

RETURN BIDS TO:
RETOURNER LES SOUMISSIONS À:
**Bid Receiving Public Works and Government
Services Canada/Réception des soumissions Travaux
publics et Services gouvernementaux Canada**
PO Box 1408, Room 100
167 Lombard Ave.
Winnipeg
Manitoba
R3C 2Z1
Bid Fax: (204) 983-0338

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

REFERENCE AANDC FILE #A0332-143784

Vendor/Firm Name and Address
**Raison sociale et adresse du
fournisseur/de l'entrepreneur**

Issuing Office - Bureau de distribution
Public Works and Government Services Canada -
Western Region
PO Box 1408, Room 100
167 Lombard Ave.
Winnipeg
Manitoba
R3C 2Z1

Title - Sujet Document Disclosure - LAC	
Solicitation No. - N° de l'invitation A0332-130016/A	Amendment No. - N° modif. 003
Client Reference No. - N° de référence du client A0332-130016	Date 2014-05-13
GETS Reference No. - N° de référence de SEAG PW-\$WPG-202-8968	
File No. - N° de dossier WPG-4-37004 (202)	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2014-05-26	Time Zone Fuseau horaire Central Daylight Saving Time CDT
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: Kozak, Tammy	Buyer Id - Id de l'acheteur wpg202
Telephone No. - N° de téléphone (204) 984-8825 ()	FAX No. - N° de FAX (204) 983-7796
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction:	

Instructions: See Herein

Instructions: Voir aux présentes

Delivery Required - Livraison exigée	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

Solicitation No. - N° de l'invitation

A0332-130016/A

Amd. No. - N° de la modif.

003

Buyer ID - Id de l'acheteur

wpg202

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

A0332-130016

File No. - N° du dossier

WPG-4-37004

CCC No./N° CCC - FMS No/ N° VME

THIS PAGE HAS BEEN LEFT BLANK INTENTIONALLY

This Amendment #003 is raised to amend the solicitation and address bidder enquiries in reference to Solicitation #A0332-130016 and amend the solicitation as follows:

1. Refer to Appendix 3, Glossary of Relevant Terms and Acronyms, page 52 of 75, and:

INSERT: **Document:** as legally defined in R.30.01 of the Ontario Rules of Civil Procedure as: “a sound recording, videotape, chart, graph, map, plan, survey, book of account and information recorded or stored by other means of any device.”

2. Refer to Annex H, Evaluation Criteria, Point Rated Criteria page 68 of 75, and:

DELETE: 2.1 in it's entirety

INSERT:

3. Refer to Annex H, Evaluation Criteria, Mandatory Criteria, page 64 of 70, and:

DELETE: M3 in it's entirety

INSERT:

M3	PROPOSED RESOURCES - The Contractor MUST identify its “team” of named resources for the provision of Collection Digitization Services. The Bidder’s proposed “team” of resources MUST include the following resource complement at a minimum: - An individual may be proposed in more than one of the above Resource Categories. - The Bidder’s response to this criterion will be further evaluated under Point Rated Criterion R3.		
3.1	One (1) Project Manager;		Name:
3.2	One (1) On site Project Co-ordinator;		Name:
3.3	One (1) Imaging and Scanning Lead;		Name:
3.4	One (1) Technical Lead;		Name:
3.5	Two (2) Historical Researchers;		Name: Name:
3.6	Two (2) Scanning Team Members;		Name: Name:
3.7	Two (2) Metadata Taggers/Indexers;		Name: Name:
3.4	The Bidder MUST provide a detailed Curriculum Vitae (CV) for each named resource.		

