for work that otherwise would have been performed if the Contractor had been able to gain access to the premises.

All payments are subject to government audit.

10. Taxes – Foreign-based Contractors

C2000C - (2007-11-30), Taxes - Foreign-based Contractor applies.

11. Canadian Customs Duties and Sales Tax - Foreign-based Contractor

C2605C - (2008-05-12), Canadian Customs Duties and Sales Tax - Foreign-based Contractor.

12. Price Protection - Most Favoured Customer (New Labour Categories)

- (a) Where Canada seeks to add a new labour category in respect of a requirement for a resource with different or additional skills to perform Work in accordance with the Contract, the Contractor certifies that to the best of the Contractor's knowledge, the pricing for the new category it is charging to Canada under this Contract is not higher than the lowest prices/rates that it has

charged any other customer (including other Government of Canada entities) for a similar quality and quantity of services in the year before the labour category is added to this Contract.

(b) The Contractor also agrees that, if after the Contract Award date of this Contract it reduces the prices/rates it charges to other customers for any New Labour Categories which were added to the Contract after the Contract Award Date for a similar quality and quantity of services, it will reduce the prices/rates for all remaining services performed by resources in the new labour category under this Contract (with notice to the Contracting Authority).

(c) At any time during the 5 years after making the final payment under this Contract or until all outstanding claims and disputes are settled, whichever is later, Canada has the right to audit the Contractor's records to verify that it is receiving (or has received) prices/rates in accordance with this certification.

(d) During this audit, the Contractor must produce invoices and contracts for similar services (similar quality and quantity) sold to other customers from one year before this Contract until the end of this Contract. If the Contractor is required by statute or contract to keep another customer's information confidential, the Contractor may black out any information on the invoices or contracts that could reasonably reveal the identity of the customer (such as the customer's name and address), as long as the Contractor provides, together with the invoices and contracts, a certification from its Senior Financial Officer describing the profile of the customer (e.g., whether it is a public sector or private sector customer and the customer's size and service locations).

(e) In determining whether the services sold to another customer were of similar quality, the terms and conditions of the contract under which those services were delivered will be considered, if those terms and conditions are reasonably likely to have had a material effect on pricing.

(f) If Canada's audit reveals that the Contractor charged lower prices/rates for a similar quality and quantity of services under any contract where services were made in the year before this Contract was issued, or that the Contractor delivered additional services under this Contract after reducing its prices for other customers but without reducing the prices/rates under this Contract, then the Contractor must pay to Canada the difference between the amount charged to Canada and the amount charged to the other customer, up to a maximum of 25% of the value of this Contract.

(g) Canada acknowledges that this commitment does not extend to prices/rates charged by any affiliates of the Contractor.

13. Invoicing Instructions

(a) The Contractor must submit a claim for payment using form [PWGSC-TPSGC 1111](#), Claim for Progress Payment.

Each claim must show:

- (i) all information required on form [PWGSC-TPSGC 1111](#);
- (ii) all applicable information detailed under the section entitled "Invoice Submission" of the general conditions;
- (iii) a list of all expenses;
- (iv) expenditures plus pro-rated profit or fee;

(v) the description and value of the milestone claimed as detailed in the Contract.

Each claim must be supported by:

- (i) a copy of time sheets to support the time claimed;
 - (ii) a copy of the invoices, receipts, vouchers for all direct expenses, travel and living expenses;
 - (iii) a copy of the monthly progress report.
- b) Applicable Taxes must be calculated on the total amount of the claim before the holdback is applied. At the time the holdback is claimed, there will be no Applicable Taxes payable as it was claimed and payable under the previous claims for progress payments.
- c) The Contractor must prepare and certify one original and two (2) copies of the claim on form [PWGSC-TPSGC 1111](#), and forward it to the Technical Authority identified under the section entitled "Authorities" of the Contract for appropriate certification after inspection and acceptance of the Work takes place.
- The Technical Authority will then forward the original and two (2) copies of the claim to the Contracting Authority for certification and onward submission to the Payment Office for the remaining certification and payment action.
- d) The Contractor must not submit claims until all work identified in the claim is completed.

14. Certifications

14.1 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.

14.2 Federal Contractors Program for Employment Equity - Default by the Contractor

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

15. Applicable Laws

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

16. 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;
- b) the Supplemental Terms and Conditions ; 4002 (2010-08-16) Software Development or Modification Services; 4004 (2013-04-25) Maintenance and Support Services for Licensed Software; 4006 (2010-08-16) Contractor to Own Intellectual Property Rights in Foreground Information; 4008, dated 2008-12-12 Personal Information;
- c) the General Conditions 2035 (2013-06-27);
- d) Annex A Statement of Work;
- e) Annex B Basis of Payment;
- f) Annex C Security Requirements Check List;
- g) Annex D Federal Contractors Program for Employment Equity - Certification;
- h) the signed Task Authorizations (including all of its annexes, if any);
- i) 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)*).

17. Defence Contract

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

SACC *Manual* clause A90062C (2011-05-16) Canadian Forces Sites .

SACC *Manual* clause B1501C (2006-06-16) Electrical Equipment used under contract .

18. Insurance

SACC *Manual* clause G1005C (2008-05-11) Insurance .

18.1 Compliance with Insurance Requirements

(i) The Contractor must comply with the insurance requirements specified in this Article. The Contractor must maintain the required insurance coverage for the duration of the Contract. Compliance with the insurance requirements does not release the Contractor from or reduce its liability under the Contract.

(ii) The Contractor is responsible for deciding if additional insurance coverage is necessary to fulfill its obligation under the Contract and to ensure compliance with any applicable law. Any additional insurance coverage is at the Contractor's expense, and for its own benefit and protection.

(iii) The Contractor should forward to the Contracting Authority within ten (10) days after the date of award of the Contract a Certificate of Insurance evidencing the insurance coverage. Coverage must be placed with an Insurer licensed to carry out business in Canada and the Certificate of Insurance must confirm that the insurance policy complying with the requirements is in force. If the Certificate of Insurance has not been completed and submitted as requested, the Contracting Authority will so inform the Contractor and provide the Contractor with a time frame within which to meet the requirement. Failure to comply with the request of the Contracting Authority and meet the requirement within the time period will constitute a default under the General Conditions. The Contractor must, if requested by the Contracting Authority, forward to Canada a certified true copy of all applicable insurance policies.

18.2 Commercial General Liability Insurance

(i) The Contractor must obtain Commercial General Liability Insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature, but for not less than \$2,000,000 per accident or occurrence and in the annual aggregate.

(ii) The Commercial General Liability policy must include the following:

(A) Additional Insured: Canada is added as an additional insured, but only with respect to liability arising out of the Contractor's performance of the Contract. The interest of Canada should read as follows: Canada, as represented by Public Works and Government Services Canada.

(B) Bodily Injury and Property Damage to third parties arising out of the operations of the Contractor.

(C) Products and Completed Operations: Coverage for bodily injury or property damage arising out of goods or products manufactured, sold, handled, or distributed by the Contractor and/or arising out of operations that have been completed by the Contractor.

(D) Personal Injury: While not limited to, the coverage must include Violation of Privacy, Libel and Slander, False Arrest, Detention or Imprisonment and Defamation of Character.

(E) Cross Liability/Separation of Insured: Without increasing the limit of liability, the policy must protect all insured parties to the full extent of coverage provided. Further, the policy must apply to each Insured in the same manner and to the same extent as if a separate policy had been issued to each.

(F) Blanket Contractual Liability: The policy must, on a blanket basis or by specific reference to the Contract, extend to assumed liabilities with respect to contractual provisions.

(G) Employees and, if applicable, Volunteers must be included as Additional Insured.

(H) Employers' Liability (or confirmation that all employees are covered by Worker's compensation (WSIB) or similar program)

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

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

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

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

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

18.3 Errors and Omissions Liability Insurance

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

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

(iii) The following endorsement must be included:

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

19. Safeguarding Electronic Media

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

20. Timely Problem Identification

(a) The Contractor must immediately advise the Contracting Authority and Technical Authority in writing of any and all situations or difficulties that the Contractor considers will have a significant impact upon the scope of the Work, expected Project achievement, delivery schedule, person-power or cost to Canada. Notwithstanding the submission of any such report, the Contractor remains responsible for the completion of the Work in accordance with the terms of this Contract.

(b) Such reports must include proposed detailed remedial action plans to resolve or alleviate the identified situations or difficulties. The plans must set out the Contractor's detailed estimates of any increase in time, resources and cost to affect such plans. Such plans must include all reasonable options for consideration by Canada plus the costs and consequences to Canada of taking no remedial action and must also provide a reasonable amount of time for Canada to review these options and obtain any necessary funding authorization.

(c) The Contractor will be prohibited from claiming for any additional costs incurred in remedying a problem not reported as described above in a timely fashion, and will be required to remedy such problems at its own expense.

21. Access to Canada's Property and Facilities

- (a) Canada's property, facilities, equipment, documentation and personnel are not automatically available to the Contractor. If the Contractor would like access to any of these, it is responsible for making a request to the Technical Authority. Unless expressly stated in the Contract, Canada has no obligation to provide any of these to the Contractor. If Canada chooses, in its discretion, to make its property, facilities, equipment, documentation or personnel available to the Contractor to perform the Work, Canada may require an adjustment to the Basis of Payment and additional security requirement may apply.
- (b) Contractor personnel are employees of the Contractor and are paid by the Contractor on the basis of services rendered. Where the Contractor, its employees, subcontractors, or agents are providing services on government premises pursuant to this Contract and the said premises become non accessible due to, but not limited to, evacuation, closure of government offices or as a result of any strike or lockout, and consequently no Work is being performed as a result of the closure or when access was prevented, Canada will not be liable for payment.

22. Transition Services

- (a) The Contractor agrees that, in the period leading up to the end of the Contract Period and for up to 3 months afterwards, it will make all reasonable efforts to assist Canada in the transition from this Contract to a new contract with another supplier. The Contractor agrees that there will be no charge for these services.
- (b) The Contractor will cooperate with the Technical Authority and with the incoming contractor to ensure a seamless transition and a continuance of service including transferring data, and winding down of services.

23. Dispute Resolution

- (a) If a dispute arises out of, or in connection with this Contract, the parties agree to meet to pursue resolution through negotiation or other appropriate dispute resolution process before resorting to litigation.
- (b) All information exchanged during this meeting or any subsequent dispute resolution process, shall be regarded as "without prejudice" communications for the purpose of settlement negotiations and shall be treated as confidential by the parties and their representatives, unless otherwise required by law. However, evidence that is independently admissible or discoverable shall not be rendered inadmissible or non-discoverable by virtue of its use during the dispute resolution process.
- (c) The parties agree that the representatives selected to participate in the dispute resolution process will have the authority required to settle the dispute or will have a rapid means of obtaining the requisite authorization.
- (d) These clauses shall not affect any of Canada's rights of cancellation or termination contained in this Contract.

24. Limitation of Liability - Information Management/Information Technology

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

(b) First Party Liability:

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

(A) any infringement of intellectual property rights to the extent the Contractor breaches the section of the General Conditions entitled "Intellectual Property Infringement and Royalties";

(B) physical injury, including death.

(ii) The Contractor is liable for all direct damages affecting real or tangible personal property owned, possessed, or occupied by Canada.

(iii) Each of the Parties is liable for all direct damages resulting from any breach of confidentiality under the Contract. Each of the Parties is also liable for all indirect, special or consequential damages in respect of any unauthorized disclosure of the other Party's trade secrets (or trade secrets of a third party provided by one Party to another under the Contract) relating to information technology.

(iv) The Contractor is liable for all direct damages relating to any encumbrance or claim relating to any portion of the Work for which Canada has made any payment. This does not apply to encumbrances or claims relating to intellectual property rights, which are addressed under (i)(A) above.

(v) The Contractor is also liable for any other direct damages to Canada caused by the Contractor in any way relating to the Contract, including:

(A) any breach of the warranty obligations under the Contract, up to the total amount paid by Canada (including any applicable taxes) for the goods and services affected by the breach of warranty; and

(B) Any other direct damages, including all identifiable direct costs to Canada associated with re-procuring the Work from another party if the Contract is terminated either in whole or in part for default, up to an aggregate maximum for this subparagraph (B) of the greater of 0.75 times the total estimated cost (meaning the dollar amount shown on the first page of the Contract in the cell titled "Total Estimated Cost" or shown on each call-up, purchase order or other document used to order goods or services under this instrument), or \$2,000,000.00.

In any case, the total liability of the Contractor under subparagraph (v) will not exceed the total estimated cost (as defined above) for the Contract or \$2,000,000.00, whichever is more.

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

(c) Third Party Claims:

(i) Regardless of whether a third party makes its claim against Canada or the Contractor, each Party agrees that it is liable for any damages that it causes to any third party in connection with the Contract as set out in a settlement agreement or as finally determined by a court of competent jurisdiction, where the court determines that the Parties are jointly and severally liable or that one Party is solely and directly liable to the third party. The amount of the

liability will be the amount set out in the settlement agreement or determined by the court to have been the Party's portion of the damages to the third party. No settlement agreement is binding on a Party unless its authorized representative has approved the agreement in writing.

(ii) If Canada is required, as a result of joint and several liability, to pay a third party in respect of damages caused by the Contractor, the Contractor must reimburse Canada by the amount finally determined by a court of competent jurisdiction to be the Contractor's portion of the damages to the third party. However, despite Sub-article (i), with respect to special, indirect, and consequential damages of third parties covered by this Section, the Contractor is only liable for reimbursing Canada for the Contractor's portion of those damages that Canada is required by a court to pay to a third party as a result of joint and several liability that relate to the infringement of a third party's intellectual property rights; physical injury of a third party, including death; damages affecting a third party's real or tangible personal property; liens or encumbrances on any portion of the Work; or breach of confidentiality.

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

25. Joint Venture Contractor

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

<p>Note to Bidders: <i>This Article will be deleted if the bidder awarded the contract is not a joint venture. If the contractor is a joint venture, this clause will be completed with information provided in its bid.</i></p>

26. Controlled Goods Program

A9131C (2011-05-16) Controlled Goods Program

27. Representations and Warranties

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

28. Identification Protocol Responsibilities

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

(a) Contractor Representatives who attend a Government of Canada meeting (whether internal or external to Canada's offices) must identify if an individual is not a permanent employee of the Contractor prior to the commencement of the meeting, to ensure that each meeting participant is aware of the fact that the individual is not a Contractor permanent employee;

(b) During the performance of any Work at a Government of Canada site, each Contractor Representative must be clearly identified at all times as being a Contractor Representative; and

(c) If a Contractor Representative requires the use of the Government of Canada's e-mail system in the performance of the Work, then the individual must clearly identify him or herself as an agent or subcontractor of the Contractor in all electronic mail in the signature block as well as under "Properties." This identification protocol must also be used in all other correspondence, communication, and documentation.

