

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

**Bid Receiving - PWGSC / Réception des
soumissions - TPSGC**

11 Laurier St. / 11, rue Laurier

Place du Portage, Phase III

Core 0A1 / Noyau 0A1

Gatineau

Québec

K1A 0S5

Bid Fax: (819) 997-9776

**REQUEST FOR PROPOSAL
DEMANDE DE PROPOSITION**

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

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

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

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

Comments - Commentaires

THIS DOCUMENT CONTAINS A SECURITY
REQUIREMENT

Title - Sujet TBIPS - Business and PM Services		
Solicitation No. - N° de l'invitation G7898-130001/B	Date 2014-02-04	
Client Reference No. - N° de référence du client G7898-130001		
GETS Reference No. - N° de référence de SEAG PW-\$\$ZM-380-26890		
File No. - N° de dossier 380zm.G7898-130001	CCC No./N° CCC - FMS No./N° VME	
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2014-02-24		Time Zone Fuseau horaire Eastern Standard Time EST
F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input checked="" type="checkbox"/> Other-Autre: <input type="checkbox"/>		
Address Enquiries to: - Adresser toutes questions à: Cook, Gail		Buyer Id - Id de l'acheteur 380zm
Telephone No. - N° de téléphone (819) 956-2591 ()		FAX No. - N° de FAX (819) 956-1207
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction: EMPLOYMENT AND SOCIAL DEVELOPMENT CANADA 140 PROMENDADE DU PORTAGE GATINEAU Quebec K1A0J9 Canada		

Instructions: See Herein

Instructions: Voir aux présentes

Vendor/Firm Name and Address

Raison sociale et adresse du

fournisseur/de l'entrepreneur

Issuing Office - Bureau de distribution

Informatics Professional Services Division / Division des
services professionnels en informatique

11 Laurier St., / 11, rue Laurier

3C2, Place du Portage

Gatineau

Québec

K1A 0S5

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

BID SOLICITATION

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

STREAM 4: BUSINESS SERVICES

STREAM 5: PROJECT MANAGEMENT SERVICES

FOR

EMPLOYMENT AND SOCIAL DEVELOPMENT CANADA (ESDC)

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BID SOLICITATION

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

STREAM 4: BUSINESS SERVICES

STREAM 5: PROJECT MANAGEMENT SERVICES

FOR

EMPLOYMENT AND SOCIAL DEVELOPMENT CANADA (ESDC)

PART 1 - GENERAL INFORMATION

1.1 Introduction

This document states terms and conditions that apply to this bid solicitation G7898-130001/B. It is divided into seven parts plus annexes and attachments as follows:

- Part 1 General Information: provides a general description of the requirement;
- Part 2 Bidder Instructions: provides the instructions, clauses and conditions applicable to the bid solicitation and states that the Bidder agrees to be bound by the clauses and conditions contained in all parts of the bid solicitation;
- Part 3 Bid Preparation Instructions: provides Bidders with instructions on how to prepare their bid;
- Part 4 Evaluation Procedures and Basis of Selection: indicates how the evaluation will be conducted, the evaluation criteria that must be addressed in the bid, if applicable, and the basis of selection;
- Part 5 Certifications: includes the certifications to be provided;
- Part 6 Security, Financial and Other Requirements: includes specific requirements that must be addressed by Bidders; and
- Part 7 Resulting Contract Clauses: includes the clauses and conditions that will apply to any resulting contract.

The annexes include the Statement of Work, the Basis of Payment, the Bid Evaluation Criteria, the Bid Submission Form and any other annexes.

1.2 Summary

- (a) This bid solicitation is being issued to satisfy the requirement of Employment and Social Development Canada (ESDC) (the "Client") for Task-Based Informatics Professional Services (TBIPS) under the TBIPS Supply Arrangement (SA) method of supply.

- (b) It is intended to result in the award of one contract per Workstream, with each contract purchasing Work from only one Workstream. Each contract will be for three years plus two one-year irrevocable options allowing Canada to extend the term of the contract.
- (c) There is a security requirement associated with this requirement. For additional information, consult Part 6 - Security, Financial and Other Requirements, and Part 7 - Resulting Contract Clauses. Bidders should consult the "Security Requirements on PWGSC Bid Solicitations - Instructions for Bidders" document on the Departmental Standard Procurement Documents (<http://ssi-iss.tpsgc-pwgsc.gc.ca>) Website.
- (d) The requirement is subject to a preference for Canadian Goods and/or services.
- (e) This procurement is set aside under the federal government's Procurement Strategy for Aboriginal Business.
- This procurement is set aside from the international trade agreements under the provision each has for set-asides for small and minority businesses.
- Further to Article 1802 of the *Agreement on Internal Trade* (AIT), AIT does not apply to this procurement.
- (f) Only Aboriginal TBIPS SA Holders currently holding a TBIPS SA for Tier 2 in the National Capital Region under the EN578-055605/E series of SAs are eligible to compete. The TBIPS SA EN578-055605/E is incorporated by reference and forms part of this bid solicitation, as though expressly set out in it, subject to any express terms and conditions contained in this bid solicitation. The capitalized terms not defined in this bid solicitation have the meaning given to them in the TBIPS SA.
- (g) SA Holders that are invited to compete as a joint venture must submit a bid as that joint venture SA Holder, forming no other joint venture to bid. Any joint venture must be already qualified under the SA #EN578-055605/E as that joint venture at the time of bid closing in order to submit a bid.
- (h) For each Workstream, the Resource Categories described below are required on an as and when requested basis in accordance with the TBIPS SA Annex "B":

WORKSTREAM 1 - BUSINESS SERVICES

RESOURCE CATEGORY	LEVEL OF EXPERTISE	ESTIMATED NUMBER OF RESOURCES REQUIRED
B.1 Business Analyst	2	Up to 12
B.2 Business Architect	3	Up to 4
B.4 Business Continuity/Disaster Recovery Specialist	2	Up to 4
B.5 Business Process Re-engineering (BPR) Consultant	2	Up to 6
B.7 Business Transformation Architect	3	Up to 6
B.14 Technical Writer	2	Up to 3

WORKSTREAM 2 - PROJECT MANAGEMENT SERVICES

RESOURCE CATEGORY	LEVEL OF EXPERTISE	ESTIMATED NUMBER OF RESOURCES REQUIRED
P.1 Change Management Consultant	3	Up to 2
P.2 Enterprise Architect	3	Up to 2
P.5 Project Executive	3	Up to 2
P.9 Project Manager	3	Up to 3
P.9 Project Manager	2	Up to 12
P.9 Project Manager - Release Manager	2	Up to 2
P.10 Project Scheduler	2	Up to 8

1.3 Debriefings

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

PART 2 - BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

- (a) All instructions, clauses and conditions identified in the bid solicitation by number, date and title are set out in the Standard Acquisition Clauses and Conditions Manual issued by Public Works and Government Services Canada (PWGSC).
- (b) Bidders who submit a bid agree to be bound by the instructions, clauses and conditions of the bid solicitation and accept the clauses and conditions of the resulting contract(s).
- (c) The 2003 (2013-06-01) Standard Instructions - Goods or Services - Competitive Requirements are incorporated by reference into and form part of the bid solicitation, with Subsection 5.4 amended by deleting "sixty (60) days" and inserting "180 days". If there is a conflict between the provisions of 2003 and this document, this document prevails.

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

- 4 Bidders who are incorporated or who are a sole proprietorship, including those bidding as a joint venture, have already provided a list of names of all individuals who are directors of the Bidder, or the name of the owner, at the time of submitting an arrangement under the Request for Supply Arrangement (RFSA). These Bidders must diligently maintain this list up-to-date by informing Canada in writing of any change occurring during the validity period of the bid as well as during the period of any contract arising from this bid solicitation.
- 5 Canada may, at any time, request that a Bidder provide properly completed and Signed Consent Forms (*Consent to a Criminal Record Verification form - PWGSC-TPSGC 229*) for any or all individuals aforementioned list within a specified time period. Failure to provide such Consent Forms within the time period provided will result in the bid being declared non-responsive.

2.2 Submission of Bids

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

2.3 Enquiries - Bid Solicitation

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

2.4 Applicable Laws

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

Note to Bidders: A bidder may, at its discretion, substitute the applicable laws of a Canadian province or territory of their choice without affecting the validity of its bid, by deleting the name of the Canadian province or territory specified and inserting the name of the Canadian province or territory of its choice. If no change is made, it acknowledges that the applicable laws specified are acceptable to the Bidder. *Bidders are requested to indicate the Canadian province or territory they wish to apply to any resulting contract in their Bid Submission Form.*

2.5 Improvement of Requirement During Solicitation Period

If bidders consider that the specifications or Statement of Work contained in the bid solicitation could be improved technically or technologically, bidders are invited to make suggestions, in writing, to the Contracting Authority named in the bid solicitation. Bidders must clearly outline the suggested improvement as well as the reasons for the suggestion. Suggestions that do not restrict the level of competition nor favour a particular bidder will be given consideration provided they are submitted to the Contracting Authority in accordance with the article entitled "Enquiries - Bid Solicitation". Canada will have the right to accept or reject any or all suggestions.

2.6 Volumetric Data

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

PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

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

- (i) Section I: Technical Bid (four hard copies and two soft copies on CD);
- (ii) Section II: Financial Bid (two hard copies); and
- (iii) Section III: Certifications not included in the Technical Bid (two hard copies).

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

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

- (b) **Format for Bid:** Canada requests that Bidders follow the format instructions described below in the preparation of their bid:

- (i) use 8.5 x 11 inch (216 mm x 279 mm) paper;
- (ii) use a numbering system that corresponds to the bid solicitation;
- (iii) include a title page at the front of each volume of the bid that includes the title, date, bid solicitation number, Bidder's name and address and contact information of its representative; and
- (iv) include a table of contents.

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

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

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

- (i) The submission of more than one bid from members of the same bidding group is not permitted in response to this bid solicitation. If members of a bidding group participate in more than one bid, Canada will set aside all bids received from members of that bidding group. A single bid may contain bids to be awarded a contract in one or more Workstreams. However, a bid may not contain a bid for a member of a bidding group to be awarded more than one contract in any given Workstream.
- (ii) For the purposes of this article, "**bidding group**" means all entities (whether those entities include one or more natural persons, corporations, partnerships, limited liability partnerships, etc.) that are related to one another. Regardless of the jurisdiction where any of the entities concerned is incorporated or otherwise formed as a matter of law, entities are considered "**related**" for the purposes of this bid solicitation if:

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

(e) **Joint Venture Experience:**

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

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

3.2 Section I: Technical Bid

The technical bid consists of the following:

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

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

If the Bidder has not included the security information in its bid, the Contracting Authority will provide the Bidder with an opportunity to submit the security information during the

evaluation period. If the Bidder has not submitted the security information within the period set by the Contracting Authority, its bid will be declared non-responsive.

- (iii) **Substantiation of Technical Compliance:** The technical bid must substantiate the compliance with the specific articles of Attachment 4.1, which is the requested format for providing the substantiation. The substantiation must not simply be a repetition of the requirement(s), but must explain and demonstrate how the Bidder will meet the requirements and carry out the required Work. Simply stating that the Bidder or its proposed solution or product complies is not sufficient. Where Canada determines that the substantiation is not complete, the Bidder will be considered non-responsive and disqualified. The substantiation may refer to additional documentation submitted with the bid - this information can be referenced in the "Bidder's Response" column of Attachment 4.1, where Bidders are requested to indicate where in the bid the reference material can be found, including the title of the document, and the page and paragraph numbers; where the reference is not sufficiently precise, Canada may request that the Bidder direct Canada to the appropriate location in the documentation.
- (iv) **For Proposed Resources:** The technical bid must include résumés for the resources as identified in Attachment 4.1. The same individual must not be proposed for more than one Resource Category or more than one Workstream. The Technical bid must demonstrate that each proposed individual meets the qualification requirements described (including any educational requirements, work experience requirements, and professional designation or membership requirements). With respect to the proposed resources:
 - (A) Proposed resources may be employees of the Bidder or employees of a subcontractor, or these individuals may be independent contractors to whom the Bidder would subcontract a portion of the Work (refer to Part 5, Certifications).
 - (B) For educational requirements for a particular degree, designation or certificate, Canada will only consider educational programmes that were successfully completed by the resource by the time of bid closing.
 - (C) For requirements relating to professional designation or membership, the resource must have the required designation or membership by the time of bid closing and must continue, where applicable, to be a member in good standing of the profession or membership throughout the evaluation period and contract period. Where the designation or membership must be demonstrated through a certification, diploma or degree, such document must be current, valid and issued by the entity specified in this solicitation. If the entity is not specified, the issuer must be an accredited or otherwise recognized body, institution or entity.
 - (D) For work experience, Canada will not consider experience gained as part of an educational programme, except for experience gained through a formal co-operative programme at a post-secondary institution.
 - (E) For any requirements that specify a particular time period (e.g., 2 years) of work experience, Canada will disregard any information about experience if the technical bid does not include the relevant dates (month and year) for the experience claimed (i.e., the start date and end date). Canada will evaluate only the duration that the resource actually worked on a project or projects (from his or her start date to end date), instead of the overall start and end date of a project or a combination of projects in which a resource has participated.
 - (F) For work experience to be considered by Canada, the technical bid must not simply indicate the title of the individual's position, but must demonstrate that the resource has the required work experience by explaining the responsibilities and

work performed by the individual while in that position. In situations in which a proposed resource worked at the same time on more than one project, the duration of any overlapping time period will be counted only once toward any requirements that relate to the individual's length of experience.

- (v) **Customer Reference Contact Information:** The Bidder must provide customer references who must each confirm, if requested by Canada the facts identified in the Bidder's bid, as required by Attachment 4.1. For each customer reference, the Bidder must, at a minimum, provide the name, the telephone number or e-mail address for a contact person. Bidders are also requested to include the title of the contact person. If there is a conflict between the information provided by the customer reference and the bid, the information provided by the customer reference will be evaluated instead of the information in the bid. If the named individual is unavailable when required during the evaluation period, the Bidder may provide the name and contact information of an alternate contact from the same customer.

3.3 Section II: Financial Bid

- (a) **Pricing:** Bidders must submit their financial bid in accordance with Attachment 4.2 - Pricing Schedule of this bid solicitation. 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.
- (b) **Variation in Resource Rates By Time Period:** For any given Resource Category, where the financial tables provided by Canada allow different firm rates to be charged for a resource category during different time periods:
- (i) the rate bid must not increase by more than 5% from one time period to the next, and
 - (ii) the rate bid for the same Resource Category during any subsequent time period must not be lower than the rate bid for the time period that includes the first month of the Initial Contract Period.
- (c) **Variation in Resource Rates By Level:** Where the financial tables provided by Canada allow different firm rates to be charged for different Levels of experience within the same Resource Category and time period, for any such Resource Category and time period
- (i) the rate bid for Level three must be equal to or higher than that bid for Level two, and
 - (ii) the rate bid for Level two must be equal to or higher than the rate bid for Level one.
- (d) **All Costs to be Included:** The financial bid must include all costs for the requirement described in the bid solicitation for the entire Contract Period, including any option periods. The identification of all necessary equipment, software, peripherals, cabling and components required to meet the requirements of the bid solicitation and the associated costs of these items is the sole responsibility of the Bidder.
- (e) **Blank Prices:** Bidders are requested to insert "\$0.00" for any item for which it does not intend to charge or for items that are already included in other prices set out in the tables. If the Bidder leaves any price blank, Canada will treat the price as "\$0.00" for evaluation purposes and may request that the Bidder confirm that the price is, in fact, \$0.00. No Bidder will be permitted to add or change a price as part of this confirmation. Any Bidder who does not confirm that the price for a blank item is \$0.00 will be declared non-responsive.

3.4 Section III: Certifications

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

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

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

the Bidder must provide the information requested by Canada within 2 working days of a request by the Contracting Authority.
 - (iv) **Extension of Time:** If additional time is required by the Bidder, the Contracting Authority may grant an extension in his or her sole discretion.

4.2 Technical Evaluation

A separate technical evaluation will be conducted for each Workstream.

(a) Mandatory Technical Criteria:

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

(b) Point- Rated Technical Criteria:

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

(c) Reference Checks:

- (i) For reference checks, Canada will conduct the reference check in writing by email. Canada will send all email reference check requests to contacts supplied by all the Bidders on the same day using the email address provided in the bid. Canada will not award any points unless the response is received within five working days of the date that Canada's email was sent.
- (ii) On the third working day after sending out the reference check request, if Canada has not received a response, Canada will notify the Bidder by email, to allow the Bidder to contact its reference directly to ensure that it responds to Canada within 5 working days. If the individual named by a Bidder is unavailable when required during the evaluation period, the Bidder may provide the name and email address of an alternate contact person from the same customer. Bidders will only be provided with this opportunity once for each customer, and only if the originally named individual is unavailable to respond (i.e., the Bidder will not be provided with an opportunity to submit the name of an alternate contact person if the original contact person indicates that he or she is unwilling or unable to respond). The Bidder will have 24 hours to submit the name of a new contact. That contact will again be given 5 working days to respond once Canada sends its reference check request.
- (iii) Wherever information provided by a reference differs from the information supplied by the Bidder, the information supplied by the reference will be the information evaluated.
- (iv) Points will not be allocated and/or a bidder will not meet the mandatory experience requirement (as applicable) if (1) the reference customer states he or she is unable or unwilling to provide the information requested, or (2) the customer reference is not a customer of the Bidder itself (for example, the customer cannot be the customer of an affiliate of the Bidder instead of being a customer of the Bidder itself). Nor will points be allocated or a mandatory met if the customer is itself an affiliate or other entity that does not deal at arm's length with the Bidder.
- (v) Whether or not to conduct reference checks is discretionary. However, if PWGSC chooses to conduct reference checks for any given rated or mandatory requirement, it will check the references for that requirement for all bidders to be recommended for contract award."

(d) Number of Resources Evaluated:

Only a certain number of resources per Resource Category will be evaluated as part of this bid solicitation as identified in Annex A. Additional resources will only be assessed after contract award once specific tasks are requested of the Contractor. After contract award, the Task Authorization process will be in accordance with Part 7 - Resulting Contract Clauses, the Article titled "Task Authorization". When a Task Authorization Form (TA Form) is issued, the Contractor will be requested to propose a resource to satisfy the specific requirement based on the TA Form's Statement of Work. The proposed resource will then be assessed against the criteria identified in the Contract's Statement of Work in accordance with Appendix C of Annex A.

4.3 Financial Evaluation - Highest Responsive Combined Rating of Technical Merit and Price

- (a) **Calculation of Total Bid Price:** The financial evaluation will be conducted by calculating the Total Bid Price using the pricing tables completed by the responsive Bidders. A separate financial evaluation will be conducted for each Workstream.
- (b) 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 (c) Financial Evaluation - Method A below). The second method will be used if fewer than three bids are determined responsive (see (d) Financial Evaluation - Method B below).
- (c) **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 Firm Per Diem Median Rate Evaluation Method explained below. A financial calculation will occur for each Bidder by multiplying its firm per diem rates for the Initial Contract Period and the option period(s) (or the median, whichever is higher) with the estimated number of days of work for each period, for all the Resource Categories stated in Attachment 4.2 - Pricing Schedule. The sum of such rates will constitute the Total Bid Price for that Bidder.
 - (ii) **Firm Per Diem Median Rate Evaluation**
 - (A) **Use:** The firm 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 firm per diem median rate calculation is for evaluation purposes only, and the actual submitted per diem rate will be used in any resulting contract in all instances.
 - (B) **Calculation for both the Initial Contract Period and the Option Period medians:** Using the per diem rate proposed for each individual resource category a median rate will be determined for each Resource Category. A median will be used to calculate each Bidder's per diem rate for the Initial Contract Period, and another median will be established for each of the option period(s). For each Resource Category, 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.
- (d) **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 Attachment 4.2 - Pricing Schedule. The sum of such rates will constitute the Total Bid Price for that Bidder.

(e) 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.

(f) Formulae in Pricing Tables

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

4.4 Basis of Selection

(a) Evaluation of Bid

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

(i) A bid must comply with the requirements of the bid solicitation, meet all mandatory evaluation criteria and obtain the required pass marks for the point rated criteria identified in this bid solicitation to be declared responsive.

(ii) The responsive bid that obtains the highest Total Bidder Score will be recommended for award of a contract. For any given Bidder, the greatest possible Total Technical Score is 65 while the greatest possible Total Financial Score is 35.