4. Refer to M4. Resource Qualifications, 4.3 Annex H, Evaluation Criteria, Mandatory Criteria, page 64 of 70, and:

DELETE: Project value of at least \$5,000.000.00

INSERT: Project value of at least \$10,000.000.00

5. BIDDER ENQUIRIES:

Q1. Page 29, Section 2.2

Stage 1 – Scoping – *“Researchers must review the indexing tools and finding aids available at LAC for each department or agency to identify which parts of the collection are likely to contain relevant documents.”* Are finding aids to be used to identify potentially “responsive” files

A1. ANSWER: Yes

Q2. Page 34, Section 6.3.1

The Contractor must:

Q2.1 b) *Create a box inventory list if not previously included (folder list)*

Can you provide a description of the box inventory list? Is it an inventory of the files in the box or something else? Given that finding aids exist that often provide this inventory, what is the reason behind re-keying?

A2.1 b) The Contractor must document what has been reviewed, as Finding Aids vary in quality and descriptiveness. Therefore, a list of relevant files from the box may need to be created especially if the Finding Aids are not specific or if the software used by the Contractor cannot replicate the reviewed files in a given box.

Q2.2 e) *Assign base document id, record file source and maintain parent/child/grandchild relationships.* Does AANDC require the document id and/or any other information, to be stamped onto one or more pages of the digital image of the document?

A2.2 b) No. Only electronic stamping is required.

Q3. Page 36, 6.4.2 Metadata

b) (i) Some key metadata may need to be captured at scan time... We presume this is referring to technical metadata captured by the scanning equipment. Can you provide the list of technical metadata that is to be captured?

A3. This depends on the equipment used by the Contractor. Technical metadata to be captured must include but not be limited to: scan date, resolution and parent-child relationships.

Q4. Page 37, 6.6 Data Conversion

6.6.1 Throughout the Contract, the Contractor must efficiently and without the loss of metadata or quality:

a) Receive digital records in various formats

6.6.2 The Contractor must be capable of converting a variety of multi-media formats into other formats; for example, batch conversion of certain audio files into other standard audio formats

Can we thus interpret Point Rated Criteria 1.4.1/1.4.2 “Digitization of documents...” to be “Digitization of all record or media types”?

A4. YES. Document is defined in the glossary as: “a sound recording, videotape, chart, graph, map, plan, survey, book of account and information recorded or stored by other means of any device.”

Q5. Page 42, Resource Categories: We strongly recommend the addition of a Records Lead resource category that has the requisite expertise to act as a liaison between LAC and the Research Team

A5. Refer to Project Coordinator for direction. LAC can also provide dedicated reference and logistics services.

Q6. Page 43, 8.1.5, Technical Lead

c) Experience (ii) Must possess a professional certification in a relevant field, such as (but not limited to) Litigation Support or E-Discovery. Confirm if a Bachelor or Masters in an IT field also qualifies.

A6. YES

Q7. Page 44, 8.1.6 Historical Researchers

c) Experience (ii) Each team member must possess an undergraduate degree or higher in a related field (such as: History, Archives, Library History or Aboriginal Studies).... Confirm that the following fields are considered to be "related": Archaeology, Interdisciplinary Studies, Political Science, Sociology, Criminology, Geography.

A7. YES to all fields.

Q8. Page 42, 8.1.2 Project Manager

b) Experience (iv) Experience as a Project Manager on at least three (3) projects of a systems integration and/or IT-based nature with a project value of at least three (3) million dollars. Confirm the dollar value of three (3) million is the total of all three (3) projects combined.

A8. EACH of the three (3) projects must EACH have a minimum project value of three (3) million dollars.

Q9. Please specifically define "systems integration and/or IT-based nature" as it relates to the current project objectives.

A9. To offer some flexibility for bidders, other project management experience outside of document disclosure projects is being considered. Projects involving systems integration or those pertaining to information technology are viewed as having relevant, transferable skill sets to the project requirements here. In addition, this industry, typically has a culture of strong project management, change management and creative risk mitigation strategies; aspects that will be key to success on this project. Projects in both these domains require a knowledge of information technology, knowledge of the application of the technology to the business issue(s), the management of resources with diverse skill sets, the management of multiple deliverables, the integration of multiple project schedules, rigorous quality assurance and frequent reporting. The project at hand will require these skill sets and management to be successful.

