RETURN BIDS TO :

RETOURNER LES SOUMISSIONS À:

Shared Services Canada
Megan.Lamont@ssc-spc.gc.ca

REQUEST FOR PROPOSAL
DEMANDE DE PROPOSITION

Proposal To: Shared Services Canada

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

Proposition aux: Services partagés Canada
Nous offrons par la présente de vendre à Sa Majesté la Reine du chef du Canada, aux conditions énoncées
Instructions : See Herein
ou incluses par référence dans la présente et aux annexes ci-jointes, les biens, services et construction
Instructions: Voir aux présentes
énumérés ici sur toute feuille ci-annexées, au(x) prix indiqué(s)

Comments - Commentaires

This document contains a Security Requirement

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

Issuing Office – Bureau de distribution
Shared Services Canada
180 Kent Street
Ottawa, ON K1G 4A8

Title – Sujet User-Centred Design Study/ Étude sur la conception axée sur les utilisateurs	
Solicitation No. – N° de l'invitation 2B0KB-14-20741	**Date** October 22, 2014
Client Reference No. – N° référence du client 2B0KB-14-20741	
GETS Reference No. – N° de reference de SEAG n/a	
File No. – N° de dossier 14-20741	**CCC No. / N° CCC - FMS No. / N° VME**
Solicitation Closes – L'invitation prend fin at – à 02:00 PM on – le **December 16, 2014**	**Time Zone** **Fuseau horaire** Eastern Standard Time EST
F.O.B. - F.A.B. **Plant-Usine:** ☐ **Destination:** ☑ **Other-Autre:** ☐	
Address Inquiries to : - Adresser toutes questions à: Megan Lamont	**Buyer Id – Id de l'acheteur** CAU
Telephone No. – N° de téléphone : 613-219-7204	**FAX No. – N° de FAX** 613-960-6007
Destination – of Goods, Services, and Construction: **Destination – des biens, services et construction :** See Herein	
Delivery required - Livraison exigée See Herein	**Delivered Offered – Livraison proposée**
Vendor/firm Name and address **Raison sociale et adresse du fournisseur/de l'entrepreneur** **Facsimile No. – N° de télécopieur** **Telephone No. – N° de téléphone**	
Name and title of person authorized to sign on behalf of Vendor/firm (type or print)- **Nom et titre de la personne autorisée à signer au nom du fournisseur/de l'entrepreneur (taper ou écrire en caractères d'imprimerie)** **Signature**	**Date**

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PART 1 - GENERAL INFORMATION

1. Statement of Work

The Contractor must perform the Work in accordance with the Statement of Work in Annex “A”.

2. Debriefings

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

3. Trade Agreements

The requirement is subject to the provisions of Agreement on Internal Trade (AIT).

PART 2 - BIDDER INSTRUCTIONS

1. Standard Instructions, Clauses and Conditions

All instructions, clauses and conditions identified in the bid solicitation by number, date and title are set out in the *Standard Acquisition Clauses and Conditions Manual* (https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) issued by Public Works and Government Services Canada.

Bidders who submit a bid agree to be bound by the instructions, clauses and conditions of the bid solicitation and accept the clauses and conditions of the resulting contract.

The 2003 (2014-09-25) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

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

Delete: sixty (60) days
Insert: ninety (90) days

2. Submission of Bids

Bids may only be submitted by email to: Megan.Lamont@ssc-spc.gc.ca by the date and time indicated on the cover page of this solicitation.

Due to the nature of this bid solicitation, bids transmitted by facsimile to SSC will not be accepted.

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 below before contract award.

Definitions

For the purposes of this clause,

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

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

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

"pension" means a pension or annual allowance paid under the *Public Service Superannuation Act (PSSA)* , R.S., 1985, c. P-36, and any increases paid pursuant to the *Supplementary*

Retirement Benefits Act, R.S., 1985, c. S-24 as it affects the PSSA. It does not include pensions payable pursuant to the *Canadian Forces Superannuation Act*, R.S., 1985, c. C-17, the *Defence Services Pension Continuation Act*, 1970, c. D-3, the *Royal Canadian Mounted Police Continuation Act* , 1970, c. R-10, and *the Royal Canadian Mounted Police Superannuation Act*, R.S., 1985, c. R-11, *the Members of Parliament Retiring Allowances Act*, R.S., 1985, c. M-5, and that portion of pension payable to the *Canada Pension Plan Act*, R.S., 1985, c. C-8.

Former Public Servant in Receipt of a Pension

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

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

a) name of former public servant;
b) date of termination of employment or retirement from the Public Service.

If the answer to the question and, as applicable, the information are not submitted in or with the bid, the Contracting Authority will so inform the Bidder and provide the Bidder with a time frame within which to meet the requirement. Failure to comply with the request of the Contracting Authority and meet the requirement within that time period will render the bid non-responsive.

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

Work Force Adjustment Directive

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

If so, the Bidder must provide the following information:

a) name of former public servant;
b) conditions of the lump sum payment incentive;
c) date of termination of employment;
d) amount of lump sum payment;
e) rate of pay on which lump sum payment is based;
f) period of lump sum payment including start date, end date and number of weeks; and
g) number and amount (professional fees) of other contracts subject to the restrictions of a work force adjustment program.

If the answer to the question and, as applicable, the information are not submitted in or with the bid, the Contracting Authority will so inform the Bidder and provide the Bidder with a time frame within which to meet the requirement. Failure to comply with the request of the Contracting Authority and meet the requirement within that time period will render the bid non-responsive.

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

4. Enquiries - Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than five (5) calendar days before the bid closing date. Enquiries received after that time may not be answered.

Bidders should reference as accurately as possible the numbered item of the bid solicitation to which the enquiry relates. Care should be taken by bidders to explain each question in sufficient detail in order to enable Canada to provide an accurate answer. Technical enquiries that are of a proprietary nature must be clearly marked "proprietary" at each relevant item. Items identified as “proprietary” will be treated as such except where Canada determines that the enquiry is not of a proprietary nature. Canada may edit the questions or may request that the Bidder do so, so that the proprietary nature of the question is eliminated, and the enquiry can be answered with copies to all bidders. Enquiries not submitted in a form that can be distributed to all bidders may not be answered by Canada.

5. Applicable Laws

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

Bidders may, at their discretion, substitute the applicable laws of a Canadian province or territory of their choice without affecting the validity of their bid, by deleting the name of the Canadian province or territory specified and inserting the name of the Canadian province or territory of their choice. If no change is made, it acknowledges that the applicable laws specified are acceptable to the bidders.

PART 3 - BID PREPARATION INSTRUCTIONS

1. Bid Preparation Instructions

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

Section I:	Technical Bid	(1 soft copy);
Section II:	Financial Bid	(1 soft copy);
Section III:	Certifications	(1 soft copy)

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

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

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

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

Section I: Technical Bid

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

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

Part 4, Evaluation Procedures and Attachment 1 to Part 4, contain additional instructions that bidders should consider when preparing their technical bid.