(d) If Canada determines that the Contractor is in breach of any obligation stated in this Article, upon written notice from Canada the Contractor must submit a written action plan describing corrective measures it will implement to eliminate the recurrence of the problem. The Contractor will have five working days to deliver the action plan to the Client and the Contracting Authority, and twenty working days to rectify the underlying problem.

(e) In addition to any other rights it has under the Contract, Canada may terminate the Contract for default if the corrective measures required of the Contractor described above are not met.

ANNEX A

STATEMENT OF WORK

DEPARTMENT OF NATIONAL DEFENCE

DRAFT REQUEST FOR PROPOSAL W8474-03-BH01

CANADIAN FORCES HEALTH INFORMATION SYSTEM (CFHIS) SUPPORT SERVICES

1	REQUIREMENT	53
2	BACKGROUND	54
3	OBJECTIVE	54
4	SCOPE	54
	4.1 IN-SERVICE SUPPORT.....	55
	4.2 SYSTEM EXPANSION SUPPORT	56
5	RESPONSIBILITIES	58
	5.1 DND HIGH LEVEL RESPONSIBILITIES.....	58
	5.2 CONTRACTOR HIGH LEVEL RESPONSIBILITIES.....	58
6	APPLICABLE DOCUMENTS AND STANDARDS	58
	6.1 IEEE STANDARDS TO BE APPLIED IN SYSTEM MANAGEMENT	59
	6.2 ORGANISATIONAL OPERATING STANDARDS	59
	6.3 BUSINESS AREA AND/OR TECHNOLOGY STANDARDS	59
	6.4 DND POLICIES, PROCEDURES AND STANDARDS.....	60
7	TECHNICAL ENVIRONMENT	60
	7.1 SYSTEM HOSTING:	61
	7.2 CFHIS APPLICATIONS INTEGRATION:	61
	7.3 CFHIS COTS APPLICATIONS:.....	61
	7.4 CENTRAL USER MANAGEMENT.....	61
	7.5 CFHIS THIN-CLIENT ARCHITECTURE	62
	7.6 SYSTEM ENVIRONMENTS	62
	7.7 END-USER WORKSTATION.....	62
	7.8 TECHNOLOGIES USED	62
8	CONTRACTOR RESOURCE TYPES	63
9	TASKS	65
	9.1 PROGRAMMER SOFTWARE DEVELOPER.....	65
	9.2 PROGRAMMER/ANALYSTS.....	65
	9.3 JUNIOR PROGRAMMER	67
	9.4 TECHNOLOGY ARCHITECT.....	67
	9.5 TESTER.....	67
	9.6 DATABASE ADMINISTRATOR	68
	9.7 IT SECURITY ENGINEER.....	69
	9.8 CONTRACTOR TEAM MANAGER.....	69
	9.9 PROJECT MANAGER	69
	9.10 MEDICAL TECHNOLOGY ADVISOR.....	70
	9.11 TRAINING DEVELOPER.....	71
	9.12 TRAINER.....	71
10	DELIVERABLES	72
11	WORKING LOCATION AND HOURS	73
12	GOVERNMENT FURNISHED EQUIPMENT	73
13	ACCEPTANCE	73
14	REPORTING REQUIREMENTS	73
15	LANGUAGE REQUIREMENTS	73
16	ABBREVIATIONS AND ACRONYMS	74

1. REQUIREMENT

The Department of National Defence (DND) has a specific requirement for services to maintain, update and expand the Canadian Forces Health Information System (CFHIS) and an ad-hoc requirement for the integration of other information systems operating in its business domain of Health Services.

The Contractor must have a proven history of supporting Health Information Systems (HIS) and must provide professional services in the various aspects of health information technology.

2. BACKGROUND

CFHIS is a modern health information management system designed to ensure that the health records of all Canadian Armed Forces (CAF) members are effectively and securely managed. CFHIS consists of a suite of Commercial-Off-The-Shelf (COTS) software applications that support various functions including: patient registration and scheduling, medical documentation, diagnostic imaging, laboratory, and dental treatment. These applications are integrated to create a complete Electronic Health Record (EHR) for CAF members. CFHIS is consistent with the emerging electronic health record movement across Canada and brings to the CAF a capability being developed by all of our allies. DND has other information systems operating in the business domain of Health Services that may have an appropriate level of integration into the CFHIS.

At present, CFHIS has approximately 4,000 registered users located at 47 sites across Canada and internationally. Continued growth is expected by incorporating other potential user groups. In addition, a read-only copy of the Electronic Health Record (EHR) is utilized in deployed operational environments where DWAN connectivity does not exist or is intermittent.

DND's Director General Enterprise Application Services (DGEAS) division and its component directorates deliver and support information management applications and solutions for CAF. The Director Application Development and Support (DADS) directorate is responsible for providing in-service support and development for both custom and commercial-off-the-shelf (COTS) applications.

3. OBJECTIVE

The professional services contract has two objectives:

- 3.1 Providing DND with in service support of CFHIS; and
- 3.2 Support DND in expanding and integrating other applications and capabilities into the CFHIS.

4. SCOPE

The Contractor will be required, via approved Task Authorizations, to provide qualified professional services resources in the delivery of work packages associated with planning, design, development and implementation required to provide steady state support of CFHIS. In addition, there may be a need for the Contractor to provide these activities in order to expand and extend the footprint of CFHIS.

Services to be provided under this contract include provision of all resources with the appropriate skill sets as and when requested under each of the following two scope categories:

4.1 In-Service Support

In-service support is defined as any activity required for the maintenance and support of the CFHIS system. Services under this scope category include, but are not limited to:

Diagnosing, troubleshooting and resolving application software problems;

Analyzing, planning, developing, configuring, testing and implementing application software upgrades, patches and bug-fixes in all approved CFHIS application environments adhering to DND processes;

Analyzing, planning, developing, configuring, testing and implementing CFHIS Change Requests (CRs) into all approved CFHIS application environments adhering to DND processes; (see chapter 6.4).

Analyzing, planning, developing, configuring, testing and implementing CRs into all approved CFHIS application environments adhering to DND processes arising from changes in: GC legislation, DND/CAF policies, and Information Technology Infrastructure (ITI) and similar;

Analyzing, planning, developing, configuring, testing and implementing enhancements, improvements and upgrades to the CFHIS into all approved CFHIS application environments adhering to DND processes

Analyzing, planning, developing, configuring, testing and implementing CRs, into all approved CFHIS application environments adhering to DND processes ,arising from integrating other hardware, software firmware tools and services and similar into the CFHIS

Performing functional and technical assessment of requests from non-CFHIS users for integration into the CFHIS;

Performing and coordinating a CFHIS system backup and recovery exercise bi-annually;

Participating in and support CFHIS disaster recovery exercises as required;

Upgrading the CFHIS baseline to the most current release of all COTS application software as required.

Configuring and maintaining existing CFHIS application software baseline (currently v5.0) and any future CFHIS Upgrade baselines;

Updating, creating and maintaining CFHIS system documentation including but not limited to system design documents, application configuration, system administration and standard operating procedures;

Attending and participating in meetings with CFHIS stakeholders regarding CFHIS in-service support issues and problems; and

Performing CFHIS system knowledge transfer to DND staff as required.

4.2 System Expansion Support

System extension support is defined as any activity which extends the CFHIS system. Extension work includes the integration of existing stand alone applications into the CFHIS system (i.e. systems integration work), the work required to accommodate additional CFHIS users and increasing the capability and functionality of the existing CFHIS application software.

Systems Integration

Systems Integration support is defined as any activity required to link together different computing systems and software applications physically or functionally, to act as a coordinated whole. This work is typically performed by a systems integrator that brings together discrete systems utilizing a variety of techniques such as computer networking, enterprise application integration, business process management and/or manual programming. Future systems integration work may include the integration of existing stand alone and internal applications such as audiology, pharmacy, redaction and imaging viewer applications. Additional integration work may also include interfacing with applications at DND and external laboratories. Services under this scope category include, but are not limited to:

- a) Software engineering;
- b) Instrumentation and peripheral hardware engineering;
- c) Maintaining and developing interface protocols; and
- d) General problem solving skills.

All work will be subject to the Task Authorization process referred to in Section 1.2 of Part 7 "Resulting Contract Clauses" of the draft RFP.

The CFHIS In Service Support Team comprises of DND IT/Health Services Group/Contractor resources working as an Integrated Product Team. Changes are managed using this team model and a change model comprising of Discovery, Assessment, Development, Implementation and Closure phases. In each phase there are a number of deliverables that are required depending on the issue under discussion to pass the decision gate into the next phase. These deliverables are of the type and nature to be expected in any complex system management activity.

The Discovery phase is necessarily an Ad-Hoc activity that requires the participation of all concerned parties.

The Assessment phase is more structured participatory phase that aims to provide the overall solution design, the acceptance criteria and substantive estimates for Level of Effort (LOE) and the Work Breakdown Structure (WBS) to develop, implement and close the change.

The Development, Implementation and Closure phases are assigned - under cover of a Task Authorisation - to the Contractor

- In Development deliver a solution that passes all required testing and is in all respects ready for implementation.
- When given Approval to Implement, implement the solution respecting other government agencies who are managing the ITI
- When given Approval to Close, Close the activity.

(The Concept of operations -CONOPS for the Change process will be provided in the final RFP)

Additional users

Additional users support is defined as any activity required to support the work required to add additional users to CFHIS. This work extends the existing functionality of the system out to additional user communities not currently utilizing CFHIS. Services under this scope category include, but are not limited to:

- a) Implementing and integrating additional CFHIS laboratory application sites; and
- b) Integrating additional CF H Svcs Gp organizational units such as Mental Health, Case Management and Physiotherapy into CFHIS.

Additional capability

Additional capability support is defined as any activity required to support the implementation of new capability or functionality of the existing CFHIS applications. Services under this scope category include, but are not limited to:

- a) Implementing and supporting additional modules of the existing CFHIS application software. For example, the implementation of the order entry and electronic forms modules of the clinical application software;
- b) Implementing and supporting a quality assurance environment for the calibration of CFHIS instrumentation; and
- c) Implementing, configuring and supporting the applicable DND business intelligence tool within CFHIS.

Additional Work Requirements

Additional Work Requirements are defined as any unforeseen requirements or system enhancements that will require a significant resource effort to address. Services under this scope category could include, but are not limited to, any of the services identified in this SOW.

5. RESPONSIBILITIES

5.1 DND High Level Responsibilities

At a high level, DND is responsible for:

- a) Overall Sponsorship and Project Management for all CFHIS activities;
- b) Review of deliverables and the provision of feedback and approvals;
- c) Provision of information, advice and direction in the form of authorized work concerning functional and non-functional requirements through the task authorization process as defined in the contract.
- d) Overall direction to the contractor in the form of authorized work concerning solution and technical architectures to satisfy functional and non-functional requirements through the task authorization process as defined in the contract;
- e) Coordinating access to subject matter experts concerning functional and non-functional requirements;
- f) Coordination required in seeking approval of deliverables where stakeholders outside the CFHIS organization must be engaged.

5.2 Contractor High Level Responsibilities

The Contractor will plan and manage all professional services resources provided by the Contractor in the performance of the work. The Contractor's responsibilities include overseeing the quality of work delivered by its resources as well as managing the resources to ensure the work is completed within the agreed upon budget and schedule, and meets the inspection and acceptance requirements as determined by the DND Technical Authority or its designate, as defined in the Task Authorization.

The Contractor's resources will collaborate with DND personnel as appropriate to deliver services, using already established and DND approved tools, methods and processes for maintenance and development activities.

6. APPLICABLE DOCUMENTS AND STANDARDS

Canada intends to be guided by the following documents to improve effectiveness, efficiency and economy in the operation and management of the CFHIS.

Where appropriate and practicable they will be used in deliverables and the qualification of personnel.

6.1 IEEE Standards to be applied in System Management

IEEE 12207- 2008 Systems and software engineering – Software life cycle processes
Section 6 and 7 of this standard will guide the technical management of the CFHIS for the duration of this contract.

IEEE 1028- 2008 Standard for Software Reviews and Audits
This standard will guide the objectives and content of management reviews, technical reviews, walk-throughs and inspections.

IEEE 828-212 Standard for Configuration Management in Systems and Software Engineering.
This standard will guide the application of configuration management in the CFHIS.

IEEE 15289 Systems and software engineering – Content of life-cycle information products
(documentation)

6.2 Organisational Operating Standards

ISO 9001 Quality Management Systems.
A current certification against this standard is a rated criteria in the evaluation process. If it is claimed this certification shall be maintained throughout the contract.

ITIL Information Technology Infrastructure Library.
Particular ITIL courses are rated criteria in the evaluation process. If they are claimed these credits – as claimed shall be maintained through the life of the contract.

CMMI – Capability Maturity Model Integration.
Appraisals for the Development and Service Practice areas at maturity level 2 and 3 are rated criteria in the evaluation process. If they are claimed these credits – as claimed shall be maintained through the life of the contract.

6.3 Business Area and/or Technology Standards

CAS/CDFU Canadian Approved Standards/Canadian Draft for Use Pan-Canadian
Standards Inventory Canada Health Infoway
Standards for technical language and clinical terminology

ICD-10-CA International Classification of Diseases
Standard for the classification of diseases and related health problems

SNOMED CT Systematized Nomenclature of Medicine Clinical Terms
Standard for clinical healthcare terminology

DICOM Digital Imaging and Communication in Medicine
Standard for diagnostic imaging communication

pCLOCD Pan-Canadian LOINC Observation Code Database

Standard for laboratory information system

DIN Health Canada Drug Identification Number
Standard for medication management

UCUM Unified Code for Units of Measure
Standard for communicating units of measure

HL7 Health Level Seven International
Standards for interoperability of health information

ISO 27799-2008 Code of practice for informatics security

ISO/IEC 27002-2005 Code of practice for information security management

ISO 3166-1: 2006 and ISO 3166-2:2007 Codes for the representation of names of countries and their subdivisions

6.4 DND Policies, Procedures and Standards

To support and understand the business and operational requirements of the organization, several documents are available to the contracted resource. These documents are related but not limited to:

Department of National Defence Architecture Framework – DNDAF, standard for DND/CAF architecture activities

DADS Certification and Accreditation Process for Applications Concept of Operations, Version 0.9

DMIS Application or Project Certification and Accreditation Standard Operating Procedures, Version 1

DADS Change & Release Management Standard Operating Procedures, Version 1.0

DND/CF Network Operating System Naming Standard, IMS 6002-1-1, Version 2.31

Others are TBD

7. TECHNICAL ENVIRONMENT

7.1 System Hosting:

CFHIS is hosted within the Defence Enterprise Services Center (DESC) in Borden, using DND's Defense Wide Area Network (DWAN) to link workstations distributed at the various medical and dental sites. CFHIS architecture maximizes the use of the existing DESC facilities and support infrastructure, which simplifies the life cycle support of the system. CFHIS also takes advantages of virtualization and the communication infrastructure; Storage Area Network (SAN); the Backup/Recovery Facility of DESC.

