

Solicitation No. - N° de l'invitation <b>A0109-130009/A</b>	Amd. No. - N° de la modif. <b>613ZM A0109-130009</b>	Buyer ID - Id de l'acheteur <b>613ZM</b>
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**BID SOLICITATION**

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

**BUSINESS DECISION SUPPORT SERVICES**

**FOR**

**DEPARTMENT OF INDIAN AFFAIRS AND NORTHERN DEVELOPMENT (DIAND)**

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**List of Attachments to Part 3 (Bid Preparation Instructions):**

Attachment 3.1:	Bid Submission Form
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Pricing Schedule

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## BID SOLICITATION

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

### FOR DEPARTMENT OF INDIAN AFFAIRS AND NORTHERN DEVELOPMENT (DIAND)

## PART 1 - GENERAL INFORMATION

### 1.1 Introduction

This document states terms and conditions that apply to this bid solicitation # A0109-130009 . 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 The Department of Indian Affairs and Northern Development (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 three contracts of three years plus two, *one-year* irrevocable options allowing Canada to extend the term of the contracts.
- (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

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(<http://ssi-iss.tpsgc-pwgsc.gc.ca>) Website.

- (d) This requirement is subject to the provisions of the World Trade Organization Agreement on Government Procurement (WTO-AGP), the North American Free Trade Agreement (NAFTA), the Canada-Chile Free Trade Agreement (CCFTA), the Agreement on Internal Trade (AIT), the Canada-Peru Free Trade Agreement (CPFTA), the Canada-Columbia Free Trade Agreement (CColFTA), and the Canada-Panama Free Trade Agreement (CPanFTA) if it is in force.
- (e) Only 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.
- (f) The Resource Categories described below are required on an as and when requested basis in accordance with the TBIPS SA Annex "B":

RESOURCE CATEGORY	LEVEL OF EXPERTISE	ESTIMATED NUMBER OF RESOURCES REQUIRED
Programmer/Analyst, A.7	Level 3	2
Programmer/Analyst, A.7	Level 2	1
Tester, A.11	Level 3	1
Tester, A.11	Level 2	1
Data Conversion Specialist, I.1	Level 3	3
Data Conversion Specialist, I.1	Level 2	2
Database Modeller/IM Modeller, I.4	Level 3	2
IM Architect, I.5	Level 3	1
Technology Architect, I.11	Level 3	1
Project Manager, P.9	Level 3	1
Project Manager, P.9	Level 2	1
Project Administrator, P.6	Level 1	1
Business Analyst, B.1	Level 3	2
Business Analyst, B.1	Level 2	1
Instructor, IT, B.11	Level 2	1

### 1.3 Debriefings

*After contracts 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.*

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## 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.
- (c) The 2003 (2014-03-01) 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 – Integrity Provisions - Bid 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.

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## 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 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 services identified in this bid solicitation will be consistent with this data. It is provided purely for information purposes.



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## 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 (4 hard copies and 1 soft copy on CD);
  - (ii) Section II: Financial Bid (1 hard copy and 1 soft copy on CD); and
  - (iii) Section III: Certifications (2 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.
  - (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

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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 Annex D, 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

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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 Annex D, 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 Previous Similar Projects:** Where the bid must include a description of previous similar projects: (i) a project must have been completed by the Bidder itself (and cannot include the experience of any proposed subcontractor or any affiliate of the Bidder); (ii) a project must have been completed by the bid closing date; (iii) each project description must include, at minimum, the name and either the telephone number or e-mail address of a customer reference; and (iv) if more similar projects are provided than requested, Canada will decide in its discretion which projects will be evaluated. A project will be considered "similar" to the Work to be performed under any resulting contract if the project was for the performance of work that closely matches the TBIPS descriptions of the Resource Categories identified in Annex A. Work will be considered to "closely match" if the work in the provided project is described in at least 50% of the points of responsibility listed in the description of the given Resource Category.
- (v) **For Proposed Resources:** The technical bid must include résumés for the resources as identified in Annex D. The same individual must not be proposed for more than one Resource Category. 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

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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.

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

### 3.3 Section II: Financial Bid

- (a) **Pricing:** Bidders must submit their financial bid in accordance with the List of Attachments to Part 4, Attachment 4.1: 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. The Bidder's proposed firm per diem rates for the Initial Contract Period must not exceed those rates set out in Annex "C" to Part A Schedule of Per Diem Rates of the SA Holder's Supply Arrangement. SA Holders may offer a percentage discount on their per diem rates.
- (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 higher than that bid for Level two, and
  - (ii) the rate bid for Level two must be 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

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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.

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## 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) **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) 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 Annex "D" - 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 Annex "D" - 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



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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 5 working days will not be extended to provide additional time for the new contact to respond.

- (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 who have not, at that point, been found non-responsive.

**(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 D. 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 the Annex E.

### 4.3 Financial Evaluation

- (a) **Calculation of Total Bid Price:** The financial evaluation will be conducted using the firm per diem rates provided by the responsive bid(s).
- (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 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 rate, whichever is higher) with the estimated number of days of work for each period, for all the Resource Categories stated in Attachment 4.1- Pricing Schedule. The sum of such rates will constitute the Financial Evaluated 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.

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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 4.1 - Pricing Schedule. The sum of such rates will constitute the Financial Evaluated 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



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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) A bid must comply with the requirements of the bid solicitation, meet all mandatory evaluation criteria and obtain the required minimum of 70% of the points for each resource category for the technical evaluation criteria which are subject to point rating to be declared responsive. The responsive bids with the lowest price per point will be recommended for award of a contract. To calculate the lowest Price-Per-Point, the following formula will be used:

$$\frac{\text{Total Bid Price}}{\text{Total points obtain by the Bidder}} = \text{Price-Per-Point obtained by the Bidder}$$

- (b) three contracts may be awarded in total as a result of this bid solicitation.
- (c) Bidders should note that all contracts award 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.
- (d) If more than one Bidder is ranked first because of identical overall scores, then the Bidder with the highest Technical Score will become the top-ranked Bidder.

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## PART 5 - CERTIFICATIONS

### INTEGRITY PROVISION - 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 Integrity Provisions - Bid of Standard Instructions 2003. The related documentation therein required will assist Canada in confirming that the certifications are true.

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.

### 5.1 Federal Contractors Program for Employment Equity - Certification

- (a) By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "[FCP Limited Eligibility to Bid](http://www.labour.gc.ca/eng/standards_equity/eq/emp/fcp/list/inelig.shtml)" list ([http://www.labour.gc.ca/eng/standards\\_equity/eq/emp/fcp/list/inelig.shtml](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.
- (b) 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.
- (c) 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.
- (d) The Bidder must provide the Contracting Authority with a completed annex [Federal Contractors Program for Employment Equity - Certification](#), before contract award. If the Bidder is a Joint Venture, the Bidder must provide the Contracting Authority with a completed annex [Federal Contractors Program for Employment Equity - Certification](#), for each member of the Joint Venture.

**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.

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## 5.2 Former Public Servant - Competitive Requirements

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

### (b) Definitions

For the purposes of this clause,

- (i) **"former public servant"** is any former member of a department as defined in the *Financial Administration Act*, R.S., 1985, c. F-11, a former member of the Canadian Armed Forces or a former member of the Royal Canadian Mounted Police. A former public servant may be:
- (A) an individual;
  - (B) an individual who has incorporated;
  - (C) a partnership made of former public servants; or
  - (D) a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.
- (ii) **"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.
- (iii) **"pension"** means, in the context of the fee abatement formula, 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 *Canadian 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:

- (i) name of former public servant;
- (ii) date of termination of employment or retirement from the Public Service.

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

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If so, the Bidder must provide the following information:

- (i) name of former public servant;
  - (ii) conditions of the lump sum payment incentive;
  - (iii) date of termination of employment;
  - (iv) amount of lump sum payment;
  - (v) rate of pay on which lump sum payment is based;
  - (vi) period of lump sum payment including start date, end date and number of weeks; and
  - (vii) number and amount (professional fees) of other contracts subject to the restrictions of a work force reduction program.
- (e) For all contracts awarded during the lump sum payment period, the total amount of fee that may be paid to a FPS who received a lump sum payment is \$5,000, including the Applicable Taxes
- (f) By submitting a bid, the Bidder certifies that the information submitted by the Bidder in response to the above requirements is accurate and complete.

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

### 5.3 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 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.

### 5.4 Certification of Language

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.

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## PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS

### 6.1 Security Requirement

- (a) Before award of a contract, the following conditions must be met:
- (i) the Bidder must hold a valid organization security clearance as indicated in Part 7 - Resulting Contract Clauses;
  - (ii) the Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work site(s) must meet the security requirement as indicated in Part 7 - Resulting Contract Clauses; and
  - (iii) the Bidder must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites.
- (b) Bidders are reminded to obtain the required security clearance promptly. Any delay in the award of a contract to allow the successful bidder to obtain the required clearance will be at the entire discretion of the Contracting Authority.
- (c) 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.
- (d) 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.

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## 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 Department of Indian Affairs and Northern Development.
- (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 Project 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) **Allocation of Task Authorizations**
- Contractors will be issued TAs with a combined dollar value that is in proportion to the percentage values determined in the Fund Allocation Formula. For example, based on the example and numbers used in the Fund Allocation Formula, Contractor X would be issued TAs with a combined total dollar value of approximately 52.24% of the combined total dollar value of all the issued TAs.

Contractor X's Price-Per-Point = \$3,200  
Contractor Y's Price-Per-Point = \$3,500  
Contractor X = 100      First ranked X has 100 points  
Contractor Y = 91.43      (Cost per point of X/Cost per point of Y) \* 100

<b>Contractor</b>	<b>Points</b>	<b>Fund Allocation Formula</b>	<b>Total Funds</b>
X	100.00	$100/191.43 \times 100 = 52.24$	\$3,134,400.00

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Y	91.43	$91.43/191.43 \times 100 = 47.76$	\$2,865,600.00
<b>Total</b>	191.43		\$6,000,000.00

Canada will make a reasonable effort to ensure that the dollar value of the TAs issued to the Contractors are proportionally balanced throughout the Contract Period based on the percentage values in the Fund Allocation Formula. A review of TAs issued to the Contractors will be conducted at six-month intervals and at the beginning of each fiscal year to confirm proportional utilization and distribution of the TAs.

**(c) Form and Content of Task Authorization:**

- (i) The Project Authority will provide the Contractor with a description of the task in a draft Task Authorization using the Task Authorization form.
- (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 Project Authority, 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.



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

- (a) To be validly issued, a TA must include the following signature(s):
  - (A) for any TA with a value less than or equal to \$500,000.00 (including GST/HST), the TA must be signed by the Project Authority; and
  - (B) for any TA with a value greater than this amount, a TA must be signed by the Project Authority and 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 30 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 (GST or HST extra);
  - (E) the total amount (GST or HST 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):



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- (A) the amount (GST or HST 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, GST or HST extra, expended to date against all validly issued TA's.

(g) **Refusal of Task Authorizations:** The Contractor is not required to submit a response to every draft TA sent to it by Canada. However, in addition to Canada's other rights to terminate the Contract, Canada may immediately, and without further notice, terminate the Contract for default in accordance with the General Conditions if the Contractor in at least three instances has either not responded or has not submitted a valid response when sent a draft TA. A valid response is one that is submitted within the required time period and meets all requirements of the TA issued, including proposing the required number of resources who each meet the minimum experience and other requirements of the categories identified in the TA at pricing not exceeding the rates set out in Annex B. Should a Contractor refuse a TA under the Contract, the next Contractor, under the same allocation process, will be offered the TA. The dollar value of the refused TA will be subtracted from the dollar value of the Contractor's Contract and may be re-allocated, at the Contracting Authority's sole discretion, in whole or in part, to one or more of the other contractors in that same Workstream. Should all Contractors refuse a TA under the Contract, Canada reserves the right to use other methods of supply. Each time the Contractor does not submit a valid response, the Contractor agrees Canada may at its option decrease the Minimum Contract Value in the clause titled "Minimum Work Guarantee" by 2%. This decrease will be evidenced for administrative purposes only through a contract amendment issued by the Contracting Authority (which does not require the agreement of the Contractor).

(h) **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 5% 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.

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#### 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 (2014-03-01), 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;

#### 7.5 Security Requirement

The following Security Requirement (SRCL and related clausings), as set out under Annex "A" to Part B to the Supply Arrangement, applies to the Contract.

##### **SECURITY REQUIREMENT FOR CANADIAN SUPPLIER: PWGSC FILE #A0109-130009**

1. The Contractor/Offeror must, at all times during the performance of the Contract/Standing Offer/Supply Arrangement, hold a valid Designated Organization Screening (DOS), issued by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC).
2. The Contractor/Offeror personnel requiring access to PROTECTED information, assets or sensitive work site(s) must EACH hold a valid RELIABILITY STATUS, granted or approved by CISD/PWGSC.

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3. The Contractor/Offeror **MUST NOT** remove any **PROTECTED** information or assets from the identified work site(s), and the Contractor/Offeror must ensure that its personnel are made aware of and comply with this restriction.
4. Subcontracts which contain security requirements are **NOT** to be awarded without the prior written permission of CISD/PWGSC.
5. The Contractor/Offeror must comply with the provisions of the:
  - a) Security Requirements Check List and Security Guide (if applicable), attached at Annex C ;
  - b) 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 3 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 period(s) under the same terms and conditions. The Contractor agrees that, during the extended periods 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: Anoule Pierre  
 Title: Supply Specialist  
 Organization: Public Works and Government Services Canada, Acquisitions Branch  
 Directorate: Informatics and Telecommunications Systems Procurement Directorate  
 Address: 11 Laurier St., Gatineau, Québec  
 Telephone: (819) 956-2137  
 Facsimile: (819) 956-1207  
 E-mail address: anoule.pierre@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:

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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) Contractor's Representative**

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

**7.8 Payment**

**(a) Basis of Payment**

- (i) Professional Services :** For the provision of professional services the Contractor will be paid for actual time worked, in accordance with the firm all-inclusive per diem rates set out in Annex B, Basis of Payment, GST/HST 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](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

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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.
- (c) **Method of Payment - Monthly Payment:**
  - (i) H1008C (2008-05-12), Monthly Payment
- (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) **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

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## 7.9 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 one copy of each invoice to the Project Authority, and a copy to the Contracting Authority.

## 7.10 Certifications

- (a) 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.

## 7.11 Applicable Laws

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

## 7.12 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;
  - (ii) General Conditions 2035 (2014-03-01);
- (c) Annex A, Statement of Work - Annex A including its Appendices as follows:
  - (i) Appendix 1 to Annex A - DIAND Enterprise Data Warehouse Technical Environment and Glossary and Acronyms;
- (d) Annex B, Basis of Payment;
- (e) Annex C, Security Requirements Check List;
- (f) Annex E, Resource Assessment Criteria and Response Table;
- (g) the signed required Certifications;
- (h) Supply Arrangement Number EN578-055605/E (the "Supply Arrangement"); and
- (i) the Contractor's bid dated \_\_\_\_\_ (*insert date of bid*), as amended \_\_\_\_\_ (*insert date(s) of amendment(s) if applicable*).