Q10. Page 48, Volumetrics

Chart – High End Estimate of Total Boxes Requiring Review by Department and Category

This chart records the following departments: AANDC, Health Canada, RCMP, NRCan, Secretary of State, Heritage Canada, PCO, Ag Canada, Parks, Public Works; however other Departments not listed in the chart are known to have intersected with the IRS system. Please confirm that the departments listed on the chart are a complete list of the departmental holdings to be collected during the contract.

A10. YES, the list is complete.

Q11. Page 49, Methodologies

For each Category, estimated review rates measured in boxes have been provided. Please confirm the number of files per box.

A11. There may be a great variance of 5 – 30 files between boxes.

Q12. Page 49, Methodologies

i) CATEGORY 1

1a) "Estimated review rate of 2.5 boxes per person, per day".

Confirm that the expected target for review of files is between 10 and 15 files per resource, per day.

.a Unknown. Rates are estimated.

b) "For each box opened, every file title [must/should] be reviewed for responsiveness". If the finding aids are reliable, why would it be necessary to check every title inside the box? If the finding aids are not reliable, shouldn't all boxes in an accession with an unreliable finding aid be opened and all file titles screened?

.b Finding Aids identify boxes to be reviewed. Reliability of Finding Aids varies between department and topic. If a box is opened, the requirement is that all file titles will be reviewed.

c) "Files deemed responsive must be reviewed carefully for relevant documents". Confirm that it is AANDC's expectation that Historical Researchers of varying degrees of expertise / experience will be relied upon to assess "responsiveness" at the file level as opposed to at the document level inside of the files.

.c Contractor personnel must meet the minimum mandatory requirements to conduct this work. "Responsiveness" at the file level will be conducted first and then "responsiveness" will also be required at the document level.

d) "If 50% or more of the file is deemed relevant, the entire file must be scanned". Please advise as to whether metadata tagging resources will subsequently tag the entire file, even though portions of the file are potentially not relevant (since only 50% was confirmed). Advise as to how this 50% sample will be undertaken.

d. A researcher would review 50% of pages throughout the file and tag only those that are relevant.

ii) CATEGORY 2

a) "Estimated review rate of three (3) boxes per person per day". Confirm that the expected target for review of files is between 12 and 18 files per resource, per day (at 50%).

a. The rate is estimated.

iii) CATEGORY 3

a) "Areas of relevancy will be harder to identify"; "Boxes are likely to contain a mix of material that may or may not be relevant"; "For each box opened, every file title must be reviewed for responsiveness" Please confirm that Historical Researchers will be determining the "responsiveness" at the file level as opposed to at the document level inside the files.

a. Contractor is expected to provide resources meeting the minimum mandatory requirements. "Responsiveness" at the file level will be conducted first and then "responsiveness" will also be required at the document level.

b) Estimated review rate of five (5) boxes per resource per day. Confirm the expected target for review of files is between 20 and 30 files per resource, per day (at 50%). Less, of course, if 50% of a box is reviewed and no relevant documents found, in which case that box is returned as non-responsive.

b. Unknown. Rates are estimated.

c) "If after reviewing 50% of a file and no relevant documents found, the file is returned to box as non-responsive". Advise as to how this 50% sample will be undertaken. Presumably, a researcher would not sample the first 50%, but, rather, review 50% of pages throughout the file.

c. Review 50% of pages throughout the file.

iii) CATEGORY 4

a) "Areas of relevancy will be extremely difficult to identify and records will likely be mixed in with documents on other topics" (approximately 1% yield); "For each box opened, every file title must be reviewed for responsiveness". Confirm that Historical Researchers will be determining the "responsiveness" at the file level as opposed to at the document level inside the files.

a. Contractor is expected to provide resources meeting the minimum mandatory requirements. "Responsiveness" at the file level will be conducted first and then "responsiveness" will also be required at the document level.

b) "Estimated review rate of ten (10) boxes per resource per day however experienced archival researchers are expected to exceed that figure and review at least eleven (11) boxes per day" Please define "experienced archival researcher".

