REQUEST FOR PROPOSAL

FOR

Implementation of OpenText Corporation's, Enterprise Content Management solution

Date issued: **April 20, 2015**

Solicitation File # : **201500471**

Solicitation Closes: **May 12, 2015**

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Security Classification: PROTECTED

Ce document est disponible en français sur demande

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1   SECTION 1   GENERAL INFORMATION

1.1   Overview of Section 1

The purpose of this section is to provide general information about Canada Mortgage and Housing Corporation (CMHC) and this Request for Proposal (RFP). All capitalized terms in this document have the meaning ascribed to them within the RFP document, the draft agreement, or in certain cases, are terms that are in common usage at CMHC.

1.2   Introduction and Scope

CMHC wishes to enter into an Agreement with a supplier(s) (hereafter referred to as the "Proponent") for the purpose of acquiring the implementation, training and related professional services for OpenText Corporation's, Enterprise Content Management solution, used within CMHC as part of a content management solution called InfoShare. This will be phase 2 of the project and will be carried out over a two (2) year term with an option to extend for one (1) additional year for a total of three (3) years. Phase 2 on-boarding is described in section 3.2.1.3 The proposed solution must be a complete turnkey solution.

CMHC recognizes that it may require a number of Proponents in order to address the requirements of this RFP, therefore, the Statement of Requirements section of the RFP is designed in such a way that it allows for Proponents to respond to all sections (referred to as "Streams") or to the Stream(s) for which they can provide a solution. See "Responding to the Statement of Requirements (SOR)" below.

The RFP has three independent streams which may result in three or four separate contracts:

1. InfoShare implementation and related professional services; Contract maximum $6,700,000 including all applicable taxes;
2. Convert the File Retrieval System (Records Management); Contract maximum $1,000,000 including all applicable taxes;
3. InfoShare training for CMHC staff; Contract maximum $995,000 including all applicable taxes.

The total value of these services has a maximum ceiling value of $8,695,000.00 for all streams, CDN, including all applicable taxes over the initial term and renewal term.

By issuing this RFP and accepting proposals, CMHC assumes the obligation of conducting the process in a fair and transparent manner. CMHC has no obligation to procure any services, or to compensate any proponent for work done other than as may be set out in a written contract with that proponent.

More detailed specifications can be found in Section 3, "Statement of Requirements".

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Responding to the Statement of Requirements (SOR)
Proponents must respond to all of the RFP sections 1, 2, 4, 5 and 6, and to one or more of the individual streams within Section 3 – "Statement of Requirements (SOR)" including the related Appendices. Each stream within Section 3 will be scored independently of the others.

Proponents MUST clearly identify to which stream(s) their response corresponds.

1.3   CMHC Background

CMHC is the Government of Canada's National Housing Agency, with a mandate to help Canadians meet their housing needs. It is a Crown corporation, with a Board of Directors, reporting to Parliament through the Minister of Employment and Social Development, Minister for Democratic Reform, and Minister responsible for Canada Mortgage and Housing Corporation, the Honourable Pierre Poilievre.

CMHC has approximately 2,000 employees located at its National Office in Ottawa and at five Business Centres throughout Canada: Atlantic; Québec; Ontario; British Columbia; and Prairies & Territories.

1.4   Purpose of Request for Proposal

CMHC uses a Request for Proposal (RFP to describe its requirements, ask Proponents for their proposed solutions, describe the criteria which will be used in evaluating proposals and selecting a lead Proponent, and outline the terms and conditions under which the successful Proponent will supply goods and/or services. In an RFP process, proposals and Proponents are evaluated in terms of ability to satisfy the stated requirements, while providing "best value" to CMHC with respect to its requirements. By submitting a proposal, Proponents agree to be bound by the terms of this RFP, and the terms of the proposal that they submit.

The policy pertaining to the selection of Proponents is based on the principle that all Proponents must be treated fairly and equally. Proponents are defined as an individual or firm that could provide, or has provided, goods or services or construction under contract.

CMHC utilizes the Supplier Information (SI) database, maintained by **Business Access Canada** as the official CMHC source list. All Proponents **must** be registered with **Business Access Canada** prior to submitting a proposal. The Procurement Business Number (PBN) provided by **Business Access Canada** must be included with your proposal. If you are not registered, and you wish to do so, you may access **Business Access Canada** (**https://buyandsell.gc.ca/**) or you may call their Information Line at: 1-800-811-1148. Proponents not registered with Business Access Canada are required to self-register on the SI via the Business Access Canada Web site.

1.5   Schedule of Events

The following schedule summarizes significant target dates for the RFP process. The dates may be changed by CMHC at its sole discretion and shall not become conditions of any ensuing Agreement which may be entered into by CMHC and the selected Proponent.

Date	Activities
April 17, 2015	Request for Proposal issued
May 7, 2015	RFP Inquiry Period Closes
May 14, 2015	Submission Deadline
June, 2015	Evaluation and Selection short listed Proponents
June, 2015	Presentations (If required)
July, 2015	Selection of lead Proponent
July, 2015	Finalize Agreement with lead Proponent
July, 2015	Agreement award and Announcement
August, 2015	Debriefing to unsuccessful Proponents as requested

1.6   Subject Requirements

Throughout this RFP, requirements are identified as Mandatory (M), Rated (R), Desirable (D), or Information (I).

1.6.1   Mandatory Requirements (M)

Throughout this RFP, certain requirements are identified as Mandatory. A Mandatory requirement is defined as a minimum standard that a proposal must meet in order to be considered for further evaluation, a requirement that must be met in order for the proponent to substantially comply with the requirements of the RFP and a term that must be included in any Agreement that results from the RFP. Proponents must supply a response of "Compliant" or "Non-Compliant" for each Mandatory requirement in this RFP and/or substantiate compliance with a statement or reference to attached documentation.

