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**Core 0A1 / Noyau 0A1**  
**Gatineau**  
**Québec**  
**K1A 0S5**  
**Bid Fax: (819) 997-9776**

## SOLICITATION AMENDMENT MODIFICATION DE L'INVITATION

The referenced document is hereby revised; unless otherwise indicated, all other terms and conditions of the Solicitation remain the same.

Ce document est par la présente révisé; sauf indication contraire, les modalités de l'invitation demeurent les mêmes.

### Comments - Commentaires

THIS DOCUMENT CONTAINS A SECURITY  
REQUIREMENT (See original solicitation  
document.)

**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

<b>Title - Sujet</b> TBIPS - Business and PM Services	
<b>Solicitation No. - N° de l'invitation</b> G7898-130001/B	<b>Amendment No. - N° modif.</b> 007
<b>Client Reference No. - N° de référence du client</b> G7898-130001	<b>Date</b> 2014-03-13
<b>GETS Reference No. - N° de référence de SEAG</b> PW-\$\$ZM-380-26890	
<b>File No. - N° de dossier</b> 380zm.G7898-130001	<b>CCC No./N° CCC - FMS No./N° VME</b>
<b>Solicitation Closes - L'invitation prend fin</b> <b>at - à 02:00 PM</b> <b>on - le 2014-03-26</b>	<b>Time Zone</b> <b>Fuseau horaire</b> Eastern Daylight Saving Time EDT
<b>F.O.B. - F.A.B.</b> <b>Plant-Usine:</b> <input type="checkbox"/> <b>Destination:</b> <input checked="" type="checkbox"/> <b>Other-Autre:</b> <input type="checkbox"/>	
<b>Address Enquiries to: - Adresser toutes questions à:</b> Cook, Gail	<b>Buyer Id - Id de l'acheteur</b> 380zm
<b>Telephone No. - N° de téléphone</b> (819) 956-2591 ( )	<b>FAX No. - N° de FAX</b> (819) 956-1207
<b>Destination - of Goods, Services, and Construction:</b> <b>Destination - des biens, services et construction:</b> EMPLOYMENT AND SOCIAL DEVELOPMENT CANADA	

**Instructions: See Herein**

**Instructions: Voir aux présentes**

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

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## AMENDMENT NO. 007

This amendment is raised to revise the RFP and answer Bidders' questions.

### **RFP REVISIONS:**

#### **1. At Page 1 of the RFP, Solicitation Closes:**

Delete: 2014-03-21

Insert: 2014-03-26

#### **2. At Attachment 4.1 Bid Evaluation Criteria, Workstream 1 - Business Services:**

Delete: In its entirety.

Insert: Revised Attachment 4.1 Bid Evaluation Criteria, Workstream 1 - Business Services attached to and forming part of the Solicitation. (Document follows in PDF format.)

#### **3. At Attachment 4.1 Bid Evaluation Criteria, Workstream 2 - Project Management Services:**

Delete: In its entirety.

Insert: Revised Attachment 4.1 Bid Evaluation Criteria, Workstream 2 - Project Management Services attached to and forming part of the Solicitation. (Document follows in PDF format.)

## **QUESTIONS AND ANSWERS**

**Q54 Re: Attachment 4.1 Workstream 2, Bid Evaluation Criteria, Section 2.6 Project Scheduler, item 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."*

As written, this is a very restrictive mandatory requirement in that it requires a resource to have worked a minimum of 2 years of the last 5 years on the same project valued greater than \$5M (which equates to ~40% of the time period allowed).

Question A:

Can the Crown please confirm that this is what is intended by this requirement?

Question B:

If yes, would the Crown please consider modifying this requirement to accept a minimum of 2 years in the last 7 years on the same project valued greater than \$5M (which equates to ~30% of the time period allowed).

**A54 Answer A:**

Confirmed.

Answer B:

The requirement will remain unchanged.

Q55 and A55 To follow.

Q56 and A56 To follow.

