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EN537-05IT01

Please see the following document.

Request for Supply Arrangement (RFSA)
Three Refreshes for Solutions-Based Informatics Professional Services (SBIPS)
for
All Federal Departments and Crown Corporations

This is a request to solicit bids for Supply Arrangements (SA's) for the provision of Solutions-Based Informatics Professional Services (SBIPS).

Suppliers capable of meeting the requirements of this solicitation are invited to submit a bid. This document also allows bidders who were issued a SA under the last solicitation to submit bids against additional streams, tiers, regions and metropolitan areas. Only suppliers qualified for the relevant Region, Metropolitan Area, Tier and Stream, at the time of individual requirements, will be eligible to provide the requested Services.

Suppliers are reminded of the importance of reading this document in its entirety, as well as all documents incorporated by reference. By submitting a bid, bidders are acknowledging that they agree to the process described in this refresh bid solicitation. Suppliers who have questions or comments about this solicitation can direct them to the Supply Arrangement Authority identified in this solicitation. The process for making enquiries is described in Part 2, Suppliers Instructions. Bids cannot be revised after the bid submission date. Therefore it is very important for suppliers to ensure that they understand the requirements of this solicitation before submitting a bid.

NOTE: Qualified suppliers who received a Supply Arrangement (SA) under RFSA EN537-05IT01/H are not obligated to respond to this Refresh RFSA.

Request for Supply Arrangement (RFSA)

Three Refreshes for Solutions-Based Informatics Professional Services (SBIPS) for All Federal Departments and Crown Corporations

Part 1 - General Information

1.1 Introduction

The SBIPS Request for Supply Arrangements (RFSA) is divided into six parts plus attachments and annexes as follows:

Part 1 - General Information:

provides a general description of the requirement

- 1.1 Introduction
- 1.2 Summary of SBIPS RFSA
- 1.3 RFSA Procurement Process
- 1.4 Three Refreshes Supply Arrangement
- 1.5 Security Requirement
- 1.6 Debriefings
- 1.7 Key Terms

Part 2 - Supplier Instructions:

provides the instructions applicable to the clauses and conditions of the RFSA

- 2.1 Standard Instructions, Clauses and Conditions
- 2.2 Supplier Participation
- 2.3 Submission of Arrangements
- 2.4 Former Public Servant - Notification
- 2.5 Federal Contractors Program for Employment Equity - Notification
- 2.6 Enquiries - Request for Supply Arrangements
- 2.7 Applicable Laws

Part 3 - Arrangement Preparation Instructions:

provides the suppliers with instructions on how to prepare the arrangement to address the evaluations criteria specified.

- 3.1 Arrangement Preparation Instructions

Part 4 - Evaluation Procedures and Basis of Selection -

indicates how the evaluation will be conducted, the evaluation criteria which must be addressed in the arrangement, and the basis of selection.

- 4.1 Evaluation Procedures
- 4.2 Basis of Selection
- 4.3 Financial Viability

Part 5 - Certifications - includes certifications to be provided

- 5.1 Certification to be submitted in hard copy and in the Data Collection Component (DCC)
- 5.2 Certifications to be submitted through the Data Collection Component (DCC) only.

Parts 1 to 5 of the SBIPS RFSA also include the following Attachments:

- (i) Attachment “A” to the SBIPS RFSA: Supplier Profile/ Centralized Professional Services System (CPSS) Supplier Module – Enrollment
- (ii) Attachment “B” to the SBIPS RFSA: Mandatory Evaluation Criteria
- (iii) Attachment “C” to the SBIPS RFSA: Technical Response Template/CPSS Supplier Module – DCC
- (iv) Attachment “D” to the SBIPS RFSA: *Certification of Formal Arrangement related to Mandatory Requirement M3.*

Part 6 - Supply Arrangement and Resulting Contract Clauses

6A - Supply Arrangement: includes the Supply Arrangement (SA) with the applicable clauses and conditions

- 1. Arrangement
- 2. Security Requirement
- 3. Standard Instructions, Clauses and Conditions
- 4. Supply Arrangement Reporting
- 5. Term of Supply Arrangement
- 6. Authorities
- 7. Clients / Identified Users
- 8. Priority of Documents
- 9. Certifications
- 10. Applicable Laws
- 11. Suspension or Cancellation of Qualification by Canada
- 12. Aboriginal Business Certification
- 13. Delivery Requirements Outside a CLCSA
- 14. Controlled Goods
- 15. Insurance
- 16. Environmental Considerations
- 17. Travel and Living
- 18. Regions and Metropolitan Areas

6A Supply Arrangement includes the following annexes:

Annex “A” to the SBIPS Supply Arrangement: SBIPS Streams of Expertise and Definitions

Annex “B” Generic Security Requirements Check Lists

Annex “C” Client Satisfaction Form

Annex “D” to the SBIPS Supply Arrangement: SBIPS SA Holder’s Eligible Streams of Expertise, Regions and Metropolitan Areas.

6B - Bid Solicitation: includes instructions for the bid solicitation process within the scope of the SA.

- 1. Bid Solicitation Documents
- 2. Bid Solicitation Process

6C - Resulting Contract Clauses: includes general information for the conditions which will apply to any contract entered into pursuant to the SA.

1.2 Summary of SBIPS RFSA

1.2.1 This solicitation is a tender for arrangements for the provision of Solutions-Based Informatics Professional Services (the “Services”) to Clients/Identified Users for locations throughout Canada, excluding any locations in area subject to any of the Comprehensive Land Claims Agreements. A supply arrangement is not a contract for the provision of services and neither party is legally bound as a result of signing the supply arrangement document alone.

1.2.2 Streams of expertise of this Request for Supply Arrangement

This RFSA includes the following Streams of Expertise of the Services, as described in Annex A of the SBIPS Supply Arrangement:

- Stream 1. Business Transformation
- Stream 2. Enterprise Resource Planning/Customer Relationship Management (ERP/CRM)
- Stream 3. Electronic Services Delivery
- Stream 4. Geospatial Informatics Services
- Stream 5. Information Management/Business Intelligence
- Stream 6. IT Systems Management
- Stream 7. Legacy Support and Transition
- Stream 8. Managed Services
- Stream 9. Network Services
- Stream 10. Security Management
- Stream 11. Systems Integration

At any time, PWGSC may conduct further Requests for Supply Arrangements for new Streams of Expertise. Requirements for new streams will be subject to an open competition posted on the Government Electronic Tendering Service.

Suppliers may submit an arrangement in respect of one or more Streams of Expertise for either Tier 1 or Tier 2. The Tier applicable to the stream is dependant on the value of the three projects provided as described in Mandatory Criteria M.3 Experience and Expertise. It is not mandatory to submit an arrangement for all Streams of Expertise to be awarded a Supply Arrangement.

Qualified streams within a supply arrangement are applicable to all regions specified by the supplier within the Supplier Profile portion of the arrangement at Attachment A - Supplier Profile/CPSS Supplier Module - Enrollment.

1.2.3 Bid Solicitation

It is intended that this bid solicitation follow the guidelines set out by PWGSC' Professional Services National Procurement Strategy; however those guidelines are not incorporated into this document. The bid solicitation documents contain all the requirements relating to the bid solicitation. Any other information or documentation provided to or obtained by a bidder from any source is not relevant.

In as much as possible, PWGSC will issue a bid solicitation intended to replace the Supply Arrangements for the Services on an annual basis, although PWGSC reserves the right to

choose to proceed with a different procurement vehicle for the requirement if it considers such action appropriate. Each such recompetition requires all bidders including those who may have received instruments under the previous solicitation, to submit a bid in response to the bid solicitation in order to continue to provide services under its resulting Supply Arrangements.

Three Refreshes:

After the date of issuance of the Supply Arrangements, a three refresh process will be initiated which enables the pre-qualification of new suppliers and/or further pre-qualification to add streams and/or Tier and/or regions for existing Suppliers already included in the ePortal of the Centralized Professional Services System (CPSS).

Canada reserves the right to issue supply arrangements to bidders who qualify throughout the entire period of the Supply Arrangement. Evaluations of such arrangements will be processed three times a year.

1.2.4 Trade Agreements

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 Agreement on Internal Trade (AIT), the Canada-Chile Free Trade Agreement (CCFTA), Canada-Peru Free Trade Agreement (CPFTA), the Canada - Columbia Free Trade Agreement (CCoIFTA), the Canada Panama Free Trade Agreement (CPanFTA), the Canada Jordan Free Trade Agreement, The Canada European Free Trade Association Free Trade Agreement, the Canada Costa Rica Free Trade Agreement, and the Canada Israel Free Trade Agreement.

1.2.5 Designation as Set Aside

Part of this procurement may be designated by one or more Identified Users as set-aside under the federal government's Procurement Strategy for Aboriginal Business (PSAB). In these specific cases, (i) the procurement is set aside from the international trade agreements under the provision each has for set-asides for small and minority businesses, and (ii) as per Article 1802 of the AIT, the AIT does not apply.

In order to be considered as an Aboriginal Business under the PSAB, Bidders must submit the Aboriginal Business certification contained in the Data Collection Component of the CPSS and identify itself as an Aboriginal Business at submission.

1.3 RFSA Procurement Process

Step 1: Issuance of Supply Arrangements

This Request for Supply Arrangement is intended to result in the issuance of Supply Arrangement(s).

The Supply Arrangement Authority will issue Supply Arrangements to Qualified Suppliers in order to establish a framework to permit Clients to expeditiously process proposals from a pool SA Holders, which result in legally binding contracts for services defined in the individual solicitation that fall within the scope of the Supply Arrangement. Suppliers are required to comply with mandatory business and experience requirements, as well as indicate in their arrangements the Tier(s), Stream(s), Metropolitan Area(s) and the Region(s) for which they wish to be considered.

Canada will conduct an evaluation of the arrangements, and successful suppliers will be awarded a SA. Each SA will specify the applicable Tier(s), Streams of Expertise, Region(s) and Metropolitan Area(s) in which the Supplier is eligible to provide Services, and if the SA can be used for Aboriginal set-aside contracts. A supplier who has qualified for Tier 2 will automatically qualify for Tier 1.

All resulting SA's are identical and will follow the format detailed in 6A- Supply Arrangement of this RFSA, with the exception of SA Holder specific information such as the SA Holders qualified Tiers, Streams of Expertise, Metropolitan Areas and Regions and administrative details.

The SAs will be available for use by Canada upon signature and award by PWGSC. A successful supplier will be added to the SA Holder list once the SA Holder Representative has returned a signed copy of the SA front page to the SA Authority.

As much as reasonably possible, PWGSC intends to issue a RFSA solicitation to re-compete the Supply Arrangements for the Services on an annual basis, also referred to as an Annual Re-Competition.

Step 2: Issuance of Request for Proposals (RFP)

A RFP may be issued by a Client, or PWGSC on behalf of the Client, to SA Holders in the appropriate Tier, Region, Metropolitan Area and Stream of Expertise to submit bids to provide services. The RFP will describe the requirement of a specific project, the evaluation criteria and the selection methodology. The RFP may result in the award of one or more contracts against Supply Arrangements and such contract(s) may also involve the issuance of "Task Authorizations" (TAs).

It is anticipated that the majority of RFPs under \$2,000,000 will be managed by Client. A resulting contract will be managed by the Contracting Authority identified in the Contract.

Invited SA Holders must be pre-qualified for the relevant Region, Metropolitan Area, Tier and Stream of Expertise at the time of bid solicitation.

1.4 Three Refreshes Supply Arrangement

This RFSA contains Three Refreshes.

1.4.1 SBIPS RFSA Three Refreshes solicit:

(1) New suppliers to become Suppliers for the Solution Based Supply Arrangements under the SBIPS Method of Supply; and,

(2) Suppliers who have a SA issued under RFSA EN537-05IT01/H to qualify for additional Streams, regions/metropolitan areas or Tier to be added to its Supply Arrangement.