An example of a compliant response to a mandatory requirement is as follows:

Requirement	Response	Response Details
Section 3. The Proponent must provide CMHC with a detailed budgetary quote...	Compliant	Refer to attached sample of detailed quote format provided to customers on page xx

Mandatory requirements are identified in:
- Section 2 Submission Instructions
- Section 3 Statement of Requirements
- Section 4 Proposal Requirements
- Section 6 Proposed Terms and Conditions, and
- Appendix A, the Certificate of Submission.

Caution: Proposals which fail, in the sole discretion of CMHC, to meet any mandatory requirement will be eliminated from further consideration in the evaluation process. Notwithstanding the foregoing, CMHC reserves the right to waive or revise any mandatory requirements during the RFP process if a waiver or revision is necessary to meet CMHC's intent in issuing the RFP, or to ensure that CMHC receives best value from the process. In the event that CMHC elects to waive a mandatory requirement, all Proponents will be advised of the change in requirements and provided with an opportunity to revise their proposals as noted in section 2.4.

1.6.2   Rated Requirements (R)

A Rated requirement is defined as a desired function, capability or feature of the proposed solution that is not Mandatory. Rated requirements are based on a points system of 1 to 10 points, as well as a base weight between 1 and 10 per requirement. Rated requirements that are considered more important will be given an higher overall weight. Points are calculated for each rated requirement by multiplying the points given by the weight.

1.6.3   Desirable Requirements   (D)

Sub-sections identified as Desirable (D) will not be assigned a score, but Proponents should provide a response.

1.6.4   Information Requirements (I)

Sub-sections identified as Information (I) are for information purposes only and may not require a response.

1.7   Proponent Feedback

CMHC aims to continuously improve its bid documents and procedures. CMHC welcomes input regarding Proponent experience in responding to its RFPs whether as a compliment or suggestion for future RFPs.

Proponents wishing to provide feedback may submit comments labelled as ***Proponent Feedback RFP # 201500471*** to the name and address provided in Section 2.4.

As CMHC does not wish to be perceived as influenced by such feedback in the award decision, Proponents are requested to submit their feedback after an Agreement award has been announced.

Any Proponent, who notes a material flaw in the RFP that could prevent the process from being conducted in a fair and objective manner, or that could prevent CMHC from receiving best value from the process, is asked to report the flaw to CMHC as soon as possible, using the inquiry process specified in Section 2.4.

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1.8   Income Tax Reporting Requirement

As a federal Crown Corporation, CMHC is obliged under the Income Tax Act and Regulations to report payments made by CMHC to suppliers of goods and/or services by using a T1204 supplementary slip. CMHC must therefore obtain the necessary information from suppliers (including the Contractor's social insurance number and/or corporate identification number) in order to allow it to complete the T1204 supplementary slip. The Lead Proponent(s) will be required to complete and sign a Supplier - Direct Deposit and Tax Information Form (CMHC/SCHL 3085) prior to execution of any ensuing Agreement.

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2   SECTION 2   SUBMISSION INSTRUCTIONS

2.1   Overview of Section 2

The purpose of Section 2 is to inform the Proponents about CMHC's procedures and rules pertaining to this RFP process.

Proponents are advised that CMHC has provided, as Appendix C, a Mandatory Compliance Checklist for your benefit to complete prior to submission. This is to assist you in ensuring that you comply with all Mandatory criteria as non-compliance with a mandatory requirement will result in the proposal being eliminated from further consideration.

2.2   Certificate of Submission (M)

The Certificate of Submission, attached as Appendix A, summarizes some of the mandatory requirements set out in the RFP.   It is also a mandatory requirement that a proposal include a Certificate of Submission (or an accurate reproduction) signed by the Proponent.   Refer to Section 1.6 Mandatory Requirements.

Proponents must submit a signed Certificate of Submission as part of their proposal. Should a Proponent not include the signed Certificate of Submission the Proponent will be notified by CMHC and will have forty-eight (48) hours from the time of notification to meet this requirement.

2.3   Submission Format

Proposals should be submitted in MS Word and Excel with copies in Adobe Acrobat.
All responses to this RFP must conform to the paragraph numbering in this RFP document and specifications.

Proposals should be typed on 8 1/2" x 11" paper with each page numbered and dated. Each of the proposal sections should begin on a new page and be separately labelled.

The following should be provided
   a) **Certificate of Submission (M)**
      The Certificate of Submission, Appendix "A", as described in section 2.2.
      <u>A signed copy of the Certificate of Submission must also be included for each participating company in the event of a joint venture proposal</u>.

   b) **Mandatory Compliance Checklist   (M)**
      Proponents must include a completed Mandatory Compliance Checklist "G" , for any and all services they are responding to within this RFP

      Providing the checklist with a check in all boxes does not by itself mean the proposal is compliant with all mandatory requirements. Should a Proponent not include the Mandatory Compliance Checklist, the Proponent will be notified by CMHC and given forty-eight (48) hours in which to meet this requirement.

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c) **Supplier Direct Deposit & Income Tax Reporting**
Proponents do not have to complete this form as part of the RFP. This is reserved for the successful Proponent. The form is described in Section 1.9

d) **Appendices**
Proponents are to include any additional information, brochures, etc. Also to be included here are any alternate terms and/or proposal if applicable

The items listed below should also be included in the RFP response as described in Section 4 of this RFP

e) Covering Letter

f) Table of Contents

g) Executive Summary

h) Detailed Item by Item Responses to Subject Requirements   **(M)**

i) Complete Financial Cost Sheet Tables **(M)**
Appendix "E"
Note: Proponents may expand and add to the cost tables to include additional items and pricing.

2.4   Delivery Instructions and Deadline

Timely and correct delivery of proposals to the exact specified proposal delivery address is the sole responsibility of the Proponent. All risks and consequences of incorrect delivery of proposals are the responsibility of the Proponent. CMHC will not assume those risks or responsibilities under any circumstances. Proposals may be submitted in English or in French.