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

$$\frac{\text{Technical Score}}{\text{Maximum Technical Points (Bidders, please refer to the maximum technical points in Annex D)}} \times 65 = \text{Total Technical Score}$$

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

$$\frac{\text{Lowest Total Bid Price}}{\text{The Bidder's Total Bid Price}} \times 35 = \text{Total Financial Score}$$

(C) Calculation of the Total Bidder Score: The Total Bidder Score will be computed for each responsive bid in accordance with the following formula:

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

(iii) In the event of identical Total Bidder Scores occurring, then the bid with the highest Total Technical Score will become the top-ranked bidder.

(iv) A maximum of one contract may be awarded in total for each Workstream, as a result of this solicitation.

(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.

PART 5 - CERTIFICATIONS

Bidders must provide the required certifications to be awarded a contract. Canada will declare a bid non-responsive if the required certifications are not completed and submitted in accordance with the articles below.

Compliance with the certifications Bidders provide to Canada is subject to verification by Canada during the bid evaluation period (before award of a contract) and after award of a contract. The Contracting Authority will have the right to ask for additional information to verify Bidders' compliance with the certifications before award of a contract. The bid will be declared non-responsive if any certification made by the Bidder is untrue, whether made knowingly or unknowingly. Failure to comply with the certifications or to comply with the request of the Contracting Authority for additional information will also render the bid non-responsive.

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

5.0 Mandatory Certifications Required Precedent to Contract Award

5.1 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.

5.2 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" 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 (Attachment 5.1), 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 (Attachment 5.1), for each member of the Joint Venture.

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

5.3 Former Public Servant - Competitive Requirements

(a) Information Required

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

(b) Definitions

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

an individual;

an individual who has incorporated;

a partnership made of former public servants; or

a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.

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

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

(c) Former Public Servant in Receipt of a Pension

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

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

name of former public servant;

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 web sites as part of the published proactive disclosure reports in accordance with Contracting Policy Notice: 2012-2 and the Guidelines on the Proactive Disclosure of Contracts.

(d) Work Force Adjustment Directive

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

If so, the Bidder must provide the following information:

name of former public servant;

conditions of the lump sum payment incentive;

date of termination of employment;

amount of lump sum payment;

rate of pay on which lump sum payment is based;

period of lump sum payment including start date, end date and number of weeks;

number and amount (professional fees) of other contracts subject to the restrictions of a work force adjustment program.

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

Note to Bidders: Bidders are requested to provide the information required by this clause in their Bid Submission Form.

5.4 Professional Services Resources

- (a) By submitting a bid, the Bidder certifies that, if it is awarded a contract as a result of the bid solicitation, every individual proposed in its bid will be available to perform the Work as required by Canada's representatives and at the time specified in the bid solicitation or agreed to with Canada's representatives.
- (b) By submitting a bid, the Bidder certifies that all the information provided in the résumés and supporting material submitted with its bid, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Bidder to be true and accurate. Furthermore, the Bidder warrants that every individual proposed by the Bidder for the requirement is capable of performing the Work described in the resulting contract.
- (c) If the Bidder is unable to provide the services of an individual named in its bid due to the death, sickness, extended leave (including parental leave or disability leave), retirement, resignation or dismissal for cause of that individual, within five business days of Canada's knowledge of the unavailability of the individual the Bidder may propose a substitute to the Contracting Authority, providing:
 - (i) the reason for the substitution with substantiating documentation acceptable to the Contracting Authority;
 - (ii) the name, qualifications and experience of a proposed replacement immediately available for work; and
 - (iii) proof that the proposed replacement has the required security clearance granted by Canada, if applicable.

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

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

If no substitute is proposed the Contracting Authority will set aside the bid and give it no further consideration.

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

5.5 Certification of Language - English Essential

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

5.6 Canadian Content Certification

- (a) This procurement is conditionally limited to Canadian services. Subject to the evaluation procedures contained in the bid solicitation, bidders acknowledge that only bids with a certification that the services offered are Canadian services, as defined in clause A3050T, may be considered. Failure to provide this certification completed with the bid will result in the services offered being treated as non-Canadian services. The Bidder certifies that:

() the services offered are Canadian services as defined in paragraph 4 of clause A3050T.

For more information on how to determine the Canadian content for a mix of goods, a mix of services or a mix of goods and services, consult Annex 3.6.(9), Example 2, of the Supply Manual.

- (b) SACC Manual Clause A3050T (2010-01-11) Canadian Content Definition

5.7 Set-aside for Aboriginal Business

- (a) This procurement is set aside for Aboriginal business under the federal government's Set-aside Program for Aboriginal Business. Bidders must complete and sign the certification entitled "Certification Requirements for the Set-aside Program for Aboriginal Business" attached as Attachment 5.2.
- (b) By executing the certification, the Bidder warrants that it is an Aboriginal business as defined in the Set-aside Program for Aboriginal Business.
- (c) SACC Manual clause A3001T (2011-05-16) applies.

PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS

6.1 Security Requirement

- (a) At the date of bid closing, the following conditions must be met:
 - (i) the Bidder must hold a valid organization security clearance as indicated in Part 7 - Resulting Contract Clauses; and
 - (ii) the Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work site(s) must each meet the security requirement as indicated in Part 7 - Resulting Contract Clauses.
- (b) For additional information on security requirements, Bidders should consult the "Security Requirements for PWGSC Bid Solicitations - Instructions to Bidders" document on the Departmental Standard Procurement Documents Website.
- (c) In the case of a joint venture Bidder, each member of the joint venture must meet the security requirements.

6.2 Financial Capability

- (a) SACC Manual clause A9033T (2012-07-16) Financial Capability applies, except that subsection 3 is deleted and replaced with the following: "If the Bidder is a subsidiary of another company, then any financial information required by the Contracting Authority in 1(a) to (f) must be provided by each level of parent company, up to and including the ultimate parent company. The financial information of a parent company does not satisfy the requirement for the provision of the financial information of the Bidder; however, if the Bidder is a subsidiary of a company and, in the normal course of business, the required financial information is not generated separately for the subsidiary, the financial information of the parent company must be provided. If Canada determines that the Bidder is not financially capable but the parent company is, or if Canada is unable to perform a separate assessment of the Bidder's financial capability because its financial information has been combined with its parent's, Canada may, in its sole discretion, award the contract to the Bidder on the condition that the parent company grant a performance guarantee to Canada."
- (b) In the case of a joint venture Bidder, each member of the joint venture must meet the financial capability requirements.

PART 7 - RESULTING CONTRACT CLAUSES

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

7.1 Requirement

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

7.2 Task Authorization

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

- (D) the categories of resources and the number required;
- (E) a description of the work for the task outlining the activities to be performed and identifying any deliverables (such as reports);
- (F) the start and completion dates;
- (G) milestone dates for deliverables and payments (if applicable);
- (H) the number of person-days of effort required;
- (I) whether the work requires on-site activities and the location;
- (J) the language profile of the resources required;
- (K) the level of security clearance required of resources;
- (L) the price payable to the Contractor for performing the task, with an indication of whether it is a firm price or a maximum TA price (and, for maximum price task authorizations, the TA must indicate how the final amount payable will be determined; where the TA does not indicate how the final amount payable will be determined, the amount payable is the amount, up to the maximum, that the Contractor demonstrates was actually worked on the project, by submitting time sheets filled in at the time of the work by the individual resources to support the charges); and
- (M) any other constraints that might affect the completion of the task.

(d) Contractor's Response to Draft Task Authorization: The Contractor must provide the ESDC Procurement Representative, within 2 working days of receiving the draft Task Authorization (or within any longer time period specified in the draft TA), the proposed total price for performing the task and a breakdown of that cost, established in accordance with the Basis of Payment specified in the Contract. The Contractor's quotation must be based on the rates set out in the Contract. The Contractor will not be paid for preparing or providing its response or for providing other information required to prepare and validly issue the TA.

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

To be validly issued, a TA must include the following signature(s):

- (i) for any TA with a value less than or equal to \$400,000.00 (including Applicable Taxes), the TA must be signed by:
 - (A) the Project Authority; and
 - (B) a representative from ESDC Procurement and Contracting Services; and
- (ii) for any TA with a value greater than this amount, a TA must include the following signatures:
 - (A) the Project Authority; and
 - (B) a representative from ESDC Procurement and Contracting Services; and
 - (C) the Contracting Authority.

Any TA that does not bear the appropriate signature(s) is not validly issued by Canada. Any work performed by the Contractor without receiving a validly issued TA is done at the Contractor's own risk. If the Contractor receives a TA that is not appropriately signed, the Contractor must notify the Contracting Authority. By providing written notice to the Contractor, the Contracting Authority may suspend the Client's ability to issue TAs at any time, or reduce the dollar value threshold described in sub-article (A) above; any suspension or reduction notice is effective upon receipt.

(f) Periodic Usage Reports:

(i) The Contractor must compile and maintain records on its provision of services to the federal government under validly issued TAs issued under the Contract. The Contractor must provide this data to Canada in accordance with the reporting requirements detailed below. If any required information is not available, the Contractor must indicate the reason. If services are not provided during a given period, the Contractor must still provide a "NIL" report. The Contractor must submit the periodic usage reports on a quarterly basis to the Contracting Authority. From time to time, the Contracting Authority may also require an interim report during a reporting period.

(ii) The quarterly periods are defined as follows:

- (A) April 1 to June 30;
- (B) July 1 to September 30;
- (C) October 1 to December 31; and
- (D) January 1 to March 31.

The data must be submitted to the Contracting Authority no later than 10 calendar days after the end of the reporting period.

(iii) Each report must contain the following information for each validly issued TA (as amended):

- (A) the Task Authorization number and the Task Authorization Revision number(s), if applicable;
- (B) a title or a brief description of the task;
- (C) the name, Resource category and level of each resource involved in performing the TA, as applicable;
- (D) the total estimated cost specified in the TA (Applicable Taxes extra);
- (E) the total amount (Applicable Taxes extra) expended to date;
- (F) the start and completion date; and
- (G) the active status, as applicable (e.g., indicate whether work is in progress or if Canada has cancelled or suspended the TA, etc.).

(iv) Each report must also contain the following cumulative information for all the validly issued TAs (as amended):

- (A) the amount (Applicable Taxes extra) specified in the contract (as last amended, if applicable) as Canada's total liability to the contractor for all validly issued TAs; and
- (B) the total amount, Applicable Taxes extra, expended to date against all validly issued TAs.

(g) Consolidation of TAs for Administrative Purposes: The Contract may be amended from time to time to reflect all validly issued Task Authorizations to date, to document the Work performed under those TAs for administrative purposes.

7.3 Minimum Work Guarantee

- (a) In this clause,
- (i) **"Maximum Contract Value"** means the amount specified in the **"Limitation of Expenditure"** clause set out in the Contract (excluding Applicable Taxes); and
 - (ii) **"Minimum Contract Value"** means 2% of the Maximum Contract Value on the date the contract is first issued.
- (b) Canada's obligation under the Contract is to request Work in the amount of the Minimum Contract Value or, at Canada's option, to pay the Contractor at the end of the Contract in accordance with sub-article (c), subject to sub-article (d). In consideration of such obligation, the Contractor agrees to stand in readiness throughout the Contract Period to perform the Work described in the Contract. Canada's maximum liability for work performed under the Contract must not exceed the Maximum Contract Value, unless an increase is authorized in writing by the Contracting Authority.
- (c) In the event that Canada does not request work in the amount of the Minimum Contract Value during the Contract Period, Canada must pay the Contractor the difference between the Minimum Contract Value and the total cost of the Work requested.
- (d) Canada will have no obligation to the Contractor under this article if Canada terminates the entire Contract
- (i) for default;
 - (ii) for convenience as a result of any decision or recommendation of a tribunal or court that the contract be cancelled, re-tendered or awarded to another supplier; or
 - (iii) for convenience within ten business days of Contract award.

7.4 Standard Clauses and Conditions

All clauses and conditions identified in the Contract by number, date and title are set out in the Standard Acquisition Clauses and Conditions Manual (<http://sacc.pwgsc.gc.ca/sacc/index-e.jsp>) issued by Public Works and Government Services Canada.

(a) **General Conditions:**

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

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

4. The total of the amounts, to which the Contractor is entitled to be paid under this section, together with any amounts paid, due or becoming due to the Contractor must not exceed the Contract Price.
5. Where the Contracting Authority terminates the entire Contract and the Articles of Agreement include a Minimum Work Guarantee, the total amount to be paid to the Contractor under the Contract will not exceed the greater of
 - (a) the total amount the Contractor may be paid under this section, together with any amounts paid, becoming due other than payable under the Minimum Revenue Guarantee, or due to the Contractor as of the date of termination, or

(b) the amount payable under the Minimum Work Guarantee, less any amounts paid, due or otherwise becoming due to the Contractor as of the date of termination.

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

(b) **Supplemental General Conditions:**

The following Supplemental General Conditions:

(i) 4006 (2010-08-16), Supplemental General Conditions - Contractor to Own Intellectual Property Rights in Foreground Information;

apply to and form part of the Contract.

7.5 Security Requirement

PWGSC File Common PS SRCL #19 and related clausling applies to the Contract.

- (a) The Contractor must, at all times during the performance of the Contract, hold a valid Facility Security Clearance at the level of SECRET, issued by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC).
- (b) The Contractor personnel requiring access to PROTECTED/CLASSIFIED information, assets or sensitive work site(s) must EACH hold a valid personnel security screening at the level of RELIABILITY STATUS, CONFIDENTIAL or SECRET as required, granted or approved by CISD/PWGSC.
- (c) The Contractor MUST NOT remove any PROTECTED/CLASSIFIED information from the identified work site(s), and the Contractor must ensure that its personnel are made aware of and comply with this restriction.
- (d) Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of CISD/PWGSC.
- (e) The Contractor must comply with the provisions of the:
 - (i) Security Requirements Check List and security guide (if applicable), attached at Annex C;
 - (ii) *Industrial Security Manual (Latest Edition)*.

7.6 Contract Period

- (a) **Contract Period:** The "**Contract Period**" is the entire period of time during which the Contractor is obliged to perform the Work, which includes:
 - (i) The "**Initial Contract Period**", which begins on the date the Contract is awarded and ends three years later; and
 - (ii) The period during which the Contract is extended, if Canada chooses to exercise any options set out in the Contract.

(b) Option to Extend the Contract:

- (i) The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to two additional one-year periods under the same terms and conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions set out in the Basis of Payment.
- (ii) Canada may exercise this option at any time by sending a written notice to the Contractor before the expiry date of the Contract. The option may only be exercised by the Contracting Authority, and will be evidenced, for administrative purposes only, through a contract amendment.

7.7 Authorities**(a) Contracting Authority**

The Contracting Authority for the Contract is:

Name: Gail Cook
 Title: Supply Team Leader
 Public Works and Government Services Canada
 Acquisitions Branch
 Directorate: Informatics and Telecommunications Systems Procurement Directorate
 Address: Place du Portage, Phase III, 3C2-2
 11 Laurier St., Gatineau, Québec K1A 0S5
 Telephone: 819-956-2591
 Facsimile: 819-956-1207
 E-mail address: gail.cook@tpsgc-pwgsc.gc.ca

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

(b) Project Authority

The Project Authority for the Contract is:

Name: _____
 Title: _____
 Organization: _____
 Address: _____
 Telephone: _____
 Facsimile: _____
 E-mail address: _____

The Project 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 Project Authority; however, the Project Authority has no authority to authorize changes to the scope of the Work. Changes to the scope of the Work can only be made through a contract amendment issued by the Contracting Authority.

(c) ESDC Procurement Representative

The ESDC Procurement Representative for the Contract is:

The ESDC 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 all matters concerning the administrative aspects of the Work under the Contract, communication with PWGSC Contracting Authority on all matters concerning the Contract, procurement initiation authority, and providing PWGSC reports on Contract utilization. Technical matters may be discussed with the ESDC Procurement Representative; however, the ESDC Procurement Representative has no authority to authorize changes to the scope of the Work. Changes to the scope of the Work can only be made through a contract amendment issued by the Contracting Authority.

(d) Contractor's Representative

The Contractor's Representative is:

Note to Bidders: The Contractor's Representative, Project Authority, and ESDC Procurement Representative and contact information will be identified at the time of contract award.

7.8 Proactive Disclosure of Contracts with Former Public Servants

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

7.9 Payment**(a) Basis of Payment**

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

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 in accordance with the clause titled "Travel and Living" of the Supply Arrangement which is also available at:

<http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/rfdso-sotli-eng.html>

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. 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.
- (i) No increase in the total liability of Canada or in the price of the Work resulting from any design changes, modifications or interpretations of the Work, will be authorized or paid to the Contractor unless these design changes, modifications or interpretations have been approved, in writing, by the Contracting Authority before their incorporation into the Work. The Contractor must not perform any work or provide any service that would result in Canada's total liability being exceeded before obtaining the written approval of the Contracting Authority. The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum when:
- (A) it is 75 percent committed, or
- (B) 4 months before the Contract expiry date, or
- (C) as soon as the Contractor considers that the contract funds provided are inadequate for the completion of the Work,
- whichever comes first.
- (ii) 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.

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- (c) **Method of Payment for Task Authorizations with a Maximum Price:** For each Task Authorization validly issued under the Contract that contains a maximum price:
- (i) Canada will pay the Contractor no more frequently than once a month in accordance with the Basis of Payment. The Contractor must submit time sheets for each resource showing the days and hours worked to support the charges claimed in the invoice.
 - (ii) Once Canada has paid the maximum TA price, Canada will not be required to make any further payment, but the Contractor must complete all the Work described in the TA, all of which is required to be performed for the maximum TA price. If the Work described in the TA is completed in less time than anticipated, and the actual time worked (as supported by the time sheets) at the rates set out in the Contract is less than the maximum TA price, Canada is only required to pay for the time spent performing the work related to that TA.
- (d) **Time Verification**
- Time charged and the accuracy of the Contractor's time recording system are subject to verification by Canada, before or after payment is made to the Contractor. If verification is done after payment, the Contract must repay any overpayment, at Canada's request.
- (e) **Payment Credits**
- (i) **Failure to Provide Resource:**
 - (A) If the Contractor does not provide a required professional services resource that has all the required qualifications within the time prescribed by the Contract, the Contractor must credit to Canada an amount equal to the per diem rate (based on a 7.5-hour workday) of the required resource for each day (or partial day) of delay in providing the resource, up to a maximum of 10 days.
 - (B) **Corrective Measures:** If credits are payable under this Article for two consecutive months or for three months in any twelve-month period, the Contractor must submit a written action plan describing measures it will implement or actions it will undertake to eliminate the recurrence of the problem. The Contractor will have *five working days* to deliver the action plan to the Client and the Contracting Authority and 20 working days to rectify the underlying problem.
 - (C) **Termination for Failure to Meet Availability Level:** In addition to any other rights it has under the Contract, Canada may terminate the Contract for default by giving the Contractor three months' written notice of its intent, if :
 - (1) the total amount of credits for a given monthly billing cycle reach a level of 10% of the total billing for that month; or
 - (2) the corrective measures required of the Contractor described above are not met.

This termination will be effective when the three month notice period expires, unless Canada determines that the Contractor has implemented the corrective measures to Canada's satisfaction during those three months.
 - (ii) **Credits Apply during Entire Contract Period:** The Parties agree that the credits apply throughout the Contract Period.

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- (iii) **Credits represent Liquidated Damages:** The Parties agree that the credits are liquidated damages and represent their best pre-estimate of the loss to Canada in the event of the applicable failure. No credit is intended to be, nor will it be construed as, a penalty.
 - (iv) **Canada's Right to Obtain Payment:** The Parties agree that these credits are a liquidated debt. To collect the credits, Canada has the right to hold back, draw back, deduct or set off from and against any money Canada owes to the Contractor from time to time.
 - (v) **Canada's Rights & Remedies not Limited:** The Parties agree that nothing in this Article limits any other rights or remedies to which Canada is entitled under the Contract (including the right to terminate the Contract for default) or under the law generally.
 - (vi) **Audit Rights:** The Contractor's calculation of credits under the Contract is subject to verification by government audit, at the Contracting Authority's discretion, before or after payment is made to the Contractor. The Contractor must cooperate fully with Canada during the conduct of any audit by providing Canada with access to any records and systems that Canada considers necessary to ensure that all credits have been accurately credited to Canada in the Contractor's invoices. If an audit demonstrates that past invoices contained errors in the calculation of the credits, the Contractor must pay to Canada the amount the audit reveals was required to be credited to Canada, plus interest, from the date Canada remitted the excess payment until the date of the refund (the interest rate is the Bank of Canada's discount annual rate of interest in effect on the date the credit was first owed to Canada, plus 1.25% per year). If, as a result of conducting an audit, Canada determines that the Contractor's records or systems for identifying, calculating or recording the credits are inadequate, the Contractor must implement any additional measures required by the Contracting Authority.
- (f) **No Responsibility to Pay for Work not performed due to Closure of Government Offices**
- (i) Where the Contractor, its employees, subcontractors, or agents are providing services on government premises under the Contract and those premises are inaccessible because of the evacuation or closure of government offices, and as a result no work is performed, Canada is not responsible for paying the Contractor for work that otherwise would have been performed if there had been no evacuation or closure.
 - (ii) If, as a result of any strike or lock-out, the Contractor or its employees, subcontractors or agents cannot obtain access to government premises and, as a result, no work is performed, Canada is not responsible for paying the Contractor for work that otherwise would have been performed if the Contractor had been able to gain access to the premises.