1.4.2 Three Refreshes Submission Due Date:

REFRESH PERIODS:

Period 1: from January 19, 2015, to March 2, 2015, 2:00 P.M., BRU; 0B2 and DCC

Period 2: from March 03, 2015 to June 01, 2015, 2:00 P.M. BRU; 0B2 and DCC

Period 3: from June 2, 2015 to July 24, 2015, 2:00 P.M. BRU; 0B2 and DCC

Due to operational requirements, the refresh periods may need revision; in this case, suppliers will be notified accordingly

1.5 Security Requirement

There is a security requirement associated with this solicitation.

Before issuance of a supply arrangement, the Supplier must hold a valid Designated Organization Security (DOS) clearance as indicated in Part 6A - Supply Arrangement.

1.6 Debriefings

After issuance of all Supply Arrangements resulting from a re-competition, Canada will notify suppliers in writing regarding the outcome of their arrangement evaluation.

Suppliers should make a request for debriefing to the Arrangement Authority within 15 working days of receipt of such written notification. The debrief will be provided in writing.

1.7 Key Terms

1) A Solutions-Based Informatics Professional Services (SBIPS) Project:

- a. is meant to produce a self standing outcome-driven result. Such result does not require any further work and could be used as a reference for future requirements, phases or projects.
- b. comprises mainly of IT services and, in certain situations, essential goods, whereby a Supplier delivers a solution to a requirement, phase or project, manages the overall requirement, phase or project and accepts responsibility/risk for the outcome.
- c. may comprise of consulting services which are typically team based and deliverable focused, involving advisory work, and thought leadership, innovation or strategy.
- d. may include methodologies and processes that may be required to manage the project (including Project Management, Contract Management, Quality Management, Risk Management and Solution Development or any other established and recognized methodologies) and may include various business models depending upon the requirement.
- e. it may include end-to-end project work where the Supplier is requested to devise a solution to a business problem in which case there may be a proof of concept; or a requirement where there is a business problem and a Supplier comes forward with a methodology, an approach or an already established solution as well as the requisite expertise to enable the Supplier to leverage the value of its methodology and/or approach to deliver the solution.

2) An acceptable substantiation reference

under this RFSA is defined as a client reference who may be contacted, to confirm the Supplier has previously provided the identified services within the project submitted. For each substantiating reference, the Supplier should provide the following information: Client Name, Contact, Telephone and E-mail address (if available). Multiple projects may have the same substantiation reference.

3) An Outside Client

is defined as any legal entity that is not a parent, subsidiary or affiliate of the supplier or the parent, subsidiary or affiliate of any member of a joint venture supplier submitting under this solicitation.

4) A Project

is a contract between the Supplier and an Outside Client under which the Supplier has provided an information technology professional services solution to the Outside Client, and has fulfilled all of the terms of the contract, provided that, if the contract provides for discrete phases with specific deliverables, then any such phase completed by the Supplier, including receipt by the supplier of payment in full for all work and delivery by the supplier of all deliverables, qualifies as a Project .

5) A New Supplier

refers to a supplier that is not a current SBIPS SA Holder.

6) An existing or current SA Holder

is a supplier who has been pre-qualified and holds a Supply Arrangement at the submission date and is in good standing.

7) The Centralized Professional Services System (CPSS):

The Centralized Professional Services System (CPSS) is a web-based system created as part of PWGSC's Professional Services National Procurement Strategy to support a single portal for professional services. It contains information on methods of supply which include SBIPS, and reflects standardized business rules. CPSS is comprised of a Supplier Module, a Client Module and a Maintenance Module. The Client Module is used by Government of Canada personnel to process procurement functions. The Maintenance Module is used to administer CPSS and the methods of supply it contains. The Supplier Module allows a supplier through a Main Supplier Contact (as defined below) to:

- i. create and manage Contacts (Contacts are supplier personnel who, using credentials received in response to actions by the Main Supplier Contact are able to input data for the supplier into the Data Collection Component, and view data displayed in the Client Module for use by Government of Canada personnel);
- ii. input and submit data as part of a solicitation process;
- iii. track the progress/status of data input against bid solicitation(s) and retrieve the data for use in other solicitations;
- iv. modify an arrangement as permitted by a solicitation's terms; and
- v. view information pertaining to that supplier and edit certain elements of that supplier's profile.

8) The Data Collection Component or DCC of the CPSS Supplier Module

replaces the concept of "Response Templates" that have been used in other professional services solicitations for SBIPS. It is mandatory that the DCC be used to submit the supplier's arrangement. The DCC will display information on methods of supply in a "dashboard" format, providing both information that has been submitted by a supplier and information on upcoming and closed solicitations for professional services.

9) Each supplier must enroll and identify a Main Supplier Contact or MSC.

The MSC will receive credentials that enable the MSC to access the CPSS Supplier Module, as defined in Article 8 above. Enrollment is conducted on-line and can be initiated by a supplier at any time, with a typical response time of minutes to receive credentials, provided that all the necessary information is received by Canada. Instructions for enrollment in the CPSS Supplier Module and other support on the use of the DCC are available at: <http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/spc-cps-eng.html>

When participating in any solicitation process that involves the use of the DCC, suppliers are responsible for the input of accurate data. Suppliers must also safeguard the credentials released to the MSC and supplier's Contacts that enable access to the Supplier Module. Canada will not delay or cancel any solicitation or Call-up process due to a supplier's inability to access, modify or validate such credentials, or because of any claim that such credentials were used without proper authorization.

Part 2: Supplier Instructions

2.1 Standard Instructions, Clauses and Conditions

All instructions, clauses and conditions identified in the Request for Supply Arrangement (RFSA) by number, date and title are set out in the Standard Acquisition Clauses and Conditions (SACC) Manual (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada (PWGSC).

Suppliers who submit an arrangement agree to be bound by the instructions, clauses and conditions of the RFSA and accept the terms and conditions of the Supply Arrangement.

The 2008 (2014-03-01) Standard Instructions - Request for Supply Arrangements - Goods or Services are incorporated by reference into and form part of the RFSA.

Subsection 5.4 of 2008, Standard Instructions - Request for Supply Arrangements - Goods or Services, is amended as follows:

Delete: sixty (60) days
Insert: two hundred twenty (220) days

2.2 Supplier Participation

In order for the supplier to receive a Supply Arrangement, a Supplier's arrangement must respond to all the requirements of this solicitation. The submission may include an arrangement for a Supply Arrangement in some or all Tiers, Regions, Metropolitan areas, and/or Streams. However, a supplier may not submit a second arrangement for the same Tier, Region, Metropolitan areas, and/or Streams.

One legal entity may participate in the submission of:

- i. One arrangement submission from the legal entity alone, or
- ii. One arrangement submission from the legal entity and one arrangement submitted in a joint venture, or
- iii. Two arrangements submitted in joint venture.

More than two arrangements generated from the same legal entity are not permitted in response to this solicitation.

If a legal entity participates in more than two arrangements, Canada will choose in its discretion which two arrangements to consider. If a legal entity chooses to participate in two arrangements, each arrangement must be a physically separate document, clearly marked as a separate arrangement.

Each arrangement will be evaluated independently without regard to other arrangements submitted and, therefore, every arrangement submitted must be complete.

2.3 Submission of Arrangements

Arrangements must be submitted only in the following manner:

- (i) physically, for the elements of the arrangement that must or may be submitted in print, to Public Works and Government Services Canada (PWGSC) Bid Receiving Unit by the closing date and time indicated in Article 1.4.2. and location indicated on page one (1) of this RFSA Refresh.

And

- (ii) electronically through the Data Collection Component of CPSS, for the arrangement elements that must or may be submitted by electronic transmission by the date and time as indicated in Article 1.4.2. Refer to the "Submission Grid" in Part 3 for detailed submission information.

Failure to **submit** the arrangement through the DCC will result in the arrangement being declared non responsive. The submission in DCC of CPSS must be done by the **Main Supplier Contact**.

All suppliers are required to comply with mandatory requirements, as well as indicate in their arrangement the Region(s), Metropolitan Area(s), Tier(s) and Stream(s) for which they wish to be considered.

Due to the nature of the Request for Supply Arrangement, bids transmitted by facsimile or electronic mail to Public Works and Government Services Canada will not be accepted.

Bid Receiving Unit Address Solely for Delivery of Proposals: The Bid Receiving address on page one of the solicitation is for the sole purpose of the elements of the arrangement that must or may be submitted in print. No other communications are to be forwarded to this address.

2.4 Former Public Servant – Notification

(please do not take into account the certification 'Former Public Servant' in the Data Collection Component)

Service contracts awarded to former public servants in receipt of a pension or a lump sum payment must bear the closest public scrutiny and reflect fairness in the spending of public funds. Therefore, the bid solicitation will require that you provide information that, were you to be the successful bidder, your status with respect to being a former public servant in receipt of a pension or a lump sum payment, will be required to report this information on the departmental websites as part of the published proactive disclosure reports generated in accordance with Treasury Board policies and directives on contracts with former public servants, Contracting Policy Notice 2012-2 and the Guidelines on the Proactive Disclosure of Contracts.

2.5 Federal Contractors Program for Employment Equity - Notification

(please do not take into account the certification 'Federal Contractors Program for Employment Equity' in the Data Collection Component)

The Federal Contractors Program (FCP) for employment equity requires that some contractors make a formal commitment to Employment and Social Development Canada (ESDC) (ESDC) Labour to implement employment equity. In the event that this Supply Arrangement would lead to a contract subject to the Federal Contractors Program (FCP) for employment equity, the bid solicitation and resulting contract templates would include such specific requirements. Further information on the Federal Contractors Program (FCP) for employment equity can be found on ESDC's-Labour's website .

2.6 Enquiries - Request for Supply Arrangements

Where to Direct Enquiries: All enquiries and other communications with government officials relating to this RFSA are to be directed ONLY to the email address: RCNMDAI.-NCRIMOS@tpsgc-pwgsc.gc.ca

All enquiries must be submitted in writing to the Arrangement Authority no later than fifteen (15) calendar days before the refresh period due dates for which you submit a bid. Enquiries received after that time may not be answered.

Suppliers should reference as accurately as possible the numbered item of the RFSA to which the enquiry relates. Care should be taken by suppliers 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 suppliers do so, so that the proprietary nature of the question is eliminated, and the enquiry can be answered to all suppliers. Enquiries not submitted in a form that can be distributed to all suppliers may not be answered by Canada

2.7 Applicable Laws

A Supply Arrangement (SA) and any contract awarded under the SA must be interpreted and governed, and the relations between the parties determined, by the laws in force in the Province of Ontario, Canada.

Suppliers may, at their discretion, substitute the applicable laws of a Canadian province or territory of their choice without affecting the validity of the arrangement, by deleting the name of the Canadian province or territory specified and inserting the name of the Canadian province or territory of their choice, under Applicable Laws in Attachment A “Supplier Profile” to the SBIPS RFSA. If no change is made, it acknowledges that the applicable laws specified are acceptable to the supplier.

Part 3: Arrangement Preparation Instructions

3.1 Arrangement Preparation Instructions

3.1.1 Arrangement Format

Canada requests that suppliers provide the Arrangement and Certifications in hard copy and as an electronic submission through the Data Collection Component (DCC) as identified in the Submission Grid below. Specifically, suppliers must provide as follows:

Section I Technical Bid: To the PWGSC Bid Receiving Unit, one Print copy of the Technical arrangement as detailed in Attachment B and Attachment C, except where identified in the Submission Grid (below) as being required to be submitted through the Data Collection Component (DCC) of the Supplier's Module of the CPSS.

Section II Certifications: For the Certifications as detailed in Component 1, Part 5, a Print copy of the Certification or submission through the DCC, as specified in the Submission Grid (below).

There is no financial submission required for the SBIPS RFSA.

Where information is required to be submitted in both print copy and via the DCC, if there is a discrepancy between information received via the Data Collection Component and the Print (hard) copy the print copy will take precedence.