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### **7.13 Foreign Nationals (Canadian Contractor)**

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

### **7.13 Foreign Nationals (Foreign Contractor)**

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

### **7.14 Insurance Requirements**

#### **(A) Compliance with Insurance Requirements**

- 1 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.
- 2 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.
- 3 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**

1. 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.
2. 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

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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**

1. 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.

2. 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.

3. 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.

### **7.15 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.



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(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

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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).

#### 7.16 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.*

#### 7.17 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

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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.

#### **7.18 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

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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.

## 7.19 Representations and Warranties

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

## 7.20 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.

## 7.21 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.

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## ANNEX A

### STATEMENT OF WORK

#### SW1 TITLE

Professional technical services in support of the Business Decisions Support (BDS) directorate of Department of Indian Affairs and Northern Development Canada (DIAND), to develop and maintain the infrastructure and evolution of the Department's enterprise Business Intelligence (BI) services.

#### SW2 BACKGROUND

The Department of Indian Affairs and Northern Development Canada (DIAND) has the primary, but not exclusive, responsibility for meeting the federal government's constitutional, treaty, political, and legal responsibilities to First Nations, Inuit, and Northerners. Under this mandate, (DIAND) is responsible for the planning, design, implementation, and assessment of policies and the delivery of a variety of programs and services to First Nations, Inuit, and Northern peoples and communities.

(DIAND) has developed many systems to support its programs and service delivery lines. Historically, reports had been produced from the data in these systems to satisfy a multitude of reporting needs for both internal and external reporting, in addition to the collection and analysis of data reported by stakeholders. Typically, these systems were not integrated and use different rules in producing reports which may result in different values for what is supposedly the same measurement. In addition, business analysts seeking information could slow the online transactional processing systems as they sift through the data to create reports. To address the challenges of departmental reporting needs, the Business Decision Support was created in 2007 with the mandate of providing a technology enabled service to organize, streamline, and simplify reporting requirements in order to enable better decision making for the department.

Under the Information Management Branch of the Chief Financial Officer Sector, the Business Decision Support directorate is responsible for enabling the 'single version of the truth' in (DIAND) by providing an enterprise-level centre of expertise in Business Intelligence (BI), operational reporting, and geomatics to support decision-making and reporting within the department.

The target audiences for BDS solutions and services are either internal or external (e.g. DIAND employees and contractual staff, Aboriginal Governments Officials, Aboriginal Peoples).

Six years after inception, the BDS directorate currently supports the department in many aspects of its program delivery through the platform of an enterprise data warehouse and business intelligence environment that provides access to financial and non-financial data from a single source. Over the past few years, the department has made an investment in a comprehensive set of BI solutions to support management-level decision-making and the development of long-term business strategies through reporting and analytic capabilities including:

- the integration of data from multiple sources (e.g. Oasis, OSMS, PeopleSoft, ICMS etc.);
- forecasting;
- program activity and strategic outcome analysis;
- trend identification;
- program costing analysis; and,

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- performance information and management.

To date, BDS maintains seven departmental BI analytical reporting solutions, including the Integrated Financials Solution, Financial Status Reporting, Integrated Human Resources Reporting Solution, Education Reporting Analysis Solution, First Nations Child and Family Services Reporting Solution, Nutrition North Canada Reporting Solution and Integrated Capital Management System Reporting Solution, with a number of new BI analytical solutions anticipated.

### **SW3 BUSINESS AND TECHNICAL ENVIRONMENT**

#### **3.1 Business Environment**

- p.m. 3.1.1 Standard Work Day Coverage - A standard workday is Monday to Friday, 8 a.m. to 5 Eastern Time, exclusive of statutory holidays ("Standard Workday"). Statutory holidays are defined as follows, where applicable: New Year's Day, Good Friday, Easter Monday, Victoria Day, St. Jean Baptiste Day (Quebec only), Canada Day, Civic Holiday (Ontario only), Labour Day, Thanksgiving Day, Remembrance Day, Christmas Day and Boxing Day. Off-Hours is defined as any time outside of the Standard Workday.
- 3.1.2 Work Outside of Regular Office Hours - All deployed contractor personnel must be available to work outside the Standard Workday for scheduled work as required, during the duration of the Contract, at the regular per diem rates, as established in the Contract. The Project Authority will advise the Contractor of requirements for scheduled hours of work and/or work outside the Standard Workday at least 24 extended hours in advance.
- regular 3.1.3 On-Call Work - Under some special circumstances, the Contractor's resources must be available (on-call) to be called back to work, outside the Standard Workday, at the per diem rate, as established in the Contract. The Project Authority will advise the Contractor of the requirement for on-call work at least 24 hours in advance. It will be the responsibility of the Contractor to provide the Contract resources with communication devices for the purpose of being contacted for any call back requirement.
- 3.1.4 The Contractor is expected to be capable of providing Technical Services and Analysis during the Standard Workday, as identified above, with occasional requirements for availability to provide services outside the Standard Workday,

#### **3.2 Technical Environment**

- 3.2.1 It is the responsibility of the Contractor to ensure that all written deliverables and services provided are in conformance with DIAND's standard desktop operating software, currently, Microsoft Office Suite 2007 (including Word, Excel, and PowerPoint) and the appropriate BI desktop and server based environments.
- 3.2.2 All deliverables and services provided by the Contractor must become integrated with DIAND's technical and operational environment.
- 3.2.3 The Contractor resources must be familiar, at a minimum, with the following software (including subsequent versions of the software) used within DIAND, in addition to any software (including subsequent versions of the software) listed in Appendix 1 - DIAND Enterprise Data Warehouse Technical Environment and Glossary and Acronyms for specific Resource Categories:
- Windows Server 2003/2008; and,
  - MS Office Suite 2007.



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3.2.4 When working on-site at DIAND, Contractor Resource(s) will be provided with access to workstations with the following software sets:

- i) Windows XP Professional or Windows7;
- ii) MS Office Suite;
- iii) Novell GroupWise or Microsoft Exchange; and,
- iv) DIAND's document repository.

3.2.5 All technical and other documentation gathered or produced during the course of work must be stored in DIAND's document repository and follow the established conventions for document management.

## **SW4 SCOPE OF WORK**

### **4.1 Technical Services and Analysis Related to this Project**

In the provision of service to DIAND, the Contractor must provide (to the satisfaction of the DIAND Project Authority) Technical Services, Analysis and Testing related to the support and maintenance of the Enterprise Data Warehouse, and the delivery and maintenance of BI solutions.

### **4.2 Supplying Resources**

In supplying resources, the Contractor may be required to supply:

- a) a single resource to work independently;
- b) a single resource to lead or be part of a team;
- c) a group of resources to act as a team;
- d) a group of resources to supplement a team; and/or,
- e) multiple resources to act in any combination of the above.

### **4.3 Contractor Resource Roles and Tasks**

#### **4.3.1 Programmer/Analyst (Category A. 7)**

##### ***Programmer/Analyst, Level 2:***

Typical activities of Programmer/Analyst, Level 2 may include (but are not limited to):

- a) Create and modify code and software;
- b) Create and modify screens and reports;
- c) Produce forms, manuals, programs, data files, and procedures for systems and/or applications;
- d) Design, develop and maintain the OLAP components, metadata models and reports for DIAND reporting application;
- e) Analyze documented business requirements and recommend technical solutions;
- f) Create and maintain BI documentation using MS Office Word, Excel and PowerPoint;
- g) Work closely with the data modellers, project managers, business analysts, DBAs and other DIAND technical resources to ensure that the data delivery environment meets the users requirements for access and response time;
- h) Attend meetings with departmental resources as required;
- i) Maintain documentation in DIAND's departmental document repository (CIDM); and,
- j) Other related BI Development Services.

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**Programmer/Analyst, Level 3:**

not

Typical activities of Programmer/Analyst, Level 3 includes all activities of Programmer/Analyst, Level 2. In addition, the following activities may be included (but limited to):

- a) Recommend development and design standards for reporting application development;
- b) Document and develop best practices and standards for reporting application development; and,
- c) Act as the development lead, coordinate and distribute work to Programmer/Analyst Level 2 resources.

4.3.2 Tester (Category A. 11)

**Tester, Level 2:**

Typical activities of Tester, Level 2 may include (but are not limited to):

- a) Test planning and coordination;
- b) Management and monitoring of test plans for all levels of testing;
- c) Management of walkthroughs and reviews related to testing and implementation readiness;
- d) Status reporting;
- e) Maintain documentation in DIAND's corporate document repository;
- f) Participate in testing projects for various components of the EDW environment and BI solutions;
- g) Design, develop and manage testing, test strategies and plans for the testing of the EDW environment and BI solutions;
- h) Conduct specific tests of the components for ETL and BI products (e.g., reports, ad-hoc packages), document testing materials and results, and provide results and feedback suggestions to the development team;
- i) Document and maintain test case and test scripts when changes are identified and required;
- j) Coordinate and report on the testing workload distributed over many team members;
- k) Monitor and report on tests plans for all levels of testing in the EDW and BI environments;
- l) Attend meetings with departmental resources as required; and,
- m) Other related EDW and BI software and environment testing services and duties.

**Tester, Level 3:**

Typical activities of Tester, Level 3 includes all activities of Tester, Level 2. In addition, the following activities may be included (but not limited to):

and

- a) Provide recommendations to analytical reporting application testing standards;
- b) Document and develop best practices and standards for reporting application testing;
- c) Act as the testing lead, coordinate and distribute work to Tester, Level 2 resources;
- d) Supervision of testing in accordance with the plan;
- e) Lead in testing projects for various components of the EDW environment and BI solutions;
- f) Manage, monitor and report on tests plans for all levels of testing in the EDW BI environments; and,
- g) Assist in the management, development and mentoring of junior testers.



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#### 4.3.3 Data Conversion Specialist (Category I. 1)

##### ***Data Conversion Specialist, Level 2:***

Typical activities of Data Conversion Specialist, Level 3 may include (but are not limited to):

- a) Design and develop appropriate data extraction, transformation and load (ETL) routines to move data from the source systems into the data warehouse environment and from the data warehouse into the data marts;
- b) Monitor and troubleshoot problems with ETL environment and/or jobs;
- c) Work closely with the source system extract designers/developers to coordinate the source system data extraction processes;
- d) Oversee all facilities of the conversion process;
- e) Complete mapping, interfaces, mock conversion work, enhancements, actual conversion, and verify completeness and accuracy of converted data;
- f) Analyze and coordinate data file conversions;
- g) Work with import files from heterogeneous platforms;
- h) Work closely with the data warehouse and data mart modellers and administrators to coordinate the data warehouse to data marts ETL processes;
- i) Develop and maintain job schedules;
- j) Perform debugging and resolution of complex issues;
- k) Maintain and configure appropriate data verification and validation tools with the EDW environment as required;
- l) Attend meetings with departmental resources as required; and,
- m) Other related ETL design and development services as required.

##### ***Data Conversion Specialist, Level 3:***

Typical activities of Data Conversion Specialist, Level 3 includes all activities of Data Conversion Specialist, Level 2. In addition, the following activities may be included (but not limited to):

- a) Provide recommendations regarding ETL development standards;
- b) Document and develop best practices and standards for ETL development;
- c) Act as the ETL development lead and coordinate and distribute work to Data Conversion Specialist, Level 2 resources;
- d) Identify opportunities for data quality improvement;
- e) Provide supervision to ETL development throughout the application development life cycle; and,
- f) Assist in the management, development and mentoring of junior ETL

ment

developers.

#### 4.3.4 Database Modeller/IM Modeller, (Category I. 4)

##### ***Database Modeller/IM Modeller, Level 3:***

Typical activities of Database Modeller/IM Modeller, Level 3 may include (but are not limited to):

- a) The Data Architect has both strategic and tactical responsibility for developing and maintaining the architecture and data models for corporate and project specific initiatives. This responsibility includes the identification of data most valuable to the department, the integration of this data, and the development of core relating data models. The resulting data models will be based on data architecture and modeling design principles and tenets;
- b) Design, develop and maintain logical data models;
- c) Analyze proposed changes to databases from the context of the logical data model;

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- d) Provide technical expertise in the use and optimization of data modeling techniques to team members;
- e) Provide technical assistance, guidance and direction in terms of data analysis and modeling to team members;
- f) Provide assistance to project team and business users relating to data issues and data analysis concepts;
- g) Participate in the development of data modeling and metadata policies and procedures;
- h) Participate in data analysis as a result of new/updated requirements;
- i) Apply approved changes to logical data models;
- j) Comply with corporate data architectures, strategies and frameworks, including enterprise data warehouse activities;
- k) Analyze and evaluate alternative data architecture solutions to meet business problems/requirements to be incorporated into the corporate data architecture;
- l) Review corporate architecture strategies and directions, data requirements, and business information needs and devise data structures to support them;
- m) Improve modeling efficiency through recommendations on how to better utilize current metadata repositories;
- n) Comply with corporate repository metadata directions;
- o) Provide input to refinement of data architectures;
- p) Define access strategies; and,
- q) Construct, monitor and report on work plans and schedules.

#### 4.3.5 IM Architect (Category I.5)

##### ***IM Architect, Level 3:***

Typical activities of IM Architect, Level 3 may include (but are not limited to):

- a) Analyse existing capabilities and requirements, develop redesigned frameworks and recommend areas for improved capability and integration.
- b) Develop and document detailed statements of requirements;
- c) Evaluate existing procedures and methods, identify and document database content, structure, and application subsystems, and develop data dictionary;
- d) Define and document interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems;
- e) Prototype potential solutions, provide trade-off information and suggest recommended courses of action;
- f) Perform information modelling in support of BPR implementation;
- g) Perform cost/benefit analysis of implementing new processes and solutions;
- h) Provide advice in developing and integrating process and information models between business processes to eliminate information and process redundancies; and,
- i) Provide advice in defining new requirements and opportunities for applying efficient and effective solutions; identify and provide preliminary costs of potential options.

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#### 4.3.6 Technology Architect (Category I.11)

##### ***Technology Architect, Level 3:***

Typical activities of Technology Architect, Level 3 may include (but are not limited to):

- a) Develop technical architectures, frameworks and strategies, either for an organization or for a major application area, to meet the business and application requirements;
- b) Identify the policies and requirements that drive out a particular solution;

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- c) Analyze and evaluate alternative technology solutions to meet business problems;
- d) Ensure the integration of all aspects of technology solutions;
- e) Monitor industry trends to ensure that solutions fit with government and industry directions for technology;
- f) Provide information, direction and support for emerging technologies;
- g) Perform impact analysis of technology changes;
- h) Provide support to applications and/or technical support teams in the proper application of existing infrastructure; and,
- i) Review application and program design or technical infrastructure design to ensure adherence to standards and to recommend performance improvements.

#### 4.3.7 Business Analyst (Category B.1)

##### ***Business Analyst, Level 2:***

Typical activities of Business Analyst, Level 2 may include (but are not limited to):

- a) Develop and document statements of requirements for considered alternatives;
- b) Perform business analyses of functional requirements to identify information, procedures, and decision flows;
- c) Evaluate existing procedures and methods, identify and document items such as database content, structure, application subsystems;
- d) Define and document interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems;
- e) Establish acceptance test criteria with client; and,
- f) Support and use the selected departmental methodologies.