7.10 Invoicing Instructions

- (a) The Contractor must submit invoices in accordance with the information required in the General Conditions.
- (b) The Contractor's invoice must include a separate line item for each subparagraph in the Basis of Payment provision, and must show all applicable Task Authorization numbers.
- (c) By submitting invoices the Contractor is certifying that the goods and services have been delivered and that all charges are in accordance with the Basis of Payment provision of the Contract, including any charges for work performed by subcontractors.

- (d) The Contractor must provide the original and two copies of each invoice to the Technical Authority, and a copy to the Contracting Authority.

7.11 Certifications

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

7.12 Federal Contractors Program for Employment Equity - Default by 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.

7.13 Aboriginal Business Certification

SACC Manual clause A3000C (2011-05-16), Aboriginal Business Certification

7.14 Applicable Laws

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

7.15 Priority of Documents

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

- (a) these Articles of Agreement, including any individual SACC clauses incorporated by reference in these Articles of Agreement;
- (b) Supplemental General Conditions, in the following order:
 - (i) 4006 (2010-08-16), Supplemental General Conditions - Contractor to Own Intellectual Property Rights in Foreground Information;
- (c) General Conditions 2035 (2013-06-27);
- (d) Annex A, Statement of Work - Annex A including its Appendices as follows:
 - (i) Appendix A to Annex A - Tasking Assessment Procedure;
 - (ii) Appendix B to Annex A - Task Authorization (TA) Form;
 - (iii) Appendix C to Annex A - Resource Assessment Criteria and Response Table;
 - (iv) Appendix D to Annex A - Certifications at the TA stage;
- (e) Annex B, Basis of Payment;
- (f) Annex C, Security Requirements Check List;

- (g) the signed Task Authorizations including any required Certifications;
- (h) Supply Arrangement Number EN578-055605/xxx/EI (the "Supply Arrangement"); and
- (i) the Contractor's bid dated _____ (*insert date of bid*), as amended _____ (*insert date(s) of amendment(s) if applicable*).

7.16 Foreign Nationals (Canadian Contractor)

SACC Manual clause A2000C (2006-06-16) Foreign Nationals (Canadian Contractor)

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

7.16 Foreign Nationals (Foreign Contractor)

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

7.17 Insurance Requirements

(a) Compliance with Insurance Requirements

- (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.

(b) 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 Insureds: Without increasing the limit of liability, the policy must protect all insured parties to the full extent of coverage provided. Further, the policy must apply to each Insured in the same manner and to the same extent as if a separate policy had been issued to each.
- (F) Blanket Contractual Liability: The policy must, on a blanket basis or by specific reference to the Contract, extend to assumed liabilities with respect to contractual provisions.
- (G) Employees and, if applicable, Volunteers must be included as Additional Insured.
- (H) Employers' Liability (or confirmation that all employees are covered by Worker's compensation (WSIB) or similar program)
- (I) Broad Form Property Damage including Completed Operations: Expands the Property Damage coverage to include certain losses that would otherwise be excluded by the standard care, custody or control exclusion found in a standard policy.
- (J) Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of policy cancellation.
- (K) If the policy is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.
- (L) Owners' or Contractors' Protective Liability: Covers the damages that the Contractor becomes legally obligated to pay arising out of the operations of a subcontractor.
- (M) Advertising Injury: While not limited to, the endorsement must include coverage for piracy or misappropriation of ideas, or infringement of copyright, trademark, title or slogan.

(c) Errors and Omissions Liability Insurance

- (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.

7.18 Limitation of Liability - Information Management/Information Technology

- (a) This section applies despite any other provision of the Contract and replaces the section of the general conditions entitled "Liability". Any reference in this section to damages caused by the Contractor also includes damages caused by its employees, as well as its subcontractors, agents, and representatives, and any of their employees. This section applies regardless of whether the claim is based in contract, tort, or another cause of action. The Contractor is not liable to Canada with respect to the performance of or failure to perform the Contract, except as described in this section and in any section of the Contract pre-establishing any liquidated damages. The Contractor is only liable for indirect, special or consequential damages to the extent described in this Article, even if it has been made aware of the potential for those damages.
- (b) **First Party Liability:**
- (i) The Contractor is fully liable for all damages to Canada, including indirect, special or consequential damages, caused by the Contractor's performance or failure to perform the Contract that relate to:
 - (A) any infringement of intellectual property rights to the extent the Contractor breaches the section of the General Conditions entitled "Intellectual Property Infringement and Royalties";
 - (B) physical injury, including death.
 - (ii) The Contractor is liable for all direct damages affecting real or tangible personal property owned, possessed, or occupied by Canada.
 - (iii) Each of the Parties is liable for all direct damages resulting from any breach of confidentiality under the Contract. Each of the Parties is also liable for all indirect, special or consequential damages in respect of any unauthorized disclosure of the other Party's trade secrets (or trade secrets of a third party provided by one Party to another under the Contract) relating to information technology.
 - (iv) The Contractor is liable for all direct damages relating to any encumbrance or claim relating to any portion of the Work for which Canada has made any payment. This does not apply to encumbrances or claims relating to intellectual property rights, which are addressed under (i)(A) above.
 - (v) The Contractor is also liable for any other direct damages to Canada caused by the Contractor in any way relating to the Contract, including:
 - (A) any breach of the warranty obligations under the Contract, up to the total amount paid by Canada (including any applicable taxes) for the goods and services affected by the breach of warranty; and
 - (B) Any other direct damages, including all identifiable direct costs to Canada associated with re-procuring the Work from another party if the Contract is terminated either in whole or in part for default, up to an aggregate maximum for this subparagraph (B) of the greater of .75 times the total estimated cost (meaning the dollar amount shown on the first page of the Contract in the cell titled "Total Estimated Cost" or shown on each call-up, purchase order or other document used to order goods or services under this instrument), or \$1,000,000.00.

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

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

(c) **Third Party Claims:**

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

7.19 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.

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

7.20 Professional Services - General

- (a) The Contractor must provide professional services on request as specified in this Contract. All resources provided by the Contractor must meet the qualifications described in the Contract (including those relating to previous experience, professional designation, education, language proficiency and security clearance) and must be competent to provide the required services by any delivery dates described in the Contract.
- (b) If the Contractor fails to deliver any deliverable (excluding delivery of a specific individual) or complete any task described in the Contract on time, in addition to any other rights or remedies available to Canada under the Contract or the law, Canada may notify the Contractor of the deficiency, in which case the Contractor must submit a written plan to the Technical Authority within ten working days detailing the actions that the Contractor will undertake to remedy the deficiency. The Contractor must prepare and implement the plan at its own expense.
- (c) In General Conditions 2035, the Section titled "Replacement of Specific Individuals" is deleted and the following applies instead:

Replacement of Specific Individuals

- (i) If the Contractor is unable to provide the services of any specific individual identified in the Contract to perform the services, the Contractor must within five working days of the individual's departure or failure to commence Work (or, if Canada has requested the replacement, within ten working days of Canada's notice of the requirement for a replacement) provide to the Contracting Authority:
 - (A) the name, qualifications and experience of a proposed replacement immediately available for Work; and
 - (B) security information on the proposed replacement as specified by Canada, if applicable.

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

- (ii) Subject to an Excusable Delay, where Canada becomes aware that a specific individual identified under the Contract to provide services has not been provided or is not performing, the Contracting Authority may elect to:

-
- (A) exercise Canada's rights or remedies under the Contract or at law, including terminating the Contract for default under Section titled "Default of the Contractor", or
 - (B) assess the information provided under (c) (i) above or, if it has not yet been provided, require the Contractor propose a replacement to be rated by the Technical Authority. The replacement must have qualifications and experience that meet or exceed those obtained for the original resource and be acceptable to Canada. Upon assessment of the replacement, Canada may accept the replacement, exercise the rights in (ii) (A) above, or require another replacement in accordance with this subarticle (c).

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

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

7.21 Safeguarding Electronic Media

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

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

7.23 Access to Canada's Property and Facilities

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

7.24 Implementation of Professional Services

If similar professional services are currently being provided by another supplier or by Canada's own personnel, the Contractor is responsible for ensuring that the transition to the professional services it provides under the Contract is completed in a way that does not disrupt Canada's operations or users, and does not result in any interim degradation to the timeliness or quality of service. The Contractor is solely responsible for any additional training required by its resources to perform the Work, and time spent by resources on that training or becoming familiar with the Client's environment must not be charged to Canada. The transition will be considered complete once the Contractor has demonstrated, to the satisfaction of the Technical Authority, that it is ready and able to carry out the Work. The transition must be complete by no later than 10 working days after the Contract is awarded. All costs associated with establishing itself to provide the professional services are the responsibility of the Contractor.

7.25 Transition Services at End of Contract Period

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

7.26 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

WORKSTREAM 1 - BUSINESS SERVICES

1. BACKGROUND

Employment and Social Development Canada (ESDC) has a requirement for an “as and when requested” contract that satisfies the need for Business Services resources to be readily available for implementation into various projects while accommodating project and/or initiative time constraints. These Business Services resources will be utilized directly in support of project management offices, especially during the initiation and project definition phases of various projects – this includes development of proposed architecture and business requirements.

Although it is anticipated that the majority of the resources will be required on a full-time basis, the actual requirement for all resources will be identified through an approved Task Authorization. The estimated levels of effort for each resource category may vary throughout the duration of the Contract.

2. OBJECTIVES

In support of the ESDC projects, the objectives of this requirement are to acquire the services of resources in order to support project management teams with business services. The team will be comprised of the following resources:

Resource Category	Level of Expertise	Estimated No. of Resources per Year	Estimated No. of Days per Year
B.1 Business Analyst	2	Up to 12	300
B.2 Business Architect	3	Up to 4	50
B.4 Business Continuity/Disaster Recovery Specialist	2	Up to 4	100
B.5 Business Process Re-engineering (BPR) Consultants	2	Up to 6	150
B.7 Business Transformation Architects	3	Up to 6	150
B.14 Technical Writers	2	Up to 3	37.5

These resources will supplement existing project teams and provide the necessary project definition support including development of business cases and other supporting documentation.

3. RESOURCE CATEGORIES

3.1 B.1 Business Analyst (Level 2)

ESDC requires the services of Business Analysts (Level 2) to support the ESDC projects. The focus for the Business Analyst (Level 2) must be on documenting business requirements, participating in the development of functional specifications, reviewing design documents, creating use cases, creating user acceptance test case scenarios, and executing User Acceptance Testing (UAT). The Business Analyst (Level 2) must provide overall advice on all matters associated with the specific project identified in the Task Authorization.

3.1.1 Tasks

Working with a team of departmental staff, the Project Management Office (PMO), and project managers, the Business Analyst (Level 2) must provide business analysis support for the ESDC project and the Business Architect (Level 3). The Business Analyst (Level 2) must serve as the conduit between the business community (internal and external clients) and the software development team through which requirements flow. The Business Analyst (Level 2) tasks include, but are not limited to:

- (a) Conduct a quality review and document the business requirements;
- (b) Identify gaps in business requirements and provide recommendations to the Business Architect (Level 3);
- (c) Identify opportunities for organizational improvement;
- (d) Elicit requirements using interviews, document analysis, requirements workshops, surveys, site visits, business process descriptions, use cases, scenarios, business analysis, task and workflow analysis;
- (e) Facilitate group sessions to identify requirements;
- (f) Critically evaluate information gathered from multiple sources, reconcile conflicts, decompose high-level information into details, abstract up from low-level information to a general understanding, and distinguish user requests from the underlying true business needs;
- (g) Communicate and collaborate with external and internal clients to analyze information needs and functional requirements and deliver the following artifacts as needed:
 - (i) Functional requirements;
 - (ii) Business requirements document;
 - (iii) Use cases, GUI, screen and interface designs;
- (h) Work independently with users to define concepts with assistance from project managers;
- (i) Challenge business units on their assumptions of how they will successfully execute their plans;
- (j) Prepare a business analysis and a work flow analysis to assess difficulties in reaching goals and to determine a better strategy;
- (k) Provide support in the analysis, evaluation and control of risks, especially related to requirements;

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- (l) Review and update documentation that may include, road map, project descriptions, system documentation, business/functional requirements, as-is business processes, architecture documents;
 - (m) Document the business and business process requirements, using the departmental Business Process Requirement (BPR) template, for components of the assigned ESDC project, using natural (plain) language;
 - (n) Participate in the development of the technical functional specification by collaborating with the Business Architect, developers and subject matter experts to establish the technical vision and analyze tradeoffs between usability and performance needs;
 - (o) Participate in the review of the design documents;
 - (p) Update the requirements traceability matrix;
 - (q) Capture relevant information in the traceability matrix for each assigned project within the project, identifying gaps and provide recommendations to the Business Architect;
 - (r) Document UAT test case scenarios and document results;
 - (s) Create user acceptance test case scenarios and obtain approval from the Business Architect;
 - (t) Execute test cases, document and present findings to the Business Architect and project team;
 - (u) Transfer functional and technical knowledge to the project team and client staff through individual and group training, demonstrations, written instructions and documents on an ongoing basis throughout the life of the project; and
 - (v) Maintain all project artifacts as per established document management requirements for the department and Treasury Board (TB) policy.

3.1.2 Deliverables

The Business Analyst (Level 2) must submit the following deliverables to the Project Authority:

- (a) A status report on a bi-weekly basis, documenting the progress of the work described above in Tasks, including difficulties which may affect overall schedule and planned tasks for the next reporting period. The status report must include:
 - (i) Activities completed within the reporting period;
 - (ii) Planned activities for the next reporting period;
 - (iii) Risks/issues that will require the attention of the Business Architect and Project Authority; and
 - (iv) Corrective actions required.
- (b) Documentation, development and delivery of the business process flows for each major business activity.

3.2 B.2 Business Architect (Level 3)

The ESDC requires the services of Business Architects (Level 3) to document the business architecture in support of ESDC major projects as identified in each Task Authorization. The focus will be on defining the business architecture for the project in order to provide a common, simplified and standardized business framework so that processes can be streamlined, automated, and managed. The Business Architect (Level 3) must work closely with the Business Analysts, Enterprise Architects, and counterparts in the Innovation and Information Technology Branch. The Business Architect (Level 3) must provide overall advice on all matters associated with business architecture with the specific project identified in the Task Authorization.

A complete business architecture must include the following:

- (a) A clearly articulated set of goals;
- (b) A model that shows what the program looks like within its environment, including what interactions the program offers to its clients and suppliers;
- (c) A model that shows how the program needs to operate as a set of processes in order to support the interactions it exposes externally;
- (d) An understanding of the mandatory and appropriate communications between the program and its environment as well as internal communications that are relevant and important; and
- (e) An understanding of all the information, in the form of business entities that the program cares about as well as the interrelationships between program entities.

The services provided by the Business Architect (Level 3) are divided in several views. Each view will describe an aspect of the entire business. Below are the architectural views that must be part of the business architecture deliverable:

- (a) Goals View: documents the main goals of the project (including associated programs);
- (b) Facades View: documents how the project presents itself to key stakeholders (e.g. clients, suppliers, regulatory bodies, etc.) This should include an organizational view which defines roles, responsibilities and business context. It describes the business itself (the internal organization);
- (c) Communications View: the flow of information for the main interactions both externally and internally;
- (d) Processes View: documents processes that are internal to the project. These represent central capabilities of the business or have a substantial coverage of the business;
- (e) Business Entities View: documents what is manipulated, stored, and acted upon by the program and how these things relate;
- (f) Human Resource View: describes how the organization will prepare for change, i.e. where staff is located, where work will be done, required tools and skill sets;
- (g) Geographic View: describes the locations of the business units and other organizational entities (i.e. call contact centers) as well as how the organization will be affected by the business process change;
- (h) Architectural Drivers: defines the architectural goals and constraints. This would include such things as business challenges, strategic outcomes, operating performance requirements, quality, extensibility and portability targets; and

- (i) Architectural Trade-offs: describes how the architectural drivers will be realized and recommends optimal solutions in the case of conflicting drivers.

3.2.1 Assumptions

The following provides a list of current assumptions that have been factored into this Statement of Work and the associated planning to successfully document the business architecture. It should be noted that each project may involve additional assumptions. The current assumptions are:

- (a) The views created and focus of the business architecture will be to advance the projects and therefore the number of views and level of detail within the views may vary, depending on the specific requirement and intended use;
- (b) Build the business architecture on the future state (to be) model;
- (c) Build the architecture from a top-down approach;
- (d) Build the architecture based on a tailored Rational Unified Process (RUP) methodology; and
- (e) The architecture will be consistent with the Government Service Reference Model (GSRM).

3.2.2 Tasks

Working with a team of departmental staff, the PMO, and project managers, the Business Architect (Level 3) must provide business analysis and architecture support for the ESDC projects. In particular, the Business Architect (Level 3) tasks include, but are not limited to:

- (a) Conduct an assessment of relevant current business architecture, processes and performance as it relates to the assigned projects;
- (b) Review existing documentation that may include, road maps, project descriptions, system documentation, business and functional requirements, "as-is" business processes and architecture documents;
- (c) Document the "as-is" business architecture to be used as a baseline and to identify root-cause of critical business issues;
- (d) Confirm the scope and requirement of the business architecture;
- (e) Apply a structured business architecture approach and methodology for capturing the key views of the business unit in the context of the enterprise;
- (f) Determine framework and approach to document the business architecture;
- (g) Define and document the architectural views identified for future state;
- (h) Ensure consistency and integration with the organization's and government architectures and business strategies;
- (i) Identify appropriate tools and techniques to be used for modeling and analysis;
- (j) Evaluate the feasibility of the architecture and technologies related to a new business change, assist in the prioritization and design of improvements from an architectural perspective;
- (k) Advise senior management on business trends and the emerging technologies being deployed and their potential impact on the organization's and/or government architectures and business strategies;

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- (l) Capture the tactical and strategic business goals that provide traceability through the organization and are mapped to metrics that provide ongoing governance;
 - (m) Describe the primary business functions of the assigned business unit in the context of the enterprise and distinguish between customer-facing, supplier-related, business execution and business management functions;
 - (n) Enumerate, analyze, catalog, and suggest improvements to the strategic, core and support processes of the business unit, as needed, to support strategic and operational goals;
 - (o) Define the data elements shared between this business unit and other units in the enterprise and the relationships between those data elements and processes, people, systems, and other data elements;
 - (p) Enumerate, analyze, and suggest improvements to the structural relationships of the business. This requires the creation and maintenance of an ongoing model of roles, capabilities and business units, the decomposition of those business units into subunits, and the interplay between these units in various business processes, materials, people, and systems;
 - (q) Determine the architectural artifacts required to be created, maintained and stored aligning business architecture artifacts with IT architecture artifacts;
 - (r) Develop recommendations and establish standards to document business processes and business requirements for these projects and align with departmental practices and standards;
 - (s) Build a requirements traceability matrix to ensure it meets the business need;
 - (t) Perform business analysis of functional requirements to identify information, processes, and procedures in order to ensure system and manual processes are documented in an integrated manner;
 - (u) Develop rules that allow the organization to carry out its mandate, functional responsibilities, and that govern the actual and planned capabilities in terms of data, human resources, communication and management responsibilities;
 - (v) Identify risks and mitigation strategies associated with the existing or proposed architecture and technologies;
 - (w) Conduct gap analysis on business processes and recommend action plans;
 - (x) Prioritize and develop work plans to address gaps, recommending alternative solutions, methodologies and strategies;
 - (y) Recommend changes to improve operational performance;
 - (z) Provide expert advice in developing and integrating processes and information models between processes to eliminate information and process redundancies and address gaps;
 - (aa) Transfer functional and technical knowledge to the project team and client staff through individual and group training, coaching, demonstrations, written instructions and documents on an ongoing basis throughout the life of the project; and
 - (ab) Maintain all project artifacts as per established document management requirements for the department and TB policy.