3.1.2 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. The Policy on Green Procurement can be found at: <http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html>

To assist Canada in reaching its objectives, suppliers are encouraged to:

1. Use 8.5 x 11 inch (216 mm x 279 mm) paper containing fiber certified as originating from a sustainably-managed forest and/or containing minimum 30% recycled content; and
2. Use an environmentally-preferable format including black and white printing instead of colour printing, printing double sided/duplex, using staples or clips instead of cerlox, duotangs or binders.

3.1.3 Data Collection Component of the Supplier's Module of the CPSS

Bidders must submit most of their technical arrangements as specified in this Part 3 through the Data Collection Component of the Supplier's Module of CPSS and a portion through the Bid Receiving Unit in hardcopy. See the submission Grid for a description of which portions of the arrangement to submit in DCC or Hardcopy or Both.

To access the Data Collection Component:

1. Access the following CPSS link: <http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/spc-cps-eng.html>
2. Enroll or login to the system. Suppliers must contact CPSS directly for enrollment questions or assistance.
3. Access this solicitation's Data Collection Component through the "Dashboard"

4. Enter all the required data into the Data Collection Component
5. Print the required parts of the Data Collection Component and submit with the hard copy of the arrangement by the closing date and time indicated in Article 1.4.2. and location indicated on page one (1) of one period of the refresh RFSA (Suppliers could submit at each period). The Data Collection Component allows suppliers to re-submit the electronic copy of the arrangement, replacing that supplier's previous electronic copy of the arrangement up until the closing date and time of the refresh period of the RFSA.

Arrangements are only received through DCC when “Submit” is selected by the Main Supplier Contact for the supplier. Simply saving the arrangement in DCC does not submit the arrangement.

3.1.4 Submission Grid

The purpose of the following grid is to assist Suppliers with their arrangement preparation and submission. It serves as a guide only. As the status and circumstances of each supplier is unique, it is the responsibility of each supplier to read all documents related to this solicitation, and to ensure that all mandatory criteria, Certifications, and elements required for arrangement validity are met in their submission. Where in the Submission Grid the symbol “&” is used, it means that the Bidder must submit the information requested through both methods.

	Guideline for New Supplier (Supplier is not a current SBIPS Holder)	Guideline for Existing SBIPS Holder who is NOT changing the Technical Offer already on file from the previous SBIPS Solicitation	Guideline for Existing SBIPS Holder who IS applying for additional Tier, Streams, Regions, Metropolitan areas □
Bidder's Profile	DCC	N/A	DCC
Supplier's Statement	DCC & Print	N/A	DCC & Print
Grandfather Certification	N/A	N/A	N/A
Aboriginal Business Certification	DCC & Print	N/A	DCC
Integrity Provisions/Code of Conduct Certification	DCC	N/A	DCC
Mandatory M.1 Financial Declaration (certification)	DCC & Print	N/A	DCC
Mandatory M.2 Minimum Years in Business	DCC & ADD	N/A	DCC
Mandatory M.3 Experience and Expertise of the Supplier	DCC	N/A	DCC
Mandatory M.4 Insurance requirements	DCC (& ADD if applying for Tier 2)	N/A	DCC & (ADD if applying for Tier 2)
Mandatory M.5 Security Clearance of the Supplier	DCC	N/A	DCC

DCC: indicates that the Supplier must input information, as applicable, into the "Data Collection Component: Suppliers' Module of CPSS" and submit prior to one of the submission refresh due date. **Ensure the Main Supplier Contact selects "SUBMIT" in the DCC or the submission will not be received.**

Print: Indicates that the supplier must print and sign the certification and should submit it with the hard copy of the arrangement to the Bid Receiving Unit by one of the submission refresh due date. Should the supplier omit any of the print certifications Canada may request the information within a deadline specified at the time of the request.

ADD: Indicates that additional documentation is required to be submitted with the Arrangement as specified in the applicable Mandatory Criteria in this SBIPS refresh RFSA

3.1.5 Technical Submission

Suppliers must identify in their arrangement the Stream(s), Region(s), Metropolitan area(s) and Tier(s) [if applicable] for which they wish to be considered.

This bid solicitation will award Supply Arrangements based upon an evaluation that does not assess the personnel that may be provided by the bidder after the award of a Supply Arrangement. As it does not require the submission of individual resources, resumes are not requested and should not be submitted with a Bidder's bid.

3.1.6 Certifications

Suppliers must provide all of the certifications required under Part 5 of the SBIPS refresh RFSA.

Part 4: Evaluation Procedures and Basis of Selection

4.1 Evaluation Procedures

- a) Arrangements will be assessed in accordance with the entire requirement of the SBIPS refresh RFSA including all technical criteria. There are several steps in the evaluation methodology, 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 Canada will evaluate the arrangements. Canada may hire any independent consultant, or use any Government resources, to evaluate any arrangement. Not all members of the evaluation team will necessarily participate in all aspects of the evaluation.
- c) If Canada seeks clarification or verification from the supplier about its arrangement submission, the supplier will have two (2) working days or a longer period if specified in writing by the Arrangement Authority to provide the necessary information to Canada. Failure to meet this deadline will result in the arrangement or part thereof being declared non-responsive, unless the Arrangement Authority grants an extension at his or her sole discretion.

4.1.1 Evaluation of Arrangements

All Mandatory Criteria are detailed within Attachment "B" to the SBIPS RFSA - **Mandatory Evaluation Criteria**

4.2 Basis of Selection

All elements of the bid solicitation that are mandatory requirements are identified specifically with the words "must" or "mandatory". Bids that do not comply with each and every mandatory requirement applicable to the offer and/or arrangement will be considered non-responsive for that arrangement. The evaluation steps are as follows:

4.2.1 Phase 1 – Technical Evaluation

Each submission will be reviewed to determine if it contains an arrangement for a Supply Arrangement that meets the mandatory requirements set out in Attachment "B" to the SBIPS RFSA, Mandatory Evaluation Criteria. Within each submission, an arrangement must comply with the requirements of the solicitation and meet all mandatory requirements of Attachment B to be declared responsive to the requirement for a Supply Arrangement.

4.2.2 Phase 2 – Selection and Issuance of Supply Arrangements:

Each technically responsive arrangement will be recommended for the issuance of a Supply Arrangement. Where an Aboriginal supplier qualifies for both an Aboriginal and Non-Aboriginal Supply Arrangement, only one Supply Arrangement will be awarded.

Suppliers should note that the issuance of all Supply Arrangements is subject to Canada's internal approvals process. If such approval is not given, the Supply Arrangements will not be issued.

After any resulting SAs have been issued, all suppliers will be notified in writing regarding the outcome of this solicitation.

4.3 Financial Viability

- A. **Financial Viability Requirement:** The Supplier must be financially viable to enter into this Supply Arrangement. To determine the Supplier's financial viability, the Supply Arrangement Authority may, by written notice to the Supplier, require the submission of some or all of the financial information detailed below during the evaluation of arrangements. The Supplier must provide the following information to the Supply Arrangement Authority within fifteen (15) working days of the request or as specified by the Supply Arrangement Authority in the notice:
- a. Audited financial statements, if available, or the unaudited financial statements (prepared by the Supplier's outside accounting firm, if available, or prepared in-house if no external statements have been prepared) for the Supplier's last three fiscal years, or for the years that the Supplier has been in business if this is less than three years (including, as a minimum, the Balance Sheet, the Statement of Retained Earnings, the Income Statement and any notes to the statements).
 - b. If the date of the financial statements in (a) above is more than five months before the date of the request for information by the Supply Arrangement Authority, the Supplier must also provide, unless this is prohibited by legislation for public companies, the last quarterly financial statements (consisting of a Balance Sheet and a year-to-date Income Statement), as of two months before the date on which the Supply Arrangement Authority requests this information.
 - c. If the Supplier has not been in business for at least one full fiscal year, the following must be provided:
 - a) the opening Balance Sheet on commencement of business (in the case of a corporation, the date of incorporation); and
 - b) The last quarterly financial statements (consisting of a Balance Sheet and a year-to-date Income Statement) as of two months before the date on which the Supply Arrangement Authority requests this information.
 - c) A certification from the Chief Financial Officer or an authorized signing officer of the Supplier that the financial information provided is complete and accurate.
- B. If the Supplier is a joint venture, the financial information required by the Supply Arrangement Authority must be provided by each member of the joint venture.
- C. If the Supplier is a subsidiary of another company, then any financial information in 1. (a) to (d) above required by the Supply Arrangement Authority must be provided by the ultimate parent company.
- D. Financial Information Already Provided to Public Works and Government Services Canada (PWGSC):

The Supplier is not required to resubmit any financial information requested by the Supply Arrangement Authority that is already on file at PWGSC with the Contract Cost Analysis, Audit and Policy Directorate of the Policy, Risk, Integrity and Strategic Management Sector, provided that within the above-noted time frame:

- a. the Supplier identifies to the Supply Arrangement Authority in writing the specific information that is on file and the requirement for which this information was provided; and
- b. the Supplier authorizes the use of the information for this requirement.

It is the Supplier's responsibility to confirm with the Supply Arrangement Authority that this information is still on file with PWGSC.

- E. Other Information: Canada reserves the right to request from the Supplier any other information that Canada requires to conduct a complete financial capability assessment of the Supplier. The Supplier also understands that a complete financial capability review of the Supplier may also be conducted at the time individual bid solicitations are issued under the supply arrangement.
- F. Confidentiality: If the Supplier provides the information required above to Canada in confidence while indicating that the disclosed information is confidential, then Canada will treat the information in a confidential manner as permitted by the **Access to Information Act**, R.S., 1985, c. A-1, Section 20(1) (b) and (c).

Part 5: Certification Required Precedent to Issuance of a Supply Arrangement

The certification listed below should be completed and submitted with the arrangement. If the required certification is not completed and submitted as requested, the Supply Arrangement Authority will inform the Supplier of a time frame within which to provide the information. Failure to comply with the request of the Supply Arrangement Authority and to provide the certifications within the time frame provided will render the arrangement non-responsive.

The certification provided by suppliers to Canada are subject to verification by Canada at all times. Canada will declare an arrangement non-responsive, or will declare a contractor in default in carrying out any of its obligations under any resulting contracts, if any certification made by the Supplier is found to be untrue whether made knowingly or unknowingly during the arrangement evaluation period, or during the period of any supply arrangement arising from this RFSA and any resulting contracts.

The certifications in the Data Collection Component (DCC) titled Federal Contractors Program for Employment Equity, Former Public Servant, and Work Force Reduction Program are not applicable to the SBIPS RFSA process and do not need to be completed, in accordance with Articles 2.4 and 2.5 of this RFSA.

5.1 Certification to be submitted in hard copy and in Data Collection Component (DCC):

The certification 5.1.2. must be signed and submitted. If the required certification is not completed and submitted as requested, the Supply Arrangement Authority will so inform the Supplier and provide a time frame within which to meet the requirement. Failure to comply with the request of the Arrangement Authority and meet the requirement within that time period will render the arrangement non-responsive.

5.1.1. N/A

5.1.2. SUPPLIER'S STATEMENT (ALL SUPPLIERS):

ALL supplier's should sign and submit the following "Supplier Responsibility Statement" with the hard copy of their arrangement to the Bid Receiving Unit by the submission due date indicated in Article 1.4.2 of this Refresh SBIPS RFSA.

We certify that all statements made with regard to these requirements are accurate and factual, and we are aware that the Department of Public Works and Government Services Canada reserves the right to verify any information provided in this regard. Untrue statements may result in the Supplier's arrangement being declared non-compliant in its entirety, current SBIPS SA Holders becoming ineligible to receive further solicitations, and any other action which Canada may consider appropriate.

SIGNATURE: _____

DATE: _____

Print Name: _____

Legal Name of Supplier : _____

(ALL SUPPLIERS: Print, sign, and submit this certification with the hard copy of your arrangement)

5.2 Certifications to be submitted through the Data Collection Component (DCC) only:

The following certifications (5.2.1. and 5.2.2.) should be provided through the Data Collection Component. If any of these required certifications is not completed and submitted as requested, the Supply Arrangement Authority will so inform the Supplier and provide a time frame within which to meet the requirement. Failure to comply with the request of the Arrangement Authority and meet the requirement within that time period will render the arrangement non-responsive.