b. AANDC defines "experienced archival researchers" as researchers meeting the mandatory requirements, who have experience locating, evaluating, and systematic interpretation and analysis of sources found in archives.

c. As most boxes at LAC Ottawa contain between 4-6 files, please confirm that the expected target for review of files is between 40 and 60 files per resource, per day (at 33%) and at least 44 and 66 files per resource, per day for “experienced archival researchers”. Less, of course, if 25% of a box is reviewed and no relevant documents found, in which case that box is returned as non-responsive.

c. [Unknown. Rates are estimated.](#)

Q13. Page 69-75, Mandatory Criteria and Point Rated Criteria

The Project Manager is evaluated heavily on systems integration experience. We would like to see this reconsidered and revised.

A13. [Point allocation remains as unchanged.](#)

Q14. 2.5 Project Co-ordinator Years' Experience in a “similar” field is worth 30 points. That leaves a lot of room for interpretation about what qualifies as “similar”.

A14. [In this context, AANDC defines similar as years' experience having worked with archives and archivists on projects with a primarily historical subject.](#)

Q15. 2.7 Historical Researcher resource category is worth a total of 30 points. 10-20 points based on years of experience (20 points being awarded for 6+ years) and 10 points for Fluency in both English and French. We have many researchers on our team who have 6+ years of experience but who do not have any file identification (record classification systems) experience. How can the criteria be so subjective if these resources are expected to screen boxes for responsive files?

A15. [Points will be assigned based on years experience conducting archival research in a field such as: History, Archives, Library History, Aboriginal studies or Canadian Studies.](#)

Q16. What happens if our firm is not security cleared at bid close?

A16. [It is mandatory the security requirements be met at bid closing. If this mandatory requirement is not met, the Bidder will be deemed non-responsive.](#)

Q17. If a single firm submits a bid using one or more sub-contractors, would the experience of the sub-Contractor be eligible for the project summaries?

A17. [Yes.](#)

Q18. Can a company submit (as experience) work they subcontracted out to another company if the subcontracted company will not be part of this project?

A18. [No.](#)

Q19. Clarify Point Rated Criteria 2.3 c) *Up to a maximum total of 24 points based on projects that demonstrate: 6 points/project = Leading or managing the work on projects involving or working with Aboriginal or indigenous peoples.* Does this require a Project Manager with an extensive (multiple multi-million dollar) background in systems integration/IT based projects to also have Project Managed projects “involving or working with Aboriginal or indigenous peoples” as opposed to the **records** of Aboriginal or indigenous peoples. In other words, does experience working on systems integration projects involving systems that contain Aboriginal records or clients whose stakeholders include Aboriginal peoples meet the requirements for Point Rated Criteria 2.3?

A19. [Experience involving systems that contain Aboriginal records or records on a historical topic related to aboriginal issues.](#)

Q20. If we submit a joint venture, consortium, or some grouping of firm, how will the security clearance be addressed?

A20. How a firm is cleared will depend on how the group is formed. For example, if a new company is formed, then the company will need to be cleared to the appropriate level. If each firm is joining as a partner, then each member of the partnership would need to be cleared.

Q21. P2.7 requires among other things, bilingual capability for researchers. Can the bilingual requirement be met by including a certification signed by attesting the individual is fluent (oral and written).

A21. Yes, addressing the bilingual requirement by including a certification signed by the supplier that the identified bilingual resources are in fact fluent (oral and written) is acceptable.

Q22. If a company assisted in the requirements definition for Solicitation #A0332-130016/A, will they be excluded from bidding or participating in working on the resulting contract?

A22. Yes.

Q23. Will you consider a solution that has the imaging portion performed outside of LAC?

A23. No. This has already been considered.

Q24. Will you consider an alternate form of pricing of price per page imaged?

A.24. No. This has already been considered.

ALL OTHER TERMS AND CONDITIONS REMAIN THE SAME.