3.2.3 Deliverables

The Business Architect (Level 3) must submit the following deliverables to the Project Authority:

- (a) Development and delivery of work plan;
- (b) A status report on a bi-weekly basis, documenting the progress of the work described in the work plan and above in Tasks , including difficulties which may affect overall schedule and planned tasks for the next reporting period. The status report must include;
 - (i) Activities completed within the reporting period;
 - (ii) Planned activities for the next reporting period;
 - (iii) Risks/issues that will require the attention of the Project Authority; and
 - (iv) Corrective actions required.
- (c) Development of all business architecture artifacts based on the architectural views using agreed to format and notation standard;
- (d) Prepare a report on current gaps, results of prioritization, the rationale for and recommended implementation of architectural improvements. The report must include a costed implementation plan;
- (e) Completion of the departmental business requirements template and development and delivery of any supporting business process template(s);
- (f) Documentation and delivery of the future state business process for each major business activity;
- (g) Authoring of ad hoc reports for management, as requested by the Project Authority; and
- (h) Development and delivery of the traceability matrix framework which will trace business services, business activities to business needs.

3.3 B.4 Business Continuity/Disaster Recovery Specialist (Level 2)

ESDC requires the services of Business Continuity/Disaster Recovery Specialists (Level 2) in support of ESDC major projects as identified in each Task Authorization. The focus will be on developing and implementing business and technology work plans in the event of a disaster resulting in disablement of ESDC production systems and business processes. The Business Continuity/Disaster Recovery Specialist (Level 2) must provide advice on all matters associated to business continuity/disaster recovery with the specific project identified in the Task Authorization.

3.3.1 Tasks

Working with the project team, IT SMEs and business SMEs, the Business Continuity/Disaster Recovery Specialist (Level 2) must perform the following tasks which include but are not limited to:

- (a) Analyze impact on, and risk to, essential business functions or information systems to identify acceptable recovery time periods and resource requirements;
- (b) Create business continuity and disaster recovery plans from impact and risk analysis, and obtain signoff from Project Authority;
- (c) Create and administer training and awareness presentations or materials;
- (d) Create scenarios to re-establish operations from various types of business disruptions;

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- (e) Develop emergency management plans for recovery decision making and communications, continuity of critical departmental processes, or temporary shut-down of non-critical operations to ensure continuity of operation and governance;
 - (f) Establish, maintain, and test call trees to ensure appropriate communication during disaster;
 - (g) Identify opportunities for strategic improvement or mitigation of business interruption and other risks caused by business, regulatory, or policy changes;
 - (h) Interpret enterprise requirements of disaster recovery to ensure compliance to ESDC and TB standards;
 - (i) Maintain all project artifacts as per established document management requirements for the department and TB policy; and
 - (j) Transfer functional and technical knowledge to the project team and client staff through individual and group training, demonstrations, written instructions and documents on an ongoing basis throughout the life of the project.

3.3.2 Deliverables

The Business Continuity/Disaster Recovery Specialist (Level 2) must provide the following deliverables:

- (a) Document outlining essential business functions, acceptable recovery time periods, rationale, and resource requirements for disaster recovery;
- (b) Business continuity / disaster recovery plan including known risks and mitigation strategies, compliant with ESDC and TB policies and regulations;
- (c) Report summarizing testing activities, including description of goals, planning, scheduling, execution, results, analysis, conclusions, and recommendations;
- (d) Training and communication materials based on the business continuity / disaster recovery plan; and
- (e) Call trees in the event of disaster recovery.

3.4 B.5 Business Process Re-engineering (BPR) Consultant (Level 2)

ESDC requires the services of Business Process Re-engineering Consultants (Level 2) to document current and future state business processes in support of major projects as identified in each Task Authorization. The focus will be on defining current state process, identifying potential processes for streamlining, and providing a future state streamlined process. The Business Process Re-engineering Consultant (Level 2) must work closely with project authorities, business leads, and the project team to identify and outline processes, provide advice on business requirements and implementation plans. The Business Process Re-engineering Consultant (Level 2) must provide overall advice on all business process re-engineering matters associated with the specific project identified in the Task Authorization.

3.4.1 Tasks

Working with the project team, IT SMEs and business SMEs, the Business Process Re-engineering Consultant (Level 2) must perform the following tasks, which include but are not limited to:

- (a) Review existing business processes and identify potential processes for streamlining;
- (b) Provide recommendations on to be processes based on analysis of current processes and business needs;

- (c) Work with the project team, business leads, and IT leads to identify opportunities for streamlining;
- (d) Provide expert advice on business requirements, data flows, process design, and efficiencies to be gained through various process and workflow scenarios;
- (e) Transfer functional and technical knowledge to the project team and client staff through individual and group training, demonstrations, written instructions and documents on an ongoing basis throughout the life of the project; and
- (e) Maintain all project artifacts as per established document management requirements for the department and TB policy.

3.4.2 Deliverables

The Business Process Re-engineering Consultant (Level 2) must submit the following deliverables to the Project Authority:

- (a) Document outlining work plan based on initial analysis;
- (b) Document current business processes and work flows using ESDC tools and systems;
- (c) Document outlining to be processes and work flows using ESDC tools and systems;
- (d) Document implementation plan based on analysis;
- (e) Document associated risks and mitigation strategies for proposed implementation plan; and
- (f) Store all documentation in the project information repository in accordance with ESDC information management standards and policies.

3.5 B.7 Business Transformation Architect (Level 3)

ESDC requires the services of Business Transformation Architects (Level 3) to provide leadership and support in the development of business transformation design and architecture related to the business processes affected by the projects outlined in specific Task Authorizations.

3.5.1 Tasks

The Business Transformation Architect (Level 3) tasks include, but are not limited to:

- (a) Lead the business transformation architecture activities;
- (b) Assist in the development of business transformation design and architecture, business transformation architecture standards definition and application of business transformation processes;
- (c) Analyze and develop architecture requirements design, process development, process mapping and training;
- (d) Identify business transformation risks and provide issue management and risk mitigation strategies;
- (e) Optimize business transformation approaches based on evolving business needs and technology capabilities;
- (f) Perform fit-gap analysis;
- (g) Develop and deliver business transformation alignment/architecture presentations to senior management; and

- (h) Provide knowledge transfer, coaching and/or training to ESDC staff as required.

3.5.2 Deliverables

The Business Transformation Architect (Level 3) deliverables will be detailed in specific Task Authorizations.

3.6 B.14 Technical Writer (Level 2)

ESDC requires the services of Technical Writers (Level 2) to provide support in the development, maintenance, organization and storage of technical documentation related to projects as outlined in specific Task Authorizations.

3.6.1 Tasks

The Technical Writer (Level 2) tasks include, but are not limited to:

- (a) Write and maintain technical documentation materials;
- (b) Organize material and complete writing assignment according to set standards regarding order, clarity, conciseness, style, and terminology;
- (c) Assess the audience for the documents/manuals which are required and prepare a statement of purpose and scope for each;
- (d) Analyze production, developmental, and experimental activities to determine operating procedure and detail;
- (e) Analyze developments in specific field to determine need for revisions in previously published materials and development of new material; and
- (f) Assist in laying out material for publication and provide translation ready documentation.

3.6.2 Deliverables

The Technical Writer (Level 2) deliverables will be detailed in specific Task Authorizations.

4. FORMAT OF DELIVERABLES

All deliverables must be in Microsoft application software compatible with the ESDC departmental standards and delivered to the Project Authority by the media as specified in the Task Authorization.

5. LANGUAGE REQUIREMENTS

- 5.1 All deliverables must be submitted in the English language.
- 5.2 The Contractor personnel must be fluent in the English language. Contractor personnel must be able to communicate orally and in writing in English without any assistance and with minimal errors.

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Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur

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

G7898-130001

File No. - N° du dossier

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CCC No./N° CCC - FMS No/ N° VME

6. LOCATION OF WORK

The majority of the work will be completed on-site in the National Capital Region (NCR) at ESDC's various offices within that region, including both Gatineau and Ottawa sites.

7. TRAVEL REQUIREMENTS

The Contractor may be required to travel outside of the NCR, and travel may be required from time to time within the NCR.

8. DELIVERY SCHEDULE

The delivery schedule for the deliverables will be identified in each Task Authorization.

ANNEX A

STATEMENT OF WORK

WORKSTREAM 2 - PROJECT MANAGEMENT SERVICES

1. BACKGROUND

Employment and Social Development Canada (ESDC) has a requirement for an “as and when requested” contract that satisfies the need for Project Management resources to be readily available for implementation into various projects while accommodating project and/or initiative time constraints.

Although it is anticipated that the majority of the resources will be required on a full-time basis, the actual requirement for all resources will be identified through an approved Task Authorization. The estimated levels of effort for each resource category may vary throughout the duration of the Contract.

2. OBJECTIVES

In support of the ESDC projects, the objectives of this requirement are to acquire the services of a team of resources in order to establish a Project Management Office (PMO) and provide project management support to a variety of project teams in all areas of the department. The team will be comprised of the following resources:

Resource Category	Level of Expertise	Estimated No. of Resources per Year	Estimated No. of Days per Year
P.1 Change Management Consultant	3	Up to 2	25
P.2 Enterprise Architect	3	Up to 2	25
P.5 Project Executive	3	Up to 2	25
P.9 Project Manager	3	Up to 3	75
P.9 Project Manager	2	Up to 12	300
P.9 Project Manager – Release Manager	2	Up to 2	50
P.10 Project Scheduler	2	Up to 8	200

These resources will supplement existing project teams and provide the necessary project office support, to support project delivery.

3. RESOURCE CATEGORIES

3.1 P.1 Change Management Consultant (Level 3)

ESDC requires the services of Change Management Consultants (Level 3) to support the ESDC projects. The primary attention is to the people side of change and creating a structured change management implementation strategy so that there is consistency in adopting change for employees impacted by the change, and when appropriate the project teams. The Change Management Consultant (Level 3) must provide overall advice on all matters associated with change management associated with the specific project identified in the Task Authorization.

3.1.1 Tasks

Working with a team of departmental staff, and project managers, the Change Management Consultant (Level 3) must support ESDC projects. The Change Management Consultant (Level 3) tasks include but are not limited to:

- (a) Identify the most expected and potential points of resistance to change. Develop counter strategies to reduce the resistance and address the doubts and uncertainty surrounding the change to foster a positive acceptance of change;
- (b) Create specific change management plans with respect to training and orientation of employees for each major change/project;
- (c) Develop a detailed work plan based on the change agenda and how the various changes will need to be implemented;
- (d) Establish parameters to measure the early adoption, effective utilization and proficiency to new change initiatives for individual employees and organizational units;
- (e) Conduct an assessment of change impact and requirements;
- (f) Identify deviations in performance from the change standards and implement strategies for corrective action to achieve full organizational adoption to change;
- (g) Establish and maintain a close engagement with specialists from the HR, training and communication branches to ensure a smooth transition to change and organization-wide successful implementation of these change initiatives;
- (h) Develop a change management and communications strategy and plan for each project;
- (i) Transfer functional and technical knowledge to the project team and client staff through individual and group training, demonstrations, written instructions and documents on an ongoing basis throughout the life of the project; and
- (j) Maintain all project artifacts as per established document management requirements for the department and Treasury Board (TB) policy.

3.1.2 Deliverables

The Change Management Consultant (Level 3) must submit the following deliverables to the Project Authority:

- (a) A status report on a bi-weekly basis, documenting the progress of the work described in the work plan and above in Tasks, including difficulties which may affect overall schedule and planned tasks for the next reporting period. The status report must include:
 - (i) Activities completed within the reporting period;

- (ii) Planned activities for the next reporting period; and
- (iii) Risks/issues that will require the attention of the Project Authority;
- (b) Development and delivery of a work plan;
- (c) Interview guides and supporting workshop materials;
- (d) A change impact assessment including a comprehensive stakeholder analysis;
- (e) A change management strategy and plan including cost estimates, change implementation schedule and roles and responsibilities;
- (f) Executive and staff level presentations for regular communications and product launch purposes; and
- (g) Ad hoc presentations and reports as requested by the Project Authority and within the approved work plan.

3.2 P.2 Enterprise Architect (Level 3)

ESDC requires the services of Enterprise Architects (Level 3) to provide enterprise architectural support for ESDC projects. The Enterprise Architect (Level 3) will serve to ensure the business solution is in alignment with the larger ESDC IT systems architecture, GoC strategies, the TB Chief Information Officer (CIO) Business Transformation Enablement Program, and the Federated Architecture Program. The Enterprise Architect (Level 3) must provide overall advice on all matters associated with enterprise architecture on the specific project identified in the Task Authorization.

3.2.1 Tasks

The Enterprise Architect (Level 3) must work with a team of professionals to become familiar with ESDC's strategic business plans and IT roadmap and strategy, and ultimately advise the Project Authority on a current and future-state business architecture.

The Enterprise Architect (Level 3) tasks include, but are not limited to:

- (a) Design and oversee implementation of end-to-end integrated systems;
- (b) Deliver architectural initiatives that improve efficiency in line with departmental and program strategy and priorities;
- (c) Develop and maintain current and planned state architectural blueprints;
- (d) Develop and maintain an aspirational roadmap for the Project Authority;
- (e) Communicate architectural decisions, plans, goals and strategies as they are developed;
- (f) Transfer functional and technical knowledge to the departmental project teams through individual and group training, demonstrations, written instructions and documents on an ongoing basis throughout the life of the project; and
- (g) Maintain all project artifacts as per established document management requirements for the department and TB policy.

3.2.2 Deliverables

The Enterprise Architect (Level 3) must submit the following deliverables to the Project Authority:

- (a) Provide bi-weekly status reports in writing;

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- (b) Document and provide regular status reports on a solution architecture work plan outlining the specific timings and dependencies for providing project deliverables included in the project's scope;
 - (c) Document and maintain the current-state and future-state business architecture as it pertains to the project and program;
 - (d) Solution architecture describing the technical environment and high level information requirements needed to deliver the business vision for the program. The deliverable is based on recognized methodology that conforms to ESDC's IT architectural road map and strategy. Key elements of the document include:
 - (i) A review of the methodology used;
 - (ii) Review of high-level business requirements and business vision;
 - (iii) Outline of high level solution architecture;
 - (iv) Overview of implementation strategy;
 - (v) Description of risks and proposed mitigation strategies;
 - (e) Maintain all project artifacts as per established document management requirements for the department and TB policy;
 - (f) Transfer functional and technical knowledge to the departmental project teams through individual and group training, demonstrations, written instructions and documents on an ongoing basis throughout the life of the project.
 - (g) Deliverables as assigned and agreed upon in individual Task Authorizations.

3.3 P.5 Project Executive (Level 3)

ESDC requires the services of Project Executives (Level 3) to support the ESDC projects and project teams. The Project Executive (Level 3) must provide overall advice on all matters associated with the specific project identified in the Task Authorization.

3.3.1 Tasks

The Project Executive (Level 3) tasks include, but are not limited to the following:

- (a) Ensure the practices and processes implemented adhere to the requirements of the department's IMP;
- (b) Ensure effective government best practices in project management, TB guidelines, and departmental management controls are observed;
- (c) Support the development of TB submissions by providing accurate program and project level details as defined by TB policy and guidance. The information is to be made available in the specified format of the department (as applicable);
- (d) Provide oversight to the active engagement of stakeholders and change management for the successful implementation of the identified projects. This includes support to communication planning and execution to ensure stakeholders and users are kept abreast of the progress, the needs to transition towards the new changes being implemented, and the adoption of its supporting technology;
- (e) Review and provide feedback in the development of project charters and project management plans in the departmental standard formats;

- (f) Recommend the readiness for approval of each project charter and project management plan;
- (g) Transfer functional and technical knowledge to the departmental project teams through individual and group training, demonstrations, written instructions, and documents on an ongoing basis throughout the life of the project; and
- (h) Maintain all project artifacts as per established document management requirements for the department and TB policy.

3.3.2 Deliverables

The Project Executive (Level 3) must submit the following deliverables to the Project Authority:

- (a) A work plan for the activities to be undertaken; and
- (b) A bi-weekly report on activities undertaken including the following:
 - (i) Activities completed within the reporting period;
 - (ii) Planned activities for the next reporting period;
 - (iii) Risks/issues that will require the attention of the Project Authority; and
 - (iv) Corrective actions required.

3.4 P.9 Project Manager (Level 3)

ESDC requires the services of Project Managers (Level 3) to provide leadership for the implementation of a variety of major projects in all ESDC branches in support of internal project teams. The Project Manager (Level 3) is required for a coordination and planning function (for example: in support of broader branch governance, or a number of projects with interdependencies) OR may also include the setting up a larger PMO in support of a very substantial project. The Project Manager (Level 3) must provide overall advice on all matters associated with the specific project identified in the Task Authorization.

The approach for the Project Manager (Level 3) must be both consultative and iterative in nature and as such requires collaboration with all internal resources both within the branch conducting the project, the other stakeholder branches and the Innovation, Information and Technology Branch (IITB).

3.4.1 Tasks

Working with a team of departmental staff, the PMO, and project managers, the Project Manager (Level 3) must lead the implementation of a project or coordinates a number of projects, and provides overall coordination and assistance to the project managers. The Project Manager (Level 3) tasks include, but are not limited to:

- (a) Develop a PMO charter and implementation plan;
- (b) Define and document PMO team development objectives;
- (c) Determine resource requirements (HR and financial), PMO composition, roles, responsibilities and terms of reference for the team;
- (d) Design, implement and monitor operations of the project office against established goals, objectives and milestones as defined in the PMO charter and implementation plan;

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- (e) Coach, mentor and direct PMO staff in project management processes (as defined by the Project Management Institute), good practices, methodologies, tools, and requirements as defined within the departmental IMP;
 - (f) Develop a results based management framework with identified Key Performance Indicators (KPIs) to measure the effectiveness of the PMO and its supporting processes;
 - (g) Create the data collection methodology, calculate and report on the KPIs identified in the results based management framework;
 - (h) Contribute to the organization's strategic and business planning initiatives, including the directorate's operational plan, if necessary;
 - (i) Develop and document project office control and reporting procedures to manage changes in the PMO implementation plan;
 - (j) Develop and document control and reporting procedures and the change control process for all projects (as applicable);
 - (k) Develop and document the risk and issue management processes to be used by the project;
 - (l) Identify, treat, and manage risks and issues;
 - (m) Establish quality control processes by which the project will be managed and must adhere to;
 - (n) Monitor all aspects of the project;
 - (o) Transfer functional and technical knowledge to the departmental project teams through individual and group training, demonstrations, written instructions and documents on an ongoing basis throughout the life of the project; and
 - (p) Maintain all project artifacts as per established document management requirements for the department and TB policy.

3.4.2 Deliverables

The Project Manager (Level 3) must submit the following deliverables to the Project Authority:

- (a) Development and delivery of a project charter;
- (b) Development and delivery of an implementation plan including sub-plans on risk management, schedule, scope, cost and time management;
- (c) Development and fully documented operational processes and practices of how the projects or set of projects will operate and guidance provided to project managers on the project management processes to deliver the identified projects consistent with the departmental requirements and which support effective senior management oversight;
- (d) A quality management framework by which each project will be managed;
- (e) A monthly reporting framework for all projects;
- (f) Establish project document management processes – consistent with TB and departmental policy requirements;
- (g) Development of a standard resource load report to be used by all project managers (as applicable by branch). This report must be designed in such a way as to identify resource loads, resource conflicts, risks, and interdependencies including but not limited to

resource allocation and work analysis, and resource load so as to identify risks, gaps, conflicts, inter-dependencies not met to aid in the identification of slippage; and

- (h) A status report on a bi-weekly basis, documenting the progress of the work described above in Tasks, including difficulties which may affect overall schedule and planned tasks for the next reporting period. The status report must include:
 - (i) Activities completed within the reporting period;
 - (ii) Planned activities for the next reporting period;
 - (iii) Risks/issues that will require the attention of the Project Authority;
 - (iv) Corrective actions required; and
 - (v) Cost and schedule performance of the project and/or PMO.