Delivery:
Number of copies
One (1) signed original and four (4) copies of the complete proposal minus the financial proposal are to be submitted plus one complete version on Compact Disk, DVD or one flash drive. One (1) financial proposal is to be submitted in a separate sealed envelope from the main technical proposal.

Method of Sending
Proposals sent by facsimile machine or e-mail will not be accepted.

Packaging and Address
Proposals, including all supporting documentation, are to be sealed. The outermost packaging of the proposal, including any courier or delivery packaging, must indicate all of the following information and be addressed exactly as listed on the next page:

C1 Guard Station
Canada Mortgage and Housing Corporation
1st Floor, "C" Building
700 Montreal Road
Ottawa, Ontario K1A 0P7
PROPOSAL CALL: Implementation of OpenText Corporation's, Enterprise
Content Management solution - 201500471

Proposals arriving late will be automatically rejected and returned, unopened, to the Proponent.

Submission Deadline   (M)
Your proposal must be **received** at the exact location as specified above on or before the submission deadline set as:

2:00 p.m. local Ottawa time, on May 14, 2015

Proposals arriving late will be automatically rejected, and the sender will be so notified by e-mail.

2.5   Inquiries

All questions regarding this RFP must be sent by e-mail or facsimile to the following:

Heather Forsyth
Tel: (613) 740-5466
Fax: (613) 748-2998
Email: hforsyth@cmhc-schl.gc.ca

Unless CMHC provides written confirmation of a change, revision or alteration to this RFP, it will not be binding on CMHC.

CMHC cannot guarantee a reply to inquiries received less than **seven (7) calendar days** prior to the closing date.

All written questions that are submitted, which in the opinion of CMHC affect all Proponents, will be answered by CMHC in writing and distributed to all Proponents by facsimile, e-mail or GETS. All identification related to the inquiry will be removed in the response. Any questions of a proprietary nature must be clearly marked. CMHC will determine, at its sole discretion, whether it will respond to the question.

In the event that it becomes necessary to revise any part of the RFP as a result of any inquiry or for any other reason, an addendum to this RFP will be provided to each Proponent to whom CMHC has issued this RFP by facsimile, e-mail or GETS.

2.6   Communication

During proposal evaluations, CMHC reserves the right to contact or meet with any individual Proponent in order to obtain clarification of its submission or to gain insight into the quality and

scope of relevant services. A Proponent will not be allowed to add, change or delete any information during this process. CMHC is in no way obliged to meet with any or all Proponents for this purpose.

2.7   Proponent Contact

The Proponent shall name a person in their proposal to act as a primary contact for CMHC during the evaluation period. A secondary contact should also be provided for backup purposes. The main Proponent's contact information (name(s), phone number(s), fax number(s) and email address (es)) should also be listed on the front cover (outside) of the proposal.

2.8   Offering Period (M)

All responses must provide that the terms of the response including the pricing proposal, shall remain valid and binding on the Proponent for a period of *one hundred and twenty (120)* days following the closing date.

2.9   Changes to Proposals

Changes to a proposal are permitted provided they are received as an addendum to, or clarification of, previously submitted proposal, or as a complete new proposal to cancel and supersede the earlier proposal. The addendum, clarification, or new proposal must be submitted as per the delivery instructions outlined in Section 2.3, be clearly marked **"REVISION"**, and be received no later than the submission deadline. In addition, the revised bid must include a description of the degree to which the contents are in substitution for the earlier proposal.

2.10   Multiple Proposals

Proponents interested in submitting more than one proposal for consideration may do so, providing that each proposal independently complies with the instructions, terms and conditions of this RFP.

2.11   Acceptable Alternative

An alternative to any portion of a proposal may be submitted and must be in a separate addendum to the proposal.

An acceptable alternative is one which CMHC considers satisfactory in meeting a mandatory requirement. CMHC at its sole discretion will determine if a proposed alternative meets the intent of the original mandatory requirement.

2.12   No Liability

While CMHC has made considerable efforts to ensure that the information in this RFP is accurate and complete, it is possible that errors may exist. The information is not guaranteed or warranted to be accurate by CMHC, nor is it necessarily comprehensive or exhaustive. CMHC will have no liability of any kind to Proponents for losses or damages arising from any errors that may be

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found in the RFP, regardless of how the errors are caused. Proponents remain obliged to make their own investigation of relevant information and to form their own opinions and conclusions in respect of the matters addressed in this RFP.

By submitting a proposal, Proponents waive any claims or causes of action that they may have against CMHC or its representatives as a result of the conduct of this RFP process or any resulting contract award, except insofar as they have proof of wilful misconduct on the part of CMHC or its representatives. Proponents agree that they will not bring a court action or institute any other proceedings against CMHC for damages arising from the conduct of this RFP or any resulting contract award. This section is intended to be a complete waiver of the Proponent's right to claim damages subject to the limited exception noted above.

2.13 Verification of Proposals

A submitted proposal gives CMHC the authorization to conduct such additional investigation as it deems appropriate to verify the contents of the Proponent's proposal.

2.14 Ownership of Responses

All responses and related materials become the property of CMHC and will not be returned. CMHC will not reimburse the Proponent for any work related to, or materials supplied in the preparation of their proposal.

The Proponent warrants that the Proponent possesses all rights necessary to satisfy this requirement. The Proponent hereby certifies that it has waived, or has obtained a waiver in favour of CMHC, all moral rights in the proposal and related materials, and hereby assigns all rights in the material, as provided for in the law of copyright. The Proponent agrees to execute any document requested by CMHC acknowledging CMHC's ownership of the material and the waiver of moral rights therein.