Section II: Financial Bid

1.1 Bidders must submit their financial bid in Canadian funds and in accordance with the pricing schedule detailed in Attachment 1 to Part 3. The total amount of Applicable Taxes must be shown separately.

1.2 Bidders must submit their (price(s) and/or rate(s)), FOB destination; Canadian customs duties and excise taxes included, as applicable; and GST or HST excluded.

1.3 When preparing their financial bid, bidders should review the basis of payment in Annex B and clause 1.2, Financial Evaluation, of Part 4**.**

1.4 Bidders should include the following information in their financial bid:

1. Their legal name;

2. Their Procurement Business Number (PBN); and
3. The name of the contact person (including this person's mailing address, phone and facsimile numbers and email address) authorized by the Bidder to enter into communications with Canada with regards to:
    a. their bid; and
    b. any contract that may result from their bid.

Section III: Certifications

Bidders must submit the certifications required under Part 5.

ATTACHMENT 1 to PART 3
PRICING SCHEDULE

1.0 The Bidder must complete this pricing schedule and include it in its financial bid.

2.0 The price/rates specified below, when quoted by the Bidder, includes the total estimated cost of all travel and living expenses that may need to be incurred for:

a. work described in Part 7, Resulting Contract Clauses, of the bid solicitation required to be performed within the National Capital Region (NCR). The NCR is defined in the *National Capital Act*, R.S.C. 1985, c. N-4, S.2. *The National Capital Act* is available on the Justice Website: http://laws.justice.gc.ca./en/N-4/;
b. travel between the successful bidder's place of business and the NCR; and
c. the relocation of resources to satisfy the terms of any resulting contract. These expenses cannot be charged directly and separately from the professional fees to any contract that may result from the bid solicitation.

3.0 The inclusion of volumetric data in this document does not represent a commitment by Canada that Canada's future usage of the services described in the bid solicitation will be consistent with this data.

4.0 Pricing Schedule:

Phase	Description	Total Cost
1	• Work Breakdown Plan • Draft information architecture and navigation design recommendations	
2	• Conduct a User Groups and Task Analysis Study • Revise the information architecture and navigation design based on the outcome of the user research • Develop a visual design and style guide	
	TOTAL:	

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

1. Evaluation Procedures

(a) Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical evaluation criteria.

(b) An evaluation team composed of representatives of Canada will evaluate the bids.

1.1 Technical Evaluation

1.1.1 Mandatory Technical Criteria

See attachment 4.1

1.1.2 Point Rated Technical Criteria

See attachment 4.1

2. Basis of Selection

2.1 Highest combined rating of technical merit and price.

1. To be declared responsive, a bid must:

    a. comply with all the requirements of the bid solicitation; and

    b. meet all mandatory criteria

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

3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 70% for the technical merit and 30% for the price.

4. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of 70%.

5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 30%.

6. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.

7. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.

The table below illustrates an example where all three bids are responsive and the selection of the contractor is determined by a 70/30 ratio of technical merit and price, respectively. The total available points equal 135 and the lowest evaluated price is $45,000 (45).

		Bidder 1	Bidder 2	Bidder 3
Overall Technical Score		115/135	89/135	92/135
Bid Evaluated Price		$55,000.00	$50,000.00	$45,000.00
Calculations	**Technical Merit Score**	115/135 x 70 = 59.63	89/135 x 70 = 46.15	92/135 x 70 = 47.70
	Pricing Score	45/55 x 30 = 24.55	45/50 x 30 = 27.00	45/45 x 30 = 30.00
Combined Rating		84.18	73.15	77.7
Overall Rating		1st	3rd	2nd

ATTACHMENT 1 to PART 4
TECHNICAL AND FINANCIAL CRITERIA

The Bidder must provide the necessary documentation to support compliance with this requirement.

a. The Bidder is advised that only listing experience without providing any supporting data to describe where and how such experience was obtained will not constitute “demonstrated” for the purpose of the evaluation.
b. The Bidder must clearly demonstrate in the proposal how the experience was gained or knowledge was attained, supported by resumes and any necessary supporting documentation.
c. The Bidder must provide complete details as to where, when and how (through which activities/responsibilities) the stated qualifications/experience were obtained. In order to demonstrate when experience was obtained, the bidder must indicate the duration of such experience, specifying the start and end dates (month and year at a minimum). In the case where the timelines of two or more projects or experience overlap, the duration of time common to each project/experience will not be counted more than once.
d. It is recommended that the Bidder include a grid in their proposals, cross-referencing statements of compliance with the supporting data and resume evidence contained in their proposals. Note: the compliance grid, by and of itself DOES NOT constitute demonstrated evidence. As stated in bullet “b” above, the resumes and supporting documentation will be accepted as evidence.

Bidders should provide the required references in the Technical Proposal of their bid.

The references provided by the Bidders are 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 validate the references before award of a contract. The bid will be declared non-responsive if any references given by the Bidder are untrue, whether made knowingly or unknowingly. Failure to comply with the request of the Contracting Authority for additional information will also render the bid non-responsive.

For Mandatory Technical Criteria and Point Rated Technical Criteria listed below requiring Project Summaries, the Bidder and its proposed resource(s) should provide:

- Name and description of client organization;
- Name, phone, email of client ;
- Scope, objective, size in dollars and resources, project timeframe (from-to dates month/year);
- Outcomes of the project; and/or
- Description of the Consultant roles and responsibilities in the project.

1.1.1 <u>Mandatory Technical Criteria</u>

The bid must meet the mandatory technical criteria specified below. The Bidder must provide the necessary documentation to support compliance with this requirement.

Bids which fail to meet the mandatory technical criteria will be declared non-responsive. Each mandatory technical criterion should be addressed separately.

Mandatory Technical Criteria (MT)

For the purpose of the mandatory technical criteria specified below, the experience of the Bidder* will be considered.

"Bidder" means the person or entity (or, in the case of a joint venture, the persons or entities) submitting a bid to perform a contract for goods, services or both. It does not include the parent, subsidiaries or other affiliates of the Bidder, or its subcontractors.