##### ***Business Analyst, Level 3:***

Typical activities of Business Analyst, Level 3 includes all activities of Business Analyst, Level 2. In addition, the following activities may be included (but not limited to):

- a) Document and develop best practices and standards for business analysis for reporting application development;
- b) Act as the business analysis team lead, coordinate and distribute work to Business Analyst, Level 2 resources;
- c) Identify opportunities for business process improvement; and,
- d) Assist in the management, development and mentoring of junior Business Analysts.

#### 4.3.8 Instructor, IT (Category B.11)

##### ***Instructor, IT, Level 2:***

Typical activities of Instructor IT, Level 2 may include (but are not limited to):

- a) Assess the relevant characteristics of a target audience;
- b) Prepare end-users for implementation of courseware materials;
- c) Conduct training courses; and,
- d) Communicate effectively by visual, oral, and written form with individuals, small groups, and in front of large audiences.

#### 4.3.9 Project Manager (Category P.9)

##### ***Project Manager, Level 2:***

Typical activities of Project Manager, Level 2 may include (but are not limited to):

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the

- a) Manage the project during the development, implementation and operations start-up by ensuring that resources are made available and that the project is developed and is fully operational within previously agreed time, cost and performance parameters;
- b) Formulate statements of problems; establishes procedures for the development and implementation of significant, new or modified project elements to solve these problems, and obtains approval thereof;
- c) Define and document the objectives for the project; determine budgetary requirements, the composition, roles and responsibilities and terms of reference for the project team;
- d) Report progress of the project on an ongoing basis and at scheduled points in life cycle;
- e) Meet in conference with stakeholders and other project managers and state problems in a form capable of being solved;
- f) Prepare plans, charts, tables and diagrams to assist in analyzing or displaying problems;
- g) work with a variety of project management tools;
- h) Provide overall leadership and direction to Project Teams for solution delivery of Business Intelligence and Data Warehousing; and,
- i) Assist with project close-out and wrap-up activities so that these are performed and documented according to generally accepted project standards.

***Project Manager, Level 3:***

Typical activities of Project Manager, Level 3 includes all activities of Project Manager, Level 2. In addition, the following activities may be included (but not limited to):

- a) Manage several Project Managers, each responsible for an element of the project and its associated project team;
- b) Project sign-off;
- c) Provide guidance to Contractor resources and DIAND personnel for solution delivery of Business Intelligence and Data Warehousing;
- d) Provide options analysis, expert advice and recommendations to support effective Departmental decision making;
- e) Responsible for ensuring project close-out and wrap-up activities are performed and documented according to generally accepted project standards;
- f) Develop and deliver presentations on project recommendations, option analysis and other project related issues to clients, management and other stakeholders;
- g) Distribute work to junior project management resources and provide ongoing monitoring and supervision to ensure work is complete to the satisfaction of the Project Authority; and,
- h) Assist in the management, development and mentoring of junior Project Management resources.

**4.3.10 Project Administrator (Category P.6)**

***Project Administrator, Level 1:***

Typical activities of Project Administrator (Category P.6). Level 1 may include (but are not limited to):

- a) Assist project management and data processing professionals, technical users and end-users in simple routine tasks;
- b) Provide administrative and technical support of a clerical nature to projects, as required;
- c) Assist in performing such tasks as maintaining project documentation and application/system libraries;
- d) Act as the first point of contact in a "hot-line" situation by accepting incoming

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- calls, logging calls, attempting to resolve simple problems and following established procedures for more difficult problems;
- e) Track project change requests;
  - f) Maintain and update relevant project information in manual and/or electronic files (project information might include such things as project activity schedule, status reports, correspondence);
  - g) Use computer tools, aids, system control languages on PCs, minis, or mainframes to perform work; and,
  - h) Communicate with project management and data processing professionals, technical users and end-users on administrative matters related to the project.

## SW5 DELIVERABLES

**5.1** Deliverables will be specified within the terms and conditions of the Contract and/or Task Authorization. The scope of work shall identify the particular deliverable(s), tasks, and other relevant areas of consideration that are required to be implemented by the Contractor in the provision of services.

**5.2** Specific deliverables for the resource categories listed and service requirements may include, but are not limited to, any combination of the following:

- a) Prepare deliverables related to development, maintenance, analysis, testing and/or project management in support of DIAND BI solutions including, but not limited to:
  - ETL programs to extract, transform and load data;
  - business intelligence products such as cubes, data marts, reports, and packages;
  - test scripts, expected results and actual results;
  - documentation related to root cause analysis for system problems and potential remediation approaches;
  - project status reports and presentations;
- b) Written reports on the detailed technical and business requirements as well as data readiness, including data conversion analysis of existing databases, applications or software and the associated costs;
- c) Documentation related to:
  - requirements for interfaces with other DIAND applications and data, and the definition of a minimum standard that must be met in any "to be" state;
  - Documentation related to requirements for non-functional concerns such as performance, reliability, availability, and security;
- d) Strategic and data quality plans to allow the business unit to proceed to cleaning up the data, and make a decision about data quality standards required for the implementation of solutions.

**5.3** In meeting its obligations under the Contract, the Contractor must ensure that all Deliverables submitted and services rendered are in conformity with the instructions issued by the DIAND Project Authority, and in accordance with section on "Reporting Requirements" and section on "Performance Standards" of this SW.

**5.4** The Contractor must submit all scheduled and requested deliverables and amendments to the DIAND Project Authority (or this person's due designate) in accordance with the timing as set out by the DIAND Project Authority. All text deliverables must be delivered in both hard and electronic copy to the specifications of DIAND. The Contractor must attest to the veracity and accuracy of the content of all deliverables submitted.

## SW6 REPORTING REQUIREMENTS

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**6.1** Reporting requirements may include, but are not limited to, any of the following:

- a) Weekly update reports, content documented through simple minutes and agenda (preferably in person);
- b) Written progress and/or status reports relating to the delivery of specific services and completion of assigned tasks; and,
- c) Other related reporting.

**6.2** The timing and format of any required reports will be specified by the DIAND Project Authority, and will be in the frequency determined when the Contract is awarded, and as the need arises based on progress of the project. Format can also include requirements laid out by DIAND project governance process, which will be communicated to the Contractor by the DIAND Project Authority without delay.

**6.3** The Contractor must provide other ad-hoc written or oral status updates upon request from the DIAND Project Authority.

**6.4** It is the responsibility of the Contractor to facilitate and maintain regular communication with the DIAND Project Authority. In addition, the Contractor is to immediately notify the DIAND Project Authority of any issues, problems, or areas of concern in relation to any work completed as they arise.

## **SW7 SUPPORT**

**7.1** As required, for the completion of the work, DIAND will provide:

- a) Access to DIAND's facilities and/or the Project Authority and/or DIAND personnel as required for the successful provision of Technical Services and Analysis;
- b) Computer equipment, network/server/databases, and Departmental intranet access and other office space to perform the work, as required;
- c) Access to relevant documentation and reference materials to which the Contractor would not otherwise have access;
- d) Security passes to DIAND facilities required for work either during normal office hours or during extended working hours, as required;
- e) Names and telephone numbers of required department/federal/provincial contacts;
- f) Comments and revisions on the Contractor's draft deliverable submissions within the timeframe mutually agreed to by the Contractor and the Project Authority; and,
- g) Other assistance and support as appropriate.

**7.2** and The DIAND Project Authority will negotiate the number of days for a given project deliverable; this must be the basis for establishing a level of effort for each project deliverable. The timing of each project deliverable must be subject to the specific requirement for that project deliverable and will be determined with the Contractor, but within the time frame allowed under the Terms and Conditions in the Contract.

**7.3** In addition to the reports provided to DIAND by the Contractor, DIAND will monitor the Contractor's ongoing service levels by conducting review meetings with the Contractor on an as-and-when-required basis, to exchange information relevant to: chronic problem areas, action plans, and pending planning activity.

## **SW8 LANGUAGE OF WORK**

**8.1** The language of work and correspondence for this Contract will be in English, in accordance with

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the Official Language(s) of Capability indicated in the Contractor's Proposal.

**8.2** The language of all written Deliverables will be, at minimum, English.



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## STATEMENT OF WORK

### APPENDIX 1

#### DIAND Enterprise Data Warehouse Technical Environment and Glossary

##### Enterprise Data Warehouse Technical Environment

The following software has been selected for use on this initiative. For Data Acquisition (Extract, Translate and Load), DIAND will be using IBM's WebSphere DataStage. The Oracle RDBMS (11g) has been chosen as the back-end data base for the EDW, Data Marts, Cubes, Metadata and any other information stores requiring an RDBMS. Oracle Designer is the data modeling tool to design and maintain these databases. For report authoring and administration the Cognos 10 toolset has been chosen. This includes Query Studio, Reports Studio, Analysis Studio, Event Studio, Business Insight & Insight Advanced, Cognos Planning, Cognos Transformer, Metrics Manager and Framework Manager.

Listed below are the applications currently being used to support the DIAND's EDW and BI infrastructure:

##### **ETL**

- IBM InfoSphere Quality Stage
- IBM InfoSphere Business Glossary
- IBM InfoSphere Meta Data Workbench
- IBM InfoSphere InfoAnalyzer
- IBM InfoSphere DataStage
  - Administrator Client
  - Designer
  - Service Pack for SAP

##### **RDMBS**

- Oracle 11g Relational Database Management System
- Oracle Enterprise Manager Client

##### **Business Intelligence and Analytical Reporting**

- Cognos v10 OLAP
- Cognos Configuration
- Cognos v10 Web Portal (Failover)
- Cognos Content (Failover)
- Cognos Script Editor
- Framework Manager
- Transformer
- Metric Manager
- Map Manager
- Access Manager Administration
- Access Manager Batch Maintenance

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## **Glossary and Acronyms**

**ANALYTICS APPLICATIONS:** PROCESSES THAT PRODUCE INFORMATION FOR MANAGEMENT DECISIONS, USUALLY INVOLVING DEMOGRAPHIC ANALYSIS, TREND ANALYSIS, PATTERN RECOGNITION, DRILL-DOWN ANALYSIS AND PROFILING.

Examples of analytics applications include: customer segmentation, customer probability models, campaign measurement, up-sell opportunities, cross-channel analysis, sales distribution analysis, cross-sell opportunities, trigger inventory analysis, supply chain analysis, customer quality analysis, channel satisfaction measurement, click stream analysis, backlog analysis, churn analysis, interaction analysis, booking analysis, billing analysis, distribution analysis, retention analysis, delivery analysis, fulfillment analysis, and promotion effectiveness.

**Business intelligence (BI)** - The capability to perform in-depth analysis, and possibly data mining, of detailed business data to providing real and significant information to business users. Business intelligence usually makes use of tools designed to easily access data warehouse data.

**Decision Support System:** An implementation that provides tactical and strategic capabilities to management and knowledge workers through reports and the ability to launch ad-hoc queries.

**Dimension data:** An entity used to describe, qualify, or otherwise add meaning to “facts” in a star schema fact table. Dimensions are the “by” items in analysis of facts “by” product, market, time, period, etc. Descriptive data that describes the measurements (facts) that business users wish to analyze.

**Enterprise data model:** A logical data model that incorporates all the important components of an enterprise data architecture. Components include entities, attributes, relationships (roles), rules and definitions stated in business terms. A schematic defining the data and their relationships that is applied to the whole organization. Diagram of a single non-redundant view of business data, showing how data is used by the business activities of an organization.

**Enterprise Data Warehouse (EDW):** A collection of data that can be defined and shared across the whole enterprise along the lines of common dimensions to be used for analysis.

**Enterprise systems:** Systems that support and are used by the entire enterprise  
*See departmental systems*

**ETL: Extract/Transform/Load:** This is the process of extracting data from their operational data sources or external data sources, transforming the data which includes cleansing, aggregation, summarization, integration, as well as basic transformation (1 becomes “Male” 2 becomes “Female”), and loading the data into some form of the data warehouse (ODS, enterprise data warehouse, data mart). ETL can also refer to the vendor software that performs these processes.

**Infrastructure:** The architectural elements, organizational support, corporate standards, methodology, data, processes, and physical hardware/network, etc. that make up the data warehouse environment.

**Logical data model:** An abstract formal representation of the categories of data and their relationships in the form of a diagram, such as an entity-relationship diagram. A logical data model is **process independent**, which means that it is fully normalized, and therefore does **not** represent a process dependent (e.g. access-path) database schema.

**Meta data:** “Data about data.” Usually refers to agreed-on definitions and business rules stored in a centralized repository so business users – even those across departments and systems – use common terminology for key business terms. Can include information about data’s currency, ownership, source system, derivation (e.g. profit = revenues minus costs), or usage rules. Prevents data misinterpretation and poor decision making due to sketchy understanding of the true meaning and use of corporate data.

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**OLAP – Online Analytical Processing:** Data structures and software designed for extremely fast response time since the data supporting the query has been pre calculated in a multidimensional database and much of the data has been pre-aggregated so there is no time spent summing up the answers. Enables a user to view different perspectives of the same data to facilitate decision-making.

**OLTP – Online transaction processing:** Defines the transaction processing that supports the daily business operations.

**Physical Data Model:** A formal representation of data and their relationships in the form of a diagram, depicting the physical placement of data in a database. A physical data model is **process dependent**, which means that it is de-normalized to provide maximum performance efficiency. It is commonly referred to as logical database design or database design schema.