All information regarding the terms and conditions, financial and/or technical aspects of the Proponent's proposal, which, in their opinion, are of a proprietary or confidential nature, must be clearly marked **"PROPRIETARY"** or **"CONFIDENTIAL"** at **each item** or at the **top of each page**. Proponents' documents and information so marked will be treated accordingly by CMHC. Notwithstanding the foregoing, Proponents are advised that as a Crown corporation, CMHC is subject to the federal legislation with respect to access to information and privacy.   Information submitted by third parties will be protected as permitted under that legislation, but may be required to be disclosed in specific circumstances.

CMHC will take steps to protect Proponents' documents and information so marked from disclosure.   Notwithstanding the foregoing, CMHC shall have no liability of any kind to Proponents based on the inadvertent or unintentional disclosure of proprietary information.

Proponents are further advised that as a Crown corporation, CMHC is subject to the federal legislation with respect to access to information and privacy.   In certain specific circumstances, information submitted to CMHC by third parties may be required to be disclosed pursuant to

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federal legislation. In such cases, to the extent reasonably possible, CMHC will make efforts to advise the Proponent of the required disclosure prior to releasing the information.

2.15   Proprietary Information

Information contained in this RFP is to be considered "Proprietary Information" and the Proponent is not to disclose this information to any party other than the Proponent's employees or agents participating in the response to this RFP.

2.16   Corporation Identification

The Proponent agrees not to make any use whatsoever of CMHC's name, logo or other official marks, including public advertisement without the express written consent of CMHC.

2.17   Declaration with respect to Gratuities

In submitting its proposal, the Proponent certifies that no representative for the Proponent has offered or given a gratuity (e.g. an entertainment or gift) to any CMHC employee, Board member or Governor-in-Council appointee; and intended, by the gratuity, to obtain an Agreement or favourable treatment under any Agreement.

2.18   Conflict of Interest

    a) The Proponent and its principals, employees and agents shall avoid any real, potential or apparent conflict of interest during the RFP process, and upon becoming aware of such a real, potential or apparent conflict, shall immediately declare the conflict to CMHC. The Proponent shall then, upon direction of CMHC, take steps to eliminate any conflict, potential conflict or perception that a conflict of interest exists.

    b) In the event that a conflict of interest, real or potential, cannot be resolved to the satisfaction of CMHC, CMHC shall have the right to immediately eliminate the Proponent from consideration under the RFP or to terminate the resulting Agreement. Upon such elimination or termination, CMHC shall have no obligation of any nature or kind to the Proponent.

    c) Any former public office holder must be in compliance with the post-employment provisions of the Conflict of Interest Act in order to derive a direct benefit from any contract which may arise from this request for proposal.

2.19   Declaration with respect to Bid Rigging and Collusion

In submitting its proposal, the Proponent certifies that:

(a) prices as submitted in its proposal have been arrived at independently from those of any other Proponent;

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(b) the prices as submitted have not been knowingly disclosed by the Proponent, and will not knowingly be disclosed by the Proponent prior to award, directly or indirectly, to any other Proponent or competitor; and

(c) no attempt has been made, nor will be made, to induce any other person to submit, or not to submit, a proposal, for the purpose of restricting competition.

2.20   Security Clearance   (M)

All persons who will perform the Proponent's obligations under any ensuing Agreement, at the request of CMHC, must apply to CMHC's Corporate Security Centre for purposes of obtaining a security clearance. Specifically any person required to perform any services on CMHC property or have access to the CMHC technical environment must be provided with a security clearance by CMHC exclusively. The Contractor's personnel will not be held responsible for delays due to the security clearance process. Additionally, the Contractor will not be responsible for any additional costs incurred by the security clearance requirement.

In addition to the security clearance described above, CMHC requires employees of the selected Proponent to be security cleared at a "Secret" level in order to permit them access to CMHC premises, CMHC information or have access to the CMHC network systems. All resources proposed by all Proponent(s) must confirm that they hold a valid secret clearance (and will be required to provide a fully signed copy to CMHC at the time of contract award to the Security Screening Certificate and Briefing Form (TBS 330-47)) at the time of the bid response.

At the time of contract award all resources of the selected Proponent(s) must forward a copy of this Certificate to CMHC's Human Resources office confirming the security clearance. The form must be signed by all parties to be considered valid. Also all resources of the selected Proponent must forward a copy of a picture ID with their address (e.g. driver's licences, passport with a utility bill, etc) along with the security certificate.   If the Proponent or any of their resources are not security cleared at secret, they will require an escort by a CMHC employee if they are required to access CMHC premises and will not be granted access to CMHC information and network systems. Each resource will be expected to sign an Oath of Fidelity and Secrecy on their first day when they are provided their security badge.

2.21   Shortlist

The evaluation procedure may include the development of a shortlist of the highest-ranked Proponents will be based on the criteria outlined in *Section 3* of the RFP. CMHC may, at its sole discretion, further shortlist the top two (2) proposals based on the top scores, which will include the price points, call upon a Proponent to prepare A Best and Final Offer of the cost sheets for final consideration.

2.22   Joint Venture Responses

Joint venture proposals should adequately represent and communicate the proposed participation and responsibilities of each company in the joint venture, and must provide a description of the proposed joint venture business arrangement which would be entered into by all parties upon receipt of an ensuing Agreement. The description must list the companies involved, indicate how

long the business arrangement has been in existence, indicate the service(s) each respective party would be providing and describe the proposed participation and responsibility of each party.

The Proponent shall designate one of the partners as the contact person through whom any communication between the Proponent and CMHC will be channelled during the RFP process.

Joint venture responses must be accompanied by a signed Certification of Submission from each participating company. Refer to Section 2.2.

2.23   Intellectual Property Rights

All material, reports and other work product produced under this (RFP and the resulting Agreement) will be the sole property of CMHC. The Proponent warrants that the Proponent/Contractor is the only person who has or will have moral rights in the material created by the Proponent/Contractor and supplied under this RFP and any ensuing Agreement and the Proponent/Contractor hereby waives in favour of CMHC all of the Proponent's/Contractor's moral rights in the material, as provided for in the law of copyright. Upon the material coming into existence, the Proponent/Contractor agrees to execute any document requested by CMHC acknowledging CMHC's ownership of the material and work product and the waiver of the Proponent's/Contractor's moral rights therein.