TABLE 1				
No.	**Mandatory Requirements**	**Met**	**Not Met**	**Demonstrated Experience**
M1	The Bidder must have completed a minimum of 10 (ten) user-centred research and design projects completed within the past 5 (five) years. Each project must have involved at least one research method, such as contextual interviews, personas and scenarios, heuristic reviews, task analysis, use cases, user journeys, content inventory, card sorting, first-click testing, and usability testing.			
M2	The Bidder's proposal must identify the resource(s) required to complete the work (the Project Team) and provide their resume(s), including one resource to be designated as Project Lead. **The proposed team must include a minimum of intermediate resources and at least one senior member.** **Intermediate resource: possesses at minimum an undergraduate degree in human factors, user experience design, computer science, web design, visual design or in a related field from a recognized university or college and at least 5 years of experience in user-centred design.** **Senior resource: possesses at minimum an undergraduate degree in human factors, user experience design, computer science, web design, visual design or in a related field from a recognized university or college and at least 10 years of experience in user-centred design.**			
M3	Each proposed resource must have at least 3 years of demonstrated experience in at least one of the following: • Creation and testing of information architecture			

	• Creation and testing of wireframes • Creation and testing of visual designs			
M4	Each proposed resource must have at least one year of demonstrated experience in at least one of the following: • TBS Standards (*Standard on Web Usability, Standard on Web Accessibility, Standard on Interoperability, Standard on Optimizing for Mobile)* • Web Experience Toolkit (WET)			

1.2 <u>Point Rated Technical Criteria</u>

Bids which meet all the mandatory technical criteria will be evaluated and scored as specified in the tables inserted below. The Bidder must provide the necessary documentation to clearly demonstrate compliance with this requirement. Simply repeating the statement contained in the bid solicitation is not sufficient.
Bids which fail to obtain the required minimum number of points specified will be declared non-responsive. Each point rated technical criterion should be addressed separately.

Please note that each resource will be evaluated against the criteria listed below.

TABLE 2			
No.	**Point-rated Requirements**	**Score**	**Referenced Section/Page in Bidder's Proposal**
R1	Experience in User-Centred Design The bidder should submit evidence of and will be evaluated on their demonstrated understanding of user-centred website design. The bidder should submit evidence of three user-centred design contracts, each valued at $50K or more, describe the research and design work performed, and provide a reference for each contract, using table 3. The research and design work must have included task analysis, card sorting, or usability testing. The deliverables must have met deadlines and contributed to successful end results. Rating: 10 points per project as follows: • Description and reference indicate low experience in and understanding of user-centred design = 3 points • Description and reference indicate satisfactory experience in and understanding of user-centred design = 5 points • Description and reference indicate superior experience in and understanding of user-centred design = 10 points	**/30**	
R2	**Experience in** e-Commerce User Experience and Web Design The bidder should demonstrate experience in and understanding of e-Commerce user experience design and Web design. The bidder should submit evidence of three e-commerce user experience and Web	**/15**	

TABLE 2			
No.	**Point-rated Requirements**	**Score**	**Referenced Section/Page in Bidder's Proposal**
	design contracts, describe the work performed, and provide a reference for each contract, using table 3. The e-Commerce work must have included task analysis and usability testing. The deliverables must have met deadlines and contributed to successful end results. Rating: 5 points per project as follows: • Description and reference indicate low experience in and understanding of e-Commerce web design = 2 points • Description and reference indicate satisfactory experience in and understanding of user-centred design = 4 points • Description and reference indicate superior experience in and understanding of user-centred design = 5 points		
R3	**Experience in the Information and Communications Technology (ICT) industry sector** The bidder should demonstrate experience in the ICT industry. The bidder should submit evidence of Web design contracts for clients in the Information and Communications Technology (ICT) industry sector and describe the work performed. Rating: • Two to five years' experience = 5 points • Six to eight years' experience = 7 points • Nine years or more experience = 10 points	**/10**	
R4	**Experience in** Information Architecture The bidder should demonstrate experience in and understanding of the design of information architectures. The bidder should submit evidence of three contracts involving the design of an information architecture, describe the work performed, and provide a reference for each	**/15**	

TABLE 2			
No.	**Point-rated Requirements**	**Score**	**Referenced Section/Page in Bidder's Proposal**
	contract, using table 3. The design work must have included task analysis, card sorting, or first-click testing. The deliverables must have met deadlines and contributed to successful end results. Rating: 5 points per project as follows: • Description and reference indicate low experience in and understanding of e-Commerce web design = 2 points • Description and reference indicate satisfactory experience in and understanding of e-Commerce web design = 4 points • Description and reference indicate superior experience in and understanding of e-Commerce web design = 5 points		
R5	**Experience in Creating** Wireframes The bidder should demonstrate experience in and understanding of the creation of annotated wireframes. The bidder should submit evidence of three contracts involving the creation of wireframes, describe the work performed and provide a reference for each contract, in the following table. The wireframe work must have included prototyping and usability testing. The deliverables must have met deadlines and contributed to successful end results. Rating: 5 points per project as follows: • Description and reference indicate low experience in and understanding of creating wireframes = 2 points • Description and reference indicate satisfactory experience in and understanding of creating wireframes = 4 points • Description and reference indicate superior experience in and understanding of creating wireframes = 5 points	**/15**	
R6	**Experience in** Visual Design of Websites	**/15**	

TABLE 2			
No.	**Point-rated Requirements**	**Score**	**Referenced Section/Page in Bidder’s Proposal**
	The bidder should demonstrate experience in and understanding of the creation of visual designs for Websites. The bidder should submit evidence of three contracts involving the creation of visual designs for a Website, describe the visual design work performed and provide a reference for each contract, using table 3. The visual design work must have included at least development of various options. The deliverables must have met deadlines and contributed to successful end results. Rating: 5 points per project as follows: • Description and reference indicate low experience in and understanding of visual design = 2 points • Description and reference indicate satisfactory experience in and understanding of visual design = 4 points • Description and reference indicate superior experience in and understanding of visual design = 5 points		
R7	**Proposed User-Centred Design Research Methodologies** In their response, the bidder should include a research proposal, indicating the user-centred design methodologies that will be used for this project, for which design phase, the rationale for each, and intended outcomes. Proposed methodologies will be evaluated against relevance to the design phases of the project and recognized user-centred design best practices. The research and design proposal and methodologies will be evaluated against best practices for user-centred design, such as contextual interviews, personas and scenarios, heuristic reviews, task analysis, use cases, user journeys, content inventory, card sorting, first-click testing, prototyping, and usability testing.	**/30**	

TABLE 2			
No.	**Point-rated Requirements**	**Score**	**Referenced Section/Page in Bidder’s Proposal**
	Methodologies for each phase will receive a maximum of 10 points: Information structure methodologies = 10 points Navigation design methodologies = 10 points Visual design methodologies = 10 points		
	Total:	**/130**	

TABLE 3			
Contract and Client	**Value**	**Description** (500 words or less)	**Reference**

PART 5 - CERTIFICATIONS

1. Federal Contractors Program

1.1 Former Public Servants Certification

Contracts with 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 below.

Definitions

For the purposes of this clause,

"former public servant" means a 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 and includes:

a) an individual;
b) an individual who has incorporated;
c) a partnership made up of former public servants; or
d) a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity. "Lump sum payment period" means the period measured in weeks of salary, for which payment has been made to facilitate the transition to retirement or to other employment as a result of the implementation of various programs to reduce the Public Service.