CFHIS occupies a segment of the Local Area Network (LAN) within DESC and is connected to the Defence Wide Area Network (DWAN) using the Data Center Border (DCB) backbone through redundant CISCO switches. CFHIS uses the SAN at DCB to store critical information. Each server that requires SAN data storage has redundant fiber channels connections to the SAN switches. CFHIS uses the Data

Center Borden (DCB) backup system, which is based on Tivoli Storage Manager (TSM) using EMC NetWorker, enterprise level data protection software. The backup schedule is maintained onsite in a separate pool identified for up to PROTECTED B data.

7.2 CFHIS Applications Integration:

Intersystems HealthShare Foundations Enterprise: HealthShare provides the HL7 messaging interface for CFHIS, facilitates the use of existing application interfaces, and enables the production and customization of application conduits. HealthShare maintains a communications link to each application and is central to all application-to-application communications. This places HealthShare in a position to easily transform, intercept, or pass along any message that traverses the network. In some instances HealthShare is used to restructure messages and in other cases HealthShare is used to block or filter information to which the receiving application is incapable of handling. HealthShare is the centralized point where all communication and message customization is carried out.

7.3 CFHIS COTS Applications:

Purkinje:

The Purkinje application suite provides the Electronic Health Record for CFHIS. It generates and maintains clinical records and issues prescriptions. Dossier Exchange and Practice Management Exchange facilitate communications between the applications and database. Purkinje application is installed and run on the Citrix server farm (Windows VMs). HL7 transport is used to communicate with CFHIS applications.

SCC Soft Computer:

SCC is a supplier of integrated laboratory and clinical information systems, including SoftLab (laboratory), and SoftRad (radiology). Modules serve as interfaces with laboratory instruments via thin Citrix clients within the CFHIS architecture. An interface to the radiology picture archiving and communication system (PACS) has also been incorporated to provide orders from SoftRad to PACS and status messages back to SoftRad. SCC software is installed on the AIX LPAR and the Citrix Server(s). Messaging between SCC and other applications is accomplished through HealthShare using HL7 messaging. Data flows from Purkinje to SCC and back, with electronic health record information stored in Purkinje. Specific SoftLab and SoftRad results are held in the SCC database.

ADSTRA:

The ADSTRA Dental Suite consists of three core Applications: ADSTRA Management; Imaging; and Charting. All of the ADSTRA applications are installed and run on the Citrix server farm (Windows VMs) while client software is installed on workstations that connect to a digital imagery device. The ADSTRA applications are accessed from dental offices via the thin Citrix Client, and integrated with the EHR in the Purkinje application. Inter-application messaging is performed via HealthShare.

7.4 Central User Management

To simplify the user management task, the Integrated Security Management System (ISMS) provides the system administrator with a single entry to the applications' user management programs for user creation/maintenance and to assign specific roles to an individual user. Because the COTS applications all have different approaches to their user maintenance, the ISMS was created to address these differences. The ISMS includes the following:

- User Management Unit (UMU);
- Partner Supplied User Setup Applications (PSUSA);
- User Mapping Service (UMS); and
- The Audit Log function.

7.5 CFHIS Thin-Client Architecture

Citrix System Presentation Server software is a COTS software-enabling application server. All CFHIS applications are installed, managed, supported, and executed on the Citrix servers. Clients must initiate a session with a Citrix server in order to launch the CFHIS applications.

A Web Interface using SSL connection allows users access the CFHIS applications using the Internet Explorer on the DWAN workstation. The security certificates used are issued by the SSC/DND PKI authority. Once authenticated, users can access the CFHIS applications through the Citrix client running on their DWAN workstation. The CFHIS Web Interface is installed through the Citrix Web Interface Management console using the Microsoft Internet Information Services (IIS) on two load-balanced VMs.

7.6 System Environments

The various CFHIS system environments including:

- **Production:** The CFHIS system environment running user applications and real-time data is known as Production (PROD). CFHIS care providers use the PROD environment to run the regular reports for their day-to-day work.
- **Training:** CFHIS trainees and new users utilize an online training environment whose behaviour exactly replicates that of the CFHIS Production environment. However, the working data is entirely artificial, having been created by the trainers and course developers.
- **Operational Reporting:** Health Services (HS) management and administrative staff use the Operational Reporting Environment (ORE) to produce audit reports, management and complex reports.
- **Validation:** The Validation environment exists in the operational environment and shares some ITI infrastructure with the Production system. Its prime purpose is to provide a near Production environment to validate configuration settings and data integrity that cannot be done on the CFHIS Testbed prior to being implemented in Production.
- **Test Environment:** Developers, integrators and testers use the Testbeds to simulate a real system environment before installing new hardware or software at DCB for the CFHIS Production or other working environment.

7.7 End-User Workstation

CFHIS users connect into the CFHIS environment using the Citrix XenApp Web Interface. Once the connection is established, users can access CFHIS using the ICA thin-client application on their DWAN workstation. The CFHIS runs on client workstations within the military bases across the country.

7.8 Technologies Used

Layer	Technologies/Software	Current Version
Applications	Purkinje (Packaged EMR Software): Scheduling Core Clinical	V5.0.1211.3 V5.0.1211.3

	Soft Lab (Packaged Laboratory Information System Software) Soft WorkLoad Soft QC AIX SCC Citrix SCC	V4.0.3.9.6 V4.0.3.9.6 V4.0.6.0.6 V4.00.1600
	Soft RAD (Radiology Information System Software) AIX SCC Citrix SCC	V4.2.1.12.11 V4.2.0.11.12
	ADSTRA (Packaged Dental Information System Software): Management Imaging Charting Capture Agent (Client)	V11.1.87.0 V11.5.0.0 V11.0.28.0 V9.2.0.0
Application Integration	InterSystems HealthShare Foundations	2012
	Integrated Security Management System (ISMS)	3.x
User Presentation	Internet Information System (IIS)	7.0
	Citrix XenApp Web Interface	6.0
Database	Oracle	11gR2
OS	Windows	2008R2
	AIX	6.1
Virtual Platform	VMware	
	PowerVM	
Physical	HP c7000 G2 Blade Enclosure HP BL460c Blade Servers	
	IBM Power Series	P770
	Storage Area Network (SAN)	
	Cisco Switches	
	CISCO VPN Gates	
Security	Protected B Environment	
	Windows Active Directory	
	Public Key Infrastructure (PKI)	
	Digital Signature	
	System Backup	
	System Redundancy	
User Workstation	Windows	XP/7
	Avaya VPN Client	10.x
	Citrix Client	12.x
	SAFF	1.9.x
	SAC	8.2
	ESP/ESPO	9.2/8.2
	Adstra Capure Agent	9.x
	RemoteScan	10.x
Internet Explorer	8.x	

8. CONTRACTOR RESOURCE TYPES

Table 1 provides anticipated estimates for the quantity of each Contractor resource type required for CFHIS support. Quantities defined as Core will be constant and will be utilized to achieve the operational in-service support of CFHIS in support of objective 3.1 defined above. Quantities defined as Ad Hoc are

maximums and are required for a particular purpose only. The ad hoc resource types and quantities are required to perform work in order to achieve objectives 3.2

Table 1: Estimated Resource Requirements

Resource Category	# of Core Resources Required	Security Clearance Required	Estimated # of Days for Each Identified Resource							
			Initial Contract Period Years			Optional Contract Period Years				
			1	2	3	1	2	3	4	
Programmer/Software Developer	1	Enhanced Reliability	220	220	220	220	220	220	150	
Programmer Analyst	4	Enhanced Reliability	220	220	220	220	220	220	150	
Junior Programmer	1	Enhanced Reliability	220	220	220	220	220	220	150	
Tester	1	Enhanced Reliability	220	220	220	220	220	220	150	
Technology Architect	1	Enhanced Reliability	220	220	220	220	220	220	150	
Database Administrator	1	Enhanced Reliability	220	220	220	220	220	220	150	
Contractor Team Manager	1	Enhanced Reliability	220	220	220	220	220	220	150	
Trainer	1	Enhanced Reliability	220	220	220	220	220	220	150	
Medical Technology Advisor	1	Enhanced Reliability	220	220	220	220	220	220	150	

Resource Category	# of Ad-hoc Resources Required	Security Clearance Required	Estimated # of Days for Each Identified Resource							
			Initial Contract Period Years			Optional Contract Period Years				
			1	2	3	1	2	3	4	
Programmer/Software Developer	1	Enhanced Reliability	75	150	220	220	220	220	150	
Programmer Analyst	4	Enhanced Reliability	75	150	220	220	220	220	150	
Junior Programmer	1	Enhanced Reliability	75	150	220	220	220	220	150	
Technology Architect	1	Enhanced Reliability	75	150	220	220	220	220	150	
Database Administrator	1	Enhanced Reliability	75	150	220	220	220	220	150	
IT Security Engineer	1	Enhanced Reliability	75	150	220	220	220	220	150	
Project Manager	1	Enhanced Reliability	75	150	220	220	220	220	150	
Training Developer	1	Enhanced Reliability	75	150	220	220	220	220	150	
Medical Technology Advisor	1	Enhanced Reliability	75	150	220	220	220	220	150	

The estimated number of resources required per category, as well as the estimated number of days of work has been provided to Bidders to assist them in preparing their bids. The inclusion of this data in the

bid solicitation does not represent a commitment by Canada that Canada's future usage of resources or days will be consistent with this data. It is provided purely for information purposes.

9. TASKS

9.1 Programmer Software Developer

The required services include, but are not limited to, the following:

Develop and prepare diagrammatic plans for solution of business, scientific and technical problems by means of computer systems of significant size and complexity.

Analyze the problems outlined by the systems analysts/designers in terms of such factors as style and extent of information to be transferred to and from storage units, variety of items to be processed, extent of sorting, and format of final printed results.

Select and incorporate available software programs.

Design detailed programs, flow charts, and diagrams indicating mathematical computation and sequence of machine operations necessary to copy and process data and print the results.

Translate detailed flow charts into coded machine instructions and confer with technical personnel in planning programs.

Verify accuracy and completeness of programs by preparing sample data, and testing them by means of system acceptance test runs made by operating personnel.

Correct program errors by revising instructions or altering the sequence of operations.

Test instructions, and assemble specifications, flow charts, diagrams, layouts, programming and operating instructions to document applications for later modification or reference.

9.2 Programmer/Analysts

The required services include, but are not limited to, the following:

Creating and modifying code and software;

Designing, developing, testing and implementing CRs, minor enhancements and standing changes;

Performing daily operational support, maintenance and related activities in order to ensure all aspects of the existing technology solutions are integrated and functioning properly;

Conducting impact analysis on newly requested CRs and minor enhancements;

Monitoring application performance and tuning application performance to acceptable performance standards;

Creating and modifying reports;

Creating and/or updating applicable documentation (e.g. SOPs, CONOPS, RFCs, etc...) whenever changes are implemented;

Transferring technical knowledge via documentation and/or training to DND staff;

Attending and participating in meetings and as required;

Providing technical support and troubleshooting services to resolve application issues;

Creating and maintaining issue tracking records utilizing DND help desk/incident tracking software;

Providing peripheral hardware support for printers, scanners and medical instrumentation;

Performing application configuration and installation support;

Creating and updating application location and role based access control;

Creating and updating document templates and validation rules;

Providing support for the bi-annual data recovery and restore activity. This activity will involve restoring a production system using backups to a specific application environment and validating the restored system;

Participating in DND disaster recovery exercises as required;

Supporting external interfaces;

Troubleshooting software integration engine and HL7 messaging problems;

Providing Interface Engine cluster installation, setup and maintenance;

Evolving the HL7 interfaces to account for any new applications integrated into the baseline;

Monitoring, maintaining and configuring the HL7 interfaces in all application environments;

Transferring technical knowledge of the integration engine software and HL7 messaging to the DND support team;

Maintaining and producing documentation (i.e. test plans) to support testing activities.

Performing testing of new integration engine software releases and bug-fixes as required;

Performing system testing;

Performing application testing; and

Assessing, designing and implementing the integration of health informatics applications.

9.3 Junior Programmer

The required services include, but are not limited to, the following:

- Creating and modifying code and software;
- Developing low-level detailed requirements;
- Testing and implementing code;
- Performing application testing;
- Maintaining and producing documentation (i.e. test plans) to support testing activities;
- Creating and modifying reports;
- Creating and/or updating applicable documentation;
- Creating and updating document templates and validation rules;

9.4 Technology Architect

The required services include, but are not limited to, the following:

- Developing technical architectures, frameworks and strategies, either for an organization or for a major application area, to meet the business and application requirements;
- Identifying the policies and requirements that drive out a particular solution;
- Analyzing and evaluating alternative technology solutions to meet business problems;
- Ensuring the integration of all aspects of technology solutions;
- Monitoring industry trends to ensure that solutions fit with government and industry directions for technology;
- Reviewing computer software systems and data requirements as well as communications and response needs and devises computer hardware configurations to support them;
- Developing techniques to improve system throughout and optimize hardware utilization; and
- Evaluating computer hardware systems relative to their ability to support specified requirements and, make recommendations to improve system performance through recommended hardware changes.

9.5 Tester

The required services include, but are not limited to, the following:

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

9.6 Database Administrator

The required services include, but are not limited to, the following:

- Performing daily operational support and administration for databases;
- Creating and administering new databases as required;
- Maintaining data dictionaries;
- Troubleshooting database performance issues and problems;
- Engaging in performance tuning and configuration of databases as required;
- Performing database synchronizations, resets and migrations as required in all application environments;
- Developing and implementing security procedures for the database, including access and user account management;
- Maintaining configuration control of the database;
- Performing and coordinating updates to the database design and database server software;
- Updating and creating documentation, for example Standard Operating Procedures (SOPs), for databases;

Developing and coordinating backup and restore and disaster recovery procedures for databases as required;

Developing, implementing and supporting data extracts from all databases; and

Performing knowledge transfer to educate and provide system knowledge and expertise to departmental personnel on an on-going basis.

9.7 IT Security Engineer

The required services include, but are not limited to, the following:

Preparing reports on security incidents for departmental security personnel.