3.5 P.9 Project Manager (Level 2)

ESDC requires the services of Project Managers (Level 2), for the day-to-day operations of projects. The Project Manager (Level 2) will be assigned the management of individual projects. The Project Manager (Level 2) must provide overall advice on all matters associated with the specific project identified in the Task Authorization.

3.5.1 Tasks

Working with a team of departmental staff, the PMO, and other project managers, the Project Manager (Level 2) must support the project, and the implementation and operation of the PMO. The Project Manager (Level 2) tasks include, but are not limited to:

- (a) Recommend, plan and coordinate project management activities as defined by PMO;
- (b) Provide planning and implementation support for direction from senior management and steering committee(s) including logistical support and facilitation of meetings or workshops to obtain required information and agreement;
- (c) Provide timely and accurate executive reporting including progress of the projects on an ongoing basis and at scheduled points in the project life cycle;
- (d) Implement the departmental project executive dashboard and provide the dashboard report monthly to IMP as per departmental requirements;
- (e) Assist the project manager in the preparation of a project scope statement;
- (f) Assist the project manager in the preparation of a work breakdown structure for a project;
- (g) Meet with project teams, stakeholders, and other project managers to validate project information and status;
- (h) Propose to a project manager formal, internal and external project communication strategies;
- (i) Guide project managers in the formulation and management of project plans – particularly schedules which define deliverables, identify key milestones, and in reviewing project progress including engaging in ongoing risk and quality management;
- (j) Produce draft plans and/or sections for incorporation into the project management plans and charters as required;

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- (k) Analyze, evaluate, and prioritize work and conduct a gap analysis of missing plans and activities and provide feedback to the project manager;
 - (l) Conduct and document post project reviews/lessons learned;
 - (m) Participate in change impact analysis and change management activities;
 - (n) Prepare project initiation documents for submission to the departmental investment planning exercise or for a Gate 1 decision and project approval;
 - (o) When running a project:
 - (i) Document stakeholder needs and conduct stakeholder analysis to identify communication requirements and appropriate governance;
 - (ii) Establish the project's high level assumptions and constraints;
 - (iii) Identify, quantify, and quantify project's high level risks and capture these risks in a risk register documenting mitigations, where appropriate;
 - (iv) Develop high level project strategy;
 - (v) Establish the project's key milestones and deliverables;
 - (vi) Develop cost and schedule estimates with a documented order of magnitude effort estimate;
 - (vii) Develop summary budget;
 - (viii) Draft project charter and supporting documents using departmental templates;
 - (ix) Prepare a project scope statement and obtain approval from the Project Authority;
 - (x) Define project deliverables using a Work Breakdown Structure (WBS) and obtain approval for scope defined by the WBS;
 - (xi) Develop project schedule and budget;
 - (xii) Identify project team, resource roles, and responsibilities;
 - (xiii) Develop and maintain resource plan and identify external resource requirements
 - (xiv) Develop and maintain project communications management plan;
 - (xv) Develop and maintain a risk management plan and maintain risk register;
 - (xvi) Identify goods and services to be acquired for the project;
 - (xvii) Develop technical specifications of goods and services to be procured;
 - (xviii) Draft project management plan and supporting plans using departmental templates and execute and monitor project as per approved plan;
 - (xix) Maintain executive project dashboard using MS Project Server and as per departmental standards;
 - (xx) Maintain all project artifacts as per established document management requirements for the department and TB policy;
 - (xxi) Track, adjust, and monitor project through its life cycle;

- (xxii) Provide project closure report to Project Authority.
- (p) Transfer functional and technical knowledge to the project team and client staff through individual and group training, demonstrations, written instructions and documents on an ongoing basis throughout the life of the project.

3.5.2 Deliverables

The Project Manager (Level 2) must submit the following deliverables to the Project Authority:

- (a) A bi-weekly report on activities undertaken including the following:
 - (i) Activities completed within the reporting period;
 - (ii) Planned activities for the next reporting period;
 - (iii) Risks/issues that will require the attention of the Project Authority; and
 - (iv) Corrective actions required.
- (b) Project charter and project management plan prepared for each project being managed by the Project Manager (Level 2);
- (c) Analytic and gap analysis reports on the status of projects, plans and activities, as required;
- (d) Provision of input towards the maintenance and ongoing management of a resource load report as defined by the PMO; and
- (e) Reports and updates as defined by the PMO for the execution of key project management processes to support project delivery and management review.

3.6 P.9 Project Manager (Level 2), Release Manager

ESDC requires the service of Project Managers (Level 2), in the role of a Release Manager. The Project Manager (Level 2), Release Manager must work as part of a team of professionals to determine which project components will be delivered in each release, that the capabilities expected are present in the release, that they function as required, and that the testing is comprehensive so that the new and existing systems work when moved into production. The Project Manager (Level 2), Release Manager must provide overall advice on all matters associated with project release management associated with the specific project identified in the Task Authorization.

3.6.1 Tasks

Working with a team of departmental staff, the PMO, and project managers, the Project Manager (Level 2), Release Manager supports the project. Working with project component team leads, the Project Manager (Level 2), Release Manager must develop a release management strategy and plan, which integrates multiple software updates and implements new products into multiple environments. The objective is to assist the program manager to establish and implement common procedures, standards and controls to ensure smooth and consistent release management, including managing change and release tasks.

The Project Manager (Level 2), Release Manager must plan and manage shared elements of the release, e.g. user documentation, test planning and execution. Effectively, the Project Manager (Level 2), Release Manager must act as overall project manager for the phases of the release where the individual projects are coming together, without releasing the responsibility of any project manager to bring their projects successfully through the common project phases.

The Project Manager (Level 2), Release Manager tasks include, but are not limited to:

- (a) Direct and manage the activities to build and maintain software releases for their promotion to the production environment, including providing direction and guidance in the establishment of a release management strategy and plan;
- (b) Coordinate the gathering of release requirements from business line group(s) and schedules the planning phase work to review and make decisions on those requests;
- (c) Lead the release negotiation and planning process whereby the release team considers candidate ESDC projects for the release and functionality to be created by those projects and makes trade-off decisions about what to include;
- (d) Assist the senior ESDC stakeholders in the management of on-going release management activities and processes by arbitrating resource issues, scope, content, and schedule between projects for the purpose of optimizing the overall release to meet the objectives of the project;
- (e) Involve stakeholders to reach agreement on release content;
- (f) Construct an overall release management schedule with milestones showing key dependencies between components of the release, key phase transitions for various components, how projects are integrated together, and shared test phases. Plan to also include resource requirements and a cost estimate for incorporation into the total cost and overall program management plan;
- (g) Work with various team leads in the creation and maintenance of the integrated release management schedule using the departmental software standards- Microsoft Project Professional and Microsoft Enterprise Project Server;
- (h) Organize component projects to implement each approved release;
- (i) Create and document the release management processes, including but not limited to the following:
 - (I) The documentation process;
 - (ii) The testing process;
 - (iii) The training processes; and
 - (iv) The change control process.
- (j) Work with the project managers to ensure on an ongoing basis that risks and issues are assessed and managed and that resource conflicts are identified and resolved;
- (k) Identify and track risks related to release management;
- (l) Document any possible deviation that may impact the deployment schedule;
- (m) Identify, track, and manage assigned issues to resolution or escalate for resolution, as appropriate;
- (n) Obtain on a weekly basis report status and issues from the project managers for projects involved in a release;
- (o) Assist the program executives and team leads to ensure that release management deliverables and deadlines fall within the established and approved program plan;
- (p) Prepare and deliver release management briefings, presentations and progress reports to senior management and steering committees;

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- (q) Help individual project managers determine how to best use the ESDC project life cycle given a project's size and complexity, helping them to get maximum benefit from the process without unnecessary overhead for small projects in the release. The Project Manager (Level 2), Release Manager and project manager must agree on what specific deliverables the release team needs from the project team;
 - (r) Review the planning phase deliverables from each project to ensure there is no missing information in order to assure quality execution;
 - (s) Support team leads in the development of release management related training materials in support of the ESDC projects;
 - (t) Ensure that individual projects do not proceed beyond their high-level design phase without appropriate reviews with other projects affecting the same areas of system architecture and that IMP gate reviews are successfully completed at the key points in time defined in IMP before proceeding;
 - (u) Evaluate the release by holding meetings with the release team including individual project managers to step back and assess the progress of the release and how well the release management process is working. The Project Manager (Level 2), Release Manager must ensure that insights and actions from this meeting are recorded and addressed;
 - (v) Conduct an end-of-release close-out meeting including a full "lessons learned" brainstorm and development of recommendations for the next release;
 - (w) Ensure that any release process documentation is updated based on the recommendations stemming from the "lessons learned" sessions;
 - (x) Transfer functional and technical knowledge to the departmental project teams through individual and group training, demonstrations, written instructions and documents on an ongoing basis throughout the life of the project; and
 - (y) Maintain all project artifacts as per established document management requirements for the department and TB policy.

3.6.2 Deliverables

The Project Manager (Level 2), Release Manager must submit the following deliverables to the Project Authority:

- (a) A status report on a bi-weekly basis, documenting the progress of the work described above in Tasks, including difficulties which may affect overall schedule and planned tasks for the next reporting period. The status report must include:
 - (i) Activities completed within the reporting period;
 - (ii) Planned activities for the next reporting period;
 - (iii) Risks/issues that will require the attention of the Project Authority; and
 - (iv) Corrective actions required.
- (b) Presentation materials for committee meetings including monthly dashboards;
- (c) A detailed release management plan captured and maintained in MS Project Server;
- (d) Documented release management processes; and
- (e) A report on lessons learned and improvements to be made within release management processes.

3.7 P.10 Project Scheduler (Level 2)

ESDC requires the services of Project Schedulers (Level 2) to support ESDC projects. The focus for the Project Scheduler (Level 2) will be on the development and implementation of detailed schedule and its maintenance, status monitoring and resource reporting to provide both formal and ad hoc reports to all required target audiences. The Project Scheduler (Level 2) must provide overall advice on all matters associated with project scheduling on the specific project identified in the Task Authorization.

The initial focus of the Project Scheduler (Level 2) must be on developing an integrated approach to planning and resourcing using tombstone data of the approved projects.

3.7.1 Tasks

Working with a team of departmental staff, and project managers, the Project Scheduler (Level 2) must provide support for ESDC projects. The Project Scheduler (Level 2) tasks include, but are not limited to:

- (a) Complete development of project schedules based on available project schedule information and capture it in MS Enterprise Project Server (or whatever the ESDC project software is at the time of task authorization);
- (b) Create and modify the schedule, detailing each sequence of work that is to be done at a particular time;
- (c) Maintain a master schedule, including recording the effects of work being performed on time and not performed on time for each project relative to the master schedule;
- (d) Analyze existing project documents including schedules to identify gaps;
- (e) Meet with Project Authority to validate and obtain missing information required to complete Resource Loaded View (resource allocation and work analysis, resource load and identify risks such as gaps, conflicts, inter-dependencies not met);
- (f) Develop and maintain integrated project schedules, documentation and resources as guided by the project manager and monitor the schedule's impact on the master schedule;
- (g) Track the progress of the project including cost and schedule controls and evaluate progress of projects;
- (h) Document issues and resolutions related to the project schedule and prepare regular updates;
- (i) Communicate verbally and in writing with the project managers, branch lead, and when necessary with stakeholders to input modifications to the project schedule;
- (j) Update risk registers for each project with any schedule risks;
- (k) Communicate with the project managers, branch lead if necessary regarding project status and deliverables;
- (l) Baseline project schedules in accordance with the departmental IMP requirements;
- (m) Provide bi-weekly schedule analysis and discuss progress and find solutions to scheduling issues;
- (n) Provide graphical representations of the high level schedule milestones for a project;
- (o) Provide input in developing work schedules, as part of estimating cost of projects, illustrating project timelines and milestones;

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- (p) When scheduling problems surface, help project managers in determining cause and finding solutions by providing options for resolving gaps and mitigating risks;
 - (q) Assist the project manager in the development of the WBS;
 - (r) Provide planning advice and support to the PMO lead and project leads by coordinating and consulting with relevant project team members to ensure completion of proper planning before a project is started;
 - (s) Transfer functional and technical knowledge to the project team and client staff through individual and group training, demonstrations, written instructions and documents on an ongoing basis throughout the life of the project; and
 - (t) Maintain all project artifacts as per established document management requirements for the department and TB policy.

3.7.2 Deliverables

The Project Scheduler (Level 2) must submit the following deliverables to the Project Authority:

- (a) A status report on a bi-weekly basis, documenting the progress of the work described above in Tasks, including difficulties which may affect overall schedule and planned tasks for the next reporting period. The status report must include:
 - (i) Activities completed within the reporting period;
 - (ii) Planned activities for the next reporting period;
 - (iii) Risks/issues that will require the attention of the Project Authority; and
 - (iv) Corrective actions required.
- (b) A schedule analysis report; and
- (c) Development, delivery and maintenance of integrated schedules for each project and a master schedule.

4. FORMAT OF DELIVERABLES

All deliverables must be in Microsoft application software compatible with the ESDC departmental standards and delivered to the Project Authority by the media as specified in the Task Authorization.

5. LANGUAGE REQUIREMENTS

- 5.1 All deliverables must be submitted in the English language.
- 5.2 The Contractor personnel must be fluent in the English language. Contractor personnel must be able to communicate orally and in writing in English without any assistance and with minimal errors.

6. LOCATION OF WORK

The majority of the work will be completed on-site in the National Capital Region (NCR) at ESDC's various offices within that region, including both Gatineau and Ottawa sites.

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7. TRAVEL REQUIREMENTS

The Contractor may be required to travel outside of the NCR, and travel may be required from time to time within the NCR.

8. DELIVERY SCHEDULE

The delivery schedule for the deliverables will be identified in each Task Authorization.

APPENDIX A TO ANNEX A

TASKING ASSESSMENT PROCEDURE

1. Where a requirement for a specific task is identified, a draft Task Authorization Form (TA Form) as attached at Appendix B to Annex A will be provided to the Contractor in accordance with the allocation methodology stated in the Contract Article titled "Allocation of Task Authorizations"., Once a draft TA Form is received the Contractor must submit to the ESDC Procurement Representative a quotation of rates to supply the requested Resource Categories based on the information identified in the TA Form. The quotation must be signed and submitted to Canada within the time for response identified in the TA Form. The Contractor will be given a minimum of 48 hours turnaround time to submit a quotation.

2. For each proposed resource the Contractor must supply a résumé, the requested security clearance information and must complete the Response Tables at Appendix C of Annex A applicable to the Resource Categories identified in the draft TA. The same individual must not be proposed for more than one Resource Category. The résumés must demonstrate that each proposed individual meets the qualification requirements described (including any educational requirements, work experience requirements, and professional designation or membership requirements). With respect to the proposed resources:
 - (A) Proposed resources may be employees of the Contractor or employees of a subcontractor, or these individuals may be independent contractors to whom the Contractor would subcontract a portion of the Work. (Refer to Appendix D to Annex A, Certifications).
 - (B) For educational requirements for a particular degree, designation or certificate, Canada will only consider educational programmes that were successfully completed by the resource before the date the draft TA was first issued to the Contractor.
 - (C) For requirements relating to professional designation or membership, the resource must have the required designation or membership by the time of draft TA issuance and must continue, where applicable, to be a member in good standing of the profession or membership throughout the assessment period and Contract Period. Where the designation or membership must be demonstrated through a certification, the certification must be current, valid and issued by the entity specified in this Contract or if the entity is not specified an accredited or otherwise recognized body, institution or entity.
 - (D) For work experience, Canada will not consider experience gained as part of an educational programme, except for experience gained through a formal co-operative programme at a post-secondary institution.
 - (E) For any requirements that specify a particular time period (e.g., 2 years) of work experience, Canada will disregard any information about experience if the résumé does not include the relevant dates (month and year) for the experience claimed (i.e., the start date and end date). Canada will evaluate only the duration that the resource actually worked on a project or projects (from his or her start date to end date), instead of the overall start and end date of a project or a combination of projects in which a resource has participated.
 - (F) A résumé must not simply indicate the title of the individual's position, but must demonstrate that the resource has the required work experience by explaining the responsibilities and work performed by the individual while in that position. Only listing experience without providing any supporting data to describe responsibilities, duties and relevance to the requirement, or reusing the same wording as the TA Form, will not be considered "demonstrated" for the purposes of the assessment. The Contractor should provide complete details as to where, when, month and year, and how, through which

activities/responsibilities, the stated qualifications / experience were obtained. In situations in which a proposed resource worked at the same time on more than one project, the duration of any overlapping time period will be counted only once toward any requirements that relate to the individual's length of experience.

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

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APPENDIX B TO ANNEX A

TASK AUTHORIZATION (TA) FORM				
CONTRACTOR		CONTRACT NUMBER:		
COMMITMENT #		FINANCIAL CODING:		
TASK NUMBER (AMENDMENT):		ISSUE DATE:	RESPONSE REQUIRED BY:	
1. STATEMENT OF WORK (WORK ACTIVITIES, CERTIFICATIONS AND DELIVERABLES)				
SEE ATTACHED FOR STATEMENT OF WORK AND CERTIFICATIONS REQUIRED.				
2. PERIOD OF SERVICES:	FROM (DATE):	TO (DATE):		
3. WORK LOCATION:				
4. TRAVEL REQUIREMENTS:				
5. LANGUAGE REQUIREMENTS:				
6. OTHER CONDITIONS/CONSTRAINTS:				
7. LEVEL OF SECURITY CLEARANCE REQUIRED FOR THE CONTRACTOR PERSONNEL:				
8. CONTRACTOR'S RESPONSE:				
CATEGORY AND NAME OF PROPOSED RESOURCE	PWGSC SECURITY FILE NUMBER	PER DIEM RATE	ESTIMATED # OF DAYS	TOTAL COST
			ESTIMATED COST	
			APPLICABLE TAXES	
			TOTAL LABOUR COST	
			TOTAL TRAVEL & LIVING COST	
			MAXIMUM TA PRICE	
CONTRACTOR'S SIGNATURE				
Name, Title and Signature of Individual Authorized to Sign on behalf of Contractor (type or print)		Signature: _____ Date: _____		

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TASK AUTHORIZATION (TA) FORM

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

7. APPROVAL - SIGNING AUTHORITY

Signatures (Client)	Signatures (PWGSC)
Name, Title and Signature of Individual Authorized to sign:	
Project Authority: _____	Contracting Authority 1: _____
Date: _____	Date: _____

¹ Signature required for projects valued at \$400,000. or more, Applicable Taxes included.

You are requested to sell to her Majesty the Queen in Right of Canada, in accordance with the terms and conditions set out herein, referred to herein, or attached hereto, the services listed herein and in any attached sheets at the price set out thereof.