"Pension" means a pension payable pursuant to the Public Service Superannuation Act, R.S., 1985, c. P-36 as indexed pursuant to the Supplementary Retirement Benefits Act, R.S., 1985, c. S-24.

Former Public Servant in Receipt of a Pension

Is the Bidder a FPS in receipt of a pension as defined above? **YES ( ) NO ( )**

If so, the Bidder must provide the following information:

a) name of former public servant,; and
b) date of termination of employment or retirement from the Public Service.

Work Force Reduction Program

Is the Bidder a FPS who received a lump sum payment pursuant to the terms of a work force reduction program? **YES ( ) NO ( )**

If so, the Bidder must provide the following information:

a) name of former public servant,;
b) conditions of the lump sum payment incentive,;
c) date of termination of employment,;
d) amount of lump sum payment,;
e) rate of pay on which lump sum payment is based,;
f) period of lump sum payment including start date, end date and number of weeks;, and
g) number and amount (professional fees) of other contracts subject to the restrictions of a work force reduction program.

For all contracts awarded during the lump sum payment period, the total amount of fee that may be paid to a FPS who received a lump sum payment is $5,000, including Goods and Services Tax or Harmonized Sales Tax.

1.2 Status and Availability of Resources

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

If the Bidder has proposed any individual who is not an employee of the Bidder, the Bidder certifies that it has the permission from that individual to propose his/her services in relation to the Work to be performed and to submit his/her résumé to Canada. The Bidder must, upon request from the Contracting Authority, provide a written confirmation, signed by the individual, of the permission given to the Bidder and of his/her availability.

1.3 Education and Experience

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

Name of Supplier’s Authorized Signatory	**Signature of Supplier’s Authorized Signatory**

Date

ATTACHMENT 1 TO PART 5
INTEGRITY CHECK

Adresse de courriel /E-mail Address: **Cliquez ici pour entrer du texte.** / Click here to enter text.
Ministère/Department: **Shared Services Canada**
Dénomination sociale complète du fournisseur / Complete Legal Name of Supplier **Cliquez ici pour entrer du texte.** / Click here to enter text.
Adresse du fournisseur / Supplier Address **Cliquez ici pour entrer du texte.** / Click here to enter text.
NEA du fournisseur / Supplier PBN **Cliquez ici pour entrer du texte.** / Click here to enter text.
Numéro de la demande de soumissions (ou numéro du contrat proposé) **Solicitation Number (or proposed Contract Number)** **Cliquez ici pour entrer du texte.** / Click here to enter text.
Membres du conseil d'administration (Utilisez le format - Prénom Nom) **Board of Directors (Use format - first name last name)**
Membre / Director - Cliquez ici pour entrer du texte. / Click here to enter text.
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Membre / Director - Cliquez ici pour entrer du texte. / Click here to enter text.
Autres Membres/ Additional Directors: **Cliquez ici pour entrer du texte.** / Click here to enter text.

PART 6 - RESULTING CONTRACT CLAUSES

1. Security Requirement

There is no security requirement applicable to this Contract.

2. Statement of Work

The Contractor must perform the Work in accordance with the Statement of Work in Annex “A”.

3. Standard Clauses and Conditions

All clauses and conditions identified in the Contract by number, date and title are set out in the *Standard Acquisition Clauses and Conditions Manual*(https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) issued by Public Works and Government Services Canada.

3.1 General Conditions

2010B (2014-09-25), General Conditions - Professional Services (Medium Complexity) apply to and form part of the Contract.

3.2 Supplemental General Conditions

4008 (2008-12-12) Personal Information (2008-12-12), 2010B 18 (2008-05-12) Confidentiality, apply to and form part of the Contract.

4. Term of Contract

4.1 Period of the Contract

The period of the Contract is from date of Contract to March 31, 2015 inclusive.

5. Authorities

5.1 Contracting Authority

The Contracting Authority for the Contract is:

Name:	Megan Lamont
Title:	Supply Specialist
Organization:	Shared Services Canada
Address:	180 Kent Street, Ottawa, Ontario, K1G 4A8
Telephone:	(613) 219-7204
Facsimile:	(613) 960-6007
E-mail Address:	Megan.Lamont@ssc-spc.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.

5.2 Technical Authority

The Technical Authority for the Contract is:

Name: TBD ______________________________
Title: ______________________________
Organization: ______________________________
Address: ______________________________
Telephone: ______________________________
E-mail Address: ______________________________

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

5.3 Contractor's Representative

Name: TBD ______________________________
Title: ______________________________
Organization: ______________________________
Address: ______________________________
Telephone: ______________________________
E-mail Address: ______________________________

6. Proactive Disclosure of Contracts with Former Public Servants

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

7. Payment

7.1 Basis of Payment

The Contractor will be reimbursed for the costs reasonably and properly incurred in the performance of the Work as determined in accordance with the Basis of Payment in Annex “B” , to a limitation of expenditure of ***$***_________. Customs duties are excluded and Applicable Taxes are extra.

7.2 Limitation of Expenditure

1. Canada's total liability to the Contractor under the Contract must not exceed $ _______. Customs duties are excluded and Applicable Taxes are extra.

2. 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:

a. when it is 75 percent committed, or

b. four (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.

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

7.3 Milestone Payments

Canada will make milestone payments in accordance with the Schedule of Milestones detailed in the Contract and the payment provisions of the Contract if:

a. an accurate and complete claim for payment and any other document required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;

b. all the certificates have been signed by the respective authorized representatives;

c. all work associated with the milestone and as applicable any deliverable required has been completed and accepted by Canada.

8. Invoicing Instructions

1. An invoice for milestone payment cannot be submitted until all Work identified on the invoice is completed.

2. Each invoice must be supported by:

   (a) a copy of time sheets to support the time claimed;
   (b) a copy of the release document and any other documents as specified in the Contract;
   (c) a copy of the invoices, receipts, vouchers for all direct expenses, travel and living expenses; and
   (d) a copy of the monthly progress report.

3. Invoices must be distributed as follows:
   (a) The original and one (1) copy must be forwarded to the following address for certification and payment: as appearing on the front page of the contract; and,

One (1) copy must be forwarded to the Contracting Authority identified under article 5 of the Contract entitled “Authorities”.

9. Certifications

9.1

The continuous compliance with the certifications provided by the Contractor in its bid and the ongoing cooperation in providing associated information are conditions of the Contract. Certifications are subject to verification by Canada during the entire period of the Contract. If the Contractor does not comply with any certification, fails to provide the associated information, or if it is determined that any certification made by the Contractor in its bid is untrue, whether made knowingly or unknowingly, Canada has the right, pursuant to the default provision of the Contract, to terminate the Contract for default.