Preparing documents for the IM/IT Certification and Accreditation process. This information is used by senior security authorities to render decisions on Certification and Accreditation requests;

Representing the security operational component on technical committees;

Advising management on the functional framework, costs, use, support capabilities and management of security products and services and provide planning inputs;

Evaluating vendor security software and make recommendations on its use to management;

Providing IM/IT security services, troubleshooting and operational support to clients; and

Analyzing, developing and testing new security software applications or upgrades to existing applications.

9.8 Contractor Team Manager

The required services include, but are not limited to, the following:

Managing and supervising the contractor support resources;

Coordinating and managing the work to develop contract deliverables;

Participating in meetings as required to resolve support issues and communicating progress of in-service support and system extension work packages; and

Providing status reports to the technical authority regarding the overall progress of all activities related to this SOW.

9.9 Project Manager

The required services include, but are not limited to, the following:

Managing health informatics projects and related initiatives;

Planning and coordinating project management activities including financial, planning and contracting aspects;

Managing personnel, financial resources and project requirements;

Planning and organizing a project management office;

Managing project risks;

Delivering briefings on progress and concerns of project;

Coordinating and preparing documentation in response to scheduled and unscheduled reports, returns and observations to update management on project progress;

Planning and coordinating the activities of project personnel, internal customers, contractors and other support providers;

Preparing Statements of Work, business cases, approval documents including departmental and Treasury Board documents, work breakdown structures and compliance charts;

Producing draft plans and sections for incorporation into the Project Implementation Plan or Request for Proposal;

Preparing draft evaluation plans, criteria and evaluation schedules; and

Managing deliverables and requirements.

9.10 Medical Technology Advisor

The required services include, but are not limited to, the following:

Providing advice concerning design and configuration options and alternatives;

Providing advice concerning functional (clinical) business solution options and alternatives in areas such as, but not limited to: physical therapy, rehabilitation, medical laboratory, dental, diagnostic imaging, pharmacy, primary care, audiology, cardiology, mental health, epidemiology, immunizations, community health, clinical decision support tools, reports and data outputs to support decision making, outcome measurement, predictive analysis tools;

Providing advice concerning functional (management) business solution options and alternatives in areas such as, but not limited to: work flow management, wait times and access, reports and data outputs to support decision making, performance measurement, workload measurement, logistics support tools;

Providing advice concerning mobility solution options and alternatives in areas such as, but not limited to: documentation at point of care, including operations;

Providing advice concerning patient engagement and collaborative solution options and alternatives in areas such as, but not limited to: patient access portals, therapy tools, patient education resources;

Providing advice concerning business transformation changes that would result from the implementation of solutions; and

Providing advice concerning strategies designed to increase user acceptance.

9.11 Training Developer

The required services include, but are not limited to, the following:

Investigating training resources for appropriate information and suggests new topics;

Developing, validating and/or adjusting instruction policies;

Assessing the training requirements of a target organization and recommending appropriate training solutions; and

Designing and developing training programs.

9.12 Trainer

The required services include, but are not limited to, the following:

Assisting in training support by analyzing, managing, and providing risk mitigation of the Training Environment to ensure its ability to support eLearning requirements;

Coordinating the addition of healthcare training data into the training environment to facilitate user access to the eLearning modules;

Analyzing and updating training scenarios;

Analyzing and developing an implementation strategy for rolling out eLearning modules to various users as per direction of the TA;

Creating a learning strategy for users that outlines the recommended approach to completing the eLearning;

Developing a communications strategy to inform target audiences of the availability of the eLearning modules;

Drafting user instruction manuals, training manuals, Functional Impact Analysis documents, training system design documents, and user communiqués;

Preparing information packages and coordinating information sessions for Account Administrator and Help Desk resources;

Training clients on application systems or in business transformation as applicable;

Providing “at elbow” support to training coordinators and users as required to support training implementation strategies;

Developing and delivery of presentations;

Contributing to enhancements and/or new training components after implementation by developing specifications, prototypes, and production-ready training components such as templates;

Defining testing requirements or assist in testing of new training components and systems;

Providing additional support and coordination activities, as required, to facilitate the implementation of the eLearning strategy;

Coordinating, reviewing, and analyzing post-implementation monitoring, QA, and communications activities;

Providing core clinical knowledge transfer to permanent CF H Svcs Gp staff of the Functional Team to include all related written documentation when requested by the TA; and

Participating in meetings and providing oral and written briefings and presentations to the TA and to other staff and contractors as required by the TA.

10. DELIVERABLES

The following deliverables are required:

- Monthly review and report on system operation and system change issues.
- Quarterly review and report on contract management issues
- Annual V&V Inspection and report on system performance and improvement.
- System Management Deliverables
TBD - that cover the functions of Operations Mgt, System Design, Change Management, Configuration Mgt, Release Mgt, Documentation Mgt, Work Mgt that meet the intentions of the following standards.

IEEE 12207- 2008 Systems and software engineering – Software life cycle processes
Section 6 and 7 of this standard will guide the technical management of the CFHIS for the duration of this contract.

IEEE 1028 - 2008 Standard for Software Reviews and Audits
This standard will guide management reviews, technical reviews, walk-throughs and inspections for the duration of this contract.

IEEE 828-212 Standard for Configuration Management in Systems and Software Engineering.
This standard will guide the application of configuration management in the CFHIS for the duration of this contract.

IEEE 90003-2008 – Guidelines for the Application of ISO 9001to Computer Software.
This standard will guide the Quality Management System to be used in the management of CFHIS for the duration of this contract.

IEEE 15289 Systems and software engineering – Content of life-cycle information products (documentation)

DNDAF – DND Architecture Framework

Transition Out Plan (TBD).

11. WORKING LOCATION AND HOURS.

- The contractor will normally work 7.5 hours per day, on a DND site, unless otherwise agreed upon by the Contractor and the Technical Authority. Business hours will commence no earlier than 0630 hrs to no later than 1800 hrs..
- The Contractor's personnel may be required to work outside of normal business hours in order to avoid user down time, or disruption of database services and to implement fixes, perform maintenance, install upgrades. Any work performed outside of normal business hours must be pre-approved in writing by the DND Technical Authority. For the duration of the contract all personnel must be available to work outside normal business hours as required, at the same rate as normal business hours. All work performed outside of normal business hours must be pre-approved by the Technical Authority in writing.
- All work must be completed at either a DND facility within the National Capital Region (NCR) or a designated Contractor support facility in Canada. Travel and parking expenses within the NCR and between Contractor and DND facilities will not be reimbursed.
- The Contractor's personnel may have to travel outside of the National Capital Region (NCR). In such cases, and only with the prior written authorization of the DND Technical Authority, travel and living expenses may be reimbursed to the Contractor. All travel and living expenses are subject to the Treasury Board (TB) regulations and guidelines.

12. GOVERNMENT FURNISHED EQUIPMENT

The GC will provide office space and DWAN workstations at DND locations in the NCR for the contracted staff as needed during the period of this contract. The GC will also provide any software tools required to prepare any deliverables and/or manage the work related to this SOW. These tools may include software such as the MS Office suite and IBM Rational DOORS.

13. ACCEPTANCE

All deliverables must be produced electronically (hard-copy if required) in English using applicable and available tools of the Department (e.g. IBM Rational DOORS, MSOffice, MS Project, MS Visio, etc.).

The Technical Authority will review and approve the deliverables.

14. REPORTING REQUIREMENTS

All reports shall be submitted to the TA as requested using a manner or technology implemented as the official reporting mechanism.

15. LANGUAGE REQUIREMENTS

The resources must be able to communicate effectively in English both orally and in writing.

16. ABBREVIATIONS AND ACRONYMS

Abbreviation / Acronym	Description
CAF	Canadian Armed Forces
CF	Canadian Forces
CR	Change Request
CM	Change Management
CF H Svcs Gp	Canadian Forces Health Services Group
CFHIS	Canadian Forces Health Information System
CONOPS	Concept of operations
COTS	Commercial Off The Shelf
CMMI	Capability Maturity Model Integration
DADS	Directorate Applications Development and Support
DGEAS	Director General Enterprise Application Services
DIN	Drug Identification Number
DMIS	Director Materiel Information Systems
DND	Department of National Defence
DNDAF	Department of National Defence Architecture Framework
DWAN	Defence Wide Area Network
EHR	Electronic Health Record
GC	Government of Canada
HIS	Health Information System
HL7	Health Level 7 (formatting and protocol standard)
IM	Information Management
ISMS	Integrated Security Management System
IT	Information Technology
ITI	Information Technology Infrastructure
ITIL	Information Technology Infrastructure Library
MS	Microsoft
NATO	North Atlantic Treaty Organization
NCR	National Capital Region
OGD	Other Government Departments
ORE	Operational Reporting Environment
RFC	Request for Change
SOP	Standard Operating Procedure
SOW	Statement of Work
TA	Technical Authority
TB	Treasury Board
TBD	To be determined

ANNEX B

BASIS OF PAYMENT

**DEPARTMENT OF NATIONAL
DEFENCE**

**DRAFT REQUEST FOR PROPOSAL
W8474-03-BH01**

**CANADIAN FORCES HEALTH INFORMATION
SYSTEM (CFHIS)
SUPPORT SERVICES**

Professional Services Labour Rates

The Bidder must provide firm per diem rates, exclusive of all applicable taxes, inclusive of all overheads and profit, for the labour categories specified in Table 1 – “Initial Contract Period” and Table 2 – “Option Periods” below.

**Table 1 – Initial Contract Period (Date of Contract Award to Three (3) Years Later)
Firm Per Diem Rates**

Resource Category	Initial Contract Period Year 1	Initial Contract Period Year 2	Initial Contract Period Year 3
Programmer/Software Developer			
Programmer/ Analyst			
Junior Programmer			
Tester			
Technology Architect			
Database Administrator			
Contractor Team Manager			
Trainer			
Medical Technology Advisor			

**Table 2 – Option Periods
Firm Per Diem Rates**

Resource Category	Option Year 1	Option Year 2	Option Year 3	Option Year 4	Option Year 5
Programmer/Software Developer					
Programmer/ Analyst					
Junior Programmer					
Technology Architect					
Database Administrator					
IT Security Engineer					
Project Manager					
Training Developer					
Medical Technology Advisor					

ANNEX C

SECURITY REQUIREMENTS CHECK LIST

**DEPARTMENT OF NATIONAL
DEFENCE**

**DRAFT REQUEST FOR PROPOSAL
W8474-03-BH01**

**CANADIAN FORCES HEALTH INFORMATION
SYSTEM (CFHIS)
SUPPORT SERVICES**

(To be provided in the Final RFP)

ANNEX D

**FEDERAL CONTRACTORS PROGRAM FOR
EMPLOYMENT EQUITY – CERTIFICATION**

**DEPARTMENT OF NATIONAL
DEFENCE**

**DRAFT REQUEST FOR PROPOSAL
W8474-03-BH01**

**CANADIAN FORCES HEALTH INFORMATION
SYSTEM (CFHIS)
SUPPORT SERVICES**

ANNEX D
FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY - CERTIFICATION

I, the Bidder, by submitting the present information to the Contracting Authority, certify that the information provided is true as of the date indicated below. The certifications provided to Canada are subject to verification at all times. I understand that Canada will declare a bid non-responsive, or will declare a contractor in default, if a certification is found to be untrue, whether during the bid evaluation period or during the contract period. Canada will have the right to ask for additional information to verify the Bidder's certifications. Failure to comply with such request by Canada will also render the bid non-responsive or will constitute a default under the Contract.

For further information on the Federal Contractors Program for Employment Equity visit [HRSDC-Labour's website](#).

Date: _____(YYYY/MM/DD) (If left blank, the date will be deemed to be the bid solicitation closing date.)

Complete both A and B.

A. Check only one of the following:

- () A1. The Bidder certifies having no work force in Canada.
- () A2. The Bidder certifies being a public sector employer.
- () A3. The Bidder certifies being a [federally regulated employer](#) being subject to the *Employment Equity Act*.
- () A4. The Bidder certifies having a combined work force in Canada of less than 100 employees (combined work force includes: permanent full-time, permanent part-time and temporary employees [temporary employees only includes those who have worked 12 weeks or more during a calendar year and who are not full-time students]).
- A5. The Bidder has a combined workforce in Canada of 100 or more employees; and
 - () A5.1. The Bidder certifies already having a valid and current [Agreement to Implement Employment Equity](#) (AIEE) in place with HRSDC-Labour.

OR

- () A5.2. The Bidder certifies having submitted the [Agreement to Implement Employment Equity \(LAB1168\)](#) to HRSDC-Labour. As this is a condition to contract award, pTAAeed to completing the form Agreement to Implement Employment Equity (LAB1168), duly signing it, and transmit it to HRSDC-Labour.

B. Check only one of the following:

- () B1. The Bidder is not a Joint Venture.

OR

- () B2. The Bidder is a Joint venture and each member of the Joint Venture must provide the Contracting Authority with a completed annex Federal Contractors Program for Employment Equity - Certification. (Refer to the Joint Venture section of the Standard Instructions)

ANNEX E

DND 626 TASK AUTHORIZATION FORM

DEPARTMENT OF NATIONAL DEFENCE

DRAFT REQUEST FOR PROPOSAL W8474-03-BH01

CANADIAN FORCES HEALTH INFORMATION SYSTEM (CFHIS) SUPPORT SERVICES



Task Authorization		Autorisation de tâches	
ALL INVOICES/PROGRESS CLAIMS MUST SHOW THE REFERENCE CONTRACT AND TASK NUMBERS		TOUTES LES FACTURES DOIVENT INDIQUER LES NUMÉROS DU CONTRAT ET DE LA TÂCHE	
Amendment No. - No de la modification		Increase/Decrease - Augmentation/Réduction	Previous Value/Valeur précédente
Task No. / No de la tâche		Contract No. / No du contrat DRM/R Doc.No. / No doc du SIGRD	
To: - A: DELIVERY LOCATION - EXPÉDIEZ À DELIVERY/COMPLETION DATE DATE DE LIVRAISON/D'ACHEVEMENT Y/M/D/J	<p>TO THE CONTRACTOR You are requested to supply the following services in accordance with the terms of the above reference contract. Only services included in the contract shall be supplied against this task. Please advise the undersigned if the completion date cannot be met. Invoice/progress claims shall be prepared in accordance with the instructions set out in the contract.</p> <p>À L'ENTREPRENEUR Vous êtes prié de fournir les services suivants en conformité des termes du contrat mentionné ci-dessus. Seuls les services mentionnés dans le contrat doivent être fournis à l'appui de cette demande. Prière d'aviser le signataire si la livraison ne peut se faire dans délais prescrits. Les factures doivent être établies selon les instructions énoncées dans le contrat.</p> <p style="text-align: center;">Date _____</p> <p style="text-align: right;">_____ for the Department of National Defence pour le ministère de la Défense nationale</p>		
Contract Item No. / No d'article du contrat	Services	Cost/Prix	
00001	<u>REQUIREMENT/BESOIN</u>		
		Subtotal	
		GST/HST TPS/TVH	
		Total	
<p>APPLICABLE ONLY TO PWGSC CONTRACTS: The Contract Authority signature is required when the total value of the DND626 exceeds the threshold specified in the contract.</p> <p>NE S'APPLIQUE QU' AUX CONTRATS DE TPSGC : La signature de l'autorité contractante est requise lorsque la valeur totale de la DND626 est supérieure au seuil précisé dans le contrat.</p>			
_____ for the Department of Public Works and Government Services pour le ministère des Travaux publics et Services gouvernementaux			

ANNEX F

**ASSESSMENT FOR RESOURCE EVALUATION
AT TASK AUTHORIZATION**

**DEPARTMENT OF NATIONAL
DEFENCE**

**DRAFT REQUEST FOR PROPOSAL
W8474-03-BH01**

**CANADIAN FORCES HEALTH INFORMATION
SYSTEM (CFHIS)
SUPPORT SERVICES**

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

2. For each proposed resource the Contractor must supply a résumé, the requested security clearance information and must complete the Response Table below applicable to the Resource Categories identified in the draft TA. The same individual must not be proposed for more than one Resource Category. The résumés must demonstrate that each proposed individual meets the qualification requirements described (including any educational requirements, work experience requirements, and professional designation or membership requirements). With respect to the proposed resources:
 - (A) Proposed resources may be employees of the Contractor or employees of a subcontractor, or these individuals may be independent contractors to whom the Contractor would subcontract a portion of the Work.