**Q57 Re: Amendment 004, Q&A 42**

We respectfully ask that the Crown re-consider their response to this question. Degrees and disciplines are different between universities, depending on the year the degree was obtained and the geographic location of the accredited institution. If one compares a transcript of a Bachelors of Commerce degree, which is considered acceptable to substantiate this criterion, with a B.A. with a major in Economics the curriculum is almost identical yet it has been deemed un-acceptable. Given this role requires a very senior resource with more than 10 years of experience at the executive level, the resources work experience is more relevant than a very slight difference in the name of their undergraduate university degree which would have been obtained more than two decades ago. We express our concern and feel this criterion is unfairly restrictive and will limit the Crown's ability to receive a fair number of compliant proposals for this competition.

**A57** A42 of Solicitation Amd. No. 004 has been revised to state that a BA with a major in economics is acceptable.

**Q58 Re: Amendment 003 & Amendment 004**

Due to the extent and complexity of the changes to the Evaluation Criteria on both workstreams presented in these amendments and clarification provided in the Q&A, much of our writing has had to be re-structured and several pieces require a complete re-write. In the busiest time for procurement activity in the Government of Canada, the result is a significant impact on the Bidders infrastructure to respond within the current solicitation period. Would the Crown please consider granting another extension to the close date to allow Bidders the time required to prepare their responses on these important RFPs.

A58 The Solicitation closing date has been revised to March 26, 2014.

Q59 For the technical writer category, R3 (WS1, page 105 of 130) requires the proposed technical writer to have "...relevant certification or formal education in the field of technical writing" in order to score points. Please confirm that a resource with a degree in a field relevant to technical writing (for example, degrees such as journalism, English, or communications, which involve analysis, theories and principles of writing, and concepts involved with the conveyance of information) will obtain the 2 points available at R3.

A59 Technical writing is substantially different than journalism. This requirement will remain unchanged.

Q60 and A60 To follow.

Q61 Please confirm that references are not required for any of the resources submitted in response to this RFP.

A61 As stated in the RFP, whether or not to conduct reference checks is discretionary. If requested by PWGSC, Bidders will be required to provide references for any or all of the proposed resources.

Q62 Attachment 4.1, Bid Evaluation Criteria, states that "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." Within some jurisdictions, such as federal, contract numbers are a common occurrence. However, contract numbers will not exist for many private sector projects, and will not be used by our clients to track the relationship between the client and the vendor. As a result, we are not in a position to reference client contract numbers for all projects. In an effort to achieve consistency, we request that the Crown could remove this requirement, as the remaining contact information should be sufficient to ensure that experience can be verified.

A62 The statement above was revised to state "It is requested that references include...". Therefore, if a bidder provides a contract that does not have a "contract number" it is acceptable to state that the contract number is not applicable.

- Q63 In Amendment 4, the Crown confirmed that vendor contract value for Bidder Mandatory and Rated projects could be "less than \$5M" as long as the overall project to which the contract applied was >\$5M. Our understanding of this clarification is that this significantly lowers the requirements for bidder project experience from the original solicitation and we would ask for further clarification if this is the Crown's intent. For example, using this clarification as a guide, if a bidder had provided a single resource for a short contract (e.g. \$25,000 total contract value) on a major transformation project (>\$5M), that project would then qualify as one of two projects required for Bidder Mandatory M4. As the requirement of this solicitation appears to be for the provision of significant support to ESDC projects rather than the example provided, can you please confirm if there is a minimum contract value that would apply to bidders, in the situation where the contract value is less than the \$5M.
- A63 The contract could be less than \$5M, the project must be at least \$5M.
- Q64 and A64 To follow.
- Q65 Amendment 003, Change 1, where Attachment 4.1, point 1 (in each of the 2 workstreams) was changed and now includes the phrase "outcomes in support of a public policy objective". While having public sector experience is a reasonable requirement for corporate reference projects, the same cannot be said for individual resource reference projects. If left as currently worded, resources would not be able to use any private sector (such as Bell Canada, Nortel, McCain, banks, etc.) projects as valid projects. Accordingly, would Canada please change the requirement from:
1. A project is an activity or series of activities that has a beginning and an end. A project is required to produce defined outputs and realize specific outcomes in support of a public policy objective, within a clear schedule and resource plan. A project is undertaken within specific time, cost and performance parameters. (Source: TBS Policy on the Management of Projects.)
- to:
1. A) For Bidder Mandatory and Rated Criteria M2, M3, M4, R1, and R2, a project is defined as an activity or series of activities that has a beginning and an end. A project is required to produce defined outputs and realize specific outcomes in support of a public policy objective within a clear schedule and resource plan. A project is undertaken within specific time, cost and performance parameters. (Source: TBS Policy on the Management of Projects.)
  - B) For individual resource reference projects, the definition of a project is an activity or series of activities that has a beginning and an end. A project is required to produce defined outputs and realize specific outcomes in support of a public policy objective or private sector objective within a clear schedule.
- A65 Criterion will be amended to read..."in support of a specific objective" the wording "a public policy objective will be removed.
- Q66 The pricing tables in Attachment 4.2 Pricing Schedule (pages 122 to 127 of the original RFP) for both Workstream 1 and Workstream 2 are different than the Basis of Payment (Annex B) given for Workstream 2 in Amendment 002 (page 4, dated 13 February 2014). Could the Crown please confirm which pricing table/basis of payment Bidders should use to complete their financial proposal?