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APPENDIX C TO ANNEX A RESOURCES ASSESSMENT CRITERIA AND RESPONSE TABLE

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

<i>Note to Bidders: Attachment 4.1 - Evaluation Criteria to be inserted and will form part of the resulting Contract.</i>
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APPENDIX D TO ANNEX A CERTIFICATIONS AT THE TA STAGE

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

1. CERTIFICATION OF EDUCATION AND EXPERIENCE

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

Print name of authorized individual & sign above

Date

2. CERTIFICATION OF AVAILABILITY OF PERSONNEL

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

Print name of authorized individual & sign above

Date

3. CERTIFICATION OF STATUS OF PERSONNEL

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

Print name of authorized individual & sign above

Date

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4. CERTIFICATION OF LANGUAGE - ENGLISH

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

Print name of authorized individual & sign above

Date

ANNEX B**BASIS OF PAYMENT****WORKSTREAM 1 - BUSINESS SERVICES**

Resource Category	Level of Expertise	Firm Per Diem Rates				
		Contract Period - Year 1	Contract Period - Year 2	Contract Period - Year 3	Option Period - Year 4	Option Period - Year 5
B.1 Business Analyst	2	\$	\$	\$	\$	\$
B.2 Business Architect	3	\$	\$	\$	\$	\$
B.4 Business Continuity/Disaster Recovery Specialist	2	\$	\$	\$	\$	\$
B.5 Business Process Re-engineering (BPR) Consultant	2	\$	\$	\$	\$	\$
B.7 Business Transformation Architect	3	\$	\$	\$	\$	\$
B.14 Technical Writer	2	\$	\$	\$	\$	\$

ANNEX B**BASIS OF PAYMENT****WORKSTREAM 2 - PROJECT MANAGEMENT SERVICES**

		Firm Per Diem Rates				
Resource Category	Level of Expertise	Contract Period - Year 1	Contract Period - Year 2	Contract Period - Year 3	Option Period - Year 4	Option Period - Year 5
P.1 Change Management Consultant	3	\$	\$	\$	\$	\$
P.2 Enterprise Architect	3	\$	\$	\$	\$	\$
P.5 Project Executive	3	\$	\$	\$	\$	\$
P.9 Project Manager	3	\$	\$	\$	\$	\$
P.9 Project Manager	2	\$	\$	\$	\$	\$
P.9 Project Manager - Release Manager	2	\$	\$	\$	\$	\$
P.10 Project Scheduler	2	\$	\$	\$	\$	\$

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

Contract Number / Numéro du contrat Common PS SRCL#19	
Security Classification / Classification de sécurité UNCLASSIFIED	
PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE	
1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine Public Works and Government Services Canada	2. Branch or Directorate / Direction générale ou Direction Acquisitions Branch
3. a) Subcontract Number / Numéro du contrat de sous-traitance	3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant
4. Brief Description of Work / Brève description du travail Professional Services - Standing Offers and Supply Arrangements	
5. a) Will the supplier require access to Controlled Goods? Le fournisseur aura-t-il accès à des marchandises contrôlées?	<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques?	<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
6. Indicate the type of access required / Indiquer le type d'accès requis	
6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? (Specify the level of access using the chart in Question 7. c) (Préciser le niveau d'accès en utilisant le tableau qu se trouve à la question 7. c)	<input type="checkbox"/> No / Non <input checked="" type="checkbox"/> Yes / Oui
6. b) Will the supplier and its employees (e.g. Cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. Le fournisseur et ses employés (p. Ex. Nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé.	<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
6. c) Is this a commercial courier or delivery requirement with no overnight storage? S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit?	<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès	
Canada <input checked="" type="checkbox"/>	NATO / OTAN <input type="checkbox"/>
Foreign / Étranger <input type="checkbox"/>	
7. b) Release restrictions / Restrictions relatives à la diffusion	
No release restrictions <input checked="" type="checkbox"/> Aucune restriction relative à la diffusion	All NATO countries <input type="checkbox"/> Tous les pays de l'OTAN
Not releasable <input type="checkbox"/> À ne pas diffuser	
Restricted to: / Limité à : <input type="checkbox"/>	Restricted to: / Limité à : <input type="checkbox"/>
Specify country(ies) / Préciser le(s) pays :	Specify country(ies) / Préciser le(s) pays :
	No release restrictions <input type="checkbox"/> Aucune restriction relative à la diffusion
	Restricted to: / Limité à : <input type="checkbox"/>
	Specify country(ies) / Préciser le(s) pays :

PART A (Continued) / PARTIE A (Suite)

7. c) Level of Information / Niveau d'information

PROTECTED A PROTÉGÉ A	<input checked="" type="checkbox"/>	NATO UNCLASSIFIED NATO NON CLASSIFIÉ	<input type="checkbox"/>	PROTECTED A PROTÉGÉ A	<input type="checkbox"/>
PROTECTED B PROTÉGÉ B	<input checked="" type="checkbox"/>	NATO RESTRICTED NATO DIFFUSION RESTREINTE	<input type="checkbox"/>	PROTECTED B PROTÉGÉ B	<input type="checkbox"/>
PROTECTED C PROTÉGÉ C	<input checked="" type="checkbox"/>	NATO CONFIDENTIAL NATO CONFIDENTIEL	<input type="checkbox"/>	PROTECTED C PROTÉGÉ C	<input type="checkbox"/>
CONFIDENTIAL CONFIDENTIEL	<input checked="" type="checkbox"/>	NATO SECRET NATO SECRET	<input type="checkbox"/>	CONFIDENTIAL CONFIDENTIEL	<input type="checkbox"/>
SECRET SECRET	<input checked="" type="checkbox"/>	COSMIC TOP SECRET COSMIS TRÈS SECRET	<input type="checkbox"/>	SECRET SECRET	<input type="checkbox"/>
TOP SECRET TRÈS SECRET	<input type="checkbox"/>			TOP SECRET TRÈS SECRET	<input type="checkbox"/>
TOP SECRET (SIGINT) TRÈS SECRET	<input type="checkbox"/>			TOP SECRET (SIGINT) TRÈS SECRET	<input type="checkbox"/>

8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets? ☒ No / ☐ Yes /
Non Oui

La fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés
PROTÉGÉS et/ou CLASSIFIÉS?

If Yes, indicate the level of sensitivity:

Dans l'affirmative, indiquer le niveau de sensibilité :

9. Will the supplier require access to extremely sensitive INFOSEC information or assets? ☒ No / ☐ Yes /
Non Oui

Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature

extrêmement délicate?

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

Document Number / Numéro du document :

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

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

- ☒ RELIABILITY STATUS
COTE DE FIABILITÉ
- ☒ CONFIDENTIAL
CONFIDENTIEL
- ☒ SECRET
SECRET
- ☐ TOP SECRET
TRÈS SECRET
- ☐ TOP SECRET - SIGINT
TRÈS SECRET - SIGINT
- ☐ NATO CONFIDENTIAL
NATO CONFIDENTIEL
- ☐ NATO SECRET
NATO SECRET
- ☐ COSMIC TOP SECRET
COSMIC TRÈS SECRET
- ☐ SITE ACCESS
ACCÈS AUX EMPLACEMENTS

Special comments:

Commentaires spéciaux : _____

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

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

10. b) May unscreened personnel be used for portions of the work? ☒ No ☐ Yes
Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail? Non Oui
- If Yes, will unscreened personnel be escorted? ☒ No ☐ Yes
Dans l'affirmative, le personnel en question sera-t-il escorté? Non Oui

PART C - SAFEGUARDS (SUPPLIER) / PARTIE C - MESURES DE PROTECTION (FOURNISSEUR)**INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS**

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

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PART C (Continued) / PARTIE C (Suite)**PRODUCTION**

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

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

11. d) Will the supplier be required to use its IT systems to electronically process, produce or store PROTECTED and/or CLASSIFIED information or data? ☒ No ☐ Yes
Non Oui
Le fournisseur sera-t-il d'utiliser ses propres systèmes informatiques pour traiter, produire ou stocker électroniquement des renseignements ou des données PROTÉGÉS et/ou CLASSIFIÉS?
11. e) Will there be an electronic link between the supplier's IT systems and the government department or agency? ☒ No ☐ Yes
Non Oui
Disposera-t-on d'un lien électronique entre le système informatique du fournisseur et celui du minist`re ou de l'agence gouvernementale?

For users completing the form **manually** use the summary chart below to indicate the category(ies) and level(s) of safeguarding required at the supplier's site(s) or premises.
Les utilisateurs qui remplissent le formulaire **manuellement** doivent utiliser le tableau récapitulatif ci-dessous pour indiquer, pour chaque catégorie, les niveaux de sauvegarde requis aux installations du fournisseur.

For users completing the form **online** (via the Internet), the summary chart is automatically populated by your responses to previous questions.
Dans le cas des utilisateurs qui remplissent le formulaire **en ligne** (par Internet), les réponses aux questions précédentes sont automatiquement saisies dans le tableau récapitulatif.

SUMMARY CHART / TABLEAU RÉCAPITULATIF

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

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- | | |
|---|---|
| <p>12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED?
La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉS et/ou CLASSIFIÉS?</p> <p>If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification".
Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée " Classification de sécurité " au haut et au bas du formulaire.</p> | <p><input checked="" type="checkbox"/> No
Non</p> <p><input type="checkbox"/> Yes
Oui</p> |
| <p>12. b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED?
La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE?</p> <p>If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification" and indicate with attachments (e.g. SECRET with Attachments).
Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée " Classification de sécurité " au haut et au bas du formulaire et indiquer qu'il y a des pièces jointes (p. Ex. SECRET avec des pièces jointes).</p> | <p><input checked="" type="checkbox"/> No
Non</p> <p><input type="checkbox"/> Yes
Oui</p> |

APPENDIX A TO ANNEX C

SECURITY CLASSIFICATION GUIDE

WORKSTREAM 1 – BUSINESS SERVICES

The Security Requirements Check List (SRCL) (Section 10.a) specifies that this Security Classification Guide must be provided whenever multiple levels of screening are identified.

The related Statement of Work (SOW) defines the professional service required to support project management teams with business services. The SOW covers aspects related to the provision of multiple personnel at any given time for the duration of the Contract.

Services with various categories will be required.

Resource Category	Level	Minimum Security Clearance
B.1 Business Analyst	2	Enhanced
B.2 Business Architect	3	Enhanced
B.4 Business Continuity/Disaster Recovery Specialist	2	Secret
B.5 Business Process Re-engineering (BPR) Consultant	2	Enhanced
B.7 Business Transformation Architect	3	Secret
B.14 Technical Writer	2	Enhanced

WORKSTREAM 2 – PROJECT MANAGEMENT SERVICES

The Security Requirements Check List (SRCL) (Section 10.a) specifies that this Security Classification Guide must be provided whenever multiple levels of screening are identified.

The related Statement of Work (SOW) defines the professional service required to support project management teams with project management services. The SOW covers aspects related to the provision of multiple personnel at any given time for the duration of the Contract.

Services with various categories will be required.

Resource Category	Level	Minimum Security Clearance
P.1 Change Management Consultant	3	Enhanced
P.2 Enterprise Architect	3	Secret
P.5 Project Executive	3	Secret
P.9 Project Manager	3	Enhanced
P.9 Project Manager	2	Enhanced
P.9 Project Manager – Release Manager	2	Enhanced
P.10 Project Scheduler	2	Enhanced

ATTACHMENT 3.1**BIDDER FORMS**

BID SUBMISSION FORM	
Bidder's full legal name	
Authorized Representative of Bidder for evaluation purposes (e.g., clarifications)	Name
	Title
	Address
	Telephone #
	Fax #
	Email
Bidder's Procurement Business Number (PBN) [see the <i>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".	Is the Bidder a FPS in receipt of a pension as defined in the bid solicitation? Yes ____ No ____ If yes, provide the information required by the Article in Part 5 entitled "Former Public Servant Certification"
	Is the Bidder a FPS who received a lump sum payment under the terms of a work force reduction program? Yes ____ No ____ If yes, provide the information required by the Article in Part 5 entitled "Former Public Servant Certification"

<p>Federal Contractors Program for Employment Equity (FCP EE) Certification:</p> <p>If the bidder is exempt, please indicate the basis for the exemption to the right. If the bidder does not fall within the exceptions enumerated to the right, the Program requirements do apply and the bidder is required either to:</p> <p>(a) submit to the Department of HRSD form LAB 1168, Certificate of Commitment to Implement Employment Equity, DULY SIGNED; or</p> <p>(b) submit a valid Certificate number confirming its adherence to the FCP-EE.</p> <p>Bidders are requested to include their FCP EE Certification or signed LAB 1168 with their bid; if this information is not provided in the bid, it must be provided upon request by the Contracting Authority during evaluation.</p> <p>For joint ventures, be sure to provide this information for each of the members of the joint venture.</p>	<p>On behalf of the bidder, by signing below, I also confirm that the bidder <i>[check the box that applies]</i>:</p>	
<p>Number of FTEs [Bidders are requested to indicate, the total number of full-time-equivalent positions that would be created and maintained by the bidder if it were awarded the Contract. This information is for information purposes only and will not be evaluated.]</p>	<p>(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;</p>	
<p>Security Clearance Level of Bidder <i>[include both the level and the date it was granted]</i></p>	<p>(b) is not subject to FCP-EE, because it is a regulated employer under the <i>Employment Equity Act</i>;</p>	
<p>On behalf of the bidder, by signing below, I confirm that I have read the entire bid solicitation including the documents incorporated by reference into the bid solicitation and I certify that:</p> <p>1. The bidder considers itself and its products able to meet all the mandatory requirements described in the bid solicitation;</p> <p>2. This bid is valid for the period requested in the bid solicitation;</p> <p>3. All the information provided in the bid is complete, true and accurate; and</p> <p>4. If the bidder is awarded a contract, it will accept all the terms and conditions set out in the resulting contract clauses included in the bid solicitation.</p>	<p>(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</p>	
<p>Signature of Authorized Representative of Bidder</p>	<p>(d) is subject to FCP-EE, and has a valid certification number as follows: _____ (and has not been declared an Ineligible Contractor by HRSD).</p>	

ATTACHMENT 4.1

BID EVALUATION CRITERIA

WORKSTREAM 1 - BUSINESS SERVICES

1. Unless specified otherwise, a 'Project' is defined as a temporary, planned activity, involving multiple parties, with a start and end date, a duration of at least 3 months, specific milestones and deliverables, defined responsibilities and a budget of \$5M or more.
2. Unless specified otherwise, 'Government' is defined as a territorial, federal, state, provincial or municipal government body.
3. Unless specified otherwise, bidders may demonstrate experience in multiple criteria during the same time frame.
4. Bidders are advised that the experience is calculated as of the closing date of the RFP. For example, if a given requirement states, "The Bidder must have experience, within the last five years," then the five-year period is calculated as of the closing date of the RFP.
5. References must include the name of the organization, the contract number, a short description of the services provided, the name, title, e-mail address or telephone number of the organization's responsible manager, as well as the award date, expiry date and dollar value of each contract. It is the Bidder's responsibility to ensure that any information divulged is with the permission of the references provided.
6. The Bidder must have been the prime contractor, rather than a subcontractor. This means that the Bidder contracted directly with the customer of the work. If the Bidder's contract was to perform work which another entity had itself first contracted to perform, the Bidder will not be considered the prime contractor. For example, Z (customer) contracted with Y for services. Y, in turn, entered into a contract with X to provide all or part of these services to Z. In this example, Y is a prime contractor and X is a subcontractor.

1.0 BIDDER MANDATORY AND RATED CRITERIA

1.1 Bidder – Mandatory Criteria

Item#	Bidder - Mandatory Criteria	Met/Not Met	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
M1	<p>The Bidder must submit the following number of résumés:</p> <ul style="list-style-type: none"> (i) One B.1 Business Analyst – Level 2; (ii) One B.2 Business Architect – Level 3; (iii) One B.4 Business Continuity/Disaster Recovery Specialist – Level 2; (iv) One B.5 Business Process Re-engineering Consultant – Level 2; (v) One B. 7 Business Transformation Architect – Level 3; and (vi) One B. 14 Technical Writer – Level 2. <p>Each résumé must include the following information:</p> <ul style="list-style-type: none"> (a) The name of the proposed resource; (b) The resource category for which the resource is being proposed; (c) Relevant academic and professional attainments in relation to Employment and Social Development Canada's requirements, as identified in the Mandatory and the Rated Evaluation Criteria for each resource category herein. Relevant formal training must be listed chronologically by the title (of the course/program) and must include the duration (in years/months/days) and the start and end dates (dates must be identified by month and year – for example March 2004 – February 2007); and (d) Work experience including duration and start and finish dates (dates must be identified by month and year – for example March 2004 – February 2007). 		
M2	<p>The Bidder must provide a reference for each of two projects where the Bidder provided a similar team of resources (3 out of the 6 resource categories listed in M1 above) to at least two projects that delivered the same or similar services outlined in the Statement of</p>		

Item#	Bidder - Mandatory Criteria	Met/Not Met	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
	<p>Work. The references must be from government or private projects valued at greater than \$5M.</p> <p>Bidders must include, as a minimum, for each project submitted:</p> <ul style="list-style-type: none"> (a) A project description; (b) The name of the client department; (c) The date and duration of the project; (d) Details about the work performed by the Bidder on the project; and (e) A client reference. 		
M3	The Bidder must demonstrate that it has adopted and implemented a commercially available methodology/framework. The Bidder must be either a registered OpenGroup Partner carrying TOGAF certified resources that have employed the methodology or have equivalent certification such as the Zachman Framework for Enterprise Architecture, or Federal Enterprise Architecture (FAE), or Gartner's Methodology.		
M4	The Bidder must provide a reference where the Bidder established a Project Management Office (PMO) to support the management of a project. The reference must be from government or private sector projects valued at greater than \$5M.		
M5	The Bidder must provide a minimum of one reference for each of 2 projects where the Bidder demonstrated the delivery of business transformation services. The references must be from government or private sector projects valued at greater than \$5M.		
M6	The Bidder must detail the PMO and business transformation methodologies, processes, support tools and/or templates (toolset) that it has used to establish and support a PMO on past government or private sector projects in order to demonstrate that it is able to support the provision of services outlined in the Statement of Work.		

1.2 Bidder – Rated Criteria

Item#	Bidder - Rated Criteria	Max Score	Point Scale	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
R1	The Bidder should demonstrate that it provided services similar to those outlined in the Statement of Work (SOW) attached at Annex A, by providing up to 4 project descriptions involving Business Transformation in government or the private sector within the last 5 years.	4	1 project = 1 point 2 projects = 2 points 3 projects = 3 points 4 projects = 4 points	
R2	The Bidder should demonstrate its experience, over and above what is required in M5 above, in the delivery of business transformation projects. The projects must be government or private sector projects valued at greater than \$5M.	3	1 project more than M5 (i.e. a total of 3 projects) = 1 point 2 projects more than M5 (i.e. a total of 4 projects) = 2 points 3 projects more than M5 (i.e. a total of 5 projects) = 3 points	
R3	The Bidder should demonstrate its capacity as a thought leader in overall Project Management with the Government of Canada or other national government, through the use of white papers, production of industry standards, the delivery of relevant practice specific disciplines such as Risk Management, Change Management, Performance Management, IT Security Guidance 33 (ITSG-33) or equivalent.	3	1 point for participation in the development of each of the following: (i) Risk Management; (ii) Change Management; (iii) Performance Management; (iv) IT Security Guidance (ITSG-33); (v) Published whitepaper.	
	Maximum Score Available	10		
	Minimum Score Required	7		

2.0 RESOURCE MANDATORY AND RATED CRITERIA

2.1 B.1 Business Analyst – Level 2

Item#	Mandatory Criteria B.1 Business Analyst – Level 2	Met/Not Met	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
M1	The proposed resource must have worked as a Business Analyst, on 2 relevant business transformation projects, each for a minimum duration of 6 months, in a similar environment as that described in the Statement of Work, in a government or private sector environment, within the last 10 years. One of the projects must have been valued at greater than \$5M.		
M2	The proposed resource must have demonstrated experience in the development of a minimum of 2 business cases on projects valued at greater than \$5M each within the last 15 years.		

Item#	Rated Criteria B.1 Business Analyst – Level 2	Max Score	Point Scale	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
R1	The proposed resource should have demonstrated experience, within the last 15 years, gathering business process requirements including preparing for and facilitating workshops and interviews.	3	Years of Experience: ≥ 3-4 years = 1 point > 4-5 years = 2 points > 5 years = 3 points	
R2	The proposed resource should have demonstrated experience, within the last 15 years, documenting business process requirements and participating in the development of functional specifications.	3	Years of Experience: ≥ 3-4 years = 1 point > 4-5 years = 2 points > 5 years = 3 points	
R3	The proposed resource should have demonstrated experience, within the last 15 years, developing business process frameworks.	3	Years of Experience: ≥ 3-4 years = 1 point > 4-5 years = 2 points > 5 years = 3 points	

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Item#	Rated Criteria	Max Score	Point Scale	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
	B.1 Business Analyst – Level 2			
R4	The proposed resource should have demonstrated experience, within the last 15 years, analyzing, evaluating, monitoring and managing risks, especially related to the definition of business process requirements.	3	Years of Experience: ≥ 3-4 years = 1 point > 4-5 years = 2 points > 5 years = 3 points	
	Maximum Score Available	12		
	Minimum Score Required	8		

2.2 B.2 Business Architect – Level 3

Item#	Mandatory Criteria B.2 Business Architect – Level 3	Met/Not Met	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
M1	The proposed resource must have at least 10+ years demonstrated experience, within the last 15 years, as a Business Architect.		
M2	Using a minimum of 2 project descriptions, it must be demonstrated that the proposed resource has experience integrating a business architecture developed by the proposed resource into other architectures (solution architecture/enterprise architecture). These projects must have occurred within the last 15 years and have been valued at greater than \$5M each.		