2.24   Non-Disclosure of CMHC Information

Under this section, "CMHC Information" refers to any and all information of a proprietary or confidential nature which is managed, accessed, collected, used, disclosed, retained, received, created or disposed of in relation to this RFP process and any ensuing Agreement, however obtained. Without limiting the generality of the foregoing, CMHC Information includes data held in any type of electronic format and information provided directly, indirectly or through third parties to the Proponent, any subcontractor, reseller, agent or any other person engaged to perform the Work under this RFP and any ensuing Agreement.

The Proponent understands and agrees to treat all CMHC Information as proprietary, confidential and sensitive unless otherwise specifically agreed to in writing by CMHC. The Proponent shall restrict access to CMHC Information to such of its responsible employees and agents (collectively the "Representatives") who require such access in order to participate in this procurement process and any ensuing Agreement and the Proponent will impose upon all such Representatives obligations of confidentiality equivalent to those contained in this RFP and any ensuing Agreement.

The Proponent acknowledges and understands that all CMHC Information is subject to Canadian laws on privacy and access to information under which CMHC is bound and that CMHC considers CMHC information to be under its custody and control at all times.

Where disclosure of CMHC Information is required pursuant to a lawful requirement or for the purposes of complying with a subpoena or warrant lawfully issued or lawfully made by a court, person or body, the Proponent shall notify CMHC promptly after discovering the potential of

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disclosure of CMHC Information so that CMHC has the opportunity to seek a protective order or other appropriate remedy.

The Proponent also agrees that in the event that disclosure of CMHC Information is required by a valid and applicable law, it shall, in co-operation with CMHC, do all things reasonably possible to prevent access to CMHC Information including but not limited to taking appropriate legal action against disclosure, providing information and other assistance in order for CMHC to take appropriate legal action against disclosure and ensuring that disclosure is strictly limited to the information lawfully requested.

The Proponent shall ensure that CMHC Information shall remain in Canada and expressly agrees to segregate CMHC Information (whether in electronic format or in hard copy) from any other information in a database or repository physically independent from all other databases or repositories. Without limiting the generality of the foregoing, the Proponent shall not release, share or otherwise divulge CMHC Information to any other person including subsidiaries, branch offices, partners of the Proponent or subcontractors without the prior written consent of CMHC and the Proponent shall ensure the same of any subcontractor, reseller, agent or any other person engaged to perform any part of the services.

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3   SECTION 3   STATEMENT OF REQUIREMENTS

3.1   Overview of Section 3

This section of the RFP is intended to provide the Proponent with the information necessary to develop a responsive proposal. The Statement of Requirements is a complete description of the tasks to be done, results to be achieved and the goods and services to be supplied.

3.1.1 Statement of Requirements (M)

The Proponent represents and warrants that if its proposal is selected, the individual(s) who will have primary responsibility for providing the products and services under any agreement resulting from this RFP process will continue to meet the skill and experience requirements contained in Section 3, as confirmed in its proposal.

Please note the R/M/I in the header of the table has the following meaning as fully described in section 1.6.1, 1.6.2, 1.6.3, 1.6.4: R = Rated, M = Mandatory, I = Information

3.1.2 Mandatory Requirements (I)

There are a number of Mandatory requirements listed in the Statement of Requirements, Proponents are reminded to refer to the definition of Mandatory requirements in Section 1.6 and that a Mandatory Compliance Checklist is located at Section7.3 (APPENDIX C).

3.1.3 All Costs   (M)

The Proponent is responsible for including all costs in their pricing and shall use their prior experience to ensure that all costs (including costs for all items not specifically identified in the RFP) are included. Such costs may include but are not limited to, taxes, import duties, travel costs and licensing fees for which a cost may be charged to CMHC. The total costs submitted will be binding on the Proponent and available for CMHC to accept the offer at these prices. No additional costs of any kind will be considered by CMHC for whatever reason. Change requests by CMHC will be considered during the Agreement term after quote is received and approved to proceed is provided by CMHC in its sole discretion.

3.1.4 Project Introduction and Scope (I)

In 2013, CMHC launched the "InfoShare" (OpenText Corporation's, Enterprise Content Management solution) project to address the recommendations of an Audit of the Records Management system within CMHC. An action plan was set up for the replacement of CMHC's legacy corporate file repositories and system. CMHC has selected the Government of Canada solution, the GCDOCS (OpenText) suite of products, to respond to its recordkeeping requirements and to build upon expertise from existing government department's implementation, approaches and business transformation best practices.

The objectives of this requirement is to establish three competitively awarded contracts with a maximum of four (4) suppliers to provide professional resource services to CMHC to assist in executing the InfoShare – Phase 2 project. The Phase 2 project will be carried out over a two (2)

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year term with an option to extend for one (1) additional year for a total of three (3) years. The proposed solution must be a complete turnkey solution. The RFP will have three independent streams which will result in three or four separate contracts:

- One supplier for stream 1 InfoShare implementation and related professional services;
- One supplier for stream 2 InfoShare Physical Object implementation and related professional services; and
- Up to a maximum of two (2) suppliers for stream 3 in a form of Task Authorization (TA) Contract for stream 3 -InfoShare Training for CMHC Staff.

A Proponent may propose resources for any one or combination of the three streams. Each stream will result in a separate contract or one contract should all streams be awarded to a single Proponent, including all the training.

3.2   Stream 1- InfoShare Implementation and Related Professional Services (I)

Based on the requirements in the remainder of section 3, CMHC expect the successful Proponent will be able to provide resources to implement InfoShare at CMHC and migrate the legacy corporate file repository to InfoShare. Also that the Proponent will have the tools and methodology necessary to "on-board" CMHC staff into InfoShare and have the capacity to provide resources for the implementation, migration and professional services for the duration of the corporate-wide implementation, estimated to take two years.