 - (B) For educational requirements for a particular degree, designation or certificate, Canada will only consider educational programs that were successfully completed by the resource before the date the draft TA was first issued to the Contractor.

 - (C) For requirements relating to professional designation or membership, the resource must have the required designation or membership by the time of draft TA issuance and must continue, where applicable, to be a member in good standing of the profession or membership throughout the assessment period and Contract Period. Where the designation or membership must be demonstrated through a certification, the certification must be current, valid and issued by the entity specified in this Contract or if the entity is not specified an accredited or otherwise recognized body, institution or entity.

 - (D) For work experience, Canada will not consider experience gained as part of an educational program, except for experience gained through a formal co-operative program at a post-secondary institution.

 - (E) For any requirements that specify a particular time period (e.g., 2 years) of work experience, Canada will disregard any information about experience if the résumé does not include the relevant dates (month and year) for the experience claimed (i.e., the start date and end date). Canada will evaluate only the duration that the resource actually worked on a project or projects (from his or her start date to end date), instead of the overall start and end date of a project or a combination of projects in which a resource has participated.

 - (F) A résumé must not simply indicate the title of the individual's position, but must demonstrate that the resource has the required work experience by explaining the responsibilities and work performed by the individual while in that position. Only listing experience without providing any supporting data to describe responsibilities, duties and relevance to the requirement, or reusing the same wording as the TA Form, will not be considered "demonstrated" for the purposes of the assessment. The Contractor should provide complete details as to where, when, month and year, and how, through which activities/responsibilities, the stated qualifications / experience were obtained. In situations in which a proposed resource worked at the same time on more than one project, the duration of any overlapping time period will be counted only once toward any requirements that relate to the individual's length of experience.

3. The qualifications and experience of the proposed resources will be assessed against the requirements set out in the assessment Table below to determine each proposed resource's compliance with the assessment criteria. Canada may request proof of successful completion of formal training, as well as reference information. Canada may conduct reference checks to verify the accuracy of the information provided. If reference checks are done, they will be conducted in writing by e-mail (unless the contact at the reference is only available by telephone). Canada will not consider a proposed resource to be acceptable unless the response is received within 5 working days. On the third working day after sending out the e-mails, if Canada has not received a response, Canada will notify the Contractor by e-mail, to allow the Contractor to contact its reference directly to ensure that it responds to Canada within 5 working days. Wherever information provided by a reference differs from the information supplied by the Contractor, the information supplied by the reference will be the information assessed. A proposed resource will not be considered an acceptable candidate 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) or if the customer is itself an affiliate or other entity that does not deal at arm's length with the Contractor. Crown references will be accepted.

4. During the assessment of the resources proposed, should the references for two or more resources required under that TA either be unavailable or fail to substantiate the required qualifications of the proposed resources to perform the required services, the DND Procurement Representative may find the Contractor's response to the draft to be non-responsive.

Resource Category	Required qualifications	Bidder's Response	
		Substantiation of Technical Compliance	Reference to Additional Documentation within the Task Authorization
Programmer/ Software Developer	<p>1. The proposed resource must have a minimum demonstrated 48 months within the last 60 months as a Programmer/Software Developer performing at least 50% of the following activities:</p> <p style="padding-left: 40px;">Developing and preparing diagrammatic plans for solution of business, scientific and technical problems by means of computer systems of significant size and complexity.</p> <p style="padding-left: 40px;">Analyzing the problems outlined by the systems analysts/designers in terms of such factors as style and extent of information to be transferred to and from storage units, variety of items to be processed, extent of sorting, and format of final printed results.</p>		

	<p>Selecting and incorporating available software programs.</p> <p>Designing detailed programs, flow charts, and diagrams indicating mathematical computation and sequence of machine operations necessary to copy and process data and print the results.</p> <p>Translating detailed flow charts into coded machine instructions and confer with technical personnel in planning programs.</p> <p>Verifying accuracy and completeness of programs by preparing sample data, and testing them by means of system acceptance test runs made by operating personnel.</p> <p>Correcting program errors by revising instructions or altering the sequence of operations.</p> <p>Testing instructions, and assemble specifications, flow charts, diagrams, layouts, programming and operating instructions to document applications for later modification or reference.</p> <p>2. The proposed resource must hold a valid minimum Enhanced Reliability security clearance</p>		
<p>Programmer/ Analyst</p>	<p>1. The proposed resource must have a minimum demonstrated 48 months of experience within the last 60 months as Programmer/Analyst performing at least 50% of the following activities:</p> <p>Creating and modifying code and software which includes but is not limited to: validation rule scripting</p>		

	<p>and maintaining the Integrated Security Management System (ISMS);</p> <p>Designing, developing, testing and implementing CRs, minor enhancements and standing changes;</p> <p>Performing daily operational support, maintenance and related activities in order to ensure all aspects of the existing technology solutions are integrated and functioning properly;</p> <p>Conducting impact analysis on newly requested CRs and minor enhancements;</p> <p>Monitoring application performance and tuning application performance to acceptable performance standards;</p> <p>Creating and modifying reports;</p> <p>Creating and/or updating applicable documentation (e.g. SOPs, CONOPS, RFCs, etc...) whenever changes are implemented;</p> <p>Transferring technical knowledge via documentation and/or training to DND staff;</p> <p>Attending and participating in meetings and as required;</p> <p>Providing technical support and troubleshooting services to resolve application issues;</p> <p>Creating and maintaining issue tracking records utilizing DND help desk/incident tracking software;</p> <p>Providing peripheral hardware support for printers, scanners and medical instrumentation;</p> <p>Performing application configuration and installation</p>		
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	<p>support;</p> <p>Creating and updating application location and role based access control;</p> <p>Creating and updating document templates and validation rules;</p> <p>Providing support for the bi-annual data recovery and restore activity. This activity will involve restoring a production system using backups to a specific application environment and validating the restored system;</p> <p>Participating in DND disaster recovery exercises as required;</p> <p>Supporting external interfaces;</p> <p>Troubleshooting software integration engine and HL7 messaging problems;</p> <p>Providing Interface Engine cluster installation, setup and maintenance;</p> <p>Evolving the HL7 interfaces to account for any new applications integrated into the baseline;</p> <p>Monitoring, maintaining and configuring the HL7 interfaces in all application environments;</p> <p>Transferring technical knowledge of the integration engine software and HL7 messaging to the DND support team;</p> <p>Maintaining and producing documentation (i.e. test plans) to support testing activities.</p> <p>Performing testing of new integration engine software releases and bug-fixes as required;</p> <p>Performing system testing;</p> <p>Performing application testing; and</p>		
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	<p>Assessing, designing and implementing the integration of health informatics applications.</p> <p>2. The proposed resource must hold a valid minimum Enhanced Reliability security clearance</p>		
Junior Programmer	<p>1. Successful completion of a university degree from a recognized university in Computer Science, Information Technology, or a related IT field; or The successful completion of a minimum two year diploma from a recognized college or a DEC from a recognized CEGEP, in Computer Science, Information Technology or a related IT field.</p> <p>2. The proposed resource must hold a minimum Enhanced Reliability security clearance.</p>		
Tester	<p>1. The proposed resource must have a minimum demonstrated 12 months of experience within the last 60 months as a Tester performing at least 50% of the following activities:</p> <ul style="list-style-type: none"> Test planning and coordination. Supervision of testing in accordance with the plan. Management and monitoring of test plans for all levels of testing. Management of walkthroughs and reviews related to testing and implementation readiness. Status reporting. Development of test scenarios and test scripts. Establishing and maintaining source and object code libraries for a multi-platform, multi-operating system environment. Establishing software testing procedures for unit test, integration testing and regression testing with emphasis on automating the testing procedures. 		

	<p>Establishing and operating "interoperability" testing procedures to ensure that the interaction and co-existence of various software elements, which are proposed to be distributed on the common infrastructure, conform to appropriate departmental standards (e.g. For performance, compatibility, etc.) and have no unforeseen detrimental effects on the shared infrastructure.</p> <p>Establishing a validation and verification capability which assumes functional and performance compliance.</p> <p>2. The proposed resource must hold a valid minimum Enhanced Reliability security clearance.</p>		
<p>Technology Architect</p>	<p>1. The proposed resource must have a minimum demonstrated 48 months within the past 60 months working as a Technology Architect performing at least 50% of the following activities:</p> <p>Developing technical architectures, frameworks and strategies, either for an organization or for a major application area, to meet the business and application requirements;</p> <p>Identifying the policies and requirements that drive out a particular solution;</p> <p>Analyzing and evaluating alternative technology solutions to meet business problems;</p> <p>Ensuring the integration of all aspects of technology solutions;</p> <p>Monitoring industry trends to ensure that solutions fit with government and industry directions for technology;</p> <p>Reviewing computer software systems and data requirements as well as communications and</p>		

	<p>response needs and devises computer hardware configurations to support them;</p> <p>Developing techniques to improve system throughout and optimize hardware utilization; and</p> <p>Evaluating computer hardware systems relative to their ability to support specified requirements and, make recommendations to improve system performance through recommended hardware changes.</p> <p>2. The proposed resource must have a minimum demonstrated 24 months of experience within the past 60 months implementing new features or functionalities into enterprise applications or systems.</p> <p>3. The proposed resource must have a minimum demonstrated 24 months of experience within the past 60 months performing and managing upgrades to enterprise Commercial Off the Shelf (COTS) or custom applications in a large organization (i.e. more than 500+ employees).</p> <p>4. The proposed resource must hold a valid minimum Enhanced Reliability security clearance.</p>		
<p>Database Administrator</p>	<p>1. The proposed resource must have a minimum demonstrated 48 months within the past 60 months working as a Database Administrator performing at least 50% of the following activities:</p> <p>Performing daily operational support and administration for all CFHIS databases;</p> <p>Creating and administering new databases as required;</p> <p>Maintaining data dictionaries;</p> <p>Troubleshooting database performance issues and problems;</p>		

	<p>Engaging in performance tuning and configuration of databases as required;</p> <p>Performing database synchronizations, resets and migrations as required in all application environments;</p> <p>Developing and implementing security procedures for the database, including access and user account management;</p> <p>Maintaining configuration control of the database;</p> <p>Performing and coordinating updates to the database design and database server software;</p> <p>Updating and creating documentation, for example Standard Operating Procedures (SOPs), for databases;</p> <p>Developing and coordinating backup and restore and disaster recovery procedures for databases as required;</p> <p>Developing, implementing and supporting data extracts from all databases; and</p> <p>Performing knowledge transfer to educate and provide system knowledge and expertise to departmental personnel on an on-going basis.</p> <p>2. The proposed resource must have a minimum demonstrated 48 months of experience within the past 60 months working as an Oracle Database Administrator.</p> <p>3. The proposed resource must have a minimum demonstrated 36 months of experience within the past 60 months developing scripts utilizing Oracle's Procedural Language / Structured Query Language (PL/SQL).</p> <p>4. The proposed resource must have</p>		
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	<p>a minimum demonstrated 24 months experience within the last 60 months extracting and/or manipulating data for the purpose of data analysis and migration.</p> <p>5. The proposed resource must hold a valid Oracle Certified Professional certification and provide a copy of the certification</p> <p>6. The proposed resource must hold a valid minimum Enhanced Reliability security clearance.</p>		
<p>Contractor Team Manager</p>	<p>1, The proposed resource must have a minimum demonstrated 24 months of experience within the past 60 months working as a Contractor Team Manager performing at least 50% of the following activities:</p> <p style="padding-left: 40px;">Managing and supervising the contractor support resources;</p> <p style="padding-left: 40px;">Coordinating and managing the work to develop contract deliverables;</p> <p style="padding-left: 40px;">Participating in meetings as required to resolve support issues and communicating progress of in-service support and system extension work packages; and</p> <p style="padding-left: 40px;">Providing status reports to the DND technical authority regarding the overall progress of all activities related to this SOW.</p> <p>2. The proposed resource must have a minimum of 24 months experience in the last 60 months developing and managing IT systems.</p> <p>3. The proposed resource must hold a valid minimum Enhanced Reliability security clearance.</p>		
<p>IT Security Engineer</p>	<p>1. The proposed resource must have a minimum demonstrated 48 months of experience performing at least 50% of the following activities:</p> <p style="padding-left: 40px;">Preparing reports on security</p>		

	<p>incidents for departmental security personnel.</p> <p>Preparing documents for the IM/IT Certification and Accreditation process. This information is used by senior security authorities to render decisions on Certification and Accreditation requests;</p> <p>Representing the security operational component on technical committees;</p> <p>Advising management on the functional framework, costs, use, support capabilities and management of security products and services and provide planning inputs;</p> <p>Evaluating vendor security software and make recommendations on its use to management;</p> <p>Providing IM/IT security services, troubleshooting and operational support to clients; and</p> <p>Analyzing, developing and testing new security software applications or upgrades to existing applications.</p> <p>2. The proposed resource must hold a valid minimum Enhanced Reliability security clearance.</p>		
<p>Project Manager</p>	<p>1. The proposed resource must have a minimum demonstrated 24 months of experience within the last 60 months performing at least 50% of the following activities:</p> <p>Managing health informatics projects and related initiatives;</p> <p>Planning and coordinating project management activities including financial, planning and contracting aspects;</p> <p>Managing personnel, financial resources and project</p>		