**RDBMS – Relational database management system:** e.g. DB2, Oracle, SQL Server, Sybase

**Source data:** The data from the operational or legacy systems that feed the ETL process.

**Source system:** An operational system, or ODS that is used as the source or input to the ETL process.

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## ANNEX B

### BASIS OF PAYMENT

#### INITIAL CONTRACT PERIOD:

Resource Category	Initial Contract Period (Date of Contract to three years later)	
	Level of Expertise	Firm Per Diem Rate
Programmer/Analyst, A.7	Level 3	\$
Programmer/Analyst, A.7	Level 2	\$
Tester, A.11	Level 3	\$
Tester, A.11	Level 2	\$
Data Conversion Specialist, I.1	Level 3	\$
Data Conversion Specialist, I.1	Level 2	\$
Database Modeller/IM Modeller, I.4	Level 3	\$
IM Architect, I.5	Level 3	\$
Technology Architect, I.11	Level 3	\$
Project Manager, P.9	Level 3	\$
Project Manager, P.9	Level 2	\$
Project Administrator, P.6	Level 1	\$
Business Analyst, B.1	Level 3	\$
Business Analyst, B.1	Level 2	\$
Instructor, IT, B.11	Level 2	\$
<b>Total Price Initial Contract Period :</b>		<b>\$ TBD</b>

**Total Expenditure:    \$ TBD**

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## OPTION PERIODS

		Option Period 1 TBD
Resource Category	Level of Expertise	Firm Per Diem Rate
Programmer/Analyst, A.7	Level 3	\$
Programmer/Analyst, A.7	Level 2	\$
Tester, A.11	Level 3	\$
Tester, A.11	Level 2	\$
Data Conversion Specialist, I.1	Level 3	\$
Data Conversion Specialist, I.1	Level 2	\$
Database Modeller/IM Modeller, I.4	Level 3	\$
IM Architect, I.5	Level 3	\$
Technology Architect, I.11	Level 3	\$
Project Manager, P.9	Level 3	\$
Project Manager, P.9	Level 2	\$
Project Administrator, P.6	Level 1	\$
Business Analyst, B.1	Level 3	\$
Business Analyst, B.1	Level 2	\$
Instructor, IT, B.11	Level 2	\$
<b>Total Price Option Period 1 :</b>		<b>\$ TBD</b>

**Total Expenditure: \$ Unfunded**

		Option Period 2 TBD
Resource Category	Level of Expertise	Firm Per Diem Rate
Programmer/Analyst, A.7	Level 3	\$
Programmer/Analyst, A.7	Level 2	\$
Tester, A.11	Level 3	\$
Tester, A.11	Level 2	\$
Data Conversion Specialist, I.1	Level 3	\$
Data Conversion Specialist, I.1	Level 2	\$
Database Modeller/IM Modeller, I.4	Level 3	\$
IM Architect, I.5	Level 3	\$
Technology Architect, I.11	Level 3	\$
Project Manager, P.9	Level 3	\$
Project Manager, P.9	Level 2	\$
Project Administrator, P.6	Level 1	\$
Business Analyst, B.1	Level 3	\$
Business Analyst, B.1	Level 2	\$
Instructor, IT, B.11	Level 2	\$
<b>Total Price Option Period 2 :</b>		<b>\$ TBD</b>

**Total Expenditure: \$ Unfunded**

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## ANNEX C SECURITY REQUIREMENTS CHECK LIST

### LISTE DE VÉRIFICATION DES EXIGENCES RELATIVES À LA SÉCURITÉ (LVERS)

Contract Number / Numéro du contrat Common PS SRCL #6	
Security Classification / Classification de sécurité UNCLASSIFIED	
<b>PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE</b>	
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
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  For the provision of Task Based Informatics Professional Services	
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 <b>no</b> overnight storage? S'agit-il d'un contrat de messagerie ou de livraison commerciale <b>sans</b> 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 Aucune restriction relative à la diffusion Not releasable À ne pas diffuser  Restricted to: / Limité à :  Specify country(ies) / Préciser le(s) pays :	All NATO countries Tous les pays de l'OTAN   Restricted to: / Limité à :  Specify country(ies) / Préciser le(s) pays :
	No release restrictions Aucune restriction relative à la diffusion   Restricted to: / Limité à :  Specify country(ies) / Préciser le(s) pays :

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### 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 type="checkbox"/>	NATO CONFIDENTIAL NATO CONFIDENTIEL	<input type="checkbox"/>	PROTECTED C PROTÉGÉ C	<input type="checkbox"/>
CONFIDENTIAL CONFIDENTIEL	<input type="checkbox"/>	NATO SECRET NATO SECRET	<input type="checkbox"/>	CONFIDENTIAL CONFIDENTIEL	<input type="checkbox"/>
SECRET SECRET	<input 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? La fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS? ☒ No / Non ☐ Yes / Oui  
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? Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate? ☒ No / Non ☐ Yes / Oui  
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

<input checked="" type="checkbox"/> RELIABILITY STATUS COTE DE FIABILITÉ	<input type="checkbox"/> CONFIDENTIAL CONFIDENTIEL	<input type="checkbox"/> SECRET SECRET	<input type="checkbox"/> TOP SECRET TRÈS SECRET
<input type="checkbox"/> TOP SECRET - SIGINT TRÈS SECRET - SIGINT	<input type="checkbox"/> NATO CONFIDENTIAL NATO CONFIDENTIEL	<input type="checkbox"/> NATO SECRET NATO SECRET	<input type="checkbox"/> COSMIC TOP SECRET COSMIC TRÈS SECRET
<input type="checkbox"/> 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? Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail? ☒ No / Non ☐ Yes / Oui  
If Yes, will unscreened personnel be escorted? Dans l'affirmative, le personnel en question sera-t-il escorté? ☒ No / Non ☐ Yes / 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? / Le fournisseur sera-t-il tenu de recevoir et d'entreposer sur place des renseignements ou des biens PROTÉGÉS et/ou CLASSIFIÉS? ☒ No / Non ☐ Yes / Oui  
11. b) Will the supplier be required to safeguard COMSEC information or assets? Le fournisseur sera-t-il tenu de protéger des renseignements ou des biens COMSEC? ☒ No / Non ☐ Yes / Oui

### PART C (Continued) / PARTIE C (Suite)



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<b>PRODUCTION</b>		
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? Les installations du fournisseur serviront-elles à la production (fabrication et/ou réparation et/ou modification) de matériel PROTÉGÉ et/ou CLASSIFIÉ?	<input checked="" type="checkbox"/> No Non	<input type="checkbox"/> Yes Oui
<b>INFORMATION TECHNOLOGY (IT) MEDIA / SUPPORT RELATIF À LA TECHNOLOGIE DE L'INFORMATION (TI)</b>		
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? 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?	<input checked="" type="checkbox"/> No Non	<input type="checkbox"/> Yes Oui
11. e) Will there be an electronic link between the supplier's IT systems and the government department or agency? Disposera-t-on d'un lien électronique entre le système informatique du fournisseur et celui du minist' re ou de l'agence gouvernementale?	<input checked="" type="checkbox"/> No Non	<input type="checkbox"/> Yes Oui

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	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Production	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IT Media / Support TI	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IT Link / Lien électronique	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

  

COMSEC						
Category Catégorie	PROTECTED PROTÉGÉ			CONFIDENTIAL CONFIDENTIEL	SECRET	TOP SECRET TRÈS SECRET
	A	B	C			
Information / Assets Renseignements / Biens	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Production	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IT Media / Support TI	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IT Link / Lien électronique	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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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?
- ☒ No  
Non
- ☐ Yes  
Oui

**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.**

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?
- ☒ No  
Non
- ☐ Yes  
Oui

**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).**

## ANNEX D

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## BID EVALUATION CRITERIA

### 1. TECHNICAL REQUIREMENTS

#### 1.1 Mandatory Requirements - Bidders

<b>Mandatory Requirements: Corporate Experience</b>	<b>Cross Reference to Proposal</b>	<b>Met Y//N</b>
<p>1.1.1 Corporate Stability: The Bidder must provide evidence attesting to have been in business for five (5) years providing professional services to departments, organizations and agencies of the Government of Canada (GOC).</p>		
<p>1.1.2 Corporate Offices: The Bidder must have a professional corporate office situated in a commercial location and have at a minimum one (1) full-time staff person working at this site and available to respond to queries between the hours of 9:00 AM and 5:00 PM EST.</p>		
<p>1.1.3 Contract/Project Summaries: The Bidder MUST provide three (3) written Project Summaries describing in detail the Bidder's current/previous experience in successfully providing Business Intelligence/Data Warehousing services within one (1) or more client organizations during the past five (5) years. At least one (1) of these Project Summaries MUST have been with a Canadian Federal Department or Agency.</p> <p>The Bidder MUST demonstrate that, cumulatively within the three (3) Project Summaries combined, the following Resource Categories were supplied by the Bidder:</p> <ol style="list-style-type: none"> <li>1. Programmer / Analyst (A.7);</li> <li>2. Tester (A.11);</li> <li>3. Data Conversion Specialist (I.1);</li> <li>4. Database Modeller/IM Modeller (I.4);</li> <li>5. Business Analyst (B.1);</li> <li>6. Project Manager (P.9)</li> </ol> <p>Within each Project Summary provided, the Bidder MUST clearly indicate each of the following:</p> <ol style="list-style-type: none"> <li>1. the name of the client organization</li> <li>2. a brief description of the scope of BI/DW Services provided, including: <ol style="list-style-type: none"> <li>a) project objectives;</li> <li>b) Resource Categories provided;</li> <li>c) the dates/duration of the project;</li> <li>d) the dollar value of the project to the Bidder;</li> <li>e) whether the Bidder was a prime or subcontractor;</li> <li>f) the extent to which these services were provided on-time, on-budget and in accordance with the established project objectives; and</li> <li>g) the name, address and telephone number of the client project authority to whom the Bidder reported.</li> </ol> </li> </ol>		

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1.1.4 Bidder Resources: The Bidder must include in its Proposal one (1) CV for each of the following Resource Categories and Levels:  a. Programmer/Analyst, Level 3 (A.7); b. Tester, Level 3 (A.11); c. Data Conversion Specialist, Level 3 (I.1); d. Database Modeller/IM Modeller, Level 3 (I.4); e. IM Architect, Level 3 (I.5); f. Technology Architect, Level 3 (I.11); g. Project Manager, Level 3 (P.9); h. Business Analyst, Level 3 (B.1); i. IT Instructor, Level 2 (B.11)		

## 1.2 Mandatory Requirements - Resources

<b>A</b>	<b>Mandatory Requirements: Programmer / Analyst (A.7) - Level 3</b>	<b>Cross Reference to Proposal</b>	<b>Met Y/N</b>
<b>MA1</b>	The proposed resource must demonstrate that they possess five (5) full years of experience in the past ten (10) years in designing and developing end user access solutions with Cognos BI tool suites.		
<b>MA2</b>	The proposed resource must demonstrate that they possess five (5) full years of hands-on experience in the past eight (8) years with Cognos Business Intelligence including Cognos Framework Manager, Query Studio and Report Studio.		
<b>MA3</b>	The proposed resource must demonstrate that they possess five (5) full years of experience working on complex BI solutions with enterprise data warehouse and data marts in the role of a BI developer, in the past eight (8) years.		
<b>MA4</b>	The proposed resource must demonstrate that they possess ten (10) full years of experience working in a multi-disciplinary team environment, interacting with other resources such as project managers, ETL developers, BI developers, other technical resources and clients.		

<b>B</b>	<b>Mandatory Requirements: Tester (A.11) - Level 3</b>	<b>Cross Reference to Proposal</b>	<b>Met Y/N</b>
<b>MB1</b>	The proposed resource must demonstrate that they possess ten (10) full years of experience designing, developing and executing testing strategies, plans and scripts for large,		

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	enterprise-level systems (minimum 100 users).				
<b>MB2</b>	The proposed resource must demonstrate that they possess two (2) full years of experience in the past five (5) years developing, conducting and monitoring testing solutions in a BI/EDW environment. Note: Experience may include testing for both component and integration testing for ETL or BI products.				
<b>MB3</b>	The proposed resource must demonstrate that they possess two (2) full years of experience in the past five (5) years planning, coordinating, and reporting on testing efforts for large enterprise-level systems (minimum 100 users).				
<b>MB4</b>	The proposed resource must demonstrate that they possess three (3) full years of experience in the past five (5) years facilitating user acceptance testing with clients, and documenting testing progress and results.				

<b>C</b>	<b>Mandatory Requirements: Data Conversion Specialist (I.1) - Level 3</b>	<b>Cross Reference to Proposal</b>	<b>Met Y/N</b>
<b>MC1</b>	The proposed resource must demonstrate that they possess ten (10) full years of experience in the past fifteen (15) years applying various strategies, approaches and technologies for ETL (extract, transform, load) processes in an EDW environment, including experience with ETL tools and relational databases, and data verification and validation techniques, methods and tools.		
<b>MC2</b>	The proposed resource must demonstrate that they possess one (1) full year of hands-on experience in the past three (3) years developing ETL jobs and scripts with IBM InfoSphere DataStage Enterprise Edition (version 8 or above).		
<b>MC3</b>	The proposed resource must demonstrate that they possess five (5) full years of experience in the past eight (8) years working with Oracle RBDMS (version 8 or above).		
<b>MC4</b>	The proposed resource must demonstrate that they possess ten (10) full years of experience in the past fifteen (15) years using PL/SQL language to perform data conversion		

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	related work for ETL development.	

<b>D</b>	<b>Mandatory Requirements: Database Modeller/IM Modeller (I.4) - Level 3</b>	<b>Cross Reference to Proposal</b>	<b>Met Y/N</b>
<b>MD1</b>	The proposed resource must demonstrate that they possess five (5) full years of experience in the design, development and maintenance of data models in BI/EDW environments.		
<b>MD2</b>	The proposed resource must demonstrate that they possess ten (10) full years of experience in the past fifteen (15) years designing, developing and maintaining enterprise-level logical and physical data models that integrate data from multiple source applications.		
<b>MD3</b>	The proposed resource must demonstrate that they possess ten (10) full years of experience in the past fifteen (15) years analyzing source data systems' structures, logic, and their business relationships and integration flows.		
<b>MD4</b>	The proposed resource must demonstrate that they possess five (5) full years of experience in the past eight (8) years designing, developing and managing relational database management systems for large-scaled enterprise applications of over 500 end-users.		

<b>E</b>	<b>Mandatory Requirements: IM Architect (I.5) - Level 3</b>	<b>Cross Reference to Proposal</b>	<b>Met Y/N</b>
<b>ME1</b>	<p>The proposed resource must demonstrate that they possess three (3) full years experience recommending and developing data management standards and processes in a Government of Canada context to senior management (Director and above), including but not limited to: data governance, data quality management, data stewardship, corporate reporting and data sharing.</p> <p><i>Government of Canada context is defined as: experience gained by working directly or indirectly through a sub-contract for government department(s), Crown corporations and any wholly owned subsidiary of these corporations.</i></p>		

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<b>F</b>	<b>Mandatory Requirements: Technology Architect (I.11) - Level 3</b>	<b>Cross Reference to Proposal</b>	<b>Met Y/N</b>
<b>MF1</b>	The proposed resource must demonstrate that they possess five (5) full years experience leading and conducting assessments of enterprise IM/IT environments, researching and evaluating technology solutions, and recommending technical options and costing analysis to senior management (Director and above) to fulfill business requirements.		

<b>G</b>	<b>Mandatory Requirements: Project Manager (P.9) - Level 3</b>	<b>Cross Reference to Proposal</b>	<b>Met Y/N</b>
<b>MG1</b>	The proposed resource must demonstrate that they possess three (3) full years of experience in the past ten (10) years managing enterprise level BI/EDW and/or analytical reporting projects (over 100 users).		
<b>MG2</b>	The proposed resource must demonstrate that they possess five (5) full years of experience in the past ten (10) years managing complex, enterprise-level IM/IT projects in the Government of Canada context. Government of Canada context is defined as: experience gained by working directly or indirectly through a sub-contract for government department(s), Crown corporations and any wholly owned subsidiary of these corporations.		
<b>MG3</b>	The proposed resource must demonstrate that they possess five (5) full years experience within the last ten (10) years as a Project Manager involved in projects in excess of \$1 million CAD in the IM/IT field using PMBOK best practices.		
<b>MG4</b>	The proposed resource must demonstrate that they possess ten (10) full years of experience in the management of IM/IT technical resources in a cross-functional IM/IT service delivery environment.		