5.2.1.ABORIGINAL BUSINESS CERTIFICATION (All Suppliers)

<p>ABORIGINAL BUSINESS CERTIFICATION (MANDATORY FOR OFFERORS SEEKING QUALIFICATION FOR ABORIGINAL SO/SA)</p> <p>VEUILLEZ REMPLIR UNE SEULE DES DEUX (2) DÉCLARATIONS CI-DESSOUS.</p> <p>PLEASE COMPLETE ONLY ONE OF THE TWO (2) STATEMENTS BELOW</p> <p>I, _____ (<i>Insert Name of duly authorized representative of business</i>), want to be considered as an Aboriginal and Non-Aboriginal Offeror. [<input type="checkbox"/>]</p> <p>I, _____ (<i>Insert Name of duly authorized representative of business</i>), want to be considered as a Aboriginal Offeror only. [<input type="checkbox"/>]</p> <p>1. PLEASE COMPLETE THE INFORMATION REQUIRED BELOW</p> <p>(a) I, _____ (<i>Insert Name of duly authorized representative of business</i>) hereby certify that _____ (<i>Insert name of Offeror</i>) meets, and will continue to meet throughout the duration of the Aboriginal Standing Offer/Supply Arrangement, the requirements for this program as set out in this Annex "E" to Part A entitled "Requirements for the Set-Aside Program for Aboriginal Business", which document I have read and understand.</p> <p>(b) The aforementioned business agrees to ensure that any subcontractor it engages with respect to any contract awarded under any resulting Aboriginal Standing Offer/Supply Arrangement will, if required, satisfy the requirements set out in "Requirements for the Set-Aside Program for Aboriginal Business."</p> <p>(c) The aforementioned business agrees to provide to Canada, immediately upon request, information to substantiate a subcontractor's compliance with this program.</p> <p>PLEASE CHECK THE APPLICABLE BOXES IN 2 AND 3 BELOW</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 5%; text-align: center;">2.</td> <td style="width: 25%; text-align: center;">[<input type="checkbox"/>]</td> <td>The aforementioned business is an Aboriginal business which is a sole proprietorship, band, limited company, co-operative, partnership or not-for-profit organization,</td> </tr> <tr> <td></td> <td style="text-align: center;">or [<input type="checkbox"/>]</td> <td>The aforementioned business is a joint venture between two or more Aboriginal businesses or an Aboriginal business and a non-Aboriginal business</td> </tr> <tr> <td style="text-align: center;">3.</td> <td style="text-align: center;">[<input type="checkbox"/>]</td> <td>The Aboriginal business or businesses have:</td> </tr> <tr> <td></td> <td style="text-align: center;">[<input type="checkbox"/>]</td> <td>fewer than six full-time employees</td> </tr> <tr> <td></td> <td style="text-align: center;">or [<input type="checkbox"/>]</td> <td>six or more full-time employees</td> </tr> </table> <p>4. The aforementioned business agrees to immediately furnish to Canada, such evidence as may be requested by Canada from time to time, corroborating this certification. Such evidence will be open to audit during normal business hours by a representative of Canada, who may make copies and take extracts from the evidence. The aforementioned business agrees to provide all facilities for audits and to furnish information requested by Canada with respect to the certification.</p> <p>5. It is understood that the civil consequences of making an untrue statement in the bid documents, or of not complying with the requirements of the Program or failing to produce satisfactory evidence to Canada regarding the requirements of the Program, may include: forfeiture of the bid deposit; retention of the holdback; disqualification of the business from participating in future contracts under the Program; and/or termination of any contract awarded pursuant to the Aboriginal SO/SA. In the event that a contract is terminated because of an untrue statement or non-compliance with the requirements of the Program, Canada may engage another contractor to complete the performance of the contract and any additional costs incurred by Canada will, upon the request of Canada, be borne by the aforementioned business.</p>		2.	[<input type="checkbox"/>]	The aforementioned business is an Aboriginal business which is a sole proprietorship, band, limited company, co-operative, partnership or not-for-profit organization,		or [<input type="checkbox"/>]	The aforementioned business is a joint venture between two or more Aboriginal businesses or an Aboriginal business and a non-Aboriginal business	3.	[<input type="checkbox"/>]	The Aboriginal business or businesses have:		[<input type="checkbox"/>]	fewer than six full-time employees		or [<input type="checkbox"/>]	six or more full-time employees
2.	[<input type="checkbox"/>]	The aforementioned business is an Aboriginal business which is a sole proprietorship, band, limited company, co-operative, partnership or not-for-profit organization,														
	or [<input type="checkbox"/>]	The aforementioned business is a joint venture between two or more Aboriginal businesses or an Aboriginal business and a non-Aboriginal business														
3.	[<input type="checkbox"/>]	The Aboriginal business or businesses have:														
	[<input type="checkbox"/>]	fewer than six full-time employees														
	or [<input type="checkbox"/>]	six or more full-time employees														

5.2.2. INTEGRITY PROVISIONS - Associated Information

By submitting an arrangement, the Supplier certifies that the Supplier and its Affiliates are in compliance with the provisions as stated in Section 01 Integrity Provisions - Arrangement of Standard Instructions 2008 (2014-03-01) Standard Instructions - Request for Supply Arrangements - Goods or Services. The associated information required within the Integrity Provisions will assist Canada in confirming that the certifications are true.

Attachment “A” to the SBIPS RFSA - Supplier Profile/CPSS Supplier Module: Enrollment
Bidders must enter the “Company Information” in the “Data Collection Component” DCC of CPSS.
To access CPSS, follow the link: <http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/spc-cps-eng.html>

Attachment “B” to the SBIPS THREE REFRESHES RFSA - Mandatory Evaluation Criteria

All Suppliers must meet the mandatory requirements set out in this Attachment B by demonstrating through the submission of proof in their arrangement that they meet the mandatory requirement. The arrangement must clearly explain and demonstrate in sufficient depth the points that are subject to the evaluation criteria against which the arrangement will be evaluated. Simply repeating the statement contained in the solicitation is not sufficient.

Evaluation of Joint Venture Proposals: Unless this solicitation expressly provides otherwise, each member of a joint venture Supplier must meet all the mandatory requirements of this solicitation.

M.1 Financial Declaration:

The Supplier must have earned a gross business volume in sales of at least \$250,000 CDN in the last fiscal year ending not more than twelve months immediately prior to the date of the submission due date in article 1.4.2. To demonstrate this requirement, the Supplier must provide in its arrangement, a financial declaration from either its Chief Financial Officer, Chief Executive Officer or the supplier’s duly authorized representative. The Supplier should:

- a. Complete in the Data Collection Component (DCC) of CPSS, Print from the DCC of CPSS, sign and submit the M.1 Financial Declaration with the hard copy of its arrangement to the Bid Receiving Unit by the submission due date indicated in Article 1.4.2 for which the arrangement is submitted.; or
- b. Existing suppliers are not required to re-submit, as long as, the information on file remains accurate; or
- c. Provide the information M.1, a) above if the Supplier was issued a SBIPS Supply Arrangement under SBIPS EN537-05IT01/H and wishes to modify its qualification against this criterion.

The Supplier acknowledges that the PWGSC reserves the right to verify that this Financial Declaration was true as of the submission due date by requesting additional financial information from the Supplier or by other means, at any time prior to supply arrangement award or during their performance, and that untrue statements may result in the arrangement being declared non-responsive or any other action which the Minister may consider appropriate, including the suspension, withdrawal or set-aside of the Supplier's arrangement once a supply arrangement has been awarded.

If the Supplier is a joint venture, the Declaration should be provided by at least one member of the joint venture.

M.2 Minimum Years in Business:

The Supplier must have been in business as the same legal entity for a minimum of three years as of the submission due date for which the arrangement is submitted.

- a. To demonstrate this requirement, the Supplier must provide documented proof of its status (such as a certificate of incorporation, business registration or tax returns confirming the number of years it has been in business); or
- b. Existing suppliers are not required to re-submit, as long as, the information on file remain accurate; or
- c. Provide the information M.2, a) above if the Supplier was issued a SBIPS Supply Arrangement under SBIPS EN537-05IT01/H and wishes to modify its qualification against this criterion.

If the supplier is a joint venture, each member of the joint venture must meet the requirement.

If the Supplier has been incorporated or otherwise created less than three years before the submission due date for which the arrangement is submitted, as the result of a corporate change under which it has in law assumed all of the assets, undertaking, operational capability, skills and resources of other legal entities, Canada will consider the three year minimum requirement to be met if the Supplier demonstrates to Canada's satisfaction that:

- a. the Supplier has been incorporated or otherwise created as the result of a corporate change under which it has in law assumed all of the assets, undertaking, operational capability, skills and resources of other legal entities;
- b. each of the other legal entities carried on business, uninterrupted and in the normal course, for at least three years ;
- c. the Supplier has carried on the business of all of the other legal entities in the normal course, uninterrupted from and after the date of the corporate change;
- d. the corporate change was solely for tax or other purposes unrelated to the business of the other legal entities and does not affect the ability of the Supplier to carry on the business that had been carried on by the other legal entities; and
- e. the Supplier, as at the date of the submission due date for which the arrangement is submitted, maintains the same assets, undertaking, operational capability, skills and resources as the other legal entities had maintained before the corporate change.

In these circumstances, Canada may require from the Supplier an unqualified legal opinion from an independent law firm stating that the Supplier meets all of the above requirements. Canada reserves the right to require other detail and material to verify that the above requirements are met. If Canada is not satisfied that the above requirements have been met, the Supplier's arrangement will be considered non-responsive. Canada reserves the right to request proof of any information provided by the Supplier. If the information cannot be validated, the Supplier's arrangement will be considered non-responsive.

M.3 Experience and Expertise of the Supplier:

- a. Existing suppliers are not required to re-submit as long as the information on file remains accurate; or
- b. Suppliers issued a SBIPS Supply Arrangement under SBIPS EN537-05IT01/H that wish to modify its qualification against this criterion by adding more Streams or increasing the Tier of a Stream are to provide all information addressing all criteria in "M.3 Mandatory Criteria" below for the new Streams/Tier, complete DCC indicating which streams are "Newly Offered" and fully complete the Grandfather Certification in Part 5 for those Domains already in the Supply Arrangement. The supplier is also required to fill in the DCC with the Streams they are already qualified for by selecting "Currently Offered".
- c. Suppliers that are not SA Holders must provide all information addressing all criteria in "M.3 Mandatory Criteria" below for the Stream/Tiers applied for and indicate "Newly Offered" for these Streams.
- d. All Suppliers are to indicate "Not Offered" in DCC for all those Streams they are not interested in offering.

Mandatory Criteria M.3:

The Supplier must meet all of the following criteria, listed as M.3a thru M.3m, for each Stream of expertise for which it is proposing to provide SBIPS.

Failure to meet all criteria listed will result in Project being declared as non-compliant.

Should a project be non-compliant, then the entire stream will be non-compliant, as each Stream requires three (3) compliant projects to be submitted.

Only three projects are to be submitted per Stream, no more and no less.

Suppliers may submit an arrangement for Tier 1 in some Streams and Tier 2 in other Streams.