	<p>requirements;</p> <p>Planning and organizing a project management office;</p> <p>Managing project risks;</p> <p>Delivering briefings on progress and concerns of project;</p> <p>Coordinating and preparing documentation in response to scheduled and unscheduled reports, returns and observations to update management on project progress;</p> <p>Planning and coordinating the activities of project personnel, internal customers, contractors and other support providers;</p> <p>Preparing Statements of Work, business cases, approval documents including departmental and Treasury Board documents, work breakdown structures and compliance charts;</p> <p>Producing draft plans and sections for incorporation into the Project Implementation Plan or Request for Proposal;</p> <p>Preparing draft evaluation plans, criteria and evaluation schedules; and</p> <p>Managing deliverables and requirements.</p> <p>2. The proposed resource must hold a valid minimum Enhanced Reliability security clearance.</p>		
<p>Training Developer</p>	<p>1. The proposed resource must have a minimum demonstrated 24 months of experience within the last 60 months as a Training Developer performing at least 50% of the following activities:</p> <p>Investigating training resources for appropriate information and</p>		

	<p>suggests new topics;</p> <p>Developing, validating and/or adjusting instruction policies;</p> <p>Assessing the training requirements of a target organization and recommending appropriate training solutions; and</p> <p>Designing and developing training programs.</p> <p>2. The proposed resource must hold a valid minimum Enhanced Reliability security clearance.</p>		
Trainer	<p>1. The proposed resource must have a minimum demonstrated 24 months of experience within the last 60 months as a Trainer performing at least 50% of the following activities:</p> <p>Assisting in training support by analyzing, managing, and providing risk mitigation of the Training Environment to ensure its ability to support eLearning requirements;</p> <p>Coordinating the addition of healthcare training data into the training environment to facilitate user access to the eLearning modules;</p> <p>Analyzing and updating training scenarios;</p> <p>Analyzing and developing an implementation strategy for rolling out eLearning modules to various users as per direction of the TA;</p> <p>Creating a learning strategy for users that outlines the recommended approach to completing the eLearning;</p>		

	<p>Developing a communications strategy to inform target audiences of the availability of the eLearning modules;</p> <p>Drafting user instruction manuals, training manuals, Functional Impact Analysis documents, training system design documents, and user communiqués;</p> <p>Preparing information packages and coordinating information sessions for Account Administrator and Help Desk resources;</p> <p>Training clients on CFHIS application systems or in business transformation as applicable;</p> <p>Providing “at elbow” support to training coordinators and users as required to support training implementation strategies;</p> <p>Developing and delivery of presentations;</p> <p>Contributing to enhancements and/or new training components after implementation by developing specifications, prototypes, and production-ready training components such as templates;</p> <p>Defining testing requirements or assist in testing of new training components and systems;</p> <p>Providing additional support and coordination activities, as required, to facilitate the implementation of the eLearning strategy;</p> <p>Coordinating, reviewing, and analyzing post-implementation monitoring, QA, and communications activities;</p> <p>Providing core clinical knowledge transfer to permanent CF H Svcs</p>		
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	<p>Gp staff of the Functional Team to include all related written documentation when requested by the TA; and</p> <p>Participating in meetings and providing oral and written briefings and presentations to the TA and to other staff and contractors as required by the TA.</p> <p>2. The proposed resource must have a minimum of 24 months experience within the last 60 months developing electronic health information system training content.</p> <p>3. The proposed resource must hold a valid minimum Enhanced Reliability security clearance.</p>		
<p>Medical Technology Advisor</p>	<p>1. The proposed resource must have a minimum demonstrated 24 months of experience within the last 60 months as a Medical Technology Advisor performing at least 50% of the following activities:</p> <p>Providing advice concerning design and configuration options and alternatives;</p> <p>Providing advice concerning functional (clinical) business solution options and alternatives in areas such as, but not limited to: physical therapy, rehabilitation, medical laboratory, dental, diagnostic imaging, pharmacy, primary care, audiology, cardiology, mental health, epidemiology, immunizations, community health, clinical decision support tools, reports and data outputs to support decision making, outcome measurement, predictive analysis tools;</p> <p>Providing advice concerning functional (management) business solution options and alternatives in areas such as, but not limited to: work flow management, wait times and access, reports and data outputs</p>		

	<p>to support decision making, performance measurement, workload measurement, logistics support tools;</p> <p>Providing advice concerning mobility solution options and alternatives in areas such as, but not limited to: documentation at point of care, including operations;</p> <p>Providing advice concerning patient engagement and collaborative solution options and alternatives in areas such as, but not limited to: patient access portals, therapy tools, patient education resources;</p> <p>Providing advice concerning business transformation changes that would result from the implementation of solutions; and</p> <p>Providing advice concerning strategies designed to increase user acceptance.</p> <p>2. The proposed resource must have a minimum of 24 months experience within the last 60 months providing advice regarding business transformation changes resulting from electronic health information solutions.</p> <p>3. The proposed resource must hold a valid minimum Enhanced Reliability security clearance.</p>		
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ATTACHMENT A

TECHNICAL EVALUATION PROCEDURES AND CRITERIA

DEPARTMENT OF NATIONAL DEFENCE

DRAFT REQUEST FOR PROPOSAL W8474-03-BH01

CANADIAN FORCES HEALTH INFORMATION SYSTEM (CFHIS) SUPPORT SERVICES

Table of Contents

ANNEXE– TECHNICAL EVALUATION PROCEDURES AND CRITERIA	102
1. TECHNICAL EVALUATION PROCEDURES	102
1.1 TECHNICAL EVALUATION METHODOLOGY.....	102
1.2 PROPOSAL REQUIREMENTS	102
2.EVALUATIONCRITERIA	103
2.1 GENERAL.....	103
2.2 CORPORATE TECHNICAL EVALUATION CRITERIA	103
2.2.1 Mandatory Evaluation Criteria - Corporate	103
2.2.2 Mandatory Evaluation Criteria – Core Resource Categories.....	103
2.2.2.1 Programmer/Software Developer	104
2.2.2.2 Programmer/Analysts	104
2.2.2.3 Junior Programmer	105
2.2.2.4 Tester.....	105
2.2.2.5 Technology Architect	105
2.2.2.6 Database Administrator	106
2.2.2.7 Contractor Team Manager.....	107
2.2.2.8 Trainer.....	107
2.2.2.9 Medical Technology Advisor.....	107
2.3 RATED EVALUATION CRITERIA.....	108
2.3.1 Rated Evaluation Criteria – Corporate.....	108
2.3.2 Rated Evaluation Criteria - Core Resource Categories	108
2.3.2.1 Programmers	109
2.3.2.2 Programmer/Software Developer	110
2.3.2.3 Programmer/Analyst - 1.....	112
2.3.2.4 Programmer/Analyst - 2.....	113
2.3.2.5 Programmer/Analyst – 3.....	114
2.3.2.6 Programmer/Analyst – 4	115
2.3.2.7 Tester.....	116
2.3.2.8 Technology Architect	117
2.3.2.9 Database Administrator	117
2.3.2.10Contractor Team Manager.....	118
2.3.2.11Trainer.....	119
2.3.2.12Medical Technology Advisor.....	120

ANNEX E – TECHNICAL EVALUATION PROCEDURES AND CRITERIA

TECHNICAL EVALUATION PROCEDURES

TECHNICAL Evaluation Methodology

Evaluation will be comprised of two parts: Technical evaluation of the Bidder as a corporate entity and evaluation of the resources proposed by the Bidder. Evaluation of the Bidder as a corporate entity will be based on their ability to provide resources for the resource categories identified in the SOW. Evaluation of specific resources for specific resource categories in the SOW will be limited to core resource categories that will be required. Evaluation of the ad hoc resources will be conducted after Contract Award as part of the Task Authorisation process. To be considered responsive, a proposal must contain, as a minimum, the indicated number of resumes for each of the following core resource categories:

- a. one (1) Programmer/Software Developer;
- b. four (4) Programmer/Analyst
- c. one (1) Junior Programmer;
- d. one (1) Tester;
- e. one (1) Technology Architect;
- f. one (1) Database Administrator;
- g. one (1) Contractor Team Manager;
- h. one (1) Trainer;
- i. one (1) Medical Technology Advisor;

The Crown (Canada) is seeking to secure an organisation experienced in supporting medical systems with an appropriate quality, quantity mix of skills that provides suitable breadth and depth. DND is seeking the opinion of Industry on how best to ensure that all standards presented under Section 2.3.2.1 of the Evaluation Criteria are met by at least one of the Resources proposed by the Bidder.

Proposal Requirements

Each resource or resource category will be evaluated in accordance with the evaluation procedures set out in this Annex E.

The Bidder must respond to all mandatory resource categories identified in Section 1.1 above with named resources to be considered for evaluation purposes.

Proposals must provide supporting information consisting of detailed résumés that clearly describe the degree and nature of the experience possessed by the proposed resource personnel. Supporting information must include relevant previous work experience or projects and dates (mm/yyyy) that enabled the individuals to acquire the necessary experience. For any projects where the project dates overlap in the résumé for a proposed resource, the Bidder must indicate the percentage of time spent on each project versus any other project for that time period for the requirement. Time spent during education and/or training does not count, unless otherwise indicated.

Only experience obtained up to the closing date for bids for this RFP will be considered relative to the Evaluation Criteria.

Note to bidders: Listing experience without providing any supporting data to describe where and how such experience was obtained will result in the experience not being included for evaluation purposes. Simply repeating or paraphrasing the contents of the SOW without providing any supporting data will not constitute compliance.

EVALUATION CRITERIA

General

Technical proposals will be evaluated and scored in accordance with the following evaluation criteria.

To meet the requirements described herein, the experience of the Bidder must be for work which the Bidder was under contract to clients external to the Bidder's own organisation. In the case of a joint venture, the combined experience of the parties forming the joint venture will be considered in the evaluation of the experience of the Bidder.

Corporate Technical Evaluation Criteria

Mandatory Evaluation Criteria - Corporate

The Bidder must demonstrate how it meets the requirements set out herein. Non-compliance with any of the Mandatory Corporate Requirements will render the proposal non-compliant and it will receive no further consideration.

Item #	Corporate Mandatory Criteria	Met	Not Met	Cross Reference
Corporate M1	<p>Corporate Experience (Reference Projects) The Bidder must provide 3 reference projects where the bidder was contracted to deliver professional services, for the development or maintenance of an integrated Health Information System (HIS) implementation and including:</p> <ul style="list-style-type: none"> i. A minimum of one (out of the 3 reference projects) contract must have had a minimum total value of \$5,000,000 (in Canadian dollars); and ii. A minimum of one (out of the 3 reference projects) must have been completed in Canada. <p>Should the Bidder provide more than 3 project references, Canada will only evaluate the first three project references provided.</p>			
Corporate M2	The Bidder must provide reference project where the bidder provided on-site in-service-support (ISS).			

Mandatory Evaluation Criteria – Core Resource Categories

Mandatory qualifications for each resource proposed for the corresponding mandatory resource category are detailed in the following sub-sections.

Note 1: The Bidder must propose the number of resources for each resource category as detailed in section 1.1 of this Annex. The Bidder must provide a résumé for **EACH** resource that is being proposed.

Note 2: For any projects where the project dates overlap in a résumé, the Bidder must indicate the percentage of time spent on each project versus any other project for the given requirement during the given time period. Overlapping project dates will not be double counted. All experience is to be strictly work related. Time spent during education and/or training will not count, unless otherwise indicated.

Note 3: For each substantiating experience period for a proposed individual in response to the requirements set out below, the Bidder will provide a Customer Reference, which will include the Customer Name, Title, Telephone Number and E-mail Address, who may be contacted to verify the claimed experience. It is the Bidder's responsibility to ensure that any information divulged has the permission of the references provided. Should the Bidder fail to provide the contact information requested for each Customer Reference, the bid submission will be deemed non-compliant and will not be given any further consideration by Canada.

Programmer/Software Developer

Bidder to propose 1 resource.

MQ-ID	Mandatory Evaluation Criteria - Programmer/Software Developer	MET	NOT MET	References
PSD M1	The proposed resource must have a minimum demonstrated 48 months of experience within the last 60months as a Programmer/Software Developer performing at least 50% of the activities listed for a Programmer/Software Developer in the Statement of Work in Annex A			Cross-reference to assigned resource Project Reference Number(s).
PSD M2	The proposed resource must hold a valid minimum Enhanced Reliability security clearance			

Programmer/Analysts

Bidder to propose 4 resources.

MQ-ID	Mandatory Evaluation Criteria - Programmer/Analysts	MET	NOT MET	References
PA M1	The proposed resource must have a minimum demonstrated 48 months of experience within the last 60months as a Programmer/Analyst performing at least 50% of the activities listed for Programmer/Analyst in the Statement of Work in Annex A			Cross-reference to assigned resource Project Reference Number(s).
PA M2	The proposed resource must hold a valid minimum Enhanced Reliability security clearance			

Junior Programmer

Bidder to propose 1 resource.

MQ-ID	Mandatory Evaluation Criteria - Junior Programmer	MET	NOT MET	References
JP M1	Successful completion of a university degree from a recognized university in Computer Science, Information Technology, or a related IT field. Or the successful completion of a minimum-two year diploma from a recognized college or a DEC from a recognized CEGEP, in Computer Science, Information Technology or a related IT field.			Cross-reference to assigned resource Project Reference Number(s).
JP M2	The proposed resource must hold a valid minimum Enhanced Reliability security clearance			

Tester

Bidder to propose 1 resource.

MQ-ID	Mandatory Evaluation Criteria - Tester	MET	NOT MET	References
TST M1	The proposed resource must have a minimum demonstrated 12 months of experience within the last 60 months as a Tester performing at least 50% of the activities listed for a Tester in the Statement of Work in Annex A			Cross-reference to assigned resource Project Reference Number(s).
TST M2	The proposed resource must hold a valid minimum Enhanced Reliability security clearance			

Technology Architect

Bidder to propose 1 resource.

MQ-ID	Mandatory Evaluation Criteria - Technology Architect	MET	NOT MET	References
TA M1	The proposed resource must have a minimum demonstrated 48 months of experience within the past 60 months working as a Technology Architect performing at least 50% of the activities listed for Technology Architect in the Statement of Work in Annex A.			Cross-reference to assigned resource Project Reference Number(s).