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- A66 Attachment 4.2 Pricing Schedule Workstream 1 – Business Services included in the original RFP remains unchanged.
- Attachment 4.2 Pricing Schedule Workstream 2 – Project Management Services included in the original RFP is replaced by Attachment 4.2 Pricing Schedule Workstream 2 – Project Management Services provided in Solicitation Amendment No. 002. The change to the Pricing Schedule was the deletion of the resource category P.2 Enterprise Architect – Level 3.
- Q67 Section 4.3 (c ) (ii) (B) states : “ 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 initial contract period contains 3 years and hence 3 separate per diems, one for each year in the Initial Contract Period. Will the median for the Initial Contract Period be a single median across the 3 years or 3 separate medians , one for each separate resource category inside the Initial Contract period? If the answer is one median across the Initial Contract period, can the Crown state how that would be calculated?
- A67 A median will be calculated for each separate resource category for each year of the Initial Contract and for each year of the Option Period.
- Q68 Amendment #2 replaced the mandatory requirements table in Attachment 4.1 Bid Evaluation Criteria Workstream 1 - Business Services, Section 1.1 Bidder - Mandatory Criteria. The effect was to remove M3 which resulted in there being a total of 5 remaining mandatory requirements. Amendment #4 Q&A discusses the nature of projects to be used as substantiation for M6. It seems apparent that the Q&A in Amendment #4 was meant to refer to the renumbered M5 but can the Crown please confirm this?
- A68 Confirmed.
- Q69 Re: Workstream 1 – Business Services, B.4 Business Continuity/Disaster Recovery Specialist – Level 2
- Criterion R1 states: (iii) *Identifying and documenting internal controls to ensure process is consistent, and compliant with existing policy legislation; and...*
- Should this instead read *policy **and** legislation*?
- A69 Yes, this should read policy and legislation.
- Q70 With regards to the Bidder, M1, part (c) on both work streams, the RFP states that “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. We do not understand the relevance of the requirement for duration(s) that it took for a resource to attain a degree/diploma/certification. Would the crown accept a date of completion as sufficient?
- A70 The completion date for certificates, diplomas, and degrees is acceptable.

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- Q71 According to Q&A 1 from Amendment 003, the definition of a project for this RFP includes that "A project is required to produce defined outputs and realize specific outcomes in support of a public policy objective, within a clear schedule and resource plan." In support of a public policy objective would seem to indicate that only government projects are to be considered, which is contradictory since many mandatory and rated criteria ask for government or private sector experience. Please confirm that this statement should read as "in support of an objective" instead of "in support of a public policy".
- A71 See A65 of Solicitation Amd. No. 007.
- Q72 With respect to Attachment 4.1 for both work streams, please confirm that "Unless specified otherwise, 'Government' is defined as a territorial, federal, state, provincial or municipal government body." Please confirm that a Crown would be also included in this definition or provide rationale as to why Crowns would not be acceptable as they provide an equivalent public policy environment.
- A72 Crown Corporations are acceptable.
- Q73 and A73 To follow.
- Q74 In discussions with CIISD, we understand that if a clearance renewal was initiated prior to its expiry date, then the individual's clearance is considered still active (even past expiry). Can you please confirm that the Crown will accept candidates who fall under this rule?
- A74 Confirmed.
- Q75 With regards to category 2.6 P.9 Project Manager, Release Manager - Level 2, R4 awards points for having a Project Management Certification. Given the concentration on Release Management for this category, would the crown accept a ISO/IEC 20000 certification that has a focus on Project Management? This would align with the Release Management centric requirement and provide a base of Project Management education.
- A75 The requirement will remain unchanged.
- Q76 Please advise if Commercial General Liability Insurance (RFP Page 37 of 130) requested should include the following provisions as the cost to carry insurance coverage with a policy in Canada meeting these elements is prohibitive for bidders for a professional services contract. It would appear more in line with a goods and services requirement (ie product manufacturing)
- (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
- (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.
- A76 These provisions are standard Commercial General Liability Insurance requirements and will remain unchanged.