<u>□ Tier 1 and Tier 2 Criteria for M.3</u>	
M.3a Three (3) Projects	The supplier must provide three (3) IT Projects successfully completed for an Outside client, as defined in article “Key Terms” of this RFSA. For each of these three (3) projects the supplier must provide all information requested within M.3b, c, d, e, f, g, h, i, j, k, l, and m, using the Data Collection Component (DCC) of CPSS. □
M.3b Total Cumulative Value	The total cumulative value of the three (3) projects for one Stream, must be \$1.5 Million or more, excluding all taxes, to be considered for Tier 1 in that Stream or ; The total cumulative value of the three (3) projects for one Stream, must be \$6Million or more, excluding all taxes, to be considered for Tier 2 in that Stream.□
M.3c Substantiation Reference	The supplier must provide an acceptable substantiation reference for each project. The substantiation reference will be contacted in accordance with the Article “Reference Check” within this RFSA. The substantiation reference information is to include: Client Organization Contact Name Phone Number E-mail Address The substantiation reference would be the client for which the supplier had a contract with to perform the services. □
M.3d Start Date	The supplier must provide the Start Date for the Project
M.3e End Date	The supplier must provide the End Date for the project. The end date is the date the completed solution was provided to the client. □
M.3f End Date □	Each of the three projects submitted must have been completed within the last three (3) years prior to the RFSA submission due date. The end date of the project must fall within the three year period. □
M.3g Project Description	The supplier must provide a description of the project and description of the solution they provided.
M.3h Project Deliverables	The supplier must provide a description of the project deliverables completed by the supplier to provide the completed solution to the client.
M.3i Project Value	The supplier must provide the project value for the completed solution, pertaining to the Stream applied for. A project may be used for more than one stream, provided that each portion of the project used for a particular stream is a solution on its own. Only the dollar value for that particular portion of the project may be used as the project dollar value for a stream. The total dollar value of that project/contract (or portion of it) may not be used elsewhere against another SBIPS Stream in this or any other streams. For example, A \$1 million dollar project can be used for Stream 1 and Stream 2, because the entire project contained a solution relating to Stream 1 and a solution relating to Stream 2. The supplier is not to state \$1 million for this project under Stream 1 and \$1 million under Stream 2. The \$1 million dollars will need to be divided accordingly amongst the two Streams. The total project value is the total amount invoiced by your company to provide the solution.
M.3j Explanation of Relation to Stream of Expertise	To demonstrate that the supplier has an understanding of the Stream of Expertise, the supplier must provide an explanation of how each project relates to the Stream of Expertise (defined in Annex “A” to the SBIPS Supply Arrangement) for which it is being proposed. The three (3) successfully completed projects submitted must relate to the Stream of Expertise for which the supplier is proposing to provide SBIPS. Referencing other parts of the arrangement submitted to substitute the explanation is not acceptable. □
M.3k 100% of Project	The supplier must certify that the supplier’s contract represents 100% of each Project. □
M.3l Explanation of SBIPS solution	The supplier must provide an explanation of how the project is a SBIPS solution as defined in article “Key Terms” within this SBIPS RFSA. For a solution to be completed would mean the solution as defined in the articles above has already been provided or delivered to the client. □
M.3m Professional Services Contract □	The supplier must certify that the project is a Professional Services Project and the professional services portion of the project represents at least seventy percent (70%) of the contract dollar value of the solution.

For the purposes of this mandatory requirement M.3 only, the Supplier may submit projects that have been completed by the Supplier, the parent company, subsidiaries or other affiliates of the Supplier where the Supplier has signed agreements in place with their respective parent, subsidiaries or affiliates.

Where the Supplier is submitting projects that have been completed by the parent company, subsidiaries, or other affiliates of the Supplier, the Supplier must provide with its arrangement, or within 10 days of request by PWGSC, a completed and duly signed copy of *Attachment "D" to the SBIPS RFSA - Certification of Formal Arrangement related to Mandatory Requirement M3.*

Attachment "D" to the SBIPS RFSA certifies that the Supplier has arrangements in place with its respective parent, subsidiaries, affiliates in order to submit the project experience for consideration under this mandatory requirement M.3. duly signed by the Supplier, the parent company, subsidiaries, or other affiliates of the Supplier.

Reference Check

Reference checks will occur only for those Streams of Expertise that meet all other mandatory criteria within M.3 except M.3c, which is determined through this reference. If there are any other M.3 criteria deemed as Non-Compliant the project will be considered non-compliant and the reference check may not take place.

A positive reference or "Yes" as indicated below, must be obtained for at least two of the three projects provided for a Stream to allow for M.3b to be compliant for the Stream of Expertise.

If one of the three responses for a Stream of Expertise is a negative response or "No" as indicated below, the stream of expertise will be found non-compliant.

A lack of response or unwillingness to provide a response from a reference does not count as a positive reference and will not be considered non-compliant.

- a. A "positive reference" is the receipt of confirmation from the substantiated reference that services were provided in accordance with mandatory criteria M.3 above based on the following questions sent via e-mail to the substantiated reference indicated in the arrangement for a particular Stream of Expertise:

"Has (*Supplier's legal name*) provided your organization with a solution for (*description of Stream of Expertise*)?"

Please indicate with an (x) the one response that applies.

_____ I am unwilling or unable to provide any information about the above services.
NOTE: If you are or have been employed by or acted as a consultant for the Bidder or for the solution referenced, this option is the most appropriate response.

_____ Yes, the Supplier has provided my organization with the solution described above within the last three years from (*the submission due date applicable.*)

_____ No, the Offeror has not provided my organization with the solution described above.

Should you have any questions regarding this SBIPS reference check process, please do not hesitate to contact me."

- b. The response received from the substantiated reference will be used to determine the compliancy of the project as follows:
- a) The substantiated reference indicates that the supplier did provide the solution relating to the Stream of Expertise requested: This is a positive reference and the project would be deemed compliant.
 - b) The substantiated reference indicates that the supplier did not provide the services: This is not considered a positive reference and that project and Stream of Expertise would be considered non-compliant.
 - c) The substantiated reference indicates that they are unable or unwilling to provide the requested reference: This is not considered a positive reference and will not be considered as non-compliant.
 - d) In the event that no response is received by the substantiated reference by the due date stated in the original e-mail: A second e-mail will be sent to the substantiated reference requesting that they respond to the questions stated. If no response is received to the second request by the date indicated in the e-mail, the evaluation team will follow-up with a telephone call to the substantiated reference. If a message is left as a result of the telephone call and no response is received within 48 hours of leaving a message. This reference will not be considered a positive or negative reference.
 - e) Indication is received via return e-mail that the original e-mail sent to the substantiated reference was improper because the e-mail address is no longer valid, or the substantiated reference is absent for a period of time: The evaluation team will contact the supplier to ask for a replacement of the substantiated reference, within the same organization. The reference request will then be sent out to that person in accordance with Article above.

M.4 Insurance requirements:

SA Tier 1

There is no mandatory insurance requirement to be satisfied in order to be awarded on a Tier Supply Arrangement.

The Supplier certifies that if awarded a SBIPS SA Tier 1, the Supplier will meet the mandatory insurance requirement as set out in individual RFP's issued against the SBIPS SA Tier 1.

SA Tier 2

To qualify as a single entity or as a joint venture for a SA Tier 2, the Supplier must have a minimum \$2M Commercial General Liability coverage at RFSA submission due date for which the arrangement is submitted.

To demonstrate the SA Tier 2 insurance requirement, the Supplier should:

- a. Submit a certificate of insurance effective as of the date of bid submission with the hard copy of its arrangement to the Bid Receiving Unit by the submission due date for which the arrangement is submitted; or
- b. Existing suppliers are not required to re-submit, as long as, the information on file remain accurate; or
- c. Provide the information M.4, a) above if the Supplier was issued a SBIPS Supply Arrangement under SBIPS EN537-05IT01/H and wishes to modify its qualification against this criterion.

If the Bidder is a joint venture, it may satisfy these insurance requirements described above with either:

- a. a single policy that satisfies the requirements of this solicitation in the name of the joint venture as the insured party, providing coverage to all members of the joint venture each of which must also be included as an additional named insured; or
- b. separate policies that each satisfy the requirements of this solicitation in the name of each member of the joint venture as the insured party.

M.5 Security Clearance of the Supplier:

The Supplier must, at the time of SA issuance, hold at least a valid Designated Organization Screening (DOS) issued by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC). If the Supplier is a Joint Venture, all Joint Venture members must hold at least a valid DOS issued by CISD, PWGSC.

To demonstrate this requirement, the Supplier must provide in the Certifications Section of the Data Collection Component of CPSS the following information. Suppliers who have an existing security clearance issued by PWGSC CISD are to provide their current level of security and the CISD File Number.

- a. Suppliers that have already initiated an application for Security Sponsorship must provide their CISD file number.
- b. Suppliers that have not yet initiated an application for Security Sponsorship and requests sponsorship when submitting their arrangement, must request Designated Organization Screening (DOS), by completing the appropriate section within the Data Collection Component of CPSS for DOS Sponsorships.

Should their arrangement be found to be compliant, PWGSC will sponsor the Supplier for the minimum clearance required. Should their arrangement be found to be non-compliant in mandatory criteria M.1, M.2, M.3 or M.4 a security sponsorship will not be initiated.

For additional information on security requirements, Offerors should consult the "Security requirements for PWGSC Bid Solicitations - Instructions to Bidders" document (<http://www.tpsgc-pwgsc.gc.ca/app-acq/lc-pl/lc-pl-eng.html#a28>) on the Departmental Standard Procurement Documents Web site.

Canada will not delay the issuance of any SA to allow suppliers to obtain the required security clearance. Suppliers, who have not yet received their DOS clearance from CISD within the bid validity of their submission, will be considered non-responsive and will be required to submit a new bid in the subsequent renewal or refresh in order to be considered for the provision of SBIPS Services. It is the responsibility of suppliers to ensure that the information required concerning the security clearance is provided on time.

Attachment C to the SBIPS RFSA: Technical Response Template/CPSS Supplier Module - DCC

The "Collection Component" DCC of CPSS serves to replace the Technical Response Template. The Data Collection Component of CPSS can be accessed through the CPSS website: <http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/spc-cps-eng.html>

Pay particular attention to those sections of the SBIPS DCC that require you to print out the information in DCC and submit in hardcopy to PWGSC. This must be completed and submitted by the Main Supplier Contact.

The following steps are provided to assist suppliers through the CPSS process:

Log-in and Supplier Profile

1. Suppliers need to register with CPSS to provide a SBIPS submission. Go to: <http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/spc-cps-eng.html>
2. Once a supplier profile is created and the supplier has logged into CPSS, they can go to Solicitation Dashboard.
3. Select the SBIPS RFSA from the Solicitation Dashboard
4. Once in the SBIPS response template in CPSS, select the appropriate Contact Persons for Contact One and Contact Two. Then Click "Save Designated Contacts.
5. Go To "Tiers", select Tier 1, Tier 2, or both depending on what the supplier wishes to apply to and Click Save.
6. Go to "Return to Response Home Page", Click Company Information", complete the information on the page and click save. If this supplier is a Joint Venture, click on "enter your joint venture information:", enter the information for each JV member and click save after each one.
7. Go to the "Company Information" link, verify the information and click Save.

Technical Submission for SBIPS

8. Go to "Return to Response Home Page", Click "Regional Information", Select the areas for which the supplier wishes to provide Solutions Based Professional Services and Click "Update".
9. Select the correct contact person for each of the Regions and Metropolitan areas in the drop down lists and click Update for the Regional Contact Information.
10. Under Local Offices, select or input a local office for each of the Regions/Metropolitan Areas, as applicable and select Update.
11. Under Language Preferences, Select the language preference from the drop down menus for each Region/Metropolitan Area and select Update.
12. Go to the "Return to Response Home Page" link and click on "Mandatory Criteria"
13. Click all Tiers available, and then add.
14. Click "Group 1", "Financial Certification", and review the text on the page. Select the "I agree" check box, include the fiscal year end date, CFO or CEO information on the page and click Save.
15. Select the "Return to Mandatory Criteria" link, and select "Number of Months in Business", review the information and enter the date the supplier's business was established in the space provided and a page reference to any information provided in hardcopy to substantiate the date. If this is a joint venture, include the date the JV was established, then the information requested for each JV member and Save.
16. Go to "Return to Mandatory Criteria", "Stream Information", Review the text on the page and for each Stream indicate if the stream is "Currently Offered", "Newly Offered", or "Not Offered". The descriptions of each choice is located on the page. Once all have been completed, click Save.