TA M2	The proposed resource must have a minimum demonstrated 24 months experience within the past 60 months implementing new features or functionalities into enterprise applications or systems.			
TA M3	The proposed resource must have a minimum demonstrated 24 months within the past 60 months performing and managing upgrades to enterprise Commercial Off the Shelf (COTS) or custom applications in a large organization (i.e. more than 500+ employees).			
TA M4	The proposed resource must hold a valid minimum Enhanced Reliability security clearance.			

Database Administrator

Bidder to propose one resource.

MQ-ID	Mandatory Evaluation Criteria - Database Administrator	MET	NOT MET	References
DA M1	The proposed resource must have a minimum demonstrated 48 months of experience within the past 60 months working as a Database Administrator performing at least 50% of the activities listed for Database Administrator in the Statement of Work in Annex A.			Cross-reference to assigned resource Project Reference Number(s).
DA M2	The proposed resource must have a minimum demonstrated 48 months of experience within the past 60 months working as an Oracle Database Administrator.			
DA M3	The proposed resource must have a minimum demonstrated 36 months of experience within the past 60 months developing scripts utilizing Oracle's Procedural Language / Structured Query Language (PL/SQL).			
DA M4	The proposed resource must have a minimum demonstrated 24 months experience within the last 60 months extracting and/or manipulating data for the purpose of data analysis and migration.			
DA M5	The proposed resource must hold a valid Oracle Certified Professional certification and provide a copy of the certification.			
DA M6	The proposed resource must hold a valid minimum Enhanced Reliability security clearance.			

Contractor Team Manager

Bidder to propose one resource.

MQ-ID	Mandatory Evaluation Criteria - Contractor Team Manager	MET	NOT MET	References
CTM M1	The proposed resource must have a minimum demonstrated 24 months of experience within the past 60 months working as a Contractor Team Manager performing at least 50% of the activities listed for Contractor Team Manager in the Statement of Work in Annex A.			Cross-reference to assigned resource Project Reference Number(s).
CTM M2	The proposed resource must have a minimum of 24 months experience in that last 60 months developing and managing IT systems.			
CTM M3	The proposed resource must hold a valid minimum Enhanced Reliability security clearance.			

Trainer

Bidder to propose one resource.

MQ-ID	Mandatory Evaluation Criteria - Trainer	MET	NOT MET	References
TR M1	The proposed resource must have a minimum demonstrated 24 months of experience within the last 60 months as a Trainer performing at least 50% of the activities listed for Trainer in the Statement of Work in Annex A.			Cross-reference to assigned resource Project Reference Number(s).
TR M2	The proposed resource must have a minimum of 24 months experience within the last 60 months developing electronic health information system training content.			
TR M3	The proposed resource must hold a valid minimum Enhanced Reliability security clearance.			

Medical Technology Advisor

Bidder to propose one resource.

MQ-ID	Mandatory Evaluation Criteria - Medical Technology Advisor	MET	NOT MET	References
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MTA M1	The proposed resource must have a minimum demonstrated 24 months of experience within the last 60 months as a Medical Technology Advisor performing at least 50% of the activities listed for Medical Technology Advisor in the Statement of Work in Annex A.			Cross-reference to assigned resource Project Reference Number(s).
MTA M2	The proposed resource must have a minimum of 24 months experience within the last 60 months providing advice regarding business transformation changes resulting from electronic health information solutions.			
MTA M3	The proposed resource must hold a valid minimum Enhanced Reliability security clearance.			

Rated Evaluation Criteria

Proposals that meet all of the Mandatory Requirements specified above will be evaluated and scored in accordance with the following point rated criteria.

Rated Evaluation Criteria – Corporate

Item #	Rated Criteria – Corporate	Max Points	Scoring Guidelines	Cross Reference to Proposal (page and paragraph)	Points
Corporate R1	The Bidder holds a valid International Organization for Standardization (ISO) 9001 certification.	255	No certification = 0 pts Has certification = 255 pts		
Corporate R2	The Bidder possesses a current Capacity Maturity Model Integration (CMMI) for development or Services appraisal.	255	Level 2 appraisal = 100 pts Level 3 appraisal = 255 pts		
TOTAL (Minimum Pass Mark)		510 (255)			

Rated Evaluation Criteria - Core Resource Categories

Proposals that meet all of the Mandatory Requirements specified above will be evaluated and scored in accordance with the following point rated criteria. Rated qualifications for each resource proposed for the corresponding mandatory resource category are detailed in the following sub-sections.

Note 1: For any projects where the project dates overlap in a résumé, the Bidder must indicate the percentage of time spent on each project versus any other project for the given requirement during the given time period. Overlapping project dates will not be double counted. All

experience is to be strictly work related. Time spent during education and/or training will not count, unless otherwise indicated.

Note 2: For each substantiating experience period for a proposed individual in response to the requirements set out below, the Bidder will provide a Customer Reference, which will include the Customer Name, title, Telephone Number and E-mail Address, who may be contacted to verify the claimed experience.

Programmers

Rated ITIL Standards Criteria – Programmers:

Provide proof of certification / course completion.

Scoring Guidelines: For each certification / course 1 point per block.

ITIL Intermediate Level	Programmer Analyst #1	Programmer Analyst #2	Programmer Analyst #3	Programmer Analyst #4	Programmer Software Developer	Junior Programmer Analyst	Score
ITIL Service Capability							
Service Offerings & Agreements certification.							
Release, Control & Validation certification.							
Operational Support & Analysis certification.							
Planning, Protection & Optimization certification.							
ITIL Service Life Cycle							
Service Strategy.							
Service Design.							
Service Transition.							
Service Operation.							
Continual Service Improvement.							
TOTAL (Minimum Pass Mark)						54 (0)	

Rated Medical Standards Criteria – Programmers

Indicate Cross Reference to Proposal (page and paragraph)

Scoring Guidelines: For each standard

- The proposed resource has worked with the standard for a minimum of 6 months in the last 60 months.
- 1 point per block

Business Area Standards	Programmer Analyst #1	Programmer Analyst #2	Programmer Analyst #3	Programmer Analyst #4	Programmer Software Developer	Junior Programmer Analyst	Score
ICD-10-CA standard. (ICD-10-CA International Classification of diseases)							
SNOMED CT standard. (SNOMED CT- Systematized Nomenclature of Medicine Clinical Terms)							
DICOM standard. (DICOM- Digital Imaging and Communication in Medicine)							
pCLOCD standard. (pCLOCD- Pan-Canadian LOINC Observation Code Database)							
TLI standard. (TLI- Transport Level Interoperability (TLI) Standards)							
DIN standard.(DIN- Health Canada Drug Identification Number)							
ISO 27799:2008 standard. (ISO 27799:2008-Standard for Health Informatics security)							
TOTAL						42	
(Minimum Pass Mark)						(0)	

Rated Technology Criteria – Programmers

Indicate Cross Reference to Proposal (page and paragraph)

Scoring Guidelines:

- For Team Coverage bonus points.
 - For each Technology the resource has worked with the technology for a minimum of 12 months in the last 60 months.
 - 1 resource = 1 point
 - 2 resources = 3 points
 - 3 resources = 5 points
 - 4 +resources = 7 points

- For the Programmers Analysts and the Programmer Software Developer. The proposed resource has demonstrated experience during the last 60 months maintaining and supporting applications with the specified technology.
 - 12 to < 24 months = 1 pts
 - 24 to < 36 months = 2 pts
 - 36 to < 48 months = 3 pts
 - 48+ months = 4 pts

Technology	Programmer Analyst #1	Programmer Analyst #2	Programmer Analyst #3	Programmer Analyst #4	Programmer Software Developer	Junior Programmer Analyst	Team Coverage Score
Electronic Medical Record System							
Laboratory Information System (LIS)							
Radiology Information System (RIS)							
Dental Information System							
HL7 messaging protocol							
Programming Language C#							
Visual Studio 2010 or greater							
Public Key Infrastructure (PKI)							
Windows Active Directory							
Oracle PL/SQL							
Oracle Database Management							
Citrix XenApp							
Windows 2008							
AIX 6.1							
TOTAL/RESOURCE 56							
(Minimum Pass Mark) (28)							
TOTAL/Team Coverage (Minimum Pass Mark)						98 (0)	

Programmer/Software Developer

Item #	Rated Criteria – Programmer/Software Developer	Max Points	Scoring Guidelines	Cross Reference to Proposal (page and paragraph)	Points
PSD R1	The proposed resource has demonstrated experience during the last 60 months working as a Programmer /Software Developer specializing in support of Health Informatics systems.	24	12 to < 24 months = 6 pts 24 to < 36 months = 12 pts 36 to < 48 months = 18 pts 48+ months = 24 pts		
PSD R2	The proposed resource has demonstrated experience during the last 60 months providing clinical application support and troubleshooting.	24	12 to < 24 months = 6 pts 24 to < 36 months = 12 pts 36 to < 48 months = 18 pts 48+ months = 24 pts		
PSD R3	The proposed resource has demonstrated experience during the last 60 months designing and developing applications based on software design specifications.	24	12 to < 24 months = 6 pts 24 to < 36 months = 12 pts 36 to < 48 months = 18 pts 48+ months = 24 pts		
PSD R4	The proposed resource has demonstrated experience during the last 60 months performing upgrades to enterprise COTS or custom applications.	24	12 to < 24 months = 6 pts 24 to < 36 months = 12 pts 36 to < 48 months = 18 pts 48+ months = 24 pts		
PSD R5	The proposed resource has demonstrated experience during the last 60 months building, testing, and releasing upgrades.	24	12 to < 24 months = 6 pts 24 to < 36 months = 12 pts 36 to < 48 months = 18 pts 48+ months = 24 pts		
TOTAL (Minimum Pass Mark)		120 (70)			

Programmer/Analyst - 1

Item #	Rated Criteria – Programmer/Analyst - 1	Max Points	Scoring Guidelines	Cross Reference to Proposal (page and paragraph)	Points
PA-1 R1	The proposed resource has demonstrated experience during the last 60 months working as a Programmer /Analyst specializing in support of	30	12 to < 24 months = 15 pts 24 to < 36 months = 20 36 to < 48 months = 25pts 48+ months = 30 pts		

Item #	Rated Criteria – Programmer/Analyst - 1	Max Points	Scoring Guidelines	Cross Reference to Proposal (page and paragraph)	Points
	Health Informatics systems.				
PA-1 R2	The proposed resource has demonstrated experience during the last 60 months providing clinical application support and troubleshooting.	30	12 to < 24 months = 15 pts 24 to < 36 months = 20 pts 36 to < 48 months = 25 pts 48+ months = 30 pts		
PA-1 R3	The proposed resource has demonstrated experience during the last 60 months providing dental application support..	30	12 to < 24 months = 15 pts 24 to < 36 months = 20 pts 36 to < 48 months = 25 pts 48+ months = 30 pts		
PA-1 R4	The proposed resource has demonstrated experience during the last 48 months providing radiology application support.	30	12 to < 24 months = 15 pts 24 to < 36 months = 20 pts 36 to < 48 months = 25 pts 48+ months = 30 pts		
TOTAL (Minimum Pass Mark)		120 (70)			

Programmer/Analyst - 2

Item #	Rated Criteria – Programmer/Analyst - 2	Max Points	Scoring Guidelines	Cross Reference to Proposal (page and paragraph)	Points
PA-2 R1	The proposed resource has demonstrated experience during the last 60 months working as a Programmer /Analyst specializing in support of Health Informatics systems.	30	12 to < 24 months = 15 pts 24 to < 36 months = 20 pts 36 to < 48 months = 25 pts 48+ months = 30 pts		
PA-2 R2	The proposed resource has demonstrated experience during the last 60 months providing clinical application support and troubleshooting.	30	12 to < 24 months = 15 pts 24 to < 36 months = 20 pts 36 to < 48 months = 25 pts 48+ months = 30 pts		

Item #	Rated Criteria – Programmer/Analyst - 2	Max Points	Scoring Guidelines	Cross Reference to Proposal (page and paragraph)	Points
PA-2 R3	The proposed resource has demonstrated experience during the last 60 months providing dental application support..	30	12 to < 24 months = 15 pts 24 to < 36 months = 20 pts 36 to < 48 months = 25 pts 48+ months = 30 pts		
PA-2 R4	The proposed resource has demonstrated experience during the last 48 months providing radiology application support.	30	12 to < 24 months = 15 pts 24 to < 36 months = 20 pts 36 to < 48 months = 25 pts 48+ months = 30 pts		
TOTAL (Minimum Pass Mark)		120 (70)			

Programmer/Analyst – 3

Item #	Rated Criteria – Programmer/Analyst - 3	Max Points	Scoring Guidelines	Cross Reference to Proposal (page and paragraph)	Points
PA-3 R1	The proposed resource has demonstrated experience during the last 60 months working as a Programmer /Analyst specializing in support of Health Informatics systems.	30	12 to < 24 months = 15 pts 24 to < 36 months = 20 pts 36 to < 48 months = 25 pts 48+ months = 30 pts		
PA-3 R2	The proposed resource has demonstrated experience during the last 60 months providing clinical application support and troubleshooting.	30	12 to < 24 months = 15 pts 24 to < 36 months = 20 pts 36 to < 48 months = 25 pts 48+ months = 30 pts		

Item #	Rated Criteria – Programmer/Analyst - 3	Max Points	Scoring Guidelines	Cross Reference to Proposal (page and paragraph)	Points
PA-3 R3	The proposed resource has demonstrated experience during the last 60 months providing dental application support..	30	12 to < 24 months = 15 pts 24 to < 36 months = 20 pts 36 to < 48 months = 25 pts 48+ months = 30 pts		
PA-3 R4	The proposed resource has demonstrated experience during the last 48 months providing radiology application support.	30	12 to < 24 months = 15 pts 24 to < 36 months = 20 pts 36 to < 48 months = 25 pts 48+ months = 30 pts		
TOTAL (Minimum Pass Mark)		120 (70)			

Programmer/Analyst – 4

Item #	Rated Criteria – Programmer/Analyst - 4	Max Points	Scoring Guidelines	Cross Reference to Proposal (page and paragraph)	Points
PA-4 R1	The proposed resource has demonstrated experience during the last 60 months working as a Programmer /Analyst specializing in support of Health Informatics systems.	30	12 to < 24 months = 15 pts 24 to < 36 months = 20 pts 36 to < 48 months = 25 pts 48+ months = 30 pts		
PA-4 R2	The proposed resource has demonstrated experience during the last 60 months providing clinical application support and troubleshooting.	30	12 to < 24 months = 15 pts 24 to < 36 months = 20 pts 36 to < 48 months = 25 pts 48+ months = 30 pts		
PA-4 R3	The proposed resource has demonstrated experience during the last 60 months providing dental application support..	30	12 to < 24 months = 15 pts 24 to < 36 months = 20 pts 36 to < 48 months = 25 pts 48+ months = 30 pts		