10. Applicable Laws

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

11. Priority of Documents

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

(a) the Articles of Agreement;
(b) the supplemental general conditions:
4008 (2008-12-12) Personal Information (2008-12-12);
(c) the general conditions 2010B (2014-09-25),
(d) Annex “A”, Statement of Work;
(e) the Contractor's bid dated ________

12. Integrity Check

The Contractor must immediately inform the Contracting Authority whenever there are any changes to the names listed on the "Annex D - Integrity Check" form during the performance of the contract. In the event that the Contractor is not successful at maintaining an approved form, Canada reserves the right to terminate the contract.

13. Electronic Procurement & Payment Support

The Contractor must support SSC's implementation of the iValua Buyer procurement system. When instructed by the Contracting Authority, the Contractor must submit quotes, accept orders, submit shipping/service delivery notices and submit invoices through the procurement system.”

ANNEX "A"

STATEMENT OF WORK

1.0 TITLE

Shared Services Canada (SSC) - Service Portal: Information Architecture -- User-Centred Design Study

2.0 OBJECTIVE

A **SSC Service Portal: Information Architecture -- User-Centred Design Study** is required to support the ongoing development of a partner-focused IT service portal by SSC. The objective of the study is to develop an information architecture and visual design that supports partners in efficiently accessing SSC services and related information through a single window. The design must be validated through a user-centred design study, and provide recommendations focused on providing ease of navigation and a high quality user experience.

The first iteration of the portal is accessible today via SSC's Serving Government website. It is expected to evolve into a single window for partner departments to efficiently request SSC services and access information. The portal design must be scalable to facilitate the addition of new services and allow for interconnection with the SSC catalogue and associated automated provisioning tools. As underlying technologies may change, the information architecture must be flexible enough to be interfaced with custom built or off-the-shelf (COTS) solutions.

3.0 BACKGROUND

SSC is mandated to operate and transform the government's IT infrastructure. Under the umbrella of that dual authority, SSC is responsible for providing its 43 partner organizations with modern, cost-effective, reliable and secure IT infrastructure services.

SSC's vision is to create a 'single window' for partners to:

- access information on SSC transformation activities and service offerings, and
- to provide an online service portal to allow partners to request IT services

In June 2014, SSC launched the Serving Government website (accessible to Government of Canada employees only). Basic information on SSC and its transformation programs is currently available on the site. This information is expected to grow over time. Further work is also required to fully establish an online service portal, with access to SSC's service catalogue and seamless links to automated provisioning tools. Given that the site is currently live, a phased implementation of features is anticipated to establish an end state online service portal.

SSC stakeholders with an interest in the online portal include employees and contractors as well as users from its 43 partner departments. Secondary stakeholders include another 53 client departments that may access SSC services in the future. The portal's users are drawn from various audiences with differing technical expertise and expectations, who currently access information from the Serving Government website. They will access the Serving Government website to seek information and request IT services that are necessary to perform their functional role.

End state vision/principles for the online service portal

The SSC Service Portal will be accessed via the Serving Government website, providing a single-window approach for the ordering of any SSC service. It will be accessible to government employees behind the Government of Canada (GC) firewall and must comply with relevant TBS web standards for Accessibility, Mobility, etc. (see section 8.0). The information architecture and visual design will be partner-centric, aimed at simplifying the retrieval of information and ordering of services for partners.

The services for partners may be offered as options across Government in future, in which case organizations will be able to enter into agreements with SSC for the provision of these services. The Portal will also relate to other services provided by SSC to all of Government through the Serving Government site, as well as to information on SSC's service transformation activities that are in planning and implementation stages.

The Portal will house the SSC Service Catalogue which will include both partner-facing and technical (enabling) services. Service descriptions will provide complete information, as required by users, and feature links to supporting information such as operating standards, user guides and supporting tools. Different services will be visible to employees, based on designated user types. Automated provisioning will be the norm, with manual intervention being the exception.

Through the Portal, users will be able to access information, order services, download programs, access links to web tools, review service specifications and, where applicable, track or manage services that have been entered into the order (provisioning) process. All content will be contextualized for the user experience and each service will be available according to a pre-defined provisioning (fulfillment) process. In its final state, the portal will feature automated user login with assigned profile authentication.

Service requests initiated on the portal will launch an automated workflow provisioning process. Within the information architecture, consideration must be given to requirements for the interface between the portal and the provisioning tool.

Figure 1 below provides a view of types of information to be accessible via the portal. Annex I provides screenshots of the current Serving Government Website and Services tab.

Further information can be found in the Annexes as follows:
Annex II – Proposed Design Elements
Annex III – Portal User Groups and Access Management
Annex IV – Types of Services
Annex V – Service Catalogue Information (Templates)
Annex VI – Sample Service Catalogue Entry
Annex VII – SSC Services Listing

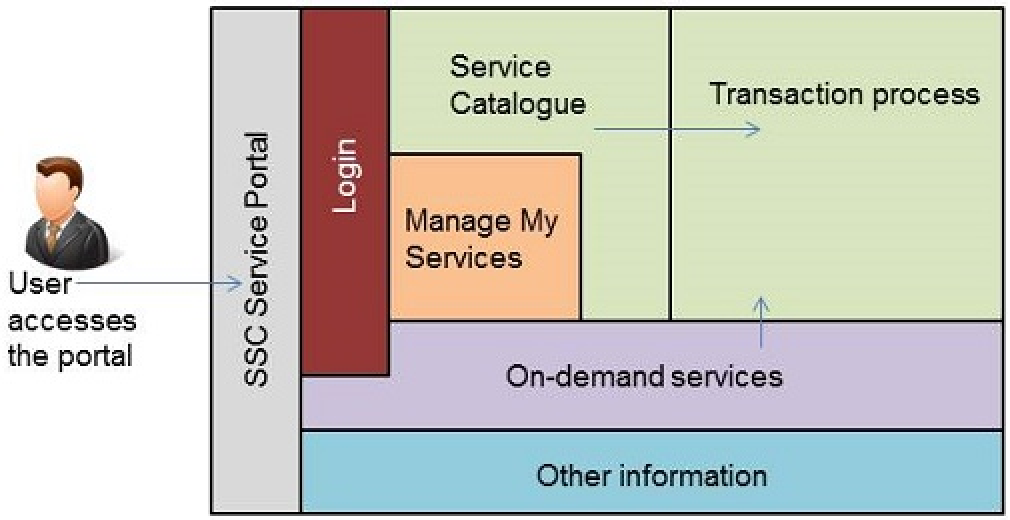


Figure 1 - Example of content available via the SSC Service Portal

Current view of the services portal

Currently, services are accessed via a ‘Services’ tab on the Service Government website. Services are listed under two user types for a limited selection of legacy services. The information is inconsistently presented for different services and is incomplete in some cases. Information on this section of the website is not re-grouped according to user preferences.