17. For each Stream that is "Newly Offered" more information is required and, For each Stream the supplier will select "View Stream Substantiate for "Stream Name"", and three projects must be provided. These projects must be in accordance with M.3a and M.3b of the SBIPS RFSA. Read the information on screen and in the SBIPS RFSA for M.3 to complete this section.
 - a. Provide a Project Summary number (1, 2, or 3)
 - b. Under Cross Reference include the Contract number for this project.
 - c. Under Project Start Date – provide the date requested at M.3d of the SBIPS RFSA.
 - d. Under Project End Date – provide the date requested at M.3e of the SBIPS RFSA.
 - e. Under project Description/Summary – Provide the Project/Contract title and information requested in M.3g of the SBIPS RFSA
 - f. Under Project Deliverables – Provide the information requested in M.3h of the SBIPS RFSA.
 - g. Under Total Project Value – Provide the value as described at M.3i of the RFSA. If the project will NOT be used against another stream for this supplier, the same dollar value can also be entered under "Total Dollar Value under the Stream". If the project/contract will be used against multiple streams, the supplier is to divide the Total Project Value amongst those Streams it will be used for as described in M.3i. The portion of the value attributed to the Stream is to be entered under "Total Dollar Value under the stream".
 - h. Under Relation of Project to Stream provide the information requested at M.3j of the SBIPS RFSA.
 - i. Under Certification Supplier Contract Represents 100% of Project Summary, provide the information requested at M.3k of the SBIPS RFSA.
 - j. Under Explanation of How Project is a Solution – Provide the information requested at M.3l of the SBIPS RFSA
 - k. Under Certification that the Project is a Professional Services Project – Provide the information requested at M.3m of the SBIPS RFSA.
 - l. Under Contact Information to Substantiate Summary – Provide the information requested in CPSS and in accordance with M.3c and the article entitled Reference Checks in the SBIPS RFSA. This information will allow PWGSC to conduct reference checks.
18. Once all of the Project Information is verified, select Save Summary.
19. This process will need to be repeated for the remainder of the Project Summaries. Save all summaries, verify the information and Click "Return to Summaries"
20. Click Save, and "Return to Mandatory Criteria"
21. Click "Insurance Requirement" for Tier 1, check the "I agree" checkbox after reviewing the information on the screen and click "Save", then "Return to Mandatory Criteria".
22. If the supplier is applying to Tier 2, there will be a second "Insurance Requirement" for Tier 2. Click on this Tier 2 Insurance Requirement link, review the information, check the "I agree" checkbox and Save. Go to "Return to Mandatory Criteria" and verify that all Mandatory Criteria have been completed.
23. Go to "Return to Response Home Page" and select "Certifications" and complete each certification provided in the CPSS DCC as stated within the SBIPS RFSA. Ensure all information is completed and saved.
24. Go back to "Return to Response Home Page" and if all information is completed and the submission is ready, change all those stating "In Progress" to "Completed" and Click Save.
25. At this point you have NOT SUBMITTED the SBIPS Submission. Click "SUBMIT" to send the DCC SBIPS Submission to PWGSC. Ensure you have all printed pages requested for the hard copy submission to be sent to PWGSC as instructed in the SBIPS RFSA.

Attachment “D” to the SBIPS RFSA
Certification of Formal Arrangement related to Mandatory Requirement M.3

In submitting an arrangement response to this RFSA, [Insert name of Supplier] certifies that it has included experience of the Supplier and the entity(ies) named below in order to qualify under this RFSA and the experience claimed is not limited solely to the experience of the Supplier.

[_____Insert name of Supplier] has formal arrangements in place with the entities named below that permit the Supplier to access personnel, intellectual property and other resources to provide SBIPS under contracts awarded to the Supplier under any resulting SA.

While organized as separate legal entities for jurisdictional purposes, [Insert name of Supplier] and the entities named below all certify:

- a. they are related in accordance with the definition of parent, subsidiary and affiliate set out in the *Canada Business Corporations Act*, and
- b. they operate on a co-ordinated basis across multiple jurisdictions with respect to (but not limited to) a common brand, deployment of human resources and use of technical knowledge and experience.

<input type="checkbox"/> Name of entity	Relationship to Supplier	Name & signature of the Authorized Representative for the entity named below	Date
[Insert name of Supplier]	Supplier		
[Insert name of entity]	[Parent, Subsidiary, Affiliate or Associated entity]		
[Insert name of entity]	Parent, Subsidiary, Affiliate or Associated entity]		
[Insert name of entity]	[Parent, Subsidiary, Affiliate or Associated entity]		
[Insert name of entity]	Parent, Subsidiary, Affiliate or Associated entity]		
[Insert name of entity]	Parent, Subsidiary, Affiliate or Associated entity] <input type="checkbox"/>		

Part 6 - Supply Arrangement and Resulting Contract Clauses

6A. Supply Arrangement

1. Arrangement

Solutions Based Informatics Professional Services “SBIPS”, or the “Services” refer to a requirement comprised mainly of IT services and, in certain situations, essential goods, through which a Supplier delivers a solution to a requirement, phase or project, manages the overall requirement, phase or project and accepts responsibility/risk for the outcome. A SBIPS requirement is meant to produce a self standing outcome-driven result. Such result does not require any further work and could be used as a reference for future requirements, phases or projects.

The Supply Arrangement includes only those Services described in the Requirements for Services at Annex A “SBIPS Streams of Expertise and Definitions”, which are also identified at Annex D “SBIPS SA Holder’s Eligible Streams of Expertise, Regions and Metropolitan Areas”.

2. Security Requirement

- a. The Supplier must hold, at minimum, a valid Designated Organization Screening (DOS) issued by the Canadian Industrial Security Directorate (CISD) as specified below in order to become and remain an SA Holder. The Supply Arrangement Authority may verify the Supplier’s security clearance with CISD of PWGSC at any time during the period of the Supply Arrangement.
- b. The requirements to be procured under this Supply Arrangement are subject to the requirements in the Security Requirement Check Lists (SRCL’s) identified in each individual bid solicitation. Samples of possible SRCL’s are located at <http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/31-eng.html>, but other SRCL’s may be used. Each bid solicitation will identify the SRCL that will apply to any resulting contract.
- c. Subcontracts which contain security requirements are not to be awarded without the prior written permission of CISD/PWGSC.
- d. In the case of a joint ventures, for any given resulting contract the highest level of corporate security attainable through CISD of PWGSC is the lowest level held by any single member of the joint venture. For example, a joint venture with five (5) members is comprised of four (4) members holding a valid Facility Security Clearance (FSC) at the Secret level and one member holding a valid Designated Organizational Screening (DOS) level. The highest corporate security level for which the joint venture would be considered under a bid solicitation run under this Supply Arrangement would be DOS until such time as the member holding a valid DOS clearance has requested sponsorship via the Supply Arrangement Authority and obtained a valid FSC at the Secret level, as issued by CISD. FSC Secret is the highest level of security the SA Authority will sponsor.
- e. Additional Security Checks may be conducted by the Identified User.

3. Standard Instructions, Clauses and Conditions

All clauses and conditions identified in the Supply Arrangement and resulting contract(s) by number, date and title are set out in the Standard Acquisition Clauses and Conditions (SACC) Manual (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada (PWGSC).

3.1 General Conditions

2020 (2014-03-01) General Conditions, Supply Arrangement - Goods or Services, apply to and form part of the Supply Arrangement.

4. Supply Arrangement Reporting

The Supplier must compile and maintain records on its provision of solution-based professional services to the federal government including any goods provided to support these professional services to the federal government under contract resulting from the Supply Arrangement. This data must include all purchases paid for by a Government of Canada Acquisition Card.

Canada will provide a report template which must be submitted at the end of each quarter. All data fields of the report must be completed as requested. If some data is not available, the reason must be indicated. If no goods or services are provided during a given period, the Supplier must still provide a 'NIL' report.

The date must be submitted on a quarterly basis to the Supply Arrangement Authority. Electronic reports must be completed and forwarded to the Supply Arrangement Authority, no later than 15 calendar days after the end of the quarterly report.

The Quarterly periods are defined as follows:

- Q1: April 1 to June 30 due July 15
- Q2: July 1 to September 30 due October 15
- Q3: October 1 to December 31 due January 15
- Q4: January 1 to March 31 due April 15

Failure to provide fully completed reports in accordance with the above instructions may result in the suspension or cancellation of the Supply Arrangement and/or the application of a vendor performance corrective measure.

5 Term of Supply Arrangement

5.1 Period of Supply Arrangement

The period begins from the date of issuance as stated on page 1 of the SA and ends with the award of the next re-compete process.

5.2 Bid Solicitation

It is intended that this bid solicitation follow the guidelines set out by PWGSC' Professional Services National Procurement Strategy; however those guidelines are not incorporated into this document. The bid solicitation documents contain all the requirements relating to the bid solicitation. Any other information or documentation provided to or obtained by a bidder from any source is not relevant.

In as much as possible, PWGSC will issue a bid solicitation intended to replace the Supply Arrangements for the Services on an annual basis, although PWGSC reserves the right to choose to proceed with a different procurement vehicle for the requirement if it considers such action appropriate. Each such recompetition requires all bidders including those who may have received instruments under the previous solicitation, to submit a bid in response to the bid solicitation in order to continue to provide services under its resulting Supply Arrangements.

Three Refreshes:

After the date of issuance of the Supply Arrangements, three refreshes process will be initiated which enables the pre-qualification of new suppliers and/or further pre-qualification to add streams and/or Tier and/or regions for existing Suppliers already included in the ePortal of the Centralized Professional Services System (CPSS).

Canada reserves the right to issue supply arrangements to bidders who qualify throughout the entire period of the Supply Arrangement. Evaluations of such arrangements will be processed three time a year (refreshes).

6. Authorities

6.1 Supply Arrangement Authority:

The Supply Arrangement Authority is:

Name: Manager of the Informatics Methods of Supply (IMOS)
Department: Public Works and Government Services Canada
Branch: Acquisitions Branch
Directorate: Informatics and Telecommunications Systems Procurement Directorate
Address: Place du Portage, Phase III, 4C1, 11 Laurier Street, Gatineau, Québec, K1A 0S5
Telephone: 1-866 930-4667 or (819) 934-4667
Facsimile: (819) 956-7827
Email: RCNMDAI.-NCRIMOS@tpsgc-pwgsc.gc.ca

The Supply Arrangement Authority (or an authorized representative) is responsible for the establishment of the Supply Arrangement, its administration and its revision, if applicable. Upon the issuance of a bid solicitation under the Supply Arrangement, that solicitation's Contracting Authority is responsible for any contractual issues relating to the contract solicited. Any changes to the Supply Arrangement must be authorized in writing by the Supply Arrangement Authority.

6.2 Supplier Representative(s)

This individual is the central point of contact within the Supplier for all matters pertaining to this Supply Arrangement. The Supplier confirms that this individual has the authority to bind the Supplier. It is the Supplier's sole responsibility to ensure that the information related to the Supplier Representative is correct. If a replacement or a new Supplier Representative is required the Supplier will:

- a. update its information in CPSS, and
- b. inform the Supply Arrangement Authority by e-mail at RCNMDAI.-NCRIMOS@tpsgc-pwgsc.gc.ca

[Note to Supplier: The Name, Title, Telephone Number, Facsimile Number, Address and Email is as per your arrangement and is available to be viewed by Clients via the Centralized Professional Services System (CPSS) website]

The Supplier may designate another individual to represent the Supplier for administrative and technical purposes under any contract resulting from this Supply Arrangement.

6.3 Offeror's information (maintenance of tombstone data in CPSS)

Suppliers are responsible for the maintenance of their tombstone data in CPSS. Suppliers must also safeguard the credentials released to the Main Supplier Contact (MSC) and supplier's

Contacts that enable access to the Supplier Module. Canada will not delay or cancel any solicitation or Call-up process due to a supplier's inability to access, modify or validate such credentials, or because of any claim that such credentials were used without proper Authorization.