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Q77 Would the Crown please consider re-issuing a full version of the RFP?

Based on the fact that many facets of the original solicitation document have changed through the question and answer process, it is difficult for the Bidders to ensure they are responding to the correct and up-to-date information due to the dispersion of information across the five amendments?

A77 Attachment 4.1 Bid Evaluation Criteria with revisions for both workstreams is attached to Solicitation Amd. No. 007.

**ALL OTHER TERMS AND CONDITIONS REMAIN THE SAME.**

**NOTE: A BID ALREADY SUBMITTED MAY BE AMENDED PRIOR TO THE CLOSING DATE. AMENDING CORRESPONDENCE MUST ADDRESS THE SOLICITATION NUMBER AND THE CLOSING DATE AND MUST BE ADDRESSED TO:**

**BID RECEIVING  
PUBLIC WORKS AND GOVERNMENT SERVICES CANADA  
PLACE DU PORTAGE, PHASE III  
MAIN LOBBY, ROOM 0A1  
11 LAURIER STREET  
GATINEAU, QUEBEC K1A 0S5**



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**ATTACHMENT 4.1**  
**BID EVALUATION CRITERIA**  
**WORKSTREAM 1 - BUSINESS SERVICES**

1. A project is an activity or series of activities that has a beginning and an end. A project is required to produce defined outputs and realize specific outcomes in support of a specific objective, within a clear schedule and resource plan. A project is undertaken within specific time, cost and performance parameters.
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. It is requested that references 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"> <li>(i) One B.1 Business Analyst – Level 2;</li> <li>(ii) One B.2 Business Architect – Level 3;</li> <li>(iii) One B.4 Business Continuity/Disaster Recovery Specialist – Level 2;</li> <li>(iv) One B.5 Business Process Re-engineering Consultant – Level 2;</li> <li>(v) One B. 7 Business Transformation Architect – Level 3; and</li> <li>(vi) One B. 14 Technical Writer – Level 2.</li> </ul> <p>Each résumé must include the following information:</p> <ul style="list-style-type: none"> <li>(a) The name of the proposed resource;</li> <li>(b) The resource category for which the resource is being proposed;</li> <li>(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</li> <li>(d) Work experience including duration and start and finish dates (dates must be identified by month and year – for example March 2004 – February 2007).</li> </ul>		
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>		

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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 \$5M or more.</p> <p>Bidders must include, as a minimum, for each project submitted:</p> <p>(a) A project description;</p> <p>(b) The name of the client department;</p> <p>(c) The date and duration of the project;</p> <p>(d) Details about the work performed by the Bidder on the project; and</p> <p>(e) A client reference.</p>		
M3	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 \$5M or more.		
M4	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 \$5M or more.		
M5	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. The projects must be valued at \$5M or more.	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 M4 above, in the delivery of business transformation projects. The projects must be government or private sector projects valued at \$5M or more.	3	1 project more than M4 (i.e. a total of 3 projects) = 1 point 2 projects more than M4 (i.e. a total of 4 projects) = 2 points 3 projects more than M4 (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.	
	<b>Maximum Score Available</b>	<b>10</b>		
	<b>Minimum Score Required</b>	<b>7</b>		