Item #	Rated Criteria – Programmer/Analyst - 4	Max Points	Scoring Guidelines	Cross Reference to Proposal (page and paragraph)	Points
PA-4 R4	The proposed resource has demonstrated experience during the last 48 months providing radiology application support.	30	12 to < 24 months = 15 pts 24 to < 36 months = 20 pts 36 to < 48 months = 25 pts 48+ months = 30 pts		
TOTAL (Minimum Pass Mark)		120 (70)			

Tester

Item #	Rated Criteria – Tester	Max Points	Scoring Guidelines	Cross Reference to Proposal (page and paragraph)	Points
TST R1	The proposed resource has demonstrated experience during the last 60 months in test planning and coordination to an IM/IT Team.	30	12 to < 24 months = 15 pts 24 to < 36 months = 20 pts 36 to < 48 months = 25 pts 48+ months = 30 pts		
TST R2	The proposed resource has demonstrated experience during the last 60 months maintaining test scripts and plans based on application releases.	30	12 to < 24 months = 15 pts 24 to < 36 months = 20 pts 36 to < 48 months = 25 pts 48+ months = 30 pts		
TST R3	The proposed resource has demonstrated experience during the last 60 months analyzing the cause of problems or errors found during testing.	30	12 to < 24 months = 15 pts 24 to < 36 months = 20 pts 36 to < 48 months = 25 pts 48+ months = 30 pts		
TST R4	The proposed resource has demonstrated experience during the last 60 months tracking bug/issue using an automated tool (e.g. Team Foundation Server (TFS), Bugzilla, Remedy).	30	12 to < 24 months = 15 pts 24 to < 36 months = 20 pts 36 to < 48 months = 25 pts 48+ months = 30 pts		
TOTAL		120			

Item #	Rated Criteria – Tester	Max Points	Scoring Guidelines	Cross Reference to Proposal (page and paragraph)	Points
(Minimum Pass Mark)		(0)			

Technology Architect

Item #	Rated Criteria – Technology Architect	Max Points	Scoring Guidelines	Cross Reference to Proposal (page and paragraph)	Points
TA R1	The proposed resource has demonstrated experience during the last 60 months working in the Health Informatics industry as a Technology Architect.	40	12 to < 24 months = 10 pts 24 to < 36 months = 20 pts 36 to < 48 months = 30 pts 48+ months = 40 pts		
TA R2	The proposed resource has demonstrated experience during the last 60 months in software/application development in a UNIX environment.	40	12 to < 24 months = 10 pts 24 to < 36 months = 20 pts 36 to < 48 months = 30 pts 48+ months = 40 pts		
TA R3	The proposed resource has demonstrated experience during the last 60 months in supporting and maintaining Oracle databases which support large enterprise applications (i.e. > 500 users).	40	12 to < 24 months = 10 pts 24 to < 36 months = 20 pts 36 to < 48 months = 30 pts 48+ months = 40 pts		
TOTAL (Minimum pass mark)		120 (70)			

Database Administrator

Item #	Rated Criteria – Database Administrator	Max Points	Scoring Guidelines	Cross Reference to Proposal (page and paragraph)	Points
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Item #	Rated Criteria – Database Administrator	Max Points	Scoring Guidelines	Cross Reference to Proposal (page and paragraph)	Points
DA R1	The proposed resource has demonstrated experience during the last 60 months designing, building and modifying Oracle applications	20	12 to < 24 months = 5 pts 24 to < 36 months = 10 pts 36 to < 48 months = 15 pts 48+ months = 20 pts		
DA R2	The proposed resource has demonstrated experience during the last 60 months providing in-service support for Oracle applications.	20	12 to < 24 months = 5 pts 24 to < 36 months = 10 pts 36 to < 48 months = 15 pts 48+ months = 20 pts		
DA R3	The proposed resource has demonstrated experience during the last 60 months in data conversion or data migration activities involving Oracle applications.	20	12 to < 24 months = 5 pts 24 to < 36 months = 10 pts 36 to < 48 months = 15 pts 48+ months = 20 pts		
DA R4	The proposed resource has demonstrated experience during the last 60 months developing Test Plans and conducting tests in support of Oracle applications.	20	12 to < 24 months = 5 pts 24 to < 36 months = 10 pts 36 to < 48 months = 15 pts 48+ months = 20 pts		
DA R5	The proposed resource has demonstrated experience during the last 60 months in Relational Database Design in an Oracle environment.	20	12 to < 24 months = 5 pts 24 to < 36 months = 10 pts 36 to < 48 months = 15 pts 48+ months = 20 pts		
DA R6	The proposed resource has demonstrated experience during the last 60 months developing and maintaining PL/SQL scripts.	20	12 to < 24 months = 5 pts 24 to < 36 months = 10 pts 36 to < 48 months = 15 pts 48+ months = 20 pts		
TOTAL (Minimum pass mark)		120 (0)			

Contractor Team Manager

Item #	Rated Criteria – Contractor Team Manager	Max Points	Scoring Guidelines	Cross Reference to Proposal (page and paragraph)	Points
CTM R1	The proposed resource has demonstrated experience in the last 60 months managing and supervising a team of technical professionals.	40	24 to < 36 months = 20 pts 36 to < 48 months = 30 pts 48 to 60 months = 40 pts		
CTM R2	The proposed resource has demonstrated experience in the last 60 months developing and managing IT system requirements.	40	24 to < 36 months = 20 pts 36 to < 48 months = 30 pts 48 to 60 months = 40 pts		
CTM R3	The proposed resource has demonstrated experience during the last 60 months developing work plans for a technical team and financial analysis for technical work packages.	40	12 to < 24 months = 10 pts 24 to < 36 months = 20 pts 36 to < 48 months = 30 pts 48 to 60 months = 40 pts		
TOTAL (Minimum Pass Mark)		120 (0)			

Trainer

Item #	Rated Criteria – Trainer	Max Points	Scoring Guidelines	Cross Reference to Proposal (page and paragraph)	Points
TR R1	The proposed resource has demonstrated experience within the last 60 months developing electronic health information system training content.	50	24 to < 36 months = 25 pts 36 to < 48 months = 30 pts 48 to 60 months = 50 pts		
TR R2	The proposed resource has demonstrated experience within the last 60 months drafting user instruction manuals, training manuals, Functional Impact Analysis documents, training system design documents, and user communiqués.	50	12 to < 24 months = 20 pts 24 to < 36 months = 30 pts 36 to < 48 months = 40 pts 48 to 60 months = 50 pts		
TR R3	The proposed resource has demonstrated	20	12 to < 24 months = 5 pts 24 to < 36 months = 10		

Item #	Rated Criteria – Trainer	Max Points	Scoring Guidelines	Cross Reference to Proposal (page and paragraph)	Points
	experience within the last 60 months in the delivery of in-person training to users.		pts 36 to < 48 months = 15 pts 48 to 60 months = 20 pts		
TOTAL (Minimum Pass Mark)		120 (0)			

Medical Technology Advisor

Item #	Rated Criteria – Medical Technology Advisor	Max Points	Scoring Guidelines	Cross Reference to Proposal (page and paragraph)	Points
MTA R1	The proposed resource has demonstrated experience within the last 60 months providing advice concerning mobility solution options and alternatives within an electronic health information system.	50	12 to < 24 months = 20 pts 24 to < 36 months = 30 pts 36 to < 48 months = 40 pts 48 to 60 months = 50 pts		
MTA R2	The proposed resource has demonstrated experience within the last 60 months providing advice concerning patient engagement and collaborative solution options and alternatives within an electronic health information system.	50	12 to < 24 months = 20 pts 24 to < 36 months = 30 pts 36 to < 48 months = 40 pts 48 to 60 months = 50 pts		
MTA R3	The proposed resource has demonstrated experience within the last 60 months providing advice concerning reports and data outputs to support decision making, outcome measurement, and performance measurement within an electronic health information system.	70	12 to < 24 months = 25 pts 24 to < 36 months = 40 pts 36 to < 48 months = 55 pts 48 to 60 months = 70 pts		
TOTAL (Minimum Pass Mark)		170 (100)			

ATTACHMENT B

BID SUBMISSION FORM

**DEPARTMENT OF NATIONAL
DEFENCE**

**DRAFT REQUEST FOR PROPOSAL
W8474-03-BH01**

**CANADIAN FORCES HEALTH INFORMATION
SYSTEM (CFHIS)
SUPPORT SERVICES**

BID SUBMISSION FORM 1.1													
Bidder's full legal name													
Authorized Representative of Bidder for evaluation purposes (e.g., clarifications)	<table border="1"> <tr><td>Name</td><td></td></tr> <tr><td>Title</td><td></td></tr> <tr><td>Address</td><td></td></tr> <tr><td>Telephone #</td><td></td></tr> <tr><td>Fax #</td><td></td></tr> <tr><td>Email</td><td></td></tr> </table>	Name		Title		Address		Telephone #		Fax #		Email	
Name													
Title													
Address													
Telephone #													
Fax #													
Email													
Bidder's Procurement Business Number (PBN) <i>[see the Standard Instructions 2003]</i>													
Jurisdiction of Contract: Province in Canada the bidder wishes to be the legal jurisdiction applicable to any resulting contract (if other than as specified in solicitation)													
Former Public Servants See the Article in Part 5 of the bid solicitation entitled Former Public Servant Certification for a definition of "Former Public Servant".	<p>Is the Bidder a FPS in receipt of a pension as defined in the bid solicitation? Yes ___ No ___</p> <p>If yes, provide the information required by the Article in Part 5 entitled "Former Public Servant Certification"</p> <hr/> <p>Is the Bidder a FPS who received a lump sum payment under the terms of a work force reduction program? Yes ___ No ___</p> <p>If yes, provide the information required by the Article in Part 5 entitled "Former Public Servant Certification"</p>												
Federal Contractors Program for Employment Equity (FCP EE) Certification: If the bidder is exempt, please indicate the basis for the exemption to the right. If the bidder does not fall within the exceptions enumerated to the right, the Program requirements do apply and the bidder is required either to: (a) submit to the Department of HRSD form LAB 1168, Certificate of Commitment to Implement Employment Equity, DULY SIGNED; or (b) submit a valid Certificate number confirming its adherence to the FCP-EE. Bidders are requested to include their FCP EE Certification or signed LAB 1168 with their bid; if this information is not provided in the bid, it must be provided upon request by the Contracting Authority during evaluation. For joint ventures, be sure to provide this information for each of the members of the joint venture.	<p>On behalf of the bidder, by signing below, I also confirm that the bidder <i>[check the box that applies]</i>:</p> <table border="1"> <tr> <td>(a) is not subject to Federal Contractors Program for Employment Equity (FCP-EE), because it has a workforce of less than 100 permanent full or part-time employees in Canada;</td> <td></td> </tr> <tr> <td>(b) is not subject to FCP-EE, because it is a regulated employer under the <i>Employment Equity Act</i>;</td> <td></td> </tr> <tr> <td>(c) is subject to the requirements of FCP-EE, because it has a workforce of 100 or more permanent full or part-time employees in Canada, but has not previously obtained a certificate number from the Department of Human Resources and Skills Development (HRSD) (having not bid on requirements of \$200,000 or more), in which case a duly signed certificate of commitment is attached; OR</td> <td></td> </tr> <tr> <td>(d) is subject to FCP-EE, and has a valid certification number as follows: _____ (and has not been declared an Ineligible Contractor by HRSD).</td> <td></td> </tr> </table>	(a) is not subject to Federal Contractors Program for Employment Equity (FCP-EE), because it has a workforce of less than 100 permanent full or part-time employees in Canada;		(b) is not subject to FCP-EE, because it is a regulated employer under the <i>Employment Equity Act</i> ;		(c) is subject to the requirements of FCP-EE, because it has a workforce of 100 or more permanent full or part-time employees in Canada, but has not previously obtained a certificate number from the Department of Human Resources and Skills Development (HRSD) (having not bid on requirements of \$200,000 or more), in which case a duly signed certificate of commitment is attached; OR		(d) is subject to FCP-EE, and has a valid certification number as follows: _____ (and has not been declared an Ineligible Contractor by HRSD).					
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(d) is subject to FCP-EE, and has a valid certification number as follows: _____ (and has not been declared an Ineligible Contractor by HRSD).													
Number of FTEs [Bidders are requested to indicate, the total number of full-time-equivalent positions that would be created and maintained by the bidder if it were awarded the Contract. This information is for information purposes only and will not be evaluated.]													
Security Clearance Level of Bidder <i>[include both the level and the date it was granted]</i>													

On behalf of the bidder, by signing below, I confirm that I have read the entire bid solicitation including the documents incorporated by reference into the bid solicitation and I certify that:

1. The bidder considers itself and its products able to meet all the mandatory requirements described in the bid solicitation;
2. This bid is valid for the period requested in the bid solicitation;
3. All the information provided in the bid is complete, true and accurate; and
4. If the bidder is awarded a contract, it will accept all the terms and conditions set out in the resulting contract clauses included in the bid solicitation.

Signature of Authorized Representative of Bidder	
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ATTACHMENT C

TEAM CERTIFICATION

**DEPARTMENT OF NATIONAL
DEFENCE**

**DRAFT REQUEST FOR PROPOSAL
W8474-03-BH01**

**CANADIAN FORCES HEALTH INFORMATION
SYSTEM (CFHIS)
SUPPORT SERVICES**

TEAM CERTIFICATION

Canada believes that there is a strong correlation between the success of an initiative and a Contractor with well-established relationships with its team members (joint venture partners, partners, parent organization, affiliated organization, any subsidiary organization and major tier-one subcontractors).

Therefore, by signing the certification below, the Bidder hereby certifies that:

(i) All of the Bidder's team members identified in its proposal have a signed teaming agreement or signed Contract in respect of the services to be provided under any contract resulting from this RFP, prior to the bid closing date (A signed letter of intent from a team member is not sufficient);

(ii) Where the team member is a related organization (i.e. parent, affiliated and/or subsidiary organization), the teaming agreement or Contract for the services to which the experience relates, must stipulate that the Bidder can rely upon and use the experience of the team member throughout the performance of any resulting Contract; and

(iii) Where the team member is a major tier-one subcontractor or limited partner, the teaming agreement or Contract must stipulate that the team member whose experience is being presented for evaluation will be actively responsible for the delivery of those services to which the experience relates under any resulting Contract.

In order to demonstrate that it meets this requirement, the Bidder is requested to provide the following certification:

CERTIFICATION SIGNATURE

We hereby certify compliance with the above noted requirements and have signed teaming agreements that meet the above requirements with the following team members:

(Bidders must enter the names of the organization(s) for which teaming agreements or Contracts are in place).

We also certify that the signature below is that of a person authorized to sign on behalf of the Bidder.

Signature

Date