7. Clients/Identified Users

The **Identified Users** (also called Clients) include any government department, agency, or crown corporation listed in Schedules I, I.1, II, III, IV, and V of the *Financial Administration Act*, R.S., 1985, c.F-11 and any other party for which the Department of Public Works and Government Services has been authorized to act from time to time under section 16 of the *Department of Public Works and Government Services Act* and Shared Services Canada (SSC) acting on its own behalf.

8. Priority of Documents

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

- a. The articles of the Supply Arrangement;
- b. The General Conditions 2020 (2014-03-01), General Conditions -Supply Arrangement - Goods or Services
- c. Attachment "B" to the SBIPS Supply Arrangement: SBIPS SA Holder's Eligible Streams of Expertise, Regions and Metropolitan Areas
- d. Attachment "A" to the SBIPS Supply Arrangement: SBIPS Streams of Expertise and Definitions
- e. Generic Security Requirements Check Lists
- f. Sample Quarterly Usage Report Template
- g. Client Satisfaction Form
- h. Model Bid Solicitation
- i. Model Resulting Contract
- j. The Supplier's arrangement received against the SBIPS RFSA.

9. Certifications

The continuous compliance with the certifications provided by the Supplier in its arrangement and the ongoing co-operation in providing associated information are conditions of issuance of the Supply Arrangement (SA). Certifications are subject to verification by Canada during entire period of the SA and of any resulting contract that would continue beyond the period of the SA. If the Supplier does not comply with any certification, fails to provide the associated information, or if it is determined that any certification made by the Supplier in the arrangement is untrue, whether made knowingly or unknowingly, Canada has the right to terminate any resulting contract for default and suspend or cancel the Supply Arrangement.

10. Applicable Laws

The Supply Arrangement and any contract resulting from the Supply Arrangement must be interpreted and governed and the relations between the parties determined, by the laws in force in the Province of Ontario, Canada unless otherwise stipulated in the supplier's arrangement response to the RFSA.

11. Suspension or Cancellation of Qualification by Canada

In addition to the circumstances identified in 2020 09, Canada may, by sending written notice to the Supplier, suspend or cancel the Supply Arrangement where the Supplier has made public any information that conflicts with the terms, conditions, pricing or availability of systems identified in this Supply Arrangement, or where the Supplier is in default in carrying out any of its obligations under this Supply Arrangement.

12. Aboriginal Business Certification

Where an Aboriginal Business Certification has been provided, the Supplier warrants that its certification of compliance is accurate and complete in accordance with the "Requirement for the Set-aside Program for Aboriginal business" details in Annex 9.4 of the Supply Manual.

If such a Certification has been provided, the Supplier must keep proper records and documentation relating to the accuracy of the certification provided to Canada. The Contractor must obtain the written consent of the Contracting Authority before disposing of any such records or documentation before the expiration of six (6) years after final payment under the Contract, or until settlement of all outstanding claims and disputes, under the Contract, whichever is later. All such records and documentation must at all times during the retention period be open to audit by the representatives of Canada, who may make copies and take extracts. The Supplier must provide all reasonably required facilities for any audits.

Nothing in this clause must be interpreted as limiting the rights and remedies which Canada may otherwise have pursuant to the Contract

13. Delivery Requirements Outside a CLCSA

The Supply Arrangement is not to be used for deliveries within a Comprehensive Land Claims Settlement Area (CLCSA). All requirements for delivery within a CLCSA are to be submitted to the Department of Public Works and Government Services for individual processing.

14. Controlled Goods (if applicable)

It is anticipated that some requirements may incorporate Controlled Goods. Supplier wishing to provide SBIPS under these requirements will need to be registered under the Controlled Goods Program. <http://ssi-iss.tpsgc-pwgsc.gc.ca/dmc-cgd/index-eng.html>

As the Contract requires production of or access to controlled goods that are subject to the Defence Production Act, R.S. 1985, c.D-1, the Supplier and any subcontractor are advised that, within Canada, only persons who are registered, exempt or excluded under the Controlled Goods Program (CGP) are lawfully entitled to examine, possess or transfer controlled goods. Details on how to register under the CGP are available at: <http://www.cgp.gc.ca>.

When the Supplier and any subcontractor proposed to examine, possess or transfer controlled goods are not registered, exempt or excluded under the CGP at time of Supply Arrangement Issuance, the Supplier and any subcontractor must, within seven (7) working days from receipt of written notification of the Supply Arrangement Issuance, ensure that the required arrangement(s) for registration or exemption are submitted to the CGP. No examination, possession or transfer of controlled goods must be performed until the Supplier has provided proof, satisfactory to the Contracting Authority, that the Supplier and any subcontractor are registered, exempt or excluded under the CGP.

Failure of the Supplier to provide proof, satisfactory to the Contracting Authority, that the Supplier and any subcontractor are registered, exempt or excluded under the CGP, within thirty (30) days from receipt of written notification of Supply Arrangement Issuance, will be considered a default under the Supply Arrangement except to the extent that Canada is responsible for the failure due to delay in processing the Arrangement.

The Supplier and any subcontractor must maintain registration, exemption or exclusion from the CGP for the duration of the Supply Arrangement and in any event for so long as they will examine, possess or transfer controlled goods.

15. Insurance

- a. The Supplier must comply with any insurance requirements specified in bid solicitations under the SBIPS SA and subsequent resulting contracts.
- b. The Supplier must maintain the required insurance coverage for the duration of the Supply Arrangement for Tier 2 Supply Arrangements. Compliance with the insurance requirements does not release the Supplier from or reduce its liability under the Supply Arrangement.
- c. The Supplier is responsible for deciding if additional insurance coverage is necessary to fulfill its obligation under the Supply Arrangement and to ensure compliance with any applicable law. Any additional insurance coverage is at the Supplier's expense, and for its own benefit and protection.

16. Environmental Considerations

As part of Canada's policy directing federal departments and agencies to take the necessary steps to acquire products and services that have a lower impact on the environment than those traditionally acquired, Suppliers should:

- a. Paper consumption
 - Provide and transmit draft reports, final reports, other documents and bids in electronic format. Should printed material be required, double sided printing in black and white format is the default unless otherwise specified by the Identified User.
 - Printed material is requested on minimum recycled content of 30% and/or certified as originating from a sustainably managed forest.
 - Recycle unneeded printed documents (in accordance with Security Requirements).
- b. Travel requirements
 - The Supplier is encouraged to use video and/or teleconferencing where possible to cut down unnecessary travel.
 - Use of Properties with Environmental Ratings: Contractors to the Government of Canada may access the PWGSC Accommodation directory, which includes Eco-Rated properties. When searching for accommodation, contractors can go to that link and search for properties with Environmental Ratings, identified by Green Keys or Green Leafs that will honour the pricing for contractors. <http://rehelv-acrd.tpsgc-pwgsc.gc.ca/rechercher-search-eng.aspx>
 - Use of public/green transit where feasible.

17 Travel and Living

The Travel and Living expenses are calculated differently between the Regions and Metropolitan areas and this may affect the total cost of a Professional Services Supply Arrangement requirement. Accordingly, if any contract resulting from a solicitation let under this supply arrangement permits payment to a Contractor in its basis of payment for Travel and Living expenses, such expense will only be reimbursed in accordance with the information provided at the following CPSS link: <http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/dznrrm-dnzmra-eng.html>

18 Regions and Metropolitan Areas

Regions:	Metropolitan Areas:
National Zone	
Atlantic	Halifax, Moncton
Quebec	Montreal, Quebec City
Ontario	Toronto
Western	Calgary, Edmonton, Saskatoon, Winnipeg
Pacific	Vancouver, Victoria
National Capital	National Capital Region

6B. Bid Solicitation

1. Bid Solicitation Documents:

Canada will use a SBIPS RFP model based on the bid solicitation template 2T-HIGH1, available in the Standard Acquisition Clauses and Conditions Manual (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) as the basis for issuing bid solicitations under this Supply Arrangement (SA) and as provided in 6C below. Each bid solicitation will contain at a minimum the following:

- a. security requirements (if applicable);
- b. a complete description of the Work to be performed;
- c. 2003, Standard Instructions - Goods or Services - Competitive Requirements; or 2004, Standard Instruction - Goods or Services - Non-competitive Requirements;
- d. bid preparation instructions;
- e. instructions for the submission of bids (address for submission of bids, bid closing date and time);
- f. evaluation procedures and basis of selection;
- g. financial capability (if applicable); and
- h. certifications
 - Federal Contractors Program (FCP) for Employment Equity - Notification
 - SACC Manual A3005T, A3010T for service requirements when specific individuals will be proposed for the work;
 - Integrity Provisions - Associated Information.
 - By submitting a bid, the Bidder certifies that the Bidder and its Affiliates are in compliance with the provision as stated in Section 01 Integrity Provisions - Bid of Standard instructions 2003. The associated information required within the Integrity Provisions will assist Canada in confirming that the certifications are true.
- i. Conditions of the resulting contract.

2. Bid Solicitation Process

2.1 General

Bids will be solicited for specific requirements within the scope of the Supply Arrangement (SA) from qualified Suppliers who have been issued a SA.

The bid solicitation will be posted on the Government Electronic Tendering Service (GETS) (or as applicable with a GoC web-based electronic procurement tool) or will be sent by email directly to suppliers depending on the selection methodology selected.

Canada may consolidate requirements across Clients and award contracts on a periodic basis to receive best or better pricing.

2.2 RFP Content

Individual solicitations will be based on the requirements of the Clients for whom the Services will be performed, and will describe the requirements of a specific project, including the appropriate Stream of Expertise, Tier, Region and Metropolitan Area. The award of the Contract may be made by assessing requirements and corporate or resource qualifications such as insurance coverage, security level, individual consultant experience. All such requirements will be further described in each individual RFP.

2.3 Proposal Submission

The selected SA Holders will be invited to submit a proposal via the GoC electronic procurement tool (or to the Contracting Authority as instructed in the SBIPS SA RFP, until such time as the electronic procurement tool is available). Based on the templates provided, the proposal may include electronic response templates for mandatory, rated and/or financial criteria, and mandatory certifications.

Only suppliers who are qualified SA Holders at the time individual solicitations are issued are eligible to compete. In addition to being a SA Holder, in order to submit a proposal, a SA Holder must:

- a. Be qualified in each Tier, Region, Metropolitan Area and for the Stream of Expertise that are the subject of the solicitation, unless otherwise stated in the solicitation, at the time the solicitation is issued; and
- b. Have the required security clearance level at the time the solicitation is issued.

2.4 Evaluation of the Proposal:

The Client will evaluate the qualifications and experience of the SA Holder against the requirements set out in the SBIPS SA RFP and as represented in the SA Holders proposal.

2.5 Evaluation of Price and Basis of Selection:

The SA Holders price will be evaluated in accordance with the requirements as set out in the SBIPS RFP and as presented in the SA Holders (bidders) Financial Proposal. Identification of the recommended SA Holder will be determined through the selection method identified in the SBIPS SA RFP. Canada reserves the right to evaluate individual solicitations issued under the SA framework on the basis of:

- a. the lowest priced compliant bid;
- b. point rated criteria which consider technical merit and price; or
- c. some other evaluation method to be defined in the applicable SBIPS SA RFP.

2.6 Issuance of Contracts

In accordance with the method of selection stated in the SBIPS SA RFP, a Contract will be issued by the Contracting Authority to authorize the SA Holder to proceed with the Services. The SA Holder will not undertake any of the specified Services unless and until a Contract is authorized by the Contracting Authority. The SA Holder must sign and return a copy of the Contract to the Contracting Authority. It is understood and agreed that the SA Holder must not commence any Services until authorized by the Contracting Authority.