When CMHC launched the InfoShare project in 2013, approximately 200 employees were on-boarded. As part of the lessons learned, a standard repeatable on-boarding process has been refined for Phase 2 deployment activities. In addition to having a standard repeatable process, CMHC wants to improve the manner in which individual business units are on-boarded by taking a more holistic approach which may involve coordinating consultations and on-boarding across business units, and/or regional employees, based on levels of collaboration or project dependencies.

A preliminary draft schedule has been prepared by CMHC's InfoShare project team. Consultation with business leaders will be required to obtain their agreement and support on timelines and necessary business resources to effectively carry-out the business requirements gathering workshops, user acceptance testing and on-boarding activities.

On-boarding is required for an estimated 2000 employees located across 9 sectors, in approximately 50-60 individual business units situated at our National Office location in Ottawa, with representation in 5 Regional Business Centers and 15 Points of Service locations across Canada.

Additional information:
CMHC has planned to upgrade the existing OpenText Content Server v10.0 to the new version of OpenText ECM – Content Server v10.5 prior the start of InfoShare Project Phase 2 in April/May 2015.

3.2.1.1   **Summary of Resourcing Requirements Stream 1 (I)**

CMHC anticipates the following number of resources will be required to complete the InfoShare Project Phase 2- Corporate Wide Deployment.

Category	Start Date	End Date	Minimum No of Resources	Estimated Total Effort
IM Business Analyst (Intermediate)			6	2640 days
IM Business Analyst (Senior)			2	880 days
Senior Technical Architect			1	60 days
Technology Analyst			5	2200 days
Developer OTIC Specialist			1	350 days
Data Migration Analyst			2	880 days
Senior Data Migration Analyst			2	880 days
Project Manager			1	440 days
		Total	20	8330 days

3.2.1.2   **Current CMHC InfoShare Configuration and Architecture (I)**

CMHC's InfoShare installation of OpenText ECM – Content Server is centralized in Ottawa with a disaster recovery (DR) installation located at another site.

The InfoShare current configuration includes Content Server 10.0 service pack 2, update 13 and is integrated with MS Active Directory services, InfoFusion Integration Center (OTIC) and the following other components:

Technical Environment:

- SQL Server 2012 R2
- Content Server 10U13 * Content Server will be upgraded to version 10.5 prior the Corporate Wide Deployment
- Archive Server 10.5
- Email Bridge 10.5.0
- Enterprise Connect 10.5 desktop clients
- OpenText Everywhere 10.0.0
- OpenText Integration Center 10.3
- Business Process Suite 10.6.6 (including PCL)
- Windows Server 2012
- Windows 7 for the workstations
- Citrix XenApp 6.5
- VMWare 5.x
- F5 Big/IP Load Balancer
- TomCat 7.0

- IIS 7.5
- Lotus Notes 8.53 (mail system)
- Citrix XenApp 6.5

3.2.1.3   **On-Boarding Process used at CMHC (I)**

Below is a brief description of the processes and approaches used to on-board the end-users to InfoShare during the Phase 1:

There are 5 repeatable stages that the InfoShare project team follows in order to successfully prepare and implement the InfoShare solution with a business group:

1. Getting Started
During the initial stage, members of the InfoShare team meet with the leaders of business group to describe how the team will be "on-boarded" and to obtain their commitment and agreement on the deployment approach and timeline. This includes obtaining confirmation on the deployment schedule, identifying and confirming the Super Users that will represent the business function and support the deployment, as well as gaining consensus on how the project team will collaborate with the business function for a successful deployment.

2. Blueprint for InfoShare
During the 2nd stage, the Super Users that were identified are prepared to be the change leaders for their business group.   The Super Users and other selected employees from the business group take part in workshops to identify the group's business requirements. The group's requirements are then balanced with the overall corporate folder structure, documented, and then formally approved.

3. Build & Validation
During this stage, the InfoShare team uses the approved requirements gathered during the previous stage to build a model of the solution for testing, validation, and further feedback and adjustment.

4. Go-Live Preparation
During this 4th stage, the team prepares for successful implementation of InfoShare to the business unit. All go-live readiness activities are completed and all end users receive Information Management (**IM**) awareness, InfoShare fundamentals training, and their new InfoShare folder structure in order to prepare them to better manage all their business related information on a daily basis.

5. Go-Live and Support
During this last stage, the new folder structure is prepared for operation and the business groups' employees will start using InfoShare. During the start-up, employees will be supported through on-line tools, their Super User and the InfoShare support team.

3.2.1.4   **Statement of Requirements Components (I)**

There are several services components within stream 1 Statement of Requirements:

    a) Implementation services (detailed in subsection 3.2.2)

    b) Migration services (detailed in subsection 3.2.3)

    c) Technical services (detailed in subsection 3.2.4)

    d) Project Management services (detailed in subsection 3.2.5)

3.2.2   Statement of Requirements for Implementation Services (I)

As part of CMHC implementation of InfoShare – Phase 2 project, the initiative encompasses developing strategies, approaches, methodologies and tools and to conduct InfoShare implementation within CMHC sectors.

It is expected that processes and tools for business requirement gathering will be provided by the selected Proponent and that CMHC's on-boarding process will be reviewed to identify improvement and/or streamlining opportunities.

3.2.2.1   **Tasks/Technical Specifications/Skills (I)**

The proposed resource(s) to take on the role of the IM Business Analyst(s) should have proven experience as a business analyst and change realization/business change management, abilities gathering business requirements, in evaluating business needs, developing and applying best practices to assist in developing and implementation of an Electronic Document Record Management System. They are required to have superior oral and written communication skills, an organized and analytical approach to problem solving and business analysis, as well as a team attitude in the achievement of milestones. The IM Business Analyst will be required to provide one-on-one coaching and mentoring. They require a strong knowledge of IM practices and policies. They should have advanced knowledge of OpenText Content Server features and capabilities.