## 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 \$5M or more.		
M2	The proposed resource must have demonstrated experience in the development of a minimum of 2 business cases on projects valued at \$5M or more 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>B.1 Business Analyst – Level 2</b>			
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	
	<b>Maximum Score Available</b>	<b>12</b>		
	<b>Minimum Score Required</b>	<b>8</b>		

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## 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 \$5M or more 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"> <li>(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;</li> <li>(ii) describing the organization's business services/functionalities, and mapping these services to the business units that perform them;</li> <li>(iii) describing the organization's shared vocabulary (e.g. client, order, etc.), and the relationships between them (e.g. client name, order date, etc.);</li> <li>(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</li> </ul>	5	1 point per activity	



Item#	Rated Criteria <b>B.2 Business Architect-Level 3</b>	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) providing oversight and direction on work plan activities 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	

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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>B.2 Business Architect-Level 3</b>  (i) advising senior management on business architecture, trends and emerging technologies, methodologies, standards and tools; and  (ii) coaching and mentoring business analysts on methodologies, standards, various mapping techniques and tools.  Compliance should be demonstrated using project descriptions.			
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	
	<b>Maximum Score Available</b>	<b>18</b>		
	<b>Minimum Score Required</b>	<b>12</b>		

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

Item#	Mandatory Criteria	Met/Not Met	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
	<b>B.4 Business Continuity/Disaster Recovery Specialist - Level 2</b>		
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 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 \$5M or more.		

Item#	Rated Criteria	Max Score	Point Scale	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
	<b>B.4 Business Continuity/Disaster Recovery Specialist - Level 2</b>			
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"> <li>(i) Defining roles and responsibilities related to the business continuity/disaster recovery plans and implicated stakeholder groups;</li> <li>(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;</li> <li>(iii) Identifying and documenting internal controls to ensure process is consistent, and compliant with existing policy and legislation; and</li> <li>(iv) Identifying implicated multi-stakeholder groups, risks, and associated cost.</li> </ul> <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"> <li>(i) Business continuity/disaster recovery requirements, risks,</li> </ul>	6	2 points per workshop	



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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>B.4 Business Continuity/Disaster Recovery Specialist - Level 2</b>  issues and gaps;  (ii) Essential business functions, acceptable recovery time periods, rationale, and resource requirements for disaster recovery; and  (iii) Risks and mitigation strategies related to the disaster recovery plans and processes.			
R3	The proposed resource should have demonstrated experience developing and delivering business continuity/disaster recovery documents including the following tasks:  (i) Document outlining essential business functions and information systems to identify acceptable recovery time periods rationale and resource requirements for disaster recovery;  (ii) Business Continuity/Disaster Recovery Plans compliant with Treasury Board policies and regulations;  (iii) Report summarizing testing activities and recommendations;  (iv) Stakeholder Training Plans and Presentations based on Business Continuity/Disaster Recovery Plan;  (v) Risk Assessment and Mitigation Strategy related to business functions and information systems; and  (vi) Call Trees in the event of	6	1 point per task	

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	<b>B.4 Business Continuity/Disaster Recovery Specialist - Level 2</b>			
	disaster recovery.			
R4	The proposed resource should have demonstrated experience within the last 10 years, creating business continuity/disaster recovery plans and managing the implementation of business continuity/disaster recovery plans.  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	
	<b>Maximum Score Available</b>	<b>19</b>		
	<b>Minimum Score Required</b>	<b>13</b>		

## 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	

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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>B.5 Business Process Re-Engineering Consultant – Level 2</b>  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.			
	<b>Maximum Score Available</b>	<b>12</b>		
	<b>Minimum Score Required</b>	<b>8</b>		



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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 #)
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 \$5M or more.		

Item#	Rated Criteria <b>B.7 Business Transformation Architect - Level 3</b>	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"> <li>(i) Definition of roles and responsibilities related to the transformation project and implicated stakeholder groups;</li> <li>(ii) Establish a baseline of processes, templates, and tools for the transformation project leadership to use or evolve as necessary;</li> <li>(iii) Develop new process flows and supporting documentation;</li> <li>(iv) Identify and document internal controls to ensure process is consistent, and compliant with existing policy legislation; and</li> <li>(v) Identify implicated multi-stakeholder groups and associated cost.</li> </ul>	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 of architecture documents including the following</p>	5	1 point per task	