See Appendix I for a screenshot of the home page and Services tab. Full access to the site will be granted upon contract award.

3.1 SSC Service Catalogue

The SSC Service Catalogue is a core component of the SSC Service Portal. The catalogue will contain all SSC service offerings including service specifications and descriptions so that users may “order the services” required to perform their own role or that fall within their responsibility to source. An example of this is the user who is tasked with sourcing a business solution to a program area or partner department. Catalogue content will be viewable based on user groups, with specific access rights. Profiles will be assigned according to the identification and organization of tasks and activities demanded by user roles.

By selecting a service from the catalogue, the provisioning process is initiated and an e-commerce style transaction is triggered. The provisioning process involves a series of reviews, checks and gates to ensure that the request is available to that specific user profile and that it meets the requirements of the solution including that of technical and IT security.

Of import to this SoW, is that the transaction is seamless to the requestor. From a user’s perspective, the only aspect of the transaction that should be visible is a notification(s) that approve or reject the request or that demand additional information or consultation with technical support to verify or clarify the requirement.

For additional detail refer to:

- Appendix V – Service Catalogue Template;
- Appendix VI – Sample Service Catalogue Entry; and,
- Appendix VII – SSC Services Listing

3.2 Service Catalogue Templates

The primary web content – or 'service catalogue entry' for each service - is derived from service catalogue templates. A service catalogue template details the service in terms of its scope, availability, terms of use and contains fields such as service name, hours of operation and information about training (links, documents, etc.).

The service catalogue template comprises two sections:

- The primary template provides end user service information and is available to everyone with access to the portal.

- The 'internal use only' section, (currently in draft format), is visible only to SSC employees and provides specific operational information needed by SSC technical staff.

The service catalogue templates will differ slightly between the End User and Technical Services.

Service Catalogue entries may be complemented with additional information, such as operating standards, links to third party documentation, etc. to provide a more complete view of a service.

For additional detail on the Service Catalogue Template, samples and operating standards, refer to the appendices listed below and located at the end of the statement of work.

- Appendix V – Service Catalogue Information (templates);
- Appendix VI – Sample Service Catalogue entries.

4.0 SCOPE OF WORK

The design of the information architecture (information design, interaction design, and visual design) has six activities:

1. A Work Breakdown Plan (activities, deliverables and dates) for the development of the information architecture design.

A work breakdown plan is needed for the planning, assignment, development, and tracking of each activity and its deliverable date. Activities for undertaking the **SSC Services Portal: User-Centred Design Study** should be reviewed with SSC stakeholders and a work breakdown structure determined to facilitate project tracking. Key areas to be included are requirements gathering (business, user experience), information design, interaction design and visual design. SSC stakeholders to be consulted include six key teams: Client Relationship Management, SSC CIO, Communications, Service Transformation, and Operations (2 groups).

2. Conduct a User Groups and Task Analysis Study

Service catalogue content will be available to users as defined by their user group (see section 3.1). User groups set explicit permissions as to content/services that are accessible or not.

As the SSC Service Portal is likely to be used by an exceptionally large audience (e.g. >300,000), further focusing needs be done through self-identification, a voluntary process on the user's part.

To do this, SSC requires assistance in defining and describing user groups according to sets of ‘most frequently performed tasks.’

As an example, Directors and executive assistants alike may be part of the user group entitled ‘End User.’ However, while access rights determined by login process may be the same, daily tasks are very different and should be reflected as such in the way services are presented to the user.

As another example, an end user could self-identify by clicking a task button in the form of ‘Onboarding a new employee.’ This selection would generate a suite of services typically accessed when onboarding a new employee.

The user groups and task analysis study is to be conducted using appropriate user research methodology or methodologies, which the bidder must identify in their bid.

*3. **Draft information architecture and navigation design recommendations for the SSC Service Portal, based on the user groups and task analysis study and input from SSC stakeholders**.*

The information architecture/navigation design is to be provided in the form of site maps, wireframes, supporting documentation, and presentation of findings to SSC. The design should be user-centric and flexible enough to accommodate current portal requirements, *i.e.* SSC Service Portal features and functions needed now, as well as anticipated future requirements. The design should take into consideration the herein requirements and information (see Background and Appendices). The vendor is encouraged to make recommendations with respect to the overall user experience, including the top-level structure of the Serving Government site.

4. ***Validate the draft information architecture and navigation design through appropriate user research methodologies***.

The information structure and navigation is to be validated using appropriate user research methodologies, which the bidder must identify in their bid.

*5. **Revise the information architecture and navigation design based on the outcome of the user research**.*

A final information architecture and navigation design proposal and recommendations that address the findings of the user research will be prepared and presented to SSC.

6. **Develop a visual design and style guide**.

Three visual design options will be prepared and presented to SSC. The design will be tested with representative users. A final visual design and style guide will be prepared.

5. 0 TASKS

Below are the tasks and how they associate with the scope of work. The vendor will conduct the following tasks.

1. *Work breakdown plan*

- Attend an in-person kickoff meeting review scope, discuss progress tracking, etc.
- Record any changes since the issuing of the request for proposal
- Ask any outstanding questions

- Propose roles and responsibilities for the project (e.g. facilitation of meetings), and
- Present the work breakdown plan

2. *Provide draft site maps, wireframes and recommendations for the SSC Service Portal*

- Review the existing Portal design elements (see Annex II).
- Provide a suite of documents pertaining to a proposed user experience. These documents should include, at a minimum:
    - Report outlining the findings of the user group and task analysis study
    - Site map for the SSC Service Portal
    - Wireframes for all current user roles (e.g. End User, Business Solutions, IT Practitioner)
    - Any user experience recommendations, based on current best practices, knowledge of SSC, etc. Recommendations may include structural changes to the top level of the Serving Government site.
- Propose a solution that complies with Government of Canada Web Standards, including Standard on Web Usability http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=24227 Standard on Web Accessibility http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=23601&section=text Standard on Interoperability http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=25875 Standard on Optimizing for Mobile http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=27088
- Web Experience Toolkit (WET) as implemented by SSC http://www.gcpedia.gc.ca/wiki/Web_Experience_Toolkit_%28WET%29Validate the draft site maps and wireframes using appropriate user-centred design methodologies.

3. *User groups and task analysis study*

- Document, for SSC approval, a proposal to:
    - Identify/propose number/types of participants to take part in the study, including roles, impact to participants (i.e. participants' time commitment) (Based on this information, SSC will identify participants and the vendor will conduct recruitment and scheduling)
    - Identifying the methodology for the study
    - Identify what information is sought, e.g. most frequently performed tasks as they pertain to the SSC Service Portal
    - Provide draft documents that will be used for the collection of information, e.g. interview package
- Execute the approved proposal by meeting with identified participants
- Gather information to validate SSC Service Portal user experience requirements, or note changes to these requirements
- With user input, capture approaches that allow end users to self-identify
- Capture "frequently performed tasks" as they pertain to the user's role, and their perception of other users' roles

4. *Present draft and validated final proposed information architecture and navigation design to SSC.*

- Share the draft and final information architecture and navigation design recommendations with the SSC project manager and stakeholders during face-to-face meetings with SSC. Recommendations may include structural changes to the top level of the Serving Government site. Attending these meeting will be the deliverables' author(s). During the meeting, the vendor will discuss the findings and recommendations and answer questions.