<b>H</b>	<b>Mandatory Requirements: Business Analyst (B.1) - Level 3</b>	<b>Cross Reference to Proposal</b>	<b>Met Y/N</b>
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<b>MH1</b>	The proposed resource must demonstrate that they possess five (5) full years of experience in the past eight (8) years in gathering, analyzing, and documenting requirements, in support of developing complex, enterprise IM/IT solutions.		
<b>MH2</b>	The proposed resource must demonstrate that they possess two (2) full years of experience in the past five (5) years working as a business analyst in the development of maintenance of enterprise level BI/EDW solutions and/or analytical reporting applications.		
<b>MH3</b>	The proposed resource must demonstrate that they possess ten (10) full years of experience working as a business analyst, developing business requirement documentation, including but not limited to Business Requirement Document, Functional Specification Document and Use Cases.		
<b>MH4</b>	The proposed resource must demonstrate that they possess five (5) full years of experience in the past eight (8) years developing, managing, and maintaining client and stakeholder relationships.		
<b>MH5</b>	The proposed resource must demonstrate that they possess five (5) full years of experience in the past eight (8) years facilitating, chairing, coordinating and leading Joint-Application-Development (JAD) sessions, working groups, and client meetings.		
<b>MH6</b>	The proposed resource must demonstrate that they possess five (5) full years working in a matrix environment, representing the technical development team in discussions with clients, functional specialists, and IM/IT specialists to influence and obtain agreement on the requirements for technology services.		

<b>I</b>	<b>Mandatory Requirements: Instructor, IT (B.11) - Level 2</b>	<b>Cross Reference to Proposal</b>	<b>Met Y/N</b>
<b>MI1</b>	The proposed resource must demonstrate that they possess five (5) full years of experience in the past eight (8) years developing IT application solution training materials, such as training plan, presentation and user manuals.		
<b>MI2</b>	The proposed resource must demonstrate that they possess two (2) full years of experience in		

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	the past five (5) years facilitating and delivering IT application solution training sessions to end-users.				
<b>MI3</b>	The proposed resource must demonstrate that they possess two (2) full years of experience in the past five (5) years working in a matrix IM/IT environment, managing and maintaining client and stakeholder relationships.				

### 1.3 Rated Requirements - Resources

<b>A</b>	<b>Rated Requirements: Programmer / Analyst (A.7) - Level 3</b>	<b>Max Point s</b>	<b>Points</b>	<b>Cross Reference to Proposal</b>
<b>RA1</b>	The proposed resource must demonstrate that they possess experience working with Cognos suite of tools to develop analytical reports.  5pts = 5+ yrs to 7yrs; 11pts = 7+ yrs to 10yrs; 15pts = 10+ yrs	15		
<b>RA2</b>	The proposed resource must demonstrate that they possess hands-on experience in the past five (5) years developing BI solutions using Cognos Business Intelligence suite of tools:  10pts = Framework Manager; 10pts = Transformer and Analysis; 3pts = Query Studio; 2pts = Report Studio; 2pts = Contributor Web; 2pts = Business Insight; 5pts = Business Insight Advanced; 10pts = Enterprise Planning (Analyst and Planning and Contributor Administration); 3pts = Page (for Dashboard);and 3pts = Analysis Studio	50		
<b>RA3</b>	The proposed resource must demonstrate that they possess experience working as a BI developer in the past five (5) years developing an enterprise-wide BI/EDW solution or set of solutions in a large-scale corporate environment.  2pts = less than 100 users; 5pts = 100 to 500 users; 11pts = 501 to 1000 users; 15pts = 1000+ users	15		
<b>RA4</b>	The proposed resource must demonstrate that they possess hands-on experience in the past eight (8) years modeling in Framework Manager.	15		

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Client Ref. No. - N° de réf. du client <b>A0109-130009</b>		File No. - N° du dossier <b>613ZM A0109-130009</b>		CCC No./N° CCC - FMS No./N° VME	
	5pts = 1yr to less than 3 yrs; 11pts = 3+yrs to less than 5 yrs; 15pts = 5+ yrs				
<b>RA5</b>	The proposed resource must demonstrate that they possess hands-on experience with the following version of Cognos suite of tools:  4pts = Cognos v8.x; 11pts = Cognos v10.x; 15pts = both Cognos v8 and v10	15			
<b>RA6</b>	The proposed resource must demonstrate that they possess experience developing and maintaining standards, policies, and/or best practices on analytical report development (provide concrete examples and deliverables).  1pt per project to a maximum of 5pts.	5			
<b>RA7</b>	The proposed resource must demonstrate that they possess hands-on experience building Dashboards using Cognos in the past three (3) years.  3pts = up to 1yr; 7pts = 1+ yrs to 2yrs; 10pts = 2+ yrs	10			
	<b>Maximum Points</b>	<b>125</b>			
	<b>Minimum Points Required 70%</b>	<b>88</b>			

<b>B</b>	<b>Rated Requirements: Tester (A.11) - Level 3</b>	<b>Max Point s</b>	<b>Points</b>	<b>Cross Reference to Proposal</b>
<b>RB1</b>	The proposed resource must demonstrate that they possess experience documenting test plans, strategies, and designing & developing test scripts applied to testing analytical reporting solutions in a BI/EDW environment.  5pts = 2 to less than 5 yrs; 11pts = 5 to less than 7 yrs; 15pts = 7+ yrs	15		
<b>RB2</b>	The proposed resource must demonstrate that they possess experience planning and coordinating testing efforts, and identification of resources required for testing of enterprise-level applications in the role of a lead tester.  2pts per full year to a maximum of 10pts.	10		
<b>RB3</b>	The proposed resource must demonstrate that they	20		

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	possess a minimum of one years experience in the past three (3) years using the following Cognos suite of tools in the testing or development of analytical reporting solutions.  5pts = Cognos Query Studio; 5pts = Cognos Report Studio; 5pts = Cognos Analysis Studio; 5pts = Cognos Business Insight orCognos Business Insight Advanced				
<b>RB4</b>	The proposed resource must demonstrate that they possess experience in leading, facilitating, and managing user acceptance testing in the past five (5) years.  2pts per full year to a maximum of 10pts.	10			
<b>RB5</b>	The proposed resource must demonstrate that they possess experience acting as a liaison between the business process owners/clients and the IT specialists to diagnose and trouble-shoot application issues in the past five (5) years.  2pts per full year to a maximum of 10pts.	10			
<b>RB6</b>	The proposed resource must demonstrate that they possess experience in the past seven (7) years writing test scripts using PL/SQL to facilitate data testing against a back-end RDBMS.  5pts = 1yr to less than 3 yrs; 11pts = 3+yrs to less than 5 yrs; 15pts = 5+ yrs	15			
<b>RB7</b>	The proposed resource must demonstrate that they possess experience establishing and maintaining testing standards and best practices in a BI/EDW environment.  3pts = up to 1 yrs; 7pts = 1+ yrs to 3yrs; 10pts = 3+ yrs	10			
	<b>Maximum Points</b>	<b>90</b>			
	<b>Minimum Points Required 70%</b>	<b>63</b>			

<b>C</b>	<b>Rated Requirements: Data Conversaion Specialist (I.1) - Level 3</b>	<b>Max Point s</b>	<b>Points</b>	<b>Cross Reference to Proposal</b>
<b>RC1</b>	The proposed resource must demonstrate that they possess experience applying various strategies, approaches and technologies for ETL processes in an	20		

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	EDW environment, including experience with ETL tools and relational databases, and data verification and validation techniques, methods and tools.  7pts = 10yrs to less than 12 yrs; 14pts = 12+ yrs to 14 yrs; 20pts = 14+ yrs				
<b>RC2</b>	The proposed resource must demonstrate that they possess experience developing ETL scripts and jobs using IBM InfoSphere DataStage v8.1 or above.  7pts = 1 to 2yrs; 14pts = 2+ yrs to 3 yrs; 21pts = 3+ yrs to 5 yrs; 30pts = 5+ yrs	30			
<b>RC3</b>	The proposed resource must demonstrate that they possess experience working with the following development tools:  IBM InfoSphere InfoAnalyzer; IBM InfoSphere QualityStage; IBM InfoSphere Metadata Workbench; IBM InfoSphere Change Data Delivery for Information Server; IBM InfoSphere Information Server Pack for SAP Applications  10pts per tool to a maximum of 20pts.	20			
<b>RC4</b>	The proposed resource must demonstrate that they possess experience designing and implementing complex ETL jobs to support BI/EDW solutions that integrate multiple source data systems into the EDW to meet business requirements.  Number of source systems integrated in the EDW: 14 pts = 2 systems; 21pts = 3 to 5 systems; 30pts = 6 or more systems	30			
<b>RC5</b>	The proposed resource must demonstrate that they possess experience recommending, developing, and implementing ETL architectures in an EDW environment.  7pts = 1yrs to 2yrs; 14pts = 3+ yrs to 4yrs; 20pts = 4+ yrs	20			
<b>RC6</b>	The proposed resource must demonstrate that they possess experience leading a team of ETL developers in the planning, delegation, monitoring and execution of ETL work to support enterprise analytical reporting	10			
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solution development.  4pts = 6+ months to 1yr; 7pts = 1+ yr to 2yr; 10pts = 2+ yrs		
<b>Maximum Points</b>	<b>130</b>	
<b>Minimum Points Required 70%</b>	<b>91</b>	

<b>D</b>	<b>Rated Requirements: Database Modeller/IM Modeller (I.4) - Level 3</b>	<b>Max Point s</b>	<b>Points</b>	<b>Cross Reference to Proposal</b>
<b>RD1</b>	The proposed resource must demonstrate that they possess hands-on experience conducting data analysis using tools such as PL/SQL Developer.  5pts = 3yrs to 4yrs; 11pts = 4+ yrs to 5yrs; 15pts = 5+ yrs	15		
<b>RD2</b>	The proposed resource must demonstrate that they possess experience working with Oracle Designer.  3pts = up to 6 months; 7pts = 6+ months to 1yr; 10pts = 1+ yrs	10		
<b>RD3</b>	The proposed resource must demonstrate that they possess experience working cooperatively with clients, other data modellers, developers, and other technical resources, in accomplishing tasks related to the organization of data model reviews and/or JAD (Joint Application Design) sessions.  5pts = up to 5yrs; 11pts = 5+ yrs to 10yrs; 15pts = 10+yrs	15		
<b>RD4</b>	The proposed resource must demonstrate that they possess experience analyzing and transforming business requirements into data modelling requirements, which resulted in the successful implementation of logical and/or physical models for enterprise-level solution(s).  7pts = up to 5yrs; 14pts = 5+ yrs to 10yrs; 20pts = 10+yrs	20		
<b>RD5</b>	The proposed resource must demonstrate that they possess experience designing and implementing complex data models that integrate multiple source data systems into the EDW to meet business needs. Number	25		

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	of source systems integrated in the enterprise data warehouse:  9pts = 1 to 3 systems; 18pts = 4 to 6 systems; 25pts = 7 or more systems				
<b>RD6</b>	The proposed resource must demonstrate that they possess experience writing ETL specifications to support ETL development. 5pts = 1yr to less than 3 yrs; 11pts = 3+ yrs to less than 5 yrs; 15pts = 5+ yrs	15			
<b>RD7</b>	The proposed resource must demonstrate that they possess experience designing, developing, implementing and/or maintaining data models in an EDW environment to support analytical reporting using the following as source systems: 15pts = SAP Financials; 15pts = Oracle PeopleSoft	30			
	<b>Maximum Points</b>	<b>130</b>			
	<b>Minimum Points Required 70%</b>	<b>91</b>			

<b>E</b>	<b>Rated Requirements: IM Architect (I.5) - Level 3</b>	<b>Max Point s</b>	<b>Points</b>	<b>Cross Reference to Proposal</b>
<b>RE1</b>	The proposed resource must demonstrate that they possess experience recommending, designing and implementing corporate meta-data standards and processes in a Government of Canada context in the past ten (10) years.  <i>Government of Canada context is defined as: Experience in the Government of Canada context is defined as experience gained by working directly or indirectly through a sub-contract for government department(s), Crown corporations and any wholly owned subsidiary of these corporations.</i>  1pt per full year to a maximum of 5pts.	5		
<b>RE2</b>	The proposed resource must demonstrate that they possess experience recommending and developing data management standards and processes in a Government of Canada context, including but not limited to: data governance, data quality management, data stewardship, corporate reporting and data sharing.  <i>Government of Canada context is defined as: Experience in the Government of Canada context is</i>	10		



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	<p><i>defined as experience gained by working directly or indirectly through a sub-contract for government department(s), Crown corporations and any wholly owned subsidiary of these corporations.</i></p> <p>3pts = 3yrs to 4yrs; 7pts = 4+ yrs to 5yrs; 10pts = 5+ yrs</p>				
<b>RE3</b>	<p>The proposed resource must demonstrate that they possess experience analyzing and transforming business requirements into data modelling requirements, which resulted in the successful implementation of logical and/or physical models for the enterprise.</p> <p>1pt per full year to a maximum of 5pts.</p>	5			
<b>RE4</b>	<p>The proposed resource must demonstrate that they possess experience in the past five (5) years working on an enterprise-wide BI/EDW solution or set of BI solutions.</p> <p>5pts per full year to a maximum of 10pts.</p>	10			
	<b>Maximum Points</b>	<b>30</b>			
	<b>Minimum Points Required 70%</b>	<b>21</b>			

<b>F</b>	<b>Rated Requirements: Technology Architect (I.11) - Level 3</b>	<b>Max Point s</b>	<b>Points</b>	<b>Cross Reference to Proposal</b>
<b>RF1</b>	<p>The proposed resource must demonstrate that they possess experience designing, developing, and implementing enterprise-level architectures in the following technology domains:</p> <p>2pts = Application Architecture; 2pts = Information Management and Data Architecture; 2pts = Business Architecture; 2pts = Security Architecture; 2pts = Technical Architecture</p>	10		
<b>RF2</b>	<p>The proposed resource must demonstrate that they have successfully designed the architecture for an enterprise-wide BI or set of BI solutions in a large-scale environment (minimum 100 users) to support enterprise analytical reporting requirements.</p> <p>3pts = up to 100 users; 7pts = 101 to 500 users; 10pts = 500+ users</p>	10		
<b>RF3</b>	The proposed resource must demonstrate that they	10		

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possess experience in the past five (5) years working on an enterprise-wide BI/EDW solution or set of BI solutions.  5pts per full year to a maximum of 10pts.		
<b>Maximum Points</b>	<b>30</b>	
<b>Minimum Points Required 70%</b>	<b>21</b>	

<b>G</b>	<b>Rated Requirements: Project Manager (P.9) - Level 3</b>	<b>Max Point s</b>	<b>Points</b>	<b>Cross Reference to Proposal</b>
<b>RG1</b>	The proposed resource must demonstrate that they are PMP certified and maintain a current certification.  0pts = no PMP certification; 10pts = PMP certified  Note: A copy of the PMP certification with the submission of the proposal is required.	10		
<b>RG2</b>	The proposed resource must demonstrate that they possess experience within the last ten (10) years in developing documentation and presentations for a senior management audience.  5pts = 1yr to 3 yrs; 11pts = 3+ yrs to 5 yrs; 15pts = 5+ yrs	15		
<b>RG3</b>	The proposed resource must demonstrate that they possess experience delivering presentations to clients or senior management audience (directors or above) in the past ten (10) years.  3pts = up to 3yrs; 7pts = 3+ yrs to 5yrs; 10pts = 5+ yrs	10		
<b>RG4</b>	The proposed resource must demonstrate that they have successfully planned and managed, in the role of Project Manager, an enterprise-wide BI/EDW solution or set of BI solutions.  10pts = less than 100 users; 15pts = 100 to 200 users; 25pts = 201 to 500 users; 35pts = 500+ users	35		
<b>RG5</b>	The proposed resource must demonstrate that they possess experiencing managing a BI project that produces analytical reporting from an Enterprise Data Warehouse.	20		