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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>B.7 Business Transformation Architect - Level 3</b>			
	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.	<b>3</b>	Years of Experience:  ≥ 3-4 years = 1 point > 4-5 years = 2 points > 5 years = 3 points	
	<b>Maximum Score Available</b>	<b>19</b>		
	<b>Minimum Score Required</b>	<b>13</b>		

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## 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 \$5M or more 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 B.14 Technical Writer - Level	Max Score	Point Scale	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
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)	
	<b>Maximum Score Available</b>	<b>8</b>		
	<b>Minimum Score Required</b>	<b>6</b>		

### 3.0 RATED CRITERIA - POINTS SUMMARY

Reference	Maximum Score Available	Minimum Score Required
1.2 Bidder	10	7
2.1 B.1 Business Analyst – Level 2	12	8
2.2 B.2 Business Architect – Level 3	18	12
2.3 B.4 Business Continuity/Disaster Recovery Specialist - Level 2	19	13
2.4 B.5 Business Process Re-Engineering Consultant – Level 2	12	8
2.5 B.7 Business Transformation Architect - Level 3	19	13
2.6 B.14 Technical Writer - Level 2	8	6
<b>Maximum Technical Points:</b>	<b>98</b>	
<b>Minimum Score Required:</b>		<b>67</b>

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**ATTACHMENT 4.1**  
**BID EVALUATION CRITERIA**  
**WORKSTREAM 2 - PROJECT MANAGEMENT SERVICES**

1. A project is an activity or series of activities that has a beginning and an end. A project is required to produce defined outputs and realize specific outcomes in support of a specific objective, within a clear schedule and resource plan. A project is undertaken within specific time, cost and performance parameters.
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. It is requested that references 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"> <li>(i) One P.1 Change Management Consultant – Level 3;</li> <li>(ii) One P.5 Project Executive – Level 3;</li> <li>(iii) One P.9 Project Manager – Level 3;</li> <li>(iv) Two P.9 Project Managers – Level 2 (one résumé for Project Manager and one résumé for Project Manager, Release Manager); and</li> <li>(v) One P.10 Project Scheduler – Level 2.</li> </ul> <p>Each résumé must include the following information:</p> <ul style="list-style-type: none"> <li>(a) The name of the proposed resource;</li> <li>(b) The resource category for which the resource is being proposed;</li> <li>(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</li> <li>(d) Work experience including duration and start and finish dates (dates must be identified by month and year – for example March 2004 – February 2007).</li> </ul>		
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 5 resource categories listed in M1 above) to at least two projects that delivered the same or similar services outlined in the Statement of</p>		



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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 \$5M or more.</p> <p>Bidders must include, as a minimum, for each project submitted:</p> <p>(a) A project description;</p> <p>(b) The name of the client department;</p> <p>(c) The date and duration of the project;</p> <p>(d) Details about the work performed by the Bidder on the project; and</p> <p>(e) A client reference.</p>		
M3	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 \$5M or greater.		
M4	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 \$5M or more.		
M5	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.		



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## 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. The projects must be valued at \$5M or more.	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 M4 above, in the delivery of business transformation projects. The projects must be government or private sector projects valued at \$5M or more.	3	1 project more than M4 (i.e. a total of 3 projects) = 1 point 2 projects more than M4 (i.e. a total of 4 projects) = 2 points 3 projects more than M4 (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.	
<b>Maximum Score Available</b>		<b>10</b>		
<b>Minimum Score Required</b>		<b>7</b>		

## 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	
	<b>Maximum Score Available</b>	<b>8</b>		
	<b>Minimum Score Required</b>	<b>5</b>		



## 2.2 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 \$5M or more 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 \$5M or more 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 \$5M or more, 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 independent Project Management	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 #)
	<b>P.5 Project Executive - Level 3</b>			
	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, Information Technology, or a BA with a major in economics by including a copy of the degree with the bid.	2	Yes = 2 points No = 0 points	
	<b>Maximum Score Available</b>	11		
	<b>Minimum Score Required</b>	7		