2.7 Identification of Contract Authorities

Provided a Client has the legal authority to contract, it may choose to award contracts under this Supply Arrangement in accordance with the Tier 1 Contract Limitations described below. All Tier 2 contracts and those contracts for clients without authority to contract under Tier 1 will be managed by PWGSC or Shared Services Canada (SSC). The Supplier agrees only to perform individual contracts made by an authorized representative of Canada pursuant to this Supply Arrangement that do not exceed the applicable Contract Authority value Limitations.

	Requirement Value (GST/HST included)	Contracting Authority
Tier 1	Requirements up to and including \$2M	Client/ PWGSC/SSC
Tier 2	Requirements greater than \$2M	PWGSC/SSC

2.8 Tier 1 Requirement Limitations

Clients may award contracts to pre-qualified Suppliers in the applicable Stream, Region, and Metropolitan Area, that best satisfies all the requirement particulars as set out in the bid solicitation, in accordance with the following:

a. Requirement valued below \$25,000 (GST/HST included):

Clients may direct a contract to an eligible Supplier in accordance with the Government Contract Regulations.

b. Requirement valued at or below NAFTA Threshold (GST/HST included):

Clients may issue a contract using this SA to pre-qualified Supplier satisfying the requirement particulars as set out in a bid solicitation in accordance with the following: a minimum of two Suppliers must be invited to submit a proposal via e-mail, with the Client (Identified User):

- a) selecting by name two Suppliers from the CPSS Client Module, or
- b) selecting by name one Supplier from the CPSS Client Module with the second Supplier randomly selected by the CPSS Client Module, or
- c) not selecting any Supplier by name in which case, the CPSS Client Module will randomly select two Suppliers.

c. Requirement Valued Above NAFTA Threshold (GST/HST included):

Clients may issue a contract to pre-qualified Supplier satisfying the requirement particulars as set out in the bid solicitation in accordance with the following: a minimum of fifteen Suppliers must be invited via e-mail to submit a proposal, with the Client:

- a) selecting by name ten Suppliers from the CPSS Client Module, with the following five randomly selected by the CPSS Client Module, or
- b) selecting more than ten Suppliers from the Client Module, in which case five additional Suppliers will be randomly selected by the CPSS Client Module, or
- c) selecting less than ten Suppliers from the Client Module, in which case the CPSS Client Module will randomly select a number of Suppliers that, in addition to the Suppliers selected by the Client, will total fifteen.

A Notice of Procurement (NPP) will be posted on GETS for all requirements above NAFTA.

Note: If the number of Suppliers that meet the requirement is less than fifteen, all Suppliers will be automatically selected.

d. No Limit to Invitation Process:

Once the minimum of Suppliers has been selected as per (ii) or (iii) above, at any time during the course of the procurement process the Client may choose to invite additional Suppliers using the CPSS Client Module. There is no limit to the maximum number of Suppliers that may be invited to submit a proposal under Tier 1; however, excepting the circumstances of 2.10 below, Suppliers may not submit a proposal in response to a solicitation unless they have been invited to do so. However, should an uninvited SA Holder wish to be invited, it may contact the Contracting Authority to request an invitation at any time prior to five days before the published bid closing date, and an invitation will be made to that SA Holder unless it would not be consistent with the efficient operation of the procurement system. In no circumstance will such an invitation require Canada to extend a bid closing date. Where additional invitations are made during the solicitation process, they may not be reflected in a bid solicitation amendment.

e. Minimum Period to submit proposal:

At a minimum, each Tier 1 bid solicitation issued will provide Suppliers with the following minimum number of calendar days to submit their proposal, which time may be extended based upon a requirement's complexity:

- a. Requirements less than or equal to the NAFTA threshold = five calendar days; and
- b. Requirements greater than the NAFTA threshold up to and including \$2M = fifteen calendar days.

2.9 Tier 2 - Requirements value over \$2,000,000 or Client department's contracting authority limit:

Tier 2 requirements will be managed by a PWGSC Procurement Representative, on behalf of the Client, or SSC on its own behalf in accordance with the following:

2.9.1 Tier 2 Invitation of SA Holders: Canada will invite through GETS all qualified Tier 2 Suppliers to submit a proposal in response to a bid solicitation. It will be the responsibility of all Tier 2 SA Holders to access GETS on a continuous basis to ensure they are kept informed of the various Tier 2 requirements available.

2.9.2 Minimum Period to submit proposal: As a minimum, each Tier 2 bid solicitation will provide qualified Suppliers with twenty (20) calendar days to submit their proposal, which may be extended based on a requirement's complexity.

2.10 All Suppliers Invited to Bid:

For a requirement in either Tier, all Suppliers qualified in each relevant Stream, Region and Metropolitan Area will be invited by e-mail or GETS to bid where any supplier has been provided with a request for information in respect of services that in whole or in part appear in the requirement to be solicited under this SA.

2.11 Disclosing of incumbent information

By submitting a bid, the Bidder agrees that during a solicitation under this supply arrangement, if the Bidder has performed services for Canada under any current or past SBIPS instrument, Canada may disclose such fact (including the previous contract value and date of issuance) during any such solicitation for replacement or follow-on services.

6C. Resulting Contract Clauses

The conditions of any contract awarded under the Supply Arrangement will be in accordance with the resulting contract clauses of the SBIPS RFP model, based on the SACC manual template 2T-HIGH1 (for higher complexity requirements) and general conditions 2035 (2014-03-01). These model resulting contract clauses contain samples of the terms that will form the basis for any future resulting contracts under the Solutions-Based Informatics Professional Services (SBIPS) Supply Arrangement method of supply.

The above template is set out in the Standard Acquisition Clauses and Conditions Manual issued by Public Works and Government Services Canada.

To the extent possible, these Articles are written as they will appear in any future SBIPS Supply Arrangement resulting contracts, however, individual resulting contract clauses may be modified to suit individual Client requirements. For example, the term of the resulting contract and the basis of payment clauses may all be tailored to individual Client requirements.

It is a mandatory requirement of this SBIPS RFSA solicitation that the bidder accepts in their entirety these Articles as they appear in the SACC manual template 2T-HIGH1 (for higher complexity requirements) and general conditions 2035 (2014-03-01), to be used in bid solicitations resulting from the SBIPS Supply Arrangement as indicated below. By submitting an arrangement the supplier accepts these Articles in their entirety.

The statement of work and basis of payment are specific to the requirement and will be determined by the Identified User.

Annex A to the SBIPS Supply Arrangement

SBIPS Streams of Expertise and Definitions

1. BUSINESS TRANSFORMATION

Services to improve and transform a business across organizational boundaries, business processes and technology platforms to better accomplish the needs and capabilities of the organization. Services may include change management, business process re-engineering, organizational development, etc.

2. ERP/ CRM

Services relating to the planning, design, implementation, integration and support of enterprise-wide systems that support corporate functions including finance, HR, customer relationship management or material with links to suppliers, stakeholders, and customers.

3. ELECTRONIC SERVICES DELIVERY

Services that use electronic transaction and management technology to facilitate access to government services. These services can include payment of financial benefits, prescribed benefits/services, provision of non-financial information, time and attendance tracking, and a myriad of other applications such as web-hosting. It is an electronic means of providing access to the services and benefits that government agencies provide to citizens, residents, employees, and those entities with which government business is conducted

4. GEOSPATIAL INFORMATICS SERVICES

Geospatial Informatics Services are focused on the acquisition, geoprocessing, storage, analysis, dissemination and management of geographically referenced information for improved decision-making with Geographic Information Systems (GIS) and spatially enabled databases. This role involves the design, customization, implementation and delivery of technical geospatial solutions.

5. INFORMATION MANAGEMENT/BUSINESS INTELLIGENCE

Services aimed at providing knowledge workers with easy and timely access to the right information, on demand, from wherever it is created or maintained within the organization. Services range from strategy to implementation of ad hoc query, report writing, decision support analytics, content management, document management and records management.

6. IT SYSTEMS MANAGEMENT

Best Practices in IT Service Management assisting organizations in achieving operational excellence through the adoption of customer focused, process oriented, cost effective approaches to IT service delivery.

7. LEGACY SUPPORT AND TRANSITION

Support, maintenance and enhancement of the legacy computing environment and the transition of legacy applications to more advanced technologies.

8. MANAGED SERVICES

IT Infrastructure and applications management services that provide cost-effective support for business applications and IT infrastructure. Services include: desktop and server management, datacentre management, network management, application management and help desk support services.

9. NETWORK SERVICES

Services to plan, deploy, optimize and manage complex network infrastructures that support data, voice, video, etc.

10. SECURITY MANAGEMENT

Services that support an enterprise-wide approach to managing real-time security events, as well as proactive alerts and notifications of new vulnerabilities. This may include both best practices as well as

infrastructure and technology solutions, and may include backup and disaster recovery capabilities as well as operational redundancy as deemed appropriate and reasonable protection.

11. SYSTEMS INTEGRATION

Services to support the development, maintenance and integration and testing of system components to merge their functional and technical characteristics into a comprehensive, interoperable system.

Services include project management, architecture, design, development, testing and deployment.

Annex B - Generic Security Requirements Check Lists

The list and details of the 31 pre-approved SRCL' for professional services is available for download from the CPSS website: <http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/31-eng.html>



Annex D - Client Satisfaction Form

SOW or SAA#:		Call-up# / Contract# :	
Professional Services Method of Supply	<input type="checkbox"/> TBPS SO	<input type="checkbox"/> TSPS SO	<input type="checkbox"/> Learning Services SO
	<input type="checkbox"/> TBPS SA	<input type="checkbox"/> TSPS SA-Task	<input type="checkbox"/> Learning Services SA
	<input type="checkbox"/> SBIPS SA	<input type="checkbox"/> TSPS SA-Solution	<input type="checkbox"/> PASS SA
Contractor's Name:		Award Amt:	Award Date:
Contractor's Address:		Amend Amt:	End Date:
		Total Spent:	
Description of Work:		TA Contract:	<input type="checkbox"/> Yes <input type="checkbox"/> No
		Amendment History:	
Client Department:			
Technical Authority Name: Telephone #: e-mail:	Client Contracting Authority Name: Telephone #: e-mail:	PWGSC Contracting Authority (if applicable) Name: Telephone #: e-mail:	
<p>1. How do you rate the Contractor's overall performance?</p> <p style="text-align: center;"><input type="checkbox"/> below expectations <input type="checkbox"/> as expected <input type="checkbox"/> above expectations</p> <p>2. Resources</p> <p>a. Did the Contractor provide the resource(s) as identified in their Proposal? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>b. Did the Contractor's resource(s) conduct their work in a professional manner? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>c. Were replacement resources required? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>3. Replacement Resources</p> <p>a. Did the Contractor request to replace the resource(s) immediately after Contract Award? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA</p> <p>b. Did the Client request to replace the resource(s)? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA</p> <p>c. Did the Replacement Resources meet the requirements of the RFP or ACP? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA</p> <p>d. How many times were the Contractor's resources replaced? _____ times</p> <p>4. Was the Contract completed within the predetermined:</p> <p>a. Time Estimate? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>b. Cost Estimate? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>5. Were the required Reports and Deliverables:</p> <p>a. In conformity with the Scope & Tasks of the SOW <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>b. Received in the specified time frame? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>6. Contract Management</p> <p>a. Did the Contractor deal with performance issues in a timely basis? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA</p> <p>b. Did the Contractor submit the invoices in accordance with the Invoicing Instructions? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>c. Did the Contractor submit the invoices in accordance with the Basis of Payment? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>d. Did the Contractor submit the invoices in accordance with the Method of Payment? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>e. Did the Contractor respond to every TA Request? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA</p> <p>f. Did the Contractor properly respond to every TA Request? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA</p> <p>7. Remarks</p>			

Annex D to the SBIPS Supply Arrangement
SA Holders Eligible Streams of Expertise, Tiers, Regions and Metropolitan Areas

Note to Suppliers: The SBIPS SA Holders Eligible Stream(s) of Expertise, Tiers, Region(s) and Metropolitan Area(s) will be filled in at SA award.