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	7pts = 1+ yrs to 2yrs; 14pts = 2+ yrs to 5yrs; 20pts = 5+ yrs				
<b>RG6</b>	The proposed resource must demonstrate that they possess experience in the past twelve (12) years leading multi-disciplinary project teams of eight (8) or more resources in the role of a project manager.  7pts = 3 yrs to 5yrs; 14pts = 5+ yrs to 8yrs; 20pts = 8+ yrs	20			
<b>RG7</b>	The proposed resource must demonstrate that they possess experience working with the following Cognos suite of tools:  10pts = Cognos Query Studio; 10pts = Cognos Report Studio; 10pts = Cognos Analysis Studio; 10pts = Cognos Business Insight or Cognos Business Insight Advanced  Note: "Experience" means a minimum of six (6) months experience in the past five (5) years is required.	40			
	<b>Maximum Points</b>	<b>150</b>			
	<b>Minimum Points Required 70%</b>	<b>105</b>			

<b>H</b>	<b>Rated Requirements: Business Analyst (B.1) - Level 3</b>	<b>Max Point s</b>	<b>Points</b>	<b>Cross Reference to Proposal</b>
<b>RH1</b>	The proposed resource must demonstrate that they possess experience in the past ten (10) years working as a business analyst to support BI/EDW and/or analytical reporting solution development and maintenance.  15pts = 2+ yrs to 3yrs; 25pts = 3+ yrs to 5yrs; 35pts = 5+ yrs to 7yrs; 50pts = 7+ years	50		
<b>RH2</b>	The proposed resource must demonstrate that they possess experience in the past fifteen (15) years facilitating, chairing, coordinating and leading Joint-Application-Development (JAD) sessions, working groups, and/or client meetings.  7pts = 5yrs to less than 8 yrs; 14pts = 8 yrs to 10 yrs; 20pts = 10+ yrs	20		

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<b>RH3</b>	<p>The proposed resource must demonstrate that they possess experience working with each of the following Cognos suite of tools:</p> <p>10pts = Cognos Query Studio or Cognos Analysis Studio; 10pts= Cognos Report Studio; 10pts = Cognos Business Insight or Cognos Business Insight Advanced</p> <p>Note: "Experience" means a minimum of six (6) months experience in the past five (5) years is required.</p>	30		
<b>RH4</b>	<p>The proposed resource must demonstrate that they possess experience in the past ten (10) years developing documentation and presentations for a variety of audiences, including but not limited to: senior management, business clients, and technical specialists.</p> <p>7pts = 1yr to 3yrs; 14pts = 3+ yrs to 5yrs; 20pts = 5+ yrs</p>	20		
<b>RH5</b>	<p>The proposed resource must demonstrate that they possess experience delivering presentations to clients or senior management audience (directors or above) in the past three (3) years. 3pts = up to 1yr; 7pts = 1+ yrs to 2yrs; 10pts = 2+ yrs</p>	10		
<b>RH6</b>	<p>The proposed resource must demonstrate that they possess experience in the past fifteen (15) years in gathering, analyzing, and documenting requirements, in support of developing complex, enterprise IM/IT solutions in the Government of Canada context.</p> <p>7pts = 5yrs to 8 yrs; 14pts = 8+ yrs to 10 yrs; 20pts = 10+ yrs</p> <p><i>Government of Canada context is defined as: experience gained by working directly or indirectly through a sub-contract for government department(s), Crown corporations and any wholly owned subsidiary of these corporations.</i></p>	20		
	<b>Maximum Points</b>	<b>150</b>		
	<b>Minimum Points Required 70%</b>	<b>105</b>		

<b>I</b>	<b>Rated Requirements: Instructor, IT (B.11) - Level 2</b>	<b>Max Point s</b>	<b>Points</b>	<b>Cross Reference to Proposal</b>
<b>RI1</b>	The proposed resource must demonstrate that they possess experience in the past ten (10) years	25		

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	<p>developing BI solutions and/or analytical reporting solution training materials, including but not limited to training plans, presentations and user manuals.</p> <p>9pts = 1yr to 3 yrs; 18pts = 3+ yrs to 5 yrs; 25pts = 5+ yrs</p>				
<b>R12</b>	<p>The proposed resource must demonstrate that they possess experience in the past ten (10) years facilitating and delivering BI solution and/or analytical reporting solution training sessions to end-users.</p> <p>9pts = 1yr to 3 yrs; 18pts = 3+ yrs to 5 yrs; 25pts = 5+ yrs</p>	25			
<b>R13</b>	<p>The proposed resource must demonstrate that they possess experience in the past ten (10) years working in a matrix IM/IT environment, managing and maintaining client and stakeholder relationships.</p> <p>5pts = 2yrs to 3 yrs; 11pts = 3+ yrs to 5 yrs; 15pts = 5+ yrs</p>	15			
<b>R14</b>	<p>The proposed resource must demonstrate that they possess experience working with the following Cognos suite of tools:</p> <p>10pts = Cognos Query Studio or Cognos Analysis Studio; 10pts = Cognos Report Studio; 10pts = Cognos Business Insight or Cognos Business Insight Advanced</p> <p>Note: "Experience" means a minimum of six (6) months experience in the past five (5) years is required.</p>	30			
<b>R15</b>	<p>The proposed resource must demonstrate that they possess experience delivering end-user training in French.</p> <p>0pts = no experience in delivering end-user training in French; 20pts: demonstrated experience in delivering end-user training in French.</p> <p>Note: "Experience" means a minimum of six (6) months experience in the past three (3) years is required.</p>	20			
<b>R16</b>	<p>The proposed resource must demonstrate that they possess experience developing eLearning modules for end-user training.</p> <p>0pts = no experience in developing eLearning modules for end-user training;</p>	20			
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	20pts = demonstrated that they possess experience developing eLearning modules for end-user training.  Note: "Experience" means a minimum of six (6) months experience in the past three (3) years is required.				
	<b>Maximum Points</b>	<b>135</b>			
	<b>Minimum Points Required 70%</b>	<b>95</b>			

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## ANNEX E

### RESOURCE ASSESSMENT CRITERIA AND RESPONSE TABLE

**1.0** The following grid is to assess resources at TA stage. 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.

#### **2.0 Mandatory Resource Assessment Criteria:**

<b>A</b>	<b>Mandatory Requirements: Programmer / Analyst (A.7) - Level 3</b>	<b>Cross Reference to Proposal</b>	<b>Met Y/N</b>
<b>MA1</b>	The proposed resource must demonstrate that they possess five (5) full years of experience in the past ten (10) years in designing and developing end user access solutions with Cognos BI tool suites.		
<b>MA2</b>	The proposed resource must demonstrate that they possess five (5) full years of hands-on experience in the past eight (8) years with Cognos Business Intelligence including Cognos Framework Manager, Query Studio and Report Studio.		
<b>MA3</b>	The proposed resource must demonstrate that they possess five (5) full years of experience working on complex BI solutions with enterprise data warehouse and data marts in the role of a BI developer, in the past eight (8) years.		
<b>MA4</b>	The proposed resource must demonstrate that they possess ten (10) full years of experience working in a multi-disciplinary team environment, interacting with other resources such as project managers, ETL developers, BI developers, other technical resources and clients.		

<b>B</b>	<b>Mandatory Requirements: Tester (A.11) - Level 3</b>	<b>Cross Reference to Proposal</b>	<b>Met Y/N</b>
<b>MB1</b>	The proposed resource must demonstrate that they possess ten (10) full years of experience designing, developing and executing testing strategies, plans and scripts for large, enterprise-level systems (minimum 100 users).		

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<b>MB2</b>	The proposed resource must demonstrate that they possess two (2) full years of experience in the past five (5) years developing, conducting and monitoring testing solutions in a BI/EDW environment. Note: Experience may include testing for both component and integration testing for ETL or BI products.		
<b>MB3</b>	The proposed resource must demonstrate that they possess two (2) full years of experience in the past five (5) years planning, coordinating, and reporting on testing efforts for large enterprise-level systems (minimum 100 users).		
<b>MB4</b>	The proposed resource must demonstrate that they possess three (3) full years of experience in the past five (5) years facilitating user acceptance testing with clients, and documenting testing progress and results.		

<b>C</b>	<b>Mandatory Requirements: Data Conversion Specialist (I.1) - Level 3</b>	<b>Cross Reference to Proposal</b>	<b>Met Y/N</b>
<b>MC1</b>	The proposed resource must demonstrate that they possess ten (10) full years of experience in the past fifteen (15) years applying various strategies, approaches and technologies for ETL (extract, transform, load) processes in an EDW environment, including experience with ETL tools and relational databases, and data verification and validation techniques, methods and tools.		
<b>MC2</b>	The proposed resource must demonstrate that they possess one (1) full year of hands-on experience in the past three (3) years developing ETL jobs and scripts with IBM InfoSphere DataStage Enterprise Edition (version 8 or above).		
<b>MC3</b>	The proposed resource must demonstrate that they possess five (5) full years of experience in the past eight (8) years working with Oracle RBDMS (version 8 or above).		
<b>MC4</b>	The proposed resource must demonstrate that they possess ten (10) full years of experience in the past fifteen (15) years using PL/SQL language to perform data conversion related work for ETL development.		



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<b>D</b>	<b>Mandatory Requirements: Database Modeller/IM Modeller (I.4) - Level 3</b>	<b>Cross Reference to Proposal</b>	<b>Met Y/N</b>
<b>MD1</b>	The proposed resource must demonstrate that they possess five (5) full years of experience in the design, development and maintenance of data models in BI/EDW environments.		
<b>MD2</b>	The proposed resource must demonstrate that they possess ten (10) full years of experience in the past fifteen (15) years designing, developing and maintaining enterprise-level logical and physical data models that integrate data from multiple source applications.		
<b>MD3</b>	The proposed resource must demonstrate that they possess ten (10) full years of experience in the past fifteen (15) years analyzing source data systems' structures, logic, and their business relationships and integration flows.		
<b>MD4</b>	The proposed resource must demonstrate that they possess five (5) full years of experience in the past eight (8) years designing, developing and managing relational database management systems for large-scaled enterprise applications of over 500 end-users.		

<b>E</b>	<b>Mandatory Requirements: IM Architect (I.5) - Level 3</b>	<b>Cross Reference to Proposal</b>	<b>Met Y/N</b>
<b>ME1</b>	<p>The proposed resource must demonstrate that they possess three (3) full years experience recommending and developing data management standards and processes in a Government of Canada context to senior management (Director and above), including but not limited to: data governance, data quality management, data stewardship, corporate reporting and data sharing.</p> <p><i>Government of Canada context is defined as: experience gained by working directly or indirectly through a sub-contract for government department(s), Crown corporations and any wholly owned subsidiary of these corporations.</i></p>		

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<b>F</b>	<b>Mandatory Requirements: Technology Architect (I.11) - Level 3</b>	<b>Cross Reference to Proposal</b>	<b>Met Y/N</b>
<b>MF1</b>	The proposed resource must demonstrate that they possess five (5) full years experience leading and conducting assessments of enterprise IM/IT environments, researching and evaluating technology solutions, and recommending technical options and costing analysis to senior management (Director and above) to fulfill business requirements.		

<b>G</b>	<b>Mandatory Requirements: Project Manager (P.9) - Level 3</b>	<b>Cross Reference to Proposal</b>	<b>Met Y/N</b>
<b>MG1</b>	The proposed resource must demonstrate that they possess three (3) full years of experience in the past ten (10) years managing enterprise level BI/EDW and/or analytical reporting projects (over 100 users).		
<b>MG2</b>	The proposed resource must demonstrate that they possess five (5) full years of experience in the past ten (10) years managing complex, enterprise-level IM/IT projects in the Government of Canada context. <i>Government of Canada context is defined as: experience gained by working directly or indirectly through a sub-contract for government department(s), Crown corporations and any wholly owned subsidiary of these corporations.</i>		
<b>MG3</b>	The proposed resource must demonstrate that they possess five (5) full years experience within the last ten (10) years as a Project Manager involved in projects in excess of \$1 million CAD in the IM/IT field using PMBOK best practices.		
<b>MG4</b>	The proposed resource must demonstrate that they possess ten (10) full years of experience in the management of IM/IT technical resources in a cross-functional IM/IT service delivery environment.		

<b>H</b>	<b>Mandatory Requirements: Business Analyst (B.1) - Level 3</b>	<b>Cross Reference to Proposal</b>	<b>Met Y/N</b>
<b>MH1</b>	The proposed resource must demonstrate that		

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	they possess five (5) full years of experience in the past eight (8) years in gathering, analyzing, and documenting requirements, in support of developing complex, enterprise IM/IT solutions.				
<b>MH2</b>	The proposed resource must demonstrate that they possess two (2) full years of experience in the past five (5) years working as a business analyst in the development of maintenance of enterprise level BI/EDW solutions and/or analytical reporting applications.				
<b>MH3</b>	The proposed resource must demonstrate that they possess ten (10) full years of experience working as a business analyst, developing business requirement documentation, including but not limited to Business Requirement Document, Functional Specification Document and Use Cases.				
<b>MH4</b>	The proposed resource must demonstrate that they possess five (5) full years of experience in the past eight (8) years developing, managing, and maintaining client and stakeholder relationships.				
<b>MH5</b>	The proposed resource must demonstrate that they possess five (5) full years of experience in the past eight (8) years facilitating, chairing, coordinating and leading Joint-Application-Development (JAD) sessions, working groups, and client meetings.				
<b>MH6</b>	The proposed resource must demonstrate that they possess five (5) full years working in a matrix environment, representing the technical development team in discussions with clients, functional specialists, and IM/IT specialists to influence and obtain agreement on the requirements for technology services.				

<b>I</b>	<b>Mandatory Requirements: Instructor, IT (B.11) - Level 2</b>	<b>Cross Reference to Proposal</b>	<b>Met Y/N</b>
<b>MI1</b>	The proposed resource must demonstrate that they possess five (5) full years of experience in the past eight (8) years developing IT application solution training materials, such as training plan, presentation and user manuals.		
<b>MI2</b>	The proposed resource must demonstrate that they possess two (2) full years of		

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	experience in the past five (5) years facilitating and delivering IT application solution training sessions to end-users.				
<b>MI3</b>	The proposed resource must demonstrate that they possess two (2) full years of experience in the past five (5) years working in a matrix IM/IT environment, managing and maintaining client and stakeholder relationships.				

<b>J</b>	<b>Mandatory Requirements: Programmer / Analyst (A.7) - Level 2</b>	<b>Cross Reference to Proposal</b>	<b>Met Y/N</b>
<b>MJ1</b>	Minimum two (2) years of experience in the past five (5) years in designing and developing end user access solutions with Cognos BI tool suites.		
<b>MJ2</b>	Minimum two (2) years of hands-on experience in the past five (5) years with Cognos Business Intelligence and Cognos Framework Manager, Query Studio and Report Studio.		
<b>MJ3</b>	Minimum two (2) years of experience in the past five (5) years working on complex BI solutions with enterprise data warehouse and data marts in the role of a BI developer.		
<b>MJ4</b>	Minimum five (5) years of experience working in a multi-disciplinary team environment, interacting with other resources such as project managers, ETL developers, BI developers, other technical resources and clients.		