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### 2.3 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 \$5M or more, 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 \$5M or more, 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 \$5M or more, 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	Max Score	Point Scale	Bidder's Response (Reference to Résumé/Annex: Project #, Organization Name and number of months, page #)
	<b>P.9 Project Manager - Level 3</b>			
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"> <li>(i) Developing Project Charters;</li> <li>(ii) Developing Project Dashboards;</li> <li>(iii) Developing Project Management Plans; and</li> <li>(iv) Conducting Project Briefings to Senior Management.</li> </ul> <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 \$5M or more – 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"> <li>≥ 3-4 years = 1 point</li> <li>&gt; 4-5 years = 2 points</li> <li>&gt; 5 years = 3 points</li> </ul>	
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 \$5M or more including:</p> <ul style="list-style-type: none"> <li>(i) Determining budgetary requirements;</li> <li>(ii) Developing Project Schedules, Work Break-down Structure and resource plans; and</li> <li>(iii) Determining composition, roles and responsibilities of team members.</li> </ul>	3	<p>Years of Experience:</p> <ul style="list-style-type: none"> <li>≥ 3-4 years = 1 point</li> <li>&gt; 4-5 years = 2 points</li> <li>&gt; 5 years = 3 points</li> </ul>	
R3	<p>The proposed resource should have demonstrated experience, within the last 15 years, as a Project Manager, managing and</p>	3	<p>Years of Experience:</p> <ul style="list-style-type: none"> <li>≥ 3-4 years = 1 point</li> <li>&gt; 4-5 years = 2 points</li> </ul>	

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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>P.9 Project Manager - Level 3</b>			
	<p>leading the risk management function for an IM/IT project including:</p> <ul style="list-style-type: none"> <li>(i) Developing a risk plan, risk register and risk mitigation strategies;</li> <li>(ii) Owning and managing the risk management process to ensure projects risks are identified, quantified, and effectively managed;</li> <li>(iii) Managing project risk with the authority to deal with risks within guidelines; and</li> <li>(iv) Liaising with other projects in the integrated development of risks.</li> </ul>		> 5 years = 3 points	
R4	The proposed resource should have demonstrated experience, within the last 15 years, as a Project Manager, on a project or projects valued at \$5M or more, in the development or review of an Operational Plan, Strategic Plan or Business Case.	3	<p>Years of Experience:</p> <ul style="list-style-type: none"> <li>≥ 3-4 years = 1 point</li> <li>&gt; 4-5 years = 2 points</li> <li>&gt; 5 years = 3 points</li> </ul>	
	<b>Maximum Score Available</b>	<b>12</b>		
	<b>Minimum Score Required</b>	<b>8</b>		

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## 2.4 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 \$5M or more.		
M3	The proposed resource must have managed change, utilizing change management principles and methodologies, on a business transformation project valued at \$5M or more.		
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 \$5M or more.	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 tracking for project(s) valued at \$5M or more.	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 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 #)
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		

## 2.5 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 \$5M or more. 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 \$5M or more.	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 #)
	<b>P.9 Project Manager, Release Manager - Level 2</b>			
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	
	<b>Maximum Score Available</b>	11		
	<b>Minimum Score Required</b>	7		



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## 2.6 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 at \$5M or more, 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 \$5M or more.	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 \$5M or more) 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 #)
	<b>P.10 Project Scheduler - Level 2</b>			
R4	The proposed resource should have demonstrated experience using and working with Microsoft Project Desktop or Microsoft Project Server.	<b>2</b>	Years of Experience: ≥ 3-4 years = 1 point > 4 years = 2 points	
	<b>Maximum Score Available</b>	<b>10</b>		
	<b>Minimum Score Required</b>	<b>7</b>		

### 3.0 RATED CRITERIA - POINTS SUMMARY

Reference	Maximum Score Available	Minimum Score Required
1.2 Bidder	10	7
2.1 P.1 Change Management Consultant - Level 3	8	5
2.2 P.5 Project Executive - Level 3	11	7
2.3 P.9 Project Manager - Level 3	12	8
2.4 P.9 Project Manager - Level 2	9	6
2.5 P.9 Project Manager, Release Manager - Level 2	11	7
2.6 P.10 Project Scheduler - Level 2	10	7
<b>Maximum Technical Points:</b>	<b>71</b>	
<b>Minimum Score Required:</b>		<b>47</b>