The required services may include, but are not limited to the following:

    a) Leads kick-off meeting and client engagement activities for identified business units;

    b) Leads individual business requirements gathering workshops to develop detailed Information Models *(identification and integration of business level folders within the Corporate folder structure, application of enterprise/business metadata, application of facets and columns, identification and creation of business folders and search templates)*, Community Models *(defining roles and responsibilities, business groups),* and Security Models *(access, roles and permissions)*;

    c) Ensures models are complete, including mandatory translations;

    d) Develops and implements solutions that address business requirements while complying with established corporate standards;

e) Recommends system configuration settings;

f) Consults and coordinates with CMHC IM and Information Technology (IT) organizations;

g) Validates consistency and quality against enterprise design and other business models;

h) Coordinates implementation and roll-out activities with the business units and the InfoShare project team;

i) Provides signed-off models to technical resource to proceed with builds;

j) Develop test plans, including user acceptance testing and conducts testing;

k) Leads User Acceptance Testing (UAT);

l) Documents and submits changes, re-builds and regression testing as required;

m) Enhances user experience by developing classification schemes and semantic and contextual informational relationships to improve the value of information

n) Advises on how to meet record and information management requirements

o) Collaborates with information technologists to include records and information management requirements in systems designs

p) Reviews and makes recommendations relating to IM business rules, system settings and configuration to ensure systems are functional, reliable, support usability, and are compliant with CMHC policies, business needs and legislative requirements

q) Deploys the solution to business units/end users

r) Participates in initiatives to increase employee understanding, awareness and buy-in to the principles/objectives of the electronic document and records management system

s) Provides IM guidance and representation throughout the on-boarding of CMHC staff on InfoShare

t) Reviews and provides input into IM and InfoShare training material as required

u) Makes recommendations and providing advice for improvements and assisting in developing solutions, scenarios and implementing recommendations;

v) Prepares and presenting findings, status and other relevant matters

w) Provides guidance on how best to maintain and improve implementation of InfoShare Content, facets, groups, Metadata, categories, classifications

x) Collects and analyzes information and presenting findings on complex issues, carrying out or coordinating research as required and preparing reports;

y) Identifies and researches best practices;

z) Processes problems into solutions or new opportunities/initiatives;

aa) Analyzes, advises on, and implements business processes, strategies and functions;

bb) Facilitates information gathering sessions and acts as facilitator during workshops;

cc) Translates the business requirements into System/Functional requirements;

dd) Analyzes and documents the business requirements and delivering work products through the life cycle;

ee) Participates in functional and technical design reviews, perform integration/functional and system testing, and verify test results;

ff) Contributes to project management deliverables, project schedule, etc.

gg) Contributes to transformation and change management activities;

hh) Provides production support to clients immediately after go-live;

ii) Performs knowledge transfer sessions to CMHC staff throughout all phases of the project;

jj) Creates and updates documentation for requirements, design and maintenance;

kk) Provides test plans, test scripts and testing results.

3.2.2.2 **Deliverables - Business Analyst (I)**

a) Establishes communication and engagement channels to ensure the team is well-prepared and business clients are prepared and informed of the scheduled requirements gathering and deployment activities.

b) Effectively manages and train resources that support the agreed upon enterprise deployment schedule, including the delivery of bilingual workshops.

c) Set of processes, tools and standards to be used through the business requirements gathering workshops.

d) Successful client on-boarding (approximately 40-60 business units) which includes:

    I. Completing client engagement results and finalizes deployment schedules, assigns business resources (Super User, UAT testers), senior level support, and end user participation;

    II. Scheduling and completing business requirements gathering workshops;

    III. Detailing and documenting information, community and security models;

    IV. Client and IM approvals of information, community and security models;

    V. Providing models to technical team as per approved schedules to proceed with import of configuration into InfoShare environments;

    VI. Standardizing and documenting test plans including user acceptance;

    VII. Successfully completes user acceptance testing and documents the results;

    VIII. Successfully completes adjustments and regression testing;

    IX. Successfully completes client on-boarding;

e) Processes developments and applies the results to ensure quality assurance standards;

f) Processes developments and applies the results for the identification, documentation and resolution of issues;

g) Regular monitoring and reporting of progress and risks including the provision of risk mitigation strategies to InfoShare Project Manager, and the Manager of Corporate Information and Records;

h) Performs knowledge transfer sessions and documentation to CMHC staff throughout all phases of the project.

The Proponent must provide demonstrated evidence of how each requirement is met.
(Include cross reference to resource resume as applicable)

Item #	Requirement	R/M/I	Points Available	Weight / max points available/ *6 persons
	3.2.2.3 **Requirements for IM Business Analyst – Intermediate (6 persons)**			**4500**
3.2.2.4	The Proponent must demonstrate that each of the proposed resources have a minimum of 5 years' experience as a Business Analyst in the IM/IT industry.	M	Pass / Fail	
3.2.2.5	The Proponent must demonstrate that each of the proposed resources have a minimum of 5 years' experience in analyzing business requests and developing and producing business requirements.	M	Pass / Fail	
3.2.2.6	The Proponent must demonstrate that each of the proposed resources have a minimum of 3 years' experience conducting requirements gathering sessions with clients via focus groups.	M	Pass / Fail	
3.2.2.7	The Proponent must demonstrate that each of the proposed resources have a minimum of 3 years' experience as a Business Analyst in the implementation of Electronic Document Record Management (EDRM) system for the Government of Canada organization(s) such as RDIMS core applications OpenText (edocs) and/or Livelink/Content Server.	M	Pass / Fail	
3.2.2.8	The Proponent should demonstrate that each of the proposed resources have experience with leading focus groups/working groups. Less than 3 year: = 0 pts 3 to 5 years: = 4 pts 5 to 8 years: = 6 pts 8 to 10 years: = 8 pts More than 10 years: 10 pts	R	1-10	5 /50/300
3.2.2.9	The Proponent should demonstrate that each of the proposed resources have experience working with OpenText Livelink and/or Content Server (for either one or combined). Less than 1 year: = 0 pts 1 to 3 years: = 2 pts 3 to 5 years: = 4 pts 5 to 7 years: = 6 pts 7 to 9 years: = 8 pts More than 9 years: 10 pts	R	1-10	10 /100/600
3.2.2.10	The Proponent should demonstrate that each of the proposed resource have experience with test scenario development, functional testing and data and application correction. Less than 1 year: = 0 pts 1 to 3 years: = 2 pts 3 to 5 years: = 4 pts More than 5 years: = 5 pts	R	1-10	10 /100/600