<b>K</b>	<b>Mandatory Requirements: Tester (A.11) - Level 2</b>	<b>Cross Reference to Proposal</b>	<b>Met Y/N</b>
<b>MK1</b>	Minimum five (5) years of experience in the past ten (10) years designing, developing and executing testing strategies, plans and scripts for large, enterprise-level systems (minimum 100 users).		
<b>MK2</b>	Minimum one (1) year of experience in the past three (3) years developing, conducting and monitoring testing solutions in a BI/EDW environment.  Note: Experience may include testing for both component and integration testing for ETL or BI products.		

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<b>MK3</b>	Minimum two (2) years of experience in the past five (5) years planning, coordinating, and reporting on testing efforts for large enterprise-level systems (minimum 100 users).		
<b>MK4</b>	Minimum two (2) years of experience in the past five (5) years facilitating user acceptance testing with clients, and documenting testing progress and results.		

<b>L</b>	<b>Mandatory Requirements: Data Conversion Specialist (I.1) - Level 2</b>	<b>Cross Reference to Proposal</b>	<b>Met Y/N</b>
<b>ML1</b>	Minimum five (5) years of experience in the past eight (8) years applying various strategies, approaches and technologies for ETL (extract, transform, load) processes in an EDW environment, including experience with ETL tools and relational databases, and data verification and validation techniques, methods and tools.		
<b>ML2</b>	Minimum six (6) months of hands-on experience in the past two (2) years developing ETL jobs and scripts with IBM InfoSphere DataStage Enterprise Edition (version 8.x or above).		
<b>ML3</b>	Minimum two (2) years of experience in the past five (5) years working with Oracle RDBMS (version 8.x or above).		
<b>ML4</b>	Minimum five (5) years of experience in the past eight (8) years using PL/SQL language to perform data conversion related work for ETL development.		

<b>M</b>	<b>Mandatory Requirements: Business Analyst (B.1) - Level 2</b>	<b>Cross Reference to Proposal</b>	<b>Met Y/N</b>
<b>MM1</b>	Minimum three (3) years of experience in the past five (5) years in gathering, analyzing, and documenting requirements, in support of developing complex, enterprise IM/IT solutions.		
<b>MM2</b>	Minimum one (1) year of experience in the past three (3) years working as a business analyst in the development or maintenance of enterprise level BI/EDW solutions and/or analytical reporting applications.		

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<b>MM3</b>	Minimum five (5) years of experience in the past ten (10) years working as a business analyst, developing business requirement documentation, including but not limited to Business Requirement Document, Functional Specification Document and Use Cases.				
<b>MM4</b>	Minimum three (3) years of experience in the past five (5) years developing, managing, and maintaining client and stakeholder relationships.				
<b>MM5</b>	Minimum three (3) years of experience in the past five (5) years facilitating, chairing, coordinating and leading Joint-Application-Development (JAD) sessions, working groups, and client meetings.				
<b>MM6</b>	Minimum three (3) years working in a matrix environment, representing the technical development team in discussions with clients, functional specialists, and IM/IT specialists to influence and obtain agreement on the requirements for technology services.				

<b>N</b>	<b>Mandatory Requirements: Project Manager (P.9) - Level 2</b>	<b>Cross Reference to Proposal</b>	<b>Met Y/N</b>
<b>MN1</b>	Minimum one (1) year of experience in the past five (5) years managing enterprise level BI/EDW and/or analytical reporting projects (over 100 users).		
<b>MN2</b>	Minimum three (3) years of experience in the past five (5) years managing complex, enterprise-level IM/IT projects in the Government of Canada context.  <i>Government of Canada context is defined as: experience gained by working directly or indirectly through a sub-contract for government department(s), Crown corporations and any wholly owned subsidiary of these corporations.</i>		
<b>MN3</b>	Minimum three (3) years experience within the last five (5) years as a Project Manager involved in projects in excess of \$1 million CAD in the IM/IT field using PMBOK best practices.		

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<b>MN4</b>	Minimum five (5) years of experience in the management of IM/IT technical resources in a cross-functional IM/IT service delivery environment.				

<b>O</b>	<b>Mandatory Requirements: Project Administrator (P.6) - Level 1</b>	<b>Cross Reference to Proposal</b>	<b>Met Y/N</b>
<b>MO1</b>	Minimum of two (2) years of experience within the last three (3) directly providing administration services.		
<b>MO2</b>	Minimum of one (1) year of experience within the last three (3) years scheduling and coordinating meetings.		
<b>MO3</b>	Minimum of one (1) year of experience within the last three (3) years in developing and facilitating written deliverables such as meeting agenda, minutes, and reports.		
<b>MO4</b>	Minimum of one (1) year of experience within the last three (3) years in preparing communication material to clients and staff.		

### 3.0 Point Rated Resource Assessment Criteria:

<b>A</b>	<b>Rated Requirements: Programmer / Analyst (A.7) - Level 3</b>	<b>Max Point s</b>	<b>Points</b>	<b>Cross Reference to Proposal</b>
<b>RA1</b>	The proposed resource must demonstrate that they possess experience working with Cognos suite of tools to develop analytical reports.  5pts = 5+ yrs to 7yrs; 11pts = 7+ yrs to 10yrs; 15pts = 10+ yrs	15		
<b>RA2</b>	The proposed resource must demonstrate that they possess hands-on experience in the past five (5) years developing BI solutions using Cognos Business Intelligence suite of tools:  10pts = Framework Manager; 10pts = Transformer and Analysis; 3pts = Query Studio; 2pts = Report Studio; 2pts = Contributor Web; 2pts = Business Insight;	50		

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	5pts = Business Insight Advanced; 10pts = Enterprise Planning (Analyst and Planning and Contributor Administration); 3pts = Page (for Dashboard);and 3pts = Analysis Studio				
<b>RA3</b>	The proposed resource must demonstrate that they possess experience working as a BI developer in the past five (5) years developing an enterprise-wide BI/EDW solution or set of solutions in a large-scale corporate environment.  2pts = less than 100 users; 5pts = 100 to 500 users; 11pts = 501 to 1000 users; 15pts = 1000+ users	15			
<b>RA4</b>	The proposed resource must demonstrate that they possess hands-on experience in the past eight (8) years modeling in Framework Manager.  5pts = 1yr to less than 3 yrs; 11pts = 3+yrs to less than 5 yrs; 15pts = 5+ yrs	15			
<b>RA5</b>	The proposed resource must demonstrate that they possess hands-on experience with the following version of Cognos suite of tools:  4pts = Cognos v8.x; 11pts = Cognos v10.x; 15pts = both Cognos v8 and v10	15			
<b>RA6</b>	The proposed resource must demonstrate that they possess experience developing and maintaining standards, policies, and/or best practices on analytical report development (provide concrete examples and deliverables).  1pt per project to a maximum of 5pts.	5			
<b>RA7</b>	The proposed resource must demonstrate that they possess hands-on experience building Dashboards using Cognos in the past three (3) years.  3pts = up to 1yr; 7pts = 1+ yrs to 2yrs; 10pts = 2+ yrs	10			
	<b>Maximum Points</b>	<b>125</b>			
	<b>Minimum Points Required 70%</b>	<b>88</b>			

<b>B</b>	<b>Rated Requirements: Tester (A.11) - Level 3</b>	<b>Max Point</b>	<b>Points</b>	<b>Cross Reference to Proposal</b>
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		<b>S</b>			
<b>RB1</b>	<p>The proposed resource must demonstrate that they possess experience documenting test plans, strategies, and designing &amp; developing test scripts applied to testing analytical reporting solutions in a BI/EDW environment.</p> <p>5pts = 2 to less than 5 yrs; 11pts = 5 to less than 7 yrs; 15pts = 7+ yrs</p>	15			
<b>RB2</b>	<p>The proposed resource must demonstrate that they possess experience planning and coordinating testing efforts, and identification of resources required for testing of enterprise-level applications in the role of a lead tester.</p> <p>2pts per full year to a maximum of 10pts.</p>	10			
<b>RB3</b>	<p>The proposed resource must demonstrate that they possess a minimum of one years experience in the past three (3) years using the following Cognos suite of tools in the testing or development of analytical reporting solutions.</p> <p>5pts = Cognos Query Studio; 5pts = Cognos Report Studio; 5pts = Cognos Analysis Studio; 5pts = Cognos Business Insight orCognos Business Insight Advanced</p>	20			
<b>RB4</b>	<p>The proposed resource must demonstrate that they possess experience in leading, facilitating, and managing user acceptance testing in the past five (5) years.</p> <p>2pts per full year to a maximum of 10pts.</p>	10			
<b>RB5</b>	<p>The proposed resource must demonstrate that they possess experience acting as a liaison between the business process owners/clients and the IT specialists to diagnose and trouble-shoot application issues in the past five (5) years.</p> <p>2pts per full year to a maximum of 10pts.</p>	10			
<b>RB6</b>	<p>The proposed resource must demonstrate that they possess experience in the past seven (7) years writing test scripts using PL/SQL to facilitate data testing against a back-end RDBMS.</p> <p>5pts = 1yr to less than 3 yrs; 11pts = 3+ yrs to less than 5 yrs; 15pts = 5+ yrs</p>	15			
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<b>RB7</b>	The proposed resource must demonstrate that they possess experience establishing and maintaining testing standards and best practices in a BI/EDW environment.  3pts = up to 1 yrs; 7pts = 1+ yrs to 3yrs; 10pts = 3+ yrs	10			
	<b>Maximum Points</b>	<b>90</b>			
	<b>Minimum Points Required 70%</b>	<b>63</b>			

<b>C</b>	<b>Rated Requirements: Data Conversaion Specialist (I.1) - Level 3</b>	<b>Max Point s</b>	<b>Points</b>	<b>Cross Reference to Proposal</b>
<b>RC1</b>	The proposed resource must demonstrate that they possess experience applying various strategies, approaches and technologies for ETL processes in an EDW environment, including experience with ETL tools and relational databases, and data verification and validation techniques, methods and tools.  7pts = 10yrs to less than 12 yrs; 14pts = 12+ yrs to 14 yrs; 20pts = 14+ yrs	20		
<b>RC2</b>	The proposed resource must demonstrate that they possess experience developing ETL scripts and jobs using IBM InfoSphere DataStage v8.1 or above.  7pts = 1 to 2yrs; 14pts = 2+ yrs to 3 yrs; 21pts: 3+ yrs to 5 yrs; 30pts = 5+ yrs	30		
<b>RC3</b>	The proposed resource must demonstrate that they possess experience working with the following development tools:  IBM InfoSphere InfoAnalyzer; IBM InfoSphere QualityStage; IBM InfoSphere Metadata Workbench; IBM InfoSphere Change Data Delivery for Information Server; IBM InfoSphere Information Server Pack for SAP Applications  10pts per tool to a maximum of 20pts.	20		
<b>RC4</b>	The proposed resource must demonstrate that they possess experience designing and implementing complex ETL jobs to support BI/EDW solutions that integrate multiple source data systems into the EDW	30		

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	to meet business requirements.  Number of source systems integrated in the EDW: 14 pts = 2 systems; 21pts = 3 to 5 systems; 30pts = 6 or more systems				
<b>RC5</b>	The proposed resource must demonstrate that they possess experience recommending, developing, and implementing ETL architectures in an EDW environment.  7pts = 1yrs to 2yrs; 14pts = 3+ yrs to 4yrs; 20pts = 4+ yrs	20			
<b>RC6</b>	The proposed resource must demonstrate that they possess experience leading a team of ETL developers in the planning, delegation, monitoring and execution of ETL work to support enterprise analytical reporting solution development.  4pts = 6+ months to 1yr; 7pts = 1+ yr to 2yr; 10pts = 2+ yrs	10			
	<b>Maximum Points</b>	<b>130</b>			
	<b>Minimum Points Required 70%</b>	<b>91</b>			

<b>D</b>	<b>Rated Requirements: Database Modeller/IM Modeller (I.4) - Level 3</b>	<b>Max Point s</b>	<b>Points</b>	<b>Cross Reference to Proposal</b>
<b>RD1</b>	The proposed resource must demonstrate that they possess hands-on experience conducting data analysis using tools such as PL/SQL Developer.  5pts = 3yrs to 4yrs; 11pts = 4+ yrs to 5yrs; 15pts = 5+ yrs	15		
<b>RD2</b>	The proposed resource must demonstrate that they possess experience working with Oracle Designer.  3pts = up to 6 months; 7pts = 6+ months to 1yr; 10pts = 1+ yrs	10		
<b>RD3</b>	The proposed resource must demonstrate that they possess experience working cooperatively with clients, other data modellers, developers, and other technical resources, in accomplishing tasks related to the organization of data model reviews and/or JAD (Joint Application Design) sessions.	15		

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	5pts = up to 5yrs; 11pts = 5+ yrs to 10yrs; 15pts = 10+yrs				
<b>RD4</b>	The proposed resource must demonstrate that they possess experience analyzing and transforming business requirements into data modelling requirements, which resulted in the successful implementation of logical and/or physical models for enterprise-level solution(s).  7pts = up to 5yrs; 14pts = 5+ yrs to 10yrs; 20pts = 10+yrs	20			
<b>RD5</b>	The proposed resource must demonstrate that they possess experience designing and implementing complex data models that integrate multiple source data systems into the EDW to meet business needs. Number of source systems integrated in the enterprise data warehouse:  9pts = 1 to 3 systems; 18pts = 4 to 6 systems; 25pts = 7 or more systems	25			
<b>RD6</b>	The proposed resource must demonstrate that they possess experience writing ETL specifications to support ETL development. 5pts = 1yr to less than 3 yrs; 11pts = 3+ yrs to less than 5 yrs; 15pts = 5+ yrs	15			
<b>RD7</b>	The proposed resource must demonstrate that they possess experience designing, developing, implementing and/or maintaining data models in an EDW environment to support analytical reporting using the following as source systems: 15pts = SAP Financials; 15pts = Oracle PeopleSoft	30			
	<b>Maximum Points</b>	<b>130</b>			
	<b>Minimum Points Required 70%</b>	<b>91</b>			

<b>E</b>	<b>Rated Requirements: IM Architect (I.5) - Level 3</b>	<b>Max Point s</b>	<b>Points</b>	<b>Cross Reference to Proposal</b>
<b>RE1</b>	The proposed resource must demonstrate that they possess experience recommending, designing and implementing corporate meta-data standards and processes in a Government of Canada context in the past ten (10) years.	5		