- Within three business days of the final meeting, the vendor will provide a revision to the project manager.

5. *Provide any source files*

The vendor will provide source files to documentation it has prepared.

6. Develop and present visual design recommendations and style guide

The vendor will prepare three visual design options and present them to the SSC project manager and stakeholders during a face-to-face meeting.

The vendor will test the visual design(s) with representative users identified by SSC. The bid is to include a proposed methodology.

The vendor will make appropriate adjustments to the design, prepare a final visual design document and accompanying style guide and present them to the SSC project manager and stakeholders during a face-to-face meeting.

The vendor will provide source files it has prepared.`

6.0 GOVERNMENT-FURNISHED INFORMATION

Two existing SSC website user personas and a report on user segmentation for workplace technology devices will be shared with the successful bidder.

Access to the existing Serving Government website will also be provided.

See additional information provided in the Annexes.

7.0 DELIVERABLES and ASSOCIATED SCHEDULE

Work breakdown structure
Due: One week from date of contract award (SSC to provide response within 1 week, i.e. week 2)

Provide draft site maps, wireframes and recommendations for the SSC Service Portal
Due: 5 weeks from date of contract award (SSC to provide response within 2 weeks i.e. week 7)

User groups and task analysis study
Due: 11 weeks from date of contract award, depending on SSC's identification of participants by week one from date of contract award. (SSC to provide response within 2 weeks, i.e. by week 13)

Provide final, tested proposed site maps, wireframes and recommendations for the SSC Service Portal
Due: 15 weeks from date of contract award, depending on SSC's identification of test participants by week one from date of contract award

Provide draft visual design options for the SSC Service Portal
Due: 17 weeks from date of contract award (SSC to provide response within 2 weeks i.e. week 19)

Provide final, tested visual design and style guide for the SSC Service Portal
Due: 21 weeks from date of contract award, depending on SSC's identification of test participants by week 15 from date of contract award.

Revisions
Due: 1 week from response from SSC.

Provide any source files
Due: Upon acceptance of design by SSC.

In addition to the above, weekly status updates will be provided to the SSC project manager identified in the contract.

Deliverables should be in Microsoft Word, Visio or Excel, as appropriate, and provided electronically to the project manager.

8.0 CONSTRAINTS

Site maps, wireframes and recommendations will meet the requirements of the following TBS web standards:

Standard on Web Usability http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=24227
Standard on Web Accessibility http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=23601&section=text
Standard on Interoperability http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=25875
Standard on Optimizing for Mobile http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=27088
Web Experience Toolkit http://www.gcpedia.gc.ca/wiki/Web_Experience_Toolkit_%28WET%29 – and as implemented by SSC.

9.0 LANGUAGE OF WORK

The language of work and of the deliverables will be in English.

10.0 TRAVEL REQUIREMENTS

There is no travel requirement associated with this contract.

11.0 LOCATION OF WORK

Most work will be completed off site at the Contractor's offices. The resources will have access to the SSC Ottawa office (99 Metcalfe) for the purpose of attending meetings. Office space at the SSC Ottawa office (99 Metcalfe) may be made available on an ad-hoc basis when necessary.

12.0 APPENDICES

Appendix I – SSC Serving Government website
Screen capture as of October 15, 2014

Home screen:

End User view (via Services menu – For Government of Canada Employees)

Appendix II – Proposed Design Elements

The SSC Service Portal will be similar to an e-commerce engine that displays content personalized to each user based on that person's SSC-defined role.

The SSC Service Catalogue is an ITIL-based directory of defined SSC services and made available via the Portal. If the Portal is compared to an e-commerce web site, then the service catalogue is the inventory database.

Once a user accesses the catalogue, they will be able to:

- View the set of services either by frequent tasks, or by service type.
- View the set of information pertaining to each service
- Order service(s)
- Access 'on-demand services.'

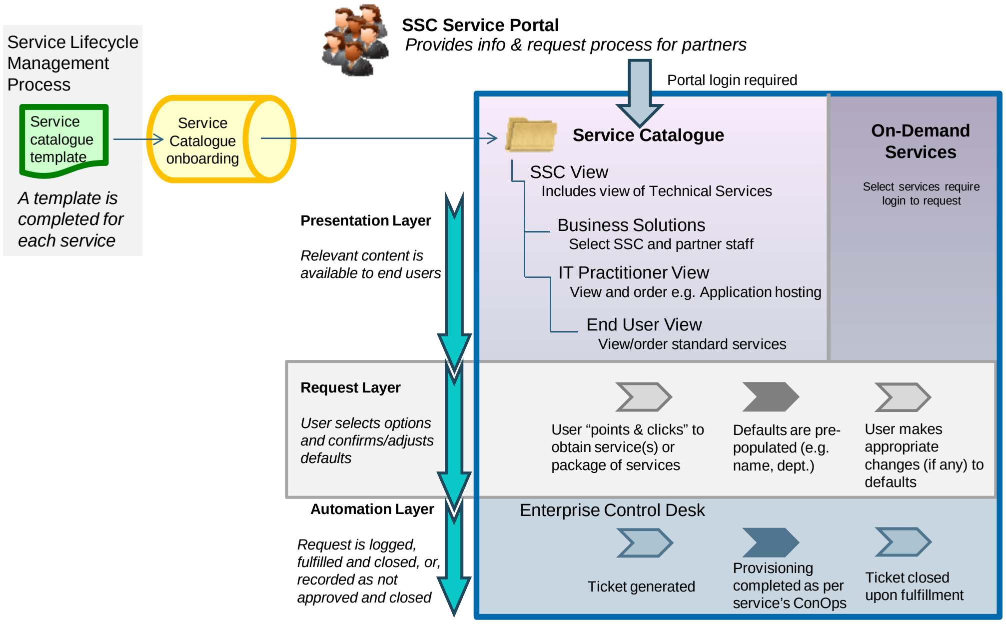
Users should be able to view the full suite of SSC services, including those for which they do not have permission. A login would be required, however, to request service for which their user role deems them eligible.

Management of services will require an immediate login to confirm identity and contextualize requested services.   Managing a user's service(s), for instance, includes deleting an email account and/or changing a phone number.

Proposed end state

The following diagram illustrates the Service Catalogue proposed end state. The focus of this Information Architecture -- User-Centred Design Study is the presentation layer.