Item#	Rated Criteria B.2 Business Architect-Level 3	Max Score	Point Scale	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
R1	<p>The proposed resource should have at least 1 year of demonstrated experience in each of the sub-elements below, within the last 15 years from the time of bid closing, reviewing, assessing and document an organization's business architecture including the following activities:</p> <ul style="list-style-type: none"> (i) describing the organization's strategic goals. The goals should be further decomposed into tactical methods for achieving these strategic goals and for provide traceability through the organization; (ii) describing the organization's business services/functionalities, and mapping these services to the business units that perform them; (iii) describing the organization's shared vocabulary (e.g. client, order, etc.), and the relationships between them (e.g. client name, order date, etc.); (iv) describing the organization's core business processes that transcend functional and organizational boundaries, identifying and describing external entities and external systems that interact with the business. The processes specification should also describe the people, resources and controls involved in the process; and 	5	1 point per activity	

Item#	Rated Criteria B.2 Business Architect-Level 3	Max Score	Point Scale	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
	<p>(v) describing the relationships among roles, capabilities and business units and geographical locations, the decomposition of these business units into sub-units and the management of these units.</p> <p>Compliance should be demonstrated using project descriptions.</p>			
R2	<p>The proposed resource should have at least 1 year of demonstrated experience, within the last 10 years, in conducting gap analysis in each of the sub-elements below, including the following activities:</p> <p>(i) reviewing the organization's business processes to identify, document and prioritize gaps</p> <p>(ii) developing work plans to address the gaps, recommending strategy, methodologies and options; and</p> <p>(iii) carrying out the recommended work plans to address the issues identified.</p> <p>Compliance should be demonstrated using project descriptions</p>	6	2 points per activity	
R3	<p>The proposed resource should have at least 1 year of demonstrated experience, within the last 10 years, in each of the sub-elements below, in the documentation of business architecture in the following activities:</p>	4	2 points per activity	

Item#	Rated Criteria	Max Score	Point Scale	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
	B.2 Business Architect-Level 3			
	<p>(i) advising senior management on business architecture, trends and emerging technologies, methodologies, standards and tools; and</p> <p>(ii) coaching and mentoring business analysts on methodologies, standards, various mapping techniques and tools.</p> <p>Compliance should be demonstrated using project descriptions.</p>			
R4	<p>The proposed resource should have demonstrated experience within the last 15 years, managing business transformation projects involving business service improvements.</p> <p>Compliance should be demonstrated using project descriptions.</p>	3	<p>Years of Experience:</p> <p>≥ 3-4 years = 1 point</p> <p>> 4-5 years = 2 points</p> <p>> 5 years = 3 points</p>	
	Maximum Score Available	18		
	Minimum Score Required	12		

2.3 B.4 Business Continuity/Disaster Recovery Specialist - Level 2

Item#	Mandatory Criteria B.4 Business Continuity/Disaster Recovery Specialist - Level 2	Met/Not Met	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
M1	The proposed resource must have at least 5 years demonstrated experience as a Business Continuity/Disaster Recovery Specialist.		
M2	The proposed resource must have worked as a Business Continuity/Disaster Recovery Specialist, on 2 relevant business projects, each for a minimum duration of 6 months, in a similar environment as that described in the Statement of Work, in a government or private sector environment, within the last 10 years. Both projects must have been valued at greater than \$5M.		

Item#	Rated Criteria	Max Score	Point Scale	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
	B.4 Business Continuity/Disaster Recovery Specialist - Level 2			
R1	<p>The proposed resource should have at least 2 years of demonstrated experience in each of the sub-elements below, within the last 10 years, reviewing, assessing and documenting an organization's business continuity/disaster recovery plans including the following activities:</p> <ul style="list-style-type: none"> (i) Defining roles and responsibilities related to the business continuity/disaster recovery plans and implicated stakeholder groups; (ii) Establishing a baseline of business continuity/disaster recovery processes, templates, and tools for the system and/or business area leadership to use or evolve as necessary; (iii) Identifying and documenting internal controls to ensure process is consistent, and compliant with existing policy legislation; and (iv) Identifying implicated multi-stakeholder groups, risks, and associated cost. <p>Compliance should be demonstrated using project descriptions.</p>	4	1 point per activity	
R2	<p>The proposed resource should have demonstrated experience with facilitating and leading workshops to elicit and document the following:</p> <ul style="list-style-type: none"> (i) Business continuity/disaster recovery requirements, risks, issues and gaps; 	6	2 points per workshop	

Item#	Rated Criteria	Max Score	Point Scale	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
	B.4 Business Continuity/Disaster Recovery Specialist - Level 2			
	<p>(ii) Essential business functions, acceptable recovery time periods, rationale, and resource requirements for disaster recovery; and</p> <p>(iii) Risks and mitigation strategies related to the disaster recovery plans and processes.</p>			
R3	<p>The proposed resource should have demonstrated experience developing and delivering business continuity/disaster recovery documents including the following tasks:</p> <p>(i) Document outlining essential business functions and information systems to identify acceptable recovery time periods rationale and resource requirements for disaster recovery;</p> <p>(ii) Business Continuity/Disaster Recovery Plans compliant with Treasury Board policies and regulations;</p> <p>(iii) Report summarizing testing activities and recommendations;</p> <p>(iv) Stakeholder Training Plans and Presentations based on Business Continuity/Disaster Recovery Plan;</p> <p>(v) Risk Assessment and Mitigation Strategy related to business functions and information systems; and</p> <p>(vi) Call Trees in the event of disaster recovery.</p>	6	1 point per task	

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Item#	Rated Criteria B.4 Business Continuity/Disaster Recovery Specialist - Level 2	Max Score	Point Scale	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
R4	The proposed resource should have demonstrated experience within the last 10 years, managing business transformation activities involving business service improvements. Compliance should be demonstrated using project descriptions.	3	Years of Experience: ≥ 3-4 years = 1 point > 4-5 years = 2 points > 5 years = 3 points	
	Maximum Score Available	19		
	Minimum Score Required	13		

2.4 B.5 Business Process Re-Engineering Consultant – Level 2

Item#	Mandatory Criteria B.5 Business Process Re-Engineering Consultant – Level 2	Met/Not Met	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
M1	The proposed resource must have at least 5 years demonstrated experience, within the last 10 years, as a Business Process Re-engineering Consultant in a government setting, where the proposed resource identified and documented potential processes for streamlining to gain efficiencies.		
M2	The proposed resource must have at least 3 years of demonstrated experience within the last 10 years, as a Business Process Re-engineering Consultant where the proposed resource provided the following services and deliverables: (i) analysis of current business processes; and (ii) current and to-be business processes, data flows and business requirements.		

Item#	Rated Criteria B.5 Business Process Re-Engineering Consultant – Level 2	Max Score	Point Scale	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
R1	The proposed resource should have at least 5 years demonstrated experience, within the last 10 years, as a Business Process Re-engineering Consultant, where the proposed resource identified and documented potential processes for streamlining to gain efficiencies.	4	Years of Experience: 2 years = 1 point 3 years = 2 points 4 years = 3 points 5 or more years = 4 points	
R2	The proposed resource should have at least 2 years demonstrated experience within the last 10 years, as a Business Process Re-engineering Consultant where the proposed	8	2 points per deliverable	

Item#	Rated Criteria	Max Score	Point Scale	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
	B.5 Business Process Re-Engineering Consultant – Level 2			
	resource provided the following deliverables: (i) A report outlining current business processes; (ii) A report outlining recommendations on processes that were candidates for streamlining to gain efficiencies or increase client satisfaction; (iii) Documented to-be re-engineered processes including data flows, and business requirements, and (iv) An analysis of efficiencies gained through the re-engineered processes.			
	Maximum Score Available	12		
	Minimum Score Required	8		

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2.5 B.7 Business Transformation Architect - Level 3

Item#	Mandatory Criteria	Met/Not Met	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
	B.7 Business Transformation Architect - Level 3		
M1	The proposed resource must have worked as a Business Transformation Architect, on 2 relevant business transformation projects, each for a minimum duration of 12 months, in a similar environment as that described in the Statement of Work, in a government or private sector environment, within the last 10 years. One of the projects must have been valued at greater than \$5M.		

Item#	Rated Criteria B.7 Business Transformation Architect - Level 3	Max Score	Point Scale	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
R1	<p>The proposed resource should have at least 2 years of demonstrated experience in each of the sub-elements below, within the last 15 years, reviewing, assessing and documenting an organization's business architecture including the following activities:</p> <ul style="list-style-type: none"> (i) Definition of roles and responsibilities related to the transformation project and implicated stakeholder groups; (ii) Establish a baseline of processes, templates, and tools for the transformation project leadership to use or evolve as necessary; (iii) Develop new process flows and supporting documentation; (iv) Identify and document internal controls to ensure process is consistent, and compliant with existing policy legislation; and (v) Identify implicated multi-stakeholder groups and associated cost. <p>Compliance should be demonstrated using project descriptions.</p>	5	1 point per activity	
R2	<p>The proposed resource should have demonstrated experience with facilitating and leading workshops to elicit and document requirements, capabilities and gaps.</p>	6	2 points per workshop	
R3	<p>The proposed resource should have demonstrated experience with the development and delivery</p>	5	1 point per task	

Item#	Rated Criteria B.7 Business Transformation Architect - Level 3	Max Score	Point Scale	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
	of architecture documents including the following tasks: (i) Business Requirements; (ii) Business Impact Analysis (iii) Workflow/Process development; (iv) Training Plans/Presentations; and (v) Legislative/Regulatory change.			
R4	The proposed resource should have demonstrated experience within the last 15 years, managing business transformation projects involving business service improvements. Compliance should be demonstrated using project descriptions.	3	Years of Experience: ≥ 3-4 years = 1 point > 4-5 years = 2 points > 5 years = 3 points	
	Maximum Score Available	19		
	Minimum Score Required	13		

2.6 B.14 Technical Writer - Level 2

Item#	Mandatory Criteria B.14 Technical Writer - Level	Met/Not Met	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
M1	The proposed resource must have greater than 5 years demonstrated experience, within the last 15 years, as a Technical Writer.		
M2	Using a minimum of 2 project descriptions, it must be demonstrated that the proposed resource has experience developing project related documentation to support business needs. These projects must have occurred within the last 15 years and have been valued at greater than \$5M each.		

Item#	Rated Criteria B.14 Technical Writer - Level	Max Score	Point Scale	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
R1	The proposed resource should have project experience assessing the audience needs for the documents or manuals which are required and prepare a statement of purpose and scope for each of the documents or manuals. Compliance should be demonstrated using project descriptions.	3	1 project = 1 point 2 projects = 2 points 3 or more projects = 3 points	
R2	The proposed resource should have project experience writing and maintaining technical or business related documentation. For project experience to qualify, the resource must have been on the project for a minimum duration of 6 months within the last 10 years. Compliance should be demonstrated using project descriptions.	3	1 project = 1 point 2 projects = 2 points 3 or more projects = 3 points	

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Item#	Rated Criteria	Max Score	Point Scale	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
	B.14 Technical Writer - Level			
R3	The proposed resource should have relevant certification or formal education in the field of technical writing. A copy of the diploma, certificate or degree must be provided with the bid.	2	2 points for a post-secondary education (College or CEGEP diploma/certificate, University Degree)	
	Maximum Score Available	8		
	Minimum Score Required	6		

ATTACHMENT 4.1

BID EVALUATION CRITERIA

WORKSTREAM 2 - PROJECT MANAGEMENT SERVICES

1. Unless specified otherwise, a 'Project' is defined as a temporary, planned activity, involving multiple parties, with a start and end date, a duration of at least 3 months, specific milestones and deliverables, defined responsibilities and a budget of \$5M or more.
2. Unless specified otherwise, 'Government' is defined as a territorial, federal, state, provincial or municipal government body.
3. Unless specified otherwise, bidders may demonstrate experience in multiple criteria during the same time frame.
4. Bidders are advised that the experience is calculated as of the closing date of the RFP. For example, if a given requirement states, "The Bidder must have experience, within the last five years," then the five-year period is calculated as of the closing date of the RFP.
5. References must include the name of the organization, the contract number, a short description of the services provided, the name, title, e-mail address or telephone number of the organization's responsible manager, as well as the award date, expiry date and dollar value of each contract. It is the Bidder's responsibility to ensure that any information divulged is with the permission of the references provided.
6. The Bidder must have been the prime contractor, rather than a subcontractor. This means that the Bidder contracted directly with the customer of the work. If the Bidder's contract was to perform work which another entity had itself first contracted to perform, the Bidder will not be considered the prime contractor. For example, Z (customer) contracted with Y for services. Y, in turn, entered into a contract with X to provide all or part of these services to Z. In this example, Y is a prime contractor and X is a subcontractor.

1.0 BIDDER MANDATORY AND RATED CRITERIA

1.1 Bidder – Mandatory Criteria

Item#	Bidder - Mandatory Criteria	Met/Not Met	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
M1	<p>The Bidder must submit the following number of résumés:</p> <ul style="list-style-type: none"> (i) One P.1 Change Management Consultant – Level 3; (ii) One P.2 Enterprise Architect – Level 3; (iii) One P.5 Project Executive – Level 3; (iv) One P.9 Project Manager – Level 3; (v) Two P.9 Project Managers – Level 2 (one résumé for Project Manager and one résumé for Project Manager, Release Manager); and (vi) One P.10 Project Scheduler – Level 2. <p>Each résumé must include the following information:</p> <ul style="list-style-type: none"> (a) The name of the proposed resource; (b) The resource category for which the resource is being proposed; (c) Relevant academic and professional attainments in relation to Employment and Social Development Canada's requirements, as identified in the Mandatory and the Rated Evaluation Criteria for each resource category herein. Relevant formal training must be listed chronologically by the title (of the course/program) and must include the duration (in years/months/days) and the start and end dates (dates must be identified by month and year – for example March 2004 – February 2007); and (d) Work experience including duration and start and finish dates (dates must be identified by month and year – for example March 2004 – February 2007). 		
M2	<p>The Bidder must provide a reference for each of two projects where the Bidder provided a similar team of resources (3 out of the 6 resource categories listed in M1 above) to at least two projects that delivered the same or</p>		

Item#	Bidder - Mandatory Criteria	Met/Not Met	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
	<p>similar services outlined in the Statement of Work. The references must be from government or private projects valued at greater than \$5M.</p> <p>Bidders must include, as a minimum, for each project submitted:</p> <ul style="list-style-type: none"> (a) A project description; (b) The name of the client department; (c) The date and duration of the project; (d) Details about the work performed by the Bidder on the project; and (e) A client reference. 		
M3	The Bidder must demonstrate that it has adopted and implemented a commercially available methodology/framework. The Bidder must be either a registered OpenGroup Partner carrying TOGAF certified resources that have employed the methodology or have equivalent certification such as the Zachman Framework for Enterprise Architecture, or Federal Enterprise Architecture (FAE), or Gartner's Methodology.		
M4	The Bidder must provide a reference where the Bidder established a Project Management Office (PMO) to support the management of a project. The reference must be from government or private sector projects valued at greater than \$5M.		
M5	The Bidder must provide a minimum of one reference for each of 2 projects where the Bidder demonstrated the delivery of business transformation services. The references must be from government or private sector projects valued at greater than \$5M.		
M6	The Bidder must detail the PMO and business transformation methodologies, processes, support tools and/or templates (toolset) that it has used to establish and support a PMO on past government or private sector projects in order to demonstrate that it is able to support the provision of services outlined in the Statement of Work.		

1.2 Bidder – Rated Criteria

Item#	Bidder - Rated Criteria	Max Score	Point Scale	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
R1	The Bidder should demonstrate that it provided services similar to those outlined in the Statement of Work (SOW) attached at Annex A, by providing up to 4 project descriptions involving Business Transformation in government or the private sector within the last 5 years.	4	1 project = 1 point 2 projects = 2 points 3 projects = 3 points 4 projects = 4 points	
R2	The Bidder should demonstrate its experience, over and above what is required in M5 above, in the delivery of business transformation projects. The projects must be government or private sector projects valued at greater than \$5M.	3	1 project more than M5 (i.e. a total of 3 projects) = 1 point 2 projects more than M5 (i.e. a total of 4 projects) = 2 points 3 projects more than M5 (i.e. a total of 5 projects) = 3 points	
R3	The Bidder should demonstrate its capacity as a thought leader in overall Project Management with the Government of Canada or other national government, through the use of white papers, production of industry standards, the delivery of relevant practice specific disciplines such as Risk Management, Change Management, Performance Management, IT Security Guidance 33 (ITSG-33) or equivalent.	3	1 point for participation in the development of each of the following: (i) Risk Management; (ii) Change Management; (iii) Performance Management; (iv) IT Security Guidance (ITSG-33); (v) Published whitepaper.	
	Maximum Score Available	10		
	Minimum Score Required	7		

2.0 RESOURCE MANDATORY AND RATED CRITERIA

2.1 P.1 Change Management Consultant - Level 3

Item#	Mandatory Criteria P.1 Change Management Consultant - Level 3	Met/Not Met	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
M1	The proposed resource must have a minimum of 10 years demonstrated experience, within the last 15 years, as a lead consultant for a nationwide, regional business or government transformation project, where the proposed resource developed transition plans with a focus on change management and communications.		
M2	The proposed resource must have a minimum of 5 years demonstrated experience with a range of transition strategies including change management, training and communications, within the last 15 years.		
M3	The proposed resource must have a minimum of 5 years demonstrated experience documenting processes and roles and responsibilities within the last 15 years.		

Item#	Rated Criteria P.1 Change Management Consultant - Level 3	Max Score	Point Scale	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
R1	The proposed resource should have demonstrated experience with large transformation projects involving IT enablement of the business.	4	1 project = 1 point 2 projects = 2 points 3 projects = 3 points 4 or more projects = 4 points	
R2	The proposed resource should have demonstrated experience in developing and delivering presentations to stakeholders, including senior officials.	3	1 presentation = 1 point 2 presentations = 2 points 3 presentations = 3 points	
R3	The proposed resource should have demonstrated experience working within the Government of Canada as an employee, a consultant or a subcontractor in the area of change management or project management.	1	Years of experience > 2 years = 1 point	
	Maximum Score Available	8		
	Minimum Score Required	5		

2.2 P.2 Enterprise Architect - Level 3

Item#	Mandatory Criteria P.2 Enterprise Architect - Level 3	Met/Not Met	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
M1	The proposed resource must have a minimum of 10+ years demonstrated experience, within the last 15 years, as an Enterprise Architect.		
M2	Using a minimum of 2 project descriptions, it must be demonstrated that the proposed resource has experience integrating an enterprise architecture developed by the proposed resource into an organization. These projects must have occurred within the last 15 years at the time of bid closing and have been valued at greater than \$5M each.		

Item#	Rated Criteria P.2 Enterprise Architect - Level 3	Max Score	Point Scale	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
R1	<p>The proposed resource should have project experience identifying, analyzing and validating business designs on business transformation initiatives.</p> <p>For project experience to qualify, the resource must have been on the project for a minimum duration of 6 months within the last 10 years.</p> <p>Compliance should be demonstrated using project descriptions.</p>	3	<p>1 project = 1 point</p> <p>2 projects = 2 points</p> <p>3 projects = 3 points</p>	
R2	<p>The proposed resource should have project experience analyzing strategic plans and aligning and validating them to business architectures and business models.</p> <p>For project experience to qualify, the resource must have been on the project for a minimum duration of 6 months within the last 10 years.</p> <p>Compliance should be demonstrated using project descriptions.</p>	3	<p>1 project = 1 point</p> <p>2 projects = 2 points</p> <p>3 projects = 3 points</p>	

Item#	Rated Criteria	Max Score	Point Scale	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
	P.2 Enterprise Architect - Level 3			
R3	<p>The bidder should demonstrate that the proposed resource has project experience as an Enterprise Architect at a Government of Canada department or Central Agency on an enterprise-wide business transformation project, utilizing the Canadian Government's Strategic Reference Model.</p> <p>For project experience to qualify, the resource should have been on the project for a minimum duration of 6 months within the last 10 years, and the project must have a value in excess of \$10M.</p> <p>Compliance should be demonstrated using project descriptions.</p>	2	<p>1 project = 1 point 2 projects = 2 points</p>	
R4	<p>The proposed resource should have a valid certification in at least one architectural framework (e.g. The Open Group Architecture Framework, Zachman Framework, TOGAF, etc.).</p> <p>A copy of the certification must be provided with the bid.</p>	3	<p>1 certification = 1 point ≥ 2 certifications = 2 points TOGAF = 1 point</p>	
	Maximum Score Available	11		
	Minimum Score Required	6		

2.3 P.5 Project Executive - Level 3

Item#	Mandatory Criteria P.5 Project Executive - Level 3	Met/Not Met	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
M1	The proposed resource must have a minimum of 10+ years of demonstrated experience within the last 15 years working as a Senior Project Executive.		
M2	The proposed resource must have a minimum of 5 years of demonstrated experience establishing and managing a project management office, within a project or projects valued at greater than \$5M each, in a government or private sector environment, within the last 15 years.		
M3	The proposed resource must have a minimum of 5 years of demonstrated experience working as a Project Executive in providing advice to senior management on implementing governance structures for government or private sector projects valued at greater than \$5M within the last 15 years.		