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	<p><i>Government of Canada context is defined as: Experience in the Government of Canada context is defined as experience gained by working directly or indirectly through a sub-contract for government department(s), Crown corporations and any wholly owned subsidiary of these corporations.</i></p> <p>1pt per full year to a maximum of 5pts.</p>				
<b>RE2</b>	<p>The proposed resource must demonstrate that they possess experience recommending and developing data management standards and processes in a Government of Canada context, including but not limited to: data governance, data quality management, data stewardship, corporate reporting and data sharing.</p> <p><i>Government of Canada context is defined as: Experience in the Government of Canada context is defined as experience gained by working directly or indirectly through a sub-contract for government department(s), Crown corporations and any wholly owned subsidiary of these corporations.</i></p> <p>3pts = 3yrs to 4yrs; 7pts = 4+ yrs to 5yrs; 10pts = 5+ yrs</p>	10			
<b>RE3</b>	<p>The proposed resource must demonstrate that they possess experience analyzing and transforming business requirements into data modelling requirements, which resulted in the successful implementation of logical and/or physical models for the enterprise.</p> <p>1pt per full year to a maximum of 5pts.</p>	5			
<b>RE4</b>	<p>The proposed resource must demonstrate that they possess experience in the past five (5) years working on an enterprise-wide BI/EDW solution or set of BI solutions.</p> <p>5pts per full year to a maximum of 10pts.</p>	10			
	<b>Maximum Points</b>	<b>30</b>			
	<b>Minimum Points Required 70%</b>	<b>21</b>			

<b>F</b>	<b>Rated Requirements: Technology Architect (I.11) - Level 3</b>	<b>Max Point s</b>	<b>Points</b>	<b>Cross Reference to Proposal</b>
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<b>RF1</b>	The proposed resource must demonstrate that they possess experience designing, developing, and implementing enterprise-level architectures in the following technology domains:  2pts = Application Architecture; 2pts = Information Management and Data Architecture; 2pts = Business Architecture; 2pts = Security Architecture; 2pts = Technical Architecture	10			
<b>RF2</b>	The proposed resource must demonstrate that they have successfully designed the architecture for an enterprise-wide BI or set of BI solutions in a large-scale environment (minimum 100 users) to support enterprise analytical reporting requirements.  3pts = up to 100 users; 7pts = 101 to 500 users; 10pts = 500+ users	10			
<b>RF3</b>	The proposed resource must demonstrate that they possess experience in the past five (5) years working on an enterprise-wide BI/EDW solution or set of BI solutions.  5pts per full year to a maximum of 10pts.	10			
	<b>Maximum Points</b>	<b>30</b>			
	<b>Minimum Points Required 70%</b>	<b>21</b>			

<b>G</b>	<b>Rated Requirements: Project Manager (P.9) - Level 3</b>	<b>Max Point s</b>	<b>Points</b>	<b>Cross Reference to Proposal</b>
<b>RG1</b>	The proposed resource must demonstrate that they are PMP certified and maintain a current certification.  0pts = no PMP certification; 10pts = PMP certified  Note: A copy of the PMP certification with the submission of the proposal is required.	10		
<b>RG2</b>	The proposed resource must demonstrate that they possess experience within the last ten (10) years in developing documentation and presentations for a senior management audience.  5pts = 1yr to 3 yrs; 11pts = 3+ yrs to 5 yrs; 15pts = 5+ yrs	15		
<b>RG3</b>	The proposed resource must demonstrate that they	10		

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	possess experience delivering presentations to clients or senior management audience (directors or above) in the past ten (10) years.  3pts = up to 3yrs; 7pts = 3+ yrs to 5yrs; 10pts = 5+ yrs				
<b>RG4</b>	The proposed resource must demonstrate that they have successfully planned and managed, in the role of Project Manager, an enterprise-wide BI/EDW solution or set of BI solutions.  10pts = less than 100 users; 15pts = 100 to 200 users; 25pts = 201 to 500 users; 35pts = 500+ users	35			
<b>RG5</b>	The proposed resource must demonstrate that they possess experiencing managing a BI project that produces analytical reporting from an Enterprise Data Warehouse.  7pts = 1+ yrs to 2yrs; 14pts = 2+ yrs to 5yrs; 20pts = 5+ yrs	20			
<b>RG6</b>	The proposed resource must demonstrate that they possess experience in the past twelve (12) years leading multi-disciplinary project teams of eight (8) or more resources in the role of a project manager.  7pts = 3 yrs to 5yrs; 14pts = 5+ yrs to 8yrs; 20pts = 8+ yrs	20			
<b>RG7</b>	The proposed resource must demonstrate that they possess experience working with the following Cognos suite of tools:  10pts = Cognos Query Studio; 10pts = Cognos Report Studio; 10pts = Cognos Analysis Studio; 10pts = Cognos Business Insight or Cognos Business Insight Advanced  Note: "Experience" means a minimum of six (6) months experience in the past five (5) years is required.	40			
	<b>Maximum Points</b>	<b>150</b>			
	<b>Minimum Points Required 70%</b>	<b>105</b>			

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<b>H</b>	<b>Rated Requirements: Business Analyst (B.1) - Level 3</b>	<b>Max Point s</b>	<b>Points</b>	<b>Cross Reference to Proposal</b>
<b>RH1</b>	<p>The proposed resource must demonstrate that they possess experience in the past ten (10) years working as a business analyst to support BI/EDW and/or analytical reporting solution development and maintenance.</p> <p>15pts = 2+ yrs to 3yrs; 25pts = 3+ yrs to 5yrs; 35pts = 5+ yrs to 7yrs; 50pts = 7+ years</p>	50		
<b>RH2</b>	<p>The proposed resource must demonstrate that they possess experience in the past fifteen (15) years facilitating, chairing, coordinating and leading Joint-Application-Development (JAD) sessions, working groups, and/or client meetings.</p> <p>7pts = 5yrs to less than 8 yrs; 14pts = 8 yrs to 10 yrs; 20pts = 10+ yrs</p>	20		
<b>RH3</b>	<p>The proposed resource must demonstrate that they possess experience working with each of the following Cognos suite of tools:</p> <p>10pts = Cognos Query Studio or Cognos Analysis Studio; 10pts= Cognos Report Studio; 10pts = Cognos Business Insight or Cognos Business Insight Advanced</p> <p>Note: "Experience" means a minimum of six (6) months experience in the past five (5) years is required.</p>	30		
<b>RH4</b>	<p>The proposed resource must demonstrate that they possess experience in the past ten (10) years developing documentation and presentations for a variety of audiences, including but not limited to: senior management, business clients, and technical specialists.</p> <p>7pts = 1yr to 3yrs; 14pts = 3+ yrs to 5yrs; 20pts = 5+ yrs</p>	20		
<b>RH5</b>	<p>The proposed resource must demonstrate that they possess experience delivering presentations to clients or senior management audience (directors or above) in the past three (3) years.3pts = up to 1yr;7pts = 1+ yrs to 2yrs;10pts = 2+ yrs</p>	10		
<b>RH6</b>	<p>The proposed resource must demonstrate that they possess experience in the past fifteen (15) years in</p>	20		



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	gathering, analyzing, and documenting requirements, in support of developing complex, enterprise IM/IT solutions in the Government of Canada context.  7pts = 5yrs to 8 yrs; 14pts = 8+ yrs to 10 yrs; 20pts = 10+ yrs  <i>Government of Canada context is defined as: experience gained by working directly or indirectly through a sub-contract for government department(s), Crown corporations and any wholly owned subsidiary of these corporations.</i>				
	<b>Maximum Points</b>	<b>150</b>			
	<b>Minimum Points Required 70%</b>	<b>105</b>			

I	Rated Requirements: Instructor, IT (B.11) - Level 2	Max Point s	Points	Cross Reference to Proposal
<b>RI1</b>	The proposed resource must demonstrate that they possess experience in the past ten (10) years developing BI solutions and/or analytical reporting solution training materials, including but not limited to training plans, presentations and user manuals.  9pts = 1yr to 3 yrs; 18pts = 3+ yrs to 5 yrs; 25pts = 5+ yrs	25		
<b>RI2</b>	The proposed resource must demonstrate that they possess experience in the past ten (10) years facilitating and delivering BI solution and/or analytical reporting solution training sessions to end-users.  9pts = 1yr to 3 yrs; 18pts = 3+ yrs to 5 yrs; 25pts = 5+ yrs	25		
<b>RI3</b>	The proposed resource must demonstrate that they possess experience in the past ten (10) years working in a matrix IM/IT environment, managing and maintaining client and stakeholder relationships.  5pts = 2yrs to 3 yrs; 11pts = 3+ yrs to 5 yrs; 15pts = 5+ yrs	15		
<b>RI4</b>	The proposed resource must demonstrate that they possess experience working with the following Cognos suite of tools:  10pts = Cognos Query Studio or Cognos Analysis	30		

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	Studio; 10pts = Cognos Report Studio; 10pts = Cognos Business Insight or Cognos Business Insight Advanced  Note: "Experience" means a minimum of six (6) months experience in the past five (5) years is required.				
<b>R15</b>	The proposed resource must demonstrate that they possess experience delivering end-user training in French. 0pts = no experience in delivering end-user training in French; 20pts: demonstrated experience in delivering end-user training in French.  Note: "Experience" means a minimum of six (6) months experience in the past three (3) years is required.	20			
<b>R16</b>	The proposed resource must demonstrate that they possess experience developing eLearning modules for end-user training.  0pts = no experience in developing eLearning modules for end-user training; 20pts = demonstrated that they possess experience developing eLearning modules for end-user training.  Note: "Experience" means a minimum of six (6) months experience in the past three (3) years is required.	20			
	<b>Maximum Points</b>	<b>135</b>			
	<b>Minimum Points Required 70%</b>	<b>95</b>			

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## ATTACHMENT 3.1

### BIDDER FORMS

BID SUBMISSION FORM		
<b>Bidder's full legal name</b>		
<b>Authorized Representative of Bidder for evaluation purposes (e.g., clarifications)</b>	Name	
	Title	
	Address	
	Telephone #	
	Fax #	
	Email	
<b>Bidder's Procurement Business Number (PBN)</b> <i>[see the Standard Instructions 2003]</i>		
<b>Jurisdiction of Contract:</b> Province in Canada the bidder wishes to be the legal jurisdiction applicable to any resulting contract (if other than as specified in solicitation)		
<b>Former Public Servants</b>  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"	

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<b>Federal Contractors Program for Employment Equity (FCP EE) Certification:</b>  If the bidder is exempt, please indicate the basis for the exemption to the right. If the bidder does not fall within the exceptions enumerated to the right, the Program requirements do apply and the bidder is required either to:  (a) submit to the Department of HRSD form LAB 1168, Certificate of Commitment to Implement Employment Equity, DULY SIGNED; or (b) submit a valid Certificate number confirming its adherence to the FCP-EE.  Bidders are requested to include their FCP EE Certification or signed LAB 1168 with their bid; if this information is not provided in the bid, it must be provided upon request by the Contracting Authority during evaluation.  For joint ventures, be sure to provide this information for each of the members of the joint venture.	On behalf of the bidder, by signing below, I also confirm that the bidder <i>[check the box that applies]</i> :	
	(a) is not subject to Federal Contractors Program for Employment Equity (FCP-EE), because it has a workforce of less than 100 permanent full or part-time employees in Canada;	
	(b) is not subject to FCP-EE, because it is a regulated employer under the <i>Employment Equity Act</i> ;	
	(c) is subject to the requirements of FCP-EE, because it has a workforce of 100 or more permanent full or part-time employees in Canada, but has not previously obtained a certificate number from the Department of Human Resources and Skills Development (HRSD) (having not bid on requirements of \$200,000 or more), in which case a duly signed certificate of commitment is attached; OR	
	(d) is subject to FCP-EE, and has a valid certification number as follows: _____ (and has not been declared an Ineligible Contractor by HRSD).	
<b>Number of FTEs</b> [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.]		
<b>Security Clearance Level of Bidder</b> <i>[include both the level and the date it was granted]</i>		
On behalf of the bidder, by signing below, I confirm that I have read the entire bid solicitation including the documents incorporated by reference into the bid solicitation and I certify that: 1. The bidder considers itself and its products able to meet all the mandatory requirements described in the bid solicitation; 2. This bid is valid for the period requested in the bid solicitation; 3. All the information provided in the bid is complete, true and accurate; and 4. If the bidder is awarded a contract, it will accept all the terms and conditions set out in the resulting contract clauses included in the bid solicitation.		
<b>Signature of Authorized Representative of Bidder</b>		

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## ATTACHMENT 4.1

### PRICING SCHEDULE

In respect of the “Estimated 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 Contract Period and option periods may be more or less, as determined by the Technical Authority.

#### INITIAL CONTRACT PERIOD:

			Initial Contract Period (Date of Contract to three years later)	
	(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)
Programmer/Analyst, A.7	Level 3	1200	\$	\$
Programmer/Analyst, A.7	Level 2	300	\$	\$
Tester, A.11	Level 3	660	\$	\$
Tester, A.11	Level 2	300	\$	\$
Data Conversion Specialist, I.1	Level 3	1980	\$	\$
Data Conversion Specialist, I.1	Level 2	1320	\$	\$
Database Modeller/IM Modeller, I.4	Level 3	1320	\$	\$
IM Architect, I.5	Level 3	150	\$	\$
Technology Architect, I.11	Level 3	150	\$	\$
Project Manager, P.9	Level 3	660	\$	\$
Project Manager, P.9	Level 2	300	\$	\$
Project Administrator, P.6	Level 1	600	\$	\$
Business Analyst, B.1	Level 3	1500	\$	\$
Business Analyst, B.1	Level 2	300	\$	\$
Instructor, IT, B.11	Level 2	750	\$	\$
Total Price Initial Contract Period :				\$ <TBD>

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## OPTION PERIODS

Option Period 1 TBD				
	(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)
Programmer/Analyst, A.7	Level 3	440	\$	\$
Programmer/Analyst, A.7	Level 2	100	\$	\$
Tester, A.11	Level 3	220	\$	\$
Tester, A.11	Level 2	100	\$	\$
Data Conversion Specialist, I.1	Level 3	660	\$	\$
Data Conversion Specialist, I.1	Level 2	440	\$	\$
Database Modeller/IM Modeller, I.4	Level 3	440	\$	\$
IM Architect, I.5	Level 3	50	\$	\$
Technology Architect, I.11	Level 3	50	\$	\$
Project Manager, P.9	Level 3	220	\$	\$
Project Manager, P.9	Level 2	100	\$	\$
Project Administrator, P.6	Level 1	200	\$	\$
Business Analyst, B.1	Level 3	500	\$	\$
Business Analyst, B.1	Level 2	100	\$	\$
Instructor, IT, B.11	Level 2	250	\$	\$
Total Price Option Period 1 :				\$ <TBD>

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Option Period 2 TBD				
	(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)
Programmer/Analyst, A.7	Level 3	440	\$	\$
Programmer/Analyst, A.7	Level 2	100	\$	\$
Tester, A.11	Level 3	220	\$	\$
Tester, A.11	Level 2	100	\$	\$
Data Conversion Specialist, I.1	Level 3	660	\$	\$
Data Conversion Specialist, I.1	Level 2	440	\$	\$
Database Modeller/IM Modeller, I.4	Level 3	440	\$	\$
IM Architect, I.5	Level 3	50	\$	\$
Technology Architect, I.11	Level 3	50	\$	\$
Project Manager, P.9	Level 3	220	\$	\$
Project Manager, P.9	Level 2	100	\$	\$
Project Administrator, P.6	Level 1	200	\$	\$
Business Analyst, B.1	Level 3	500	\$	\$
Business Analyst, B.1	Level 2	100	\$	\$
Instructor, IT, B.11	Level 2	250	\$	\$
Total Price Option Period 2 :				\$ <TBD>
Total Bid Price :Initial Contrat period + Options 1 & 2)				\$ <TBD>