Service Catalogue: Proposed End State



Appendix III - Portal User Groups and Access Management

SSC is responsible for providing services to 43 government departments. This can translate to >300,000 users accessing the portal. Those departments, mandated by the Government of Canada to consume services provided by SSC, are referred to as 'partners.' Although not in place yet, SSC has the option to provide those same services to additional government departments on a cost-recovery basis. Those additional departments are referred to as 'clients.'

Partner/clients, SSC employees and contractors are currently categorized into five main user groups for the purposes of access management:

- **End Users;**
    - All employees and contractors of SSC and of SSC partners and clients are considered to be end users.

- **IT Practitioners;**
    - IT practitioner services are deployed to a technical employee or contractor in a specialized field, likely a technical IT position, requiring specialized IT support services to perform functional role requirements.

- **Business Solutions;**
    - Specific SSC employees (e.g. partner and client facing staff), and GC End Users (program leads), will have the ability to view information pertaining to more complex services that cannot be fulfilled through the portal. A Business Solution service request is generated by an individual assigned a corporate service role, who is procuring the service on behalf of a partner department or in support of a specific program.

- **Technical Services;**
    - SSC staff are able to view all technical service catalogue entries. For details of Technical Services, see section 3.2 below.
    - SSC staff are able to view text content of services that have not been authorized (launched) yet. The content in this "coming soon" type of web page is written by project managers and indicates the status of each service (scope, dates, etc.).
    - SSC staff are able to view 'internal use only' sections of service catalogue entries.

Figure 2 below provides a diagram that identifies the roles and access rights of each type of user.

Additional user groups will be added as user needs change and as efficiencies are further identified.

<table>
<tr><th colspan="3">Users</th><th colspan="4">Services
(Visible on SSC Portal: Y/N)</th></tr>
<tr><th>From?</th><th>User Group Name</th><th>Description</th><th>End User Services</th><th>IT Practitioner Services</th><th>Technical Services</th><th>Business Solutions Services</th></tr>
<tr><td rowspan="2">Partner Employees (incl. SSC)</td><td>End Users</td><td>Ability to order services</td><td>Y</td><td>N</td><td>N</td><td>N</td></tr>
<tr><td>IT Practitioners</td><td>Ability to order non-standard services which will be available to a sub-group of employees</td><td>Y</td><td>Y</td><td>N</td><td>N</td></tr>
<tr><td>Select Partner & SSC Employees</td><td>Business Solutions</td><td>Able to view select services that cannot be ordered “out of the box”</td><td>Y</td><td>N</td><td>N</td><td>Y</td></tr>
<tr><td>Select SSC Employees</td><td>Technical Services</td><td>- Able to view “behind-the-scenes” services that make partner services possible (e.g. Network)
- Able to view ‘coming soon’ info related to service authorization
- Able to view ‘internal use only’ sections of catalogue entries</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td></tr>
<tr><td>TBD</td><td>Other Roles</td><td>Determined on an as-needed basis</td><td>Y</td><td>TBD</td><td>TBD</td><td>TBD</td></tr>
</table>

Appendix IV - Types of Services

SSC offers a multitude of services but a service or bundle or services is segregated between specific user groups. Some, such as “on-demand,” services are available to all while others are approved for only to a very limited audience. All service delivery is directly tied to the functional roles and responsibilities of the user or for specific groups that fall under the responsibility of a particular role, such as a user who orders a business solution for a program or partner(s).

Three types of partner-facing services are defined as being partner-facing services:

1. **End User Services** Within the context of SSC, end user services enable a Government of Canada employee (or contractor) to perform functional role requirements. This type of service accounts for the greatest number of requests going through the Service Catalogue. Due to the high volume of end user requests across SSC and its partner/client departments, these services are typically deployed at a relatively low cost per individual user.

   An example of an end user service is a request for desktop items or personal communications devices.

2. **IT Practitioner Services** Within the context of SSC, IT practitioner services are deployed to a technical employee (or contractor) requiring specialized IT support services to perform functional role requirements. It would be considered standard practice for the employee to directly procure this type of service from the Service Catalogue. Service request fulfillment is typically low cost per individual user.

   An example of an IT Practitioner Service is an application developer requesting a development environment or database hosting.

3. **Business Solutions Services** Within the SSC context, a Business Solution Service request is generated by an individual with a corporate service role, who is procuring the service on behalf of a department or in support of a specific program. A Business Solution service is not intended to support an individual employee’s functional role. Deployment of this service type has the potential to incur substantial cost to SSC and/or the partner/client due to additional complexities in delivering the business solution. Cost factors likely include additional resource requirements related to the engagement of a Client Relationship Manager (CRM) and/or procurement resources if a competitive procurement process is demanded. A request for a Business Solution service could be initiated by many functional areas of SSC or its partner/clients.

   Examples of a Business Solution service include the establishment of a hosted contact centre or a toll free line to support inquiries to support responses to inquiries from the public.

On-Demand Services

On-Demand Services are services that are either required by most, if not all, users to enable the performance of their role, or are considered tools common and universally accessible. An on-demand service will be available from the portal but it will not be sourced from the Service Catalogue as it is available at no cost to the requestor. Accessing an “on-demand,” service will be completed by a “point and click,” transaction on the portal. Although an on-demand service is globally available it does not require individual implementation or an e-commerce transaction process. Typically, an “on-demand,” service is required as an information tool.

An example of a globally available “on demand” service is access to the Government Electronic Directory Service, version 2 (GEDS 2.0).

Note: In limited and identified instances, an on demand service is available only to those with assigned login credentials. Although it is considered “on-demand,” it is needed in a limited number of roles. An example of this is in a downloadable, billing tool. A pre-defined authentication process determines the user’s level of access. Once credentials are verified, the service product, typically a link or downloadable file, becomes available to the requestor.

Appendix V outlines the current list of partner-facing services. A list of technical services is currently in development and will be provided at time of contract award.

Appendix V - Service Catalogue Information (templates)

Below is the Service Catalogue Information template for partner-facing services.

Service Catalogue
Information - Partner-

The Technical Services template is currently in development and will be provided once available.

The Operating Standards template is also in development and will outline the type of information to be posted on the Serving Government website. Operating standards will be linked to relevant catalogue entries.

Appendix VI – Sample Service Catalogue Entry

Below is an example of current service catalogue entries. Note that the status of this service catalogue entry is draft.

Videoconferencing cat
entry-EN.docx

Appendix VII – SSC Services Listing

Current list of partner-facing and technical services.

SSC Services Listing -
EN.xlsx

ANNEX "B"
Basis of Payment

Phase	Description	Total Cost
1	• Work Breakdown Plan • Draft information architecture and navigation design recommendations	
2	• Conduct a User Groups and Task Analysis Study • Revise the information architecture and navigation design based on the outcome of the user research • Develop a visual design and style guide	
	TOTAL:	