Item#	Rated Criteria P.5 Project Executive - Level 3	Max Score	Point Scale	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
R1	The proposed resource should have demonstrated experience within the last 15 years, as part of an integrated project team, in the delivery of a business transformation project or projects in a complex organizational environment. A complex organizational environment is defined as across multi-organizational boundaries.	3	1 project = 1 point 2 projects = 2 points 3 projects = 3 points	
R2	The proposed resource should have demonstrated experience in providing project management, planning and oversight of two or more concurrent projects. The projects must have been valued at greater than \$5M, and have been delivered in the last 15 years.	3	1 project = 1 point 2 projects = 2 points 3 projects = 3 points	
R3	The proposed resource should have demonstrated experience in the management of an	3	1 project = 1 point 2 projects = 2 points 3 projects = 3 points	

Item#	Rated Criteria	Max Score	Point Scale	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
	P.5 Project Executive - Level 3			
	independent Project Management Office responsible for the configuration and implementation of COTS (commercial off the shelf) products, using third party Systems Integration vendors, within the last 15 years.			
R4	The proposed resource should demonstrate they have obtained a university degree from an accredited university in any of the following domains: Commerce, Computer Sciences, Engineering, Information Management or Information Technology by including a copy of the degree with the bid.	2	Yes = 2 points No = 0 points	
	Maximum Score Available	11		
	Minimum Score Required	7		

2.4 P.9 Project Manager - Level 3

Item#	Mandatory Criteria P.9 Project Manager - Level 3	Met/Not Met	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
M1	The proposed resource must have greater than 10 years demonstrated experience within the last 15 years as a Senior (Level 3) Project Manager.		
M2	The proposed resource must have worked as a senior project manager, leading as a minimum, a team of 3 project managers, on each of 2 government or private sector projects. The projects must relate to IM/IT, business architecture or project management in a similar environment to the one outlined in the Statement of Work, one of which was valued at greater than \$5M, and both occurred within the last 15 years.		
M3	The proposed resource must have worked on 2 government or private sector projects, each valued at greater than \$5M, where the proposed resource was required to collaborate with a number of stakeholders (both internal and external to the organization), within the last 15 years.		
M4	The proposed resource must have worked on 2 projects, each valued at greater than \$5M, where the role required coaching/ mentoring of project managers, or the development of project management best practices or frameworks. One of the referenced projects must be from a government environment, within the last 15 years.		
M5	The proposed resource must hold a valid Project Management Professional (PMP) or PRINCE2 designation by including the candidate's PMP or PRINCE2 Certification Number. A copy of the certification must be provided with the bid.		

Item#	Rated Criteria P.9 Project Manager - Level 3	Max Score	Point Scale	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
R1	<p>The proposed resource should have demonstrated experience, within the last 15 years, as a Project Manager, conducting all of the following activities:</p> <ul style="list-style-type: none"> (i) Developing Project Charters; (ii) Developing Project Dashboards; (iii) Developing Project Management Plans; and (iv) Conducting Project Briefings to Senior Management. <p>All of which are related to the project planning, management and oversight of IM/IT projects, with multiple and diverse stakeholders and valued at greater than \$5M – at least 1 of which must have been in a government environment.</p>	3	<p>Years of Experience:</p> <ul style="list-style-type: none"> ≥ 3-4 years = 1 point > 4-5 years = 2 points > 5 years = 3 points 	
R2	<p>The proposed resource should have demonstrated experience, within the last 15 years, as a Project Manager, conducting cost management functions for an IM/IT project, valued at greater than \$5M including:</p> <ul style="list-style-type: none"> (i) Determining budgetary requirements; (ii) Developing Project Schedules, Work Break-down Structure and resource plans; and (iii) Determining composition, roles and responsibilities of team members. 	3	<p>Years of Experience:</p> <ul style="list-style-type: none"> ≥ 3-4 years = 1 point > 4-5 years = 2 points > 5 years = 3 points 	
R3	<p>The proposed resource should have demonstrated experience, within the last 15 years, as a Project Manager, managing and leading the risk management</p>	3	<p>Years of Experience:</p> <ul style="list-style-type: none"> ≥ 3-4 years = 1 point > 4-5 years = 2 points > 5 years = 3 points 	

Item#	Rated Criteria	Max Score	Point Scale	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
	P.9 Project Manager - Level 3			
	function for an IM/IT project including: (i) Developing a risk plan, risk register and risk mitigation strategies; (ii) Owning and managing the risk management process to ensure projects risks are identified, quantified, and effectively managed; (iii) Managing project risk with the authority to deal with risks within guidelines; and (iv) Liaising with other projects in the integrated development of risks.			
R4	The proposed resource should have demonstrated experience, within the last 15 years, as a Project Manager, on a project or projects valued at greater than \$5M, in the development or review of an Operational Plan, Strategic Plan or Business Case.	3	Years of Experience: ≥ 3-4 years = 1 point > 4-5 years = 2 points > 5 years = 3 points	
	Maximum Score Available	12		
	Minimum Score Required	8		

2.5 P.9 Project Manager - Level 2

Item#	Mandatory Criteria P.9 Project Manager - Level 2	Met/Not Met	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
M1	The proposed resource must have greater than 5 years demonstrated experience within the last 15 years, as a Project Manager.		
M2	The proposed resource must have worked as a Project Manager leading, as a minimum, 3 subordinates on each of 2 relevant business transformation projects. The projects must have been for a minimum duration of 6 months each, relating to business architecture or project management, in a similar environment as that described in the Statement of Work, and in a government or private sector environment, within the last 15 years. One of the referenced projects must have been valued at greater than \$5M.		
M3	The proposed resource must have managed change, utilizing change management principles and methodologies, on a business transformation project valued at greater than \$5M.		
M4	The proposed resource must hold a valid Project Management Professional (PMP) or Prince2 designation by including the candidate's PMP or Prince2 Certification Number. A copy of the certification must be provided with the bid.		

Item#	Rated Criteria P.9 Project Manager - Level 2	Max Score	Point Scale	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
R1	The proposed resource should have demonstrated experience within the last 15 years, in a project management role for projects with multiple and diverse stakeholders and valued at greater than \$5M.	3	Years of Experience: ≥ 3-4 years = 1 point > 4-5 years = 2 points > 5 years = 3 points	
R2	The proposed resource should have demonstrated experience, within the last 15 years, in the use of the Microsoft Project application for project planning, developing, controlling and	3	Years of Experience: ≥ 3-4 years = 1 point > 4-5 years = 2 points > 5 years = 3 points	

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Item#	Rated Criteria	Max Score	Point Scale	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
	P.9 Project Manager - Level 2			
	tracking for project(s) valued at greater than \$5M.			
R3	The proposed resource should have demonstrated experience, within the last 15 years, in defining and implementing new organizational business processes and business process reengineering.	3	Years of Experience: ≥ 3-4 years = 1 point > 4-5 years = 2 points > 5 years = 3 points	
	Maximum Score Available	9		
	Minimum Score Required	6		

2.6 P.9 Project Manager, Release Manager - Level 2

Item#	Mandatory Criteria P.9 Project Manager, Release Manager - Level 2	Met/Not Met	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
M1	The proposed resource must have a minimum of 5 years demonstrated experience within the last 15 years as a Project Manager.		
M2	The proposed resource must have demonstrated experience establishing, supporting and leading Release Management on a minimum of 2 projects within the last 5 years, each valued at greater than \$5M. For project experience to qualify, the proposed resource must have been on the project for a minimum duration of 12 months.		

Item#	Rated Criteria P.9 Project Manager, Release Manager - Level 2	Max Score	Point Scale	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
R1	In addition to the experience required in M2 above, the proposed resource should have demonstrated experience within the last 15 years, in establishing, supporting and leading release management for a business transformation initiative integrating a COTS solution, for a minimum duration of 6 months.	3	1 project more than M2 (i.e. a total of 3 projects) = 1 point 2 projects more than M2 (i.e. a total of 4 projects) = 2 points 3 projects more than M2 (i.e. a total of 5 projects) = 3 points	
R2	The proposed resource should have demonstrated experience, within the last 15 years, developing and maintaining a release management plan where the project was multi-year and valued at greater than \$5M.	3	1 project = 1 point 2 projects = 2 points 3 projects = 3 points	
R3	The proposed resource should have demonstrated project experience in release management for an entire release management lifecycle including planning, building, testing, preparing and deploying a release within the last 10 years. For project experience to qualify, the release management lifecycle must have had a minimum duration of 12 months.	3	1 project = 1 point 2 projects = 2 points 3 projects = 3 points	

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Item#	Rated Criteria	Max Score	Point Scale	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
	P.9 Project Manager, Release Manager - Level 2			
R4	The proposed resource should hold a valid Project Management Professional (PMP) or Prince2 designation by including the candidate's PMP or Prince2 Certification Number. A copy of the certification must be provided with the bid.	2	Yes = 2 points No = 0 points	
	Maximum Score Available	11		
	Minimum Score Required	7		

2.7 P.10 Project Scheduler - Level 2

Item#	Mandatory Criteria P.10 Project Scheduler - Level 2	Met/Not Met	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
M1	The proposed resource must have a minimum of 5 years demonstrated experience, within the last 15 years, as a Project Scheduler.		
M2	The proposed resource must have demonstrated experience working in a project scheduler role on one project within a government or private sector environment, valued greater than \$5M, for a period of at least 2 years, within the last 5 years.		
M3	The proposed resource must have a minimum of 5 years demonstrated experience within the last 15 years scoping, developing and maintaining project schedules using Microsoft Project Desktop or Microsoft Project Server.		
M4	The proposed resource must have a minimum of 5 years demonstrated experience within the last 15 years monitoring and reporting project performance.		

Item#	Rated Criteria P.10 Project Scheduler - Level 2	Max Score	Point Scale	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
R1	The proposed resource should have demonstrated experience as part of an integrated project team, within the last 15 years, in the delivery of projects relating to business service transformation.	3	Years of Experience: ≥ 3-4 years = 1 point > 4-5 years = 2 points > 5 years = 3 points	
R2	The proposed resource should have demonstrated experience working within a Project Management Office, for large Information Technology (IT) projects, valued at greater than \$5M.	3	1 project = 1 point 2 projects = 2 points 3 projects = 3 points	
R3	The proposed resource should have demonstrated experience in developing, monitoring and analyzing project schedules in Microsoft Project, for a large-scale (valued at greater than \$5M) government or private sector project.	2	Years of Experience: ≥ 3-4 years = 1 point > 4 years = 2 points	

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Item#	Rated Criteria	Max Score	Point Scale	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
	P.10 Project Scheduler - Level 2			
R4	The proposed resource should have demonstrated experience using and working with Microsoft Project Desktop and Microsoft Project Server.	2	Years of Experience: ≥ 3-4 years = 1 point > 4 years = 2 points	
	Maximum Score Available	10		
	Minimum Score Required	7		

ATTACHMENT 4.2
PRICING SCHEDULE
WORKSTREAM 1 - BUSINESS SERVICES

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

INITIAL CONTRACT PERIOD:

Contract Period - Year 1				
(A)	(B)	(C)	(D)	(E)
Resource Category	Level of Expertise	Estimated Number of Days	Firm Per Diem Rate or Median Rate whichever is higher	Total Cost (CxD)
B.1 Business Analyst	2	300	\$	\$
B.2 Business Architect	3	50	\$	\$
B.4 Business Continuity/Disaster Recovery Specialist	2	100	\$	\$
B.5 Business Process Re-engineering (BPR) Consultant	2	150	\$	\$
B.7 Business Transformation Architect	3	150	\$	\$
B.14 Technical Writer	2	37.5	\$	\$
1800				\$ <TBD>

Contract Period - Year 2				
(A)	(B)	(C)	(D)	(E)
Resource Category	Level of Expertise	Estimated Number of Days	Firm Per Diem Rate or Median Rate whichever is higher	Total Cost (CxD)
B.1 Business Analyst	2	300	\$	\$
B.2 Business Architect	3	50	\$	\$
B.4 Business Continuity/Disaster Recovery Specialist	2	100	\$	\$
B.5 Business Process Re-engineering (BPR) Consultant	2	150	\$	\$
B.7 Business Transformation Architect	3	150	\$	\$
B.14 Technical Writer	2	37.5	\$	\$
Total Price (Contract Period - Year 2):				\$ <TBD>

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Contract Period - Year 3				
(A)	(B)	(C)	(D)	(E)
Resource Category	Level of Expertise	Estimated Number of Days	Firm Per Diem Rate or Median Rate whichever is higher	Total Cost (CxD)
B.1 Business Analyst	2	300	\$	\$
B.2 Business Architect	3	50	\$	\$
B.4 Business Continuity/Disaster Recovery Specialist	2	100	\$	\$
B.5 Business Process Re-engineering (BPR) Consultant	2	150	\$	\$
B.7 Business Transformation Architect	3	150	\$	\$
B.14 Technical Writer	2	37.5	\$	\$
Total Price (Contract Period - Year 3):				\$ <TBD>

OPTION PERIODS:

Option Period - Year 4				
(A)	(B)	(C)	(D)	(E)
Resource Category	Level of Expertise	Estimated Number of Days	Firm Per Diem Rate or Median Rate whichever is higher	Total Cost (CxD)
B.1 Business Analyst	2	300	\$	\$
B.2 Business Architect	3	50	\$	\$
B.4 Business Continuity/Disaster Recovery Specialist	2	100	\$	\$
B.5 Business Process Re-engineering (BPR) Consultant	2	150	\$	\$
B.7 Business Transformation Architect	3	150	\$	\$
B.14 Technical Writer	2	37.5	\$	\$
Total Price (Option Period - Year 4):				\$ <TBD>

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Option Period - Year 5				
(A)	(B)	(C)	(D)	(E)
Resource Category	Level of Expertise	Estimated Number of Days	Firm Per Diem Rate or Median Rate whichever is higher	Total Cost (CxD)
B.1 Business Analyst	2	300	\$	\$
B.2 Business Architect	3	50	\$	\$
B.4 Business Continuity/Disaster Recovery Specialist	2	100	\$	\$
B.5 Business Process Re-engineering (BPR) Consultant	2	150	\$	\$
B.7 Business Transformation Architect	3	150	\$	\$
B.14 Technical Writer	2	37.5	\$	\$
Total Price (Option Period - Year 5):				\$ <TBD>

Total Bid Price - Workstream 1 - Business Services	
Total Initial Contract Period (Year 1, Year 2 and Year 3) + Option Periods (Year 4 and Year 5)	\$ <TBD>

ATTACHMENT 4.2**PRICING SCHEDULE****WORKSTREAM 2 - PROJECT MANAGEMENT SERVICES**

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

INITIAL CONTRACT PERIOD:

Contract Period - Year 1				
(A)	(B)	(C)	(D)	(E)
Resource Category	Level of Expertise	Estimated Number of Days	Firm Per Diem Rate or Median Rate whichever is higher	Total Cost (Cx D)
P.1 Change Management Consultant	3	25	\$	\$
P.2 Enterprise Architect	3	25	\$	\$
P.5 Project Executive	3	25	\$	\$
P.9 Project Manager	3	75	\$	\$
P.9 Project Manager	2	300	\$	\$
P.9 Project Manager - Release Manager	2	50	\$	\$
P.10 Project Scheduler	2	200	\$	\$
Total Price (Contract Period - Year 1):				\$ <TBD>

Contract Period - Year 2				
(A)	(B)	(C)	(D)	(E)
Resource Category	Level of Expertise	Estimated Number of Days	Firm Per Diem Rate or Median Rate whichever is higher	Total Cost (Cx D)
P.1 Change Management Consultant	3	25	\$	\$
P.2 Enterprise Architect	3	25	\$	\$
P.5 Project Executive	3	25	\$	\$
P.9 Project Manager	3	75	\$	\$
P.9 Project Manager	2	300	\$	\$
P.9 Project Manager - Release Manager	2	50	\$	\$
P.10 Project Scheduler	2	200	\$	\$
Total Price (Contract Period - Year 2):				\$ <TBD>

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Contract Period - Year 3				
(A)	(B)	(C)	(D)	(E)
Resource Category	Level of Expertise	Estimated Number of Days	Firm Per Diem Rate or Median Rate whichever is higher	Total Cost (CxD)
P.1 Change Management Consultant	3	25	\$	\$
P.2 Enterprise Architect	3	25	\$	\$
P.5 Project Executive	3	25	\$	\$
P.9 Project Manager	3	75	\$	\$
P.9 Project Manager	2	300	\$	\$
P.9 Project Manager - Release Manager	2	50	\$	\$
P.10 Project Scheduler	2	200	\$	\$
Total Price (Contract Period - Year 3):				\$ <TBD>

OPTION PERIODS:

Option Period - Year 4				
(A)	(B)	(C)	(D)	(E)
Resource Category	Level of Expertise	Estimated Number of Days	Firm Per Diem Rate or Median Rate whichever is higher	Total Cost (CxD)
P.1 Change Management Consultant	3	25	\$	\$
P.2 Enterprise Architect	3	25	\$	\$
P.5 Project Executive	3	25	\$	\$
P.9 Project Manager	3	75	\$	\$
P.9 Project Manager	2	300	\$	\$
P.9 Project Manager - Release Manager	2	50	\$	\$
P.10 Project Scheduler	2	200	\$	\$
Total Price (Option Period - Year 4):				\$ <TBD>

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Option Period - Year 5				
(A)	(B)	(C)	(D)	(E)
Resource Category	Level of Expertise	Estimated Number of Days	Firm Per Diem Rate or Median Rate whichever is higher	Total Cost (Cx D)
P.1 Change Management Consultant	3	25	\$	\$
P.2 Enterprise Architect	3	25	\$	\$
P.5 Project Executive	3	25	\$	\$
P.9 Project Manager	3	75	\$	\$
P.9 Project Manager	2	300	\$	\$
P.9 Project Manager - Release Manager	2	50	\$	\$
P.10 Project Scheduler	2	200	\$	\$
Total Price (Option Period - Year 5):				\$ <TBD>

Total Bid Price - Workstream 2 - Project Management Services	
Total Initial Contract Period (Year 1, Year 2 and Year 3) + Option Periods (Year 4 and Year 5)	\$ <TBD>

ATTACHMENT 5.1**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, proceed 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).

ATTACHMENT 5.2

CERTIFICATION REQUIREMENTS FOR THE SET-ASIDE PROGRAM FOR ABORIGINAL BUSINESS

1. This procurement is set aside under the federal government's Procurement Strategy for Aboriginal Business, as detailed in Annex 9.4, Requirements for the Set-aside Program for Aboriginal Business, of the *Supply Manual*.
2. The Bidder:
 - (i) certifies that it meets, and will continue to meet throughout the duration of any resulting contract, the requirements described in the above-mentioned annex;
 - (ii) agrees that any subcontractor it engages under any resulting contract must satisfy the requirements described in the above-mentioned annex; and
 - (iii) agrees to provide to Canada, immediately upon request, evidence supporting any subcontractor's compliance with the requirements described in the above-mentioned annex.
3. The Bidder must check the applicable box below:
 - (i) ☐ The Bidder is an Aboriginal business that is a sole proprietorship, band, limited company, co-operative, partnership or not-for-profit organization.

OR
 - (ii) ☐ The Bidder is either a joint venture consisting of two or more Aboriginal businesses or a joint venture between an Aboriginal business and a non-Aboriginal business.
4. The Bidder must check the applicable box below:
 - (i) ☐ The Aboriginal business has fewer than six full-time employees.

OR
 - (ii) ☐ The Aboriginal business has six or more full-time employees.
5. The Bidder must, upon request by Canada, provide all information and evidence supporting this certification. The Bidder must ensure that this evidence will be available for audit during normal business hours by a representative of Canada, who may make copies and take extracts from the evidence. The Bidder must provide all reasonably required facilities for any audits.
6. By submitting a bid, the Bidder certifies that the information submitted by the Bidder in response to the above requirements is accurate and complete.