3.2.2.11	The Proponent should demonstrate that each of the proposed resources is able to communicate effectively, orally and in writing, in both official languages (English and French). English OR French only: 5 pts English and French : 10 pts	R	1-10	20 /200/1200
3.2.2.12	The Proponent should demonstrate that each of the proposed resources have experience defining functional requirements for the RDIMS core applications OpenText (edocs) and/or Livelink/Content Server. Less than 3 year: = 0 pts 3 to 5 years: = 4 pts 5 to 7 years: = 6 pts 7 to 9 years: = 8 pts More than 9 years: = 10 pts	R	1-10	10 /100/600
3.2.2.13	The Proponent should demonstrate that each of the proposed resources have experience establishing business rules for the Government of Canada RDIMS core applications OpenText (edocs) and/or Livelink/Content Server.. Less than 3 year: = 0 pts 3 to 5 years: = 4 pts 5 to 7 years: = 6 pts 7 to 9 years: = 8 pts More than 9 years: = 10 pts	R	1-10	10 /100/600
3.2.2.14	The Proponent should demonstrate that each of the proposed resources have experience in developing and implementing Records Filing/Classification Systems at the corporate/departmental level in a national organization. Less than 1 year: = 0 pts 1 to 3 years : = 2 pts 3 to 5 years: = 4 pts 5 to 7 years: = 6 pts 7 to 9 years: = 8 pts More than 9 years: =10 pts	R	1-10	5 /50/300
3.2.2.15	The Proponent should demonstrate that each of the proposed resources hold a College Diploma or University Degree in a discipline related to Information Management. No diploma = 0 pts College Diploma = 5 pts University diploma = 10 pts	R	1-10	5 /50/300

Item #	Requirement	R/M/I	Points Available	Weight / max points available/ *2 persons
	***3.2.2.16* Requirements for IM Business Analyst – Senior (2 persons)**			**1500**
3.2.2.17	The Proponent must demonstrate that each of the proposed resources have a minimum of 10 years' experience as a Senior Business Analyst in the IM/IT industry.	M	Pass / Fail	
3.2.2.18	The Proponent must demonstrate that each of the proposed Senior resources have a minimum of 10 years' experience in analyzing business requests and developing and producing business requirements.	M	Pass / Fail	
3.2.2.19	The Proponent must demonstrate that each of the proposed Senior resources have a minimum of 5 years' experience conducting requirements gathering sessions with clients via focus groups.	M	Pass / Fail	
3.2.2.20	The Proponent must demonstrate that each of the proposed Senior resources have a minimum of 5 years' experience as a Business Analyst in the implementation of Electronic Document Record Management (EDRM) system for the Government of Canada organization(s) such as RDIMS core applications OpenText (edocs) and/or Livelink/Content Server.	M	Pass / Fail	
3.2.2.21	The Proponent should demonstrate that each of the proposed Senior resources have experience with leading focus groups/working groups. Less than 5 year: = 0 pts 5 to 8 years: = 4 pts 8 to 10 years: = 7 pts More than 10 years: = 10 pts	R	1-10	5 /50/100
3.2.2.22	The Proponent should demonstrate that each of the proposed Senior resources have experience working with OpenText Livelink and/or Content Server. Less than 1 year: = 0 pts 1 to 3 years: = 2 pts 3 to 5 years: = 4 pts 5 to 7 years: = 6 pts 7 to 9 years: = 8 pts More than 9 years: = 10 pts	R	1-10	10 /100/200
3.2.2.23	The Proponent should demonstrate that each of the proposed Senior resources have experience with test scenario development, functional testing and data and application correction. Less than 1 year: = 0 pts 1 to 2 years: = 2 pts 3 to 4 years: = 5 pts 4 to 5 years: = 8 pts More than 5 years: = 10 pts	R	1-10	10 /100/200

3.2.2.24	The Proponent should demonstrate that each of the proposed Senior resources is able to communicate effectively, orally and in writing, in both official languages (English and French). English OR French only: = 5 pts English and French : = 10 pts	R	1-10	10 /100/200
3.2.2.25	The Proponent should demonstrate that each of the proposed Senior resources have experience defining functional requirements for the RDIMS core applications OpenText (edocs) and/or Livelink/Content Server. Less than 5 year: = 0 pts 5 to 8 years: = 4 pts 8 to 10 years: = 7 pts More than 10 years: = 10 pts	R	1-10	20 /200/400
3.2.2.26	The Proponent should demonstrate that each of the proposed Senior resources have experience establishing business rules for the Government of Canada RDIMS core applications OpenText (edocs) and/or Livelink/Content Server.. Less than 5 year: = 0 pts 5 to 8 years: = 4 pts 8 to 10 years: = 7 pts More than 10 years: = 10 pts	R	1-10	10 /100/200
3.2.2.27	The Proponent should demonstrate that each of the proposed Senior resources have experience in developing and implementing Records Filing/Classification Systems at the corporate/departmental level in a national organization. Less than 1 year: = 0 pts 1 to 3 years : = 2 pts 3 to 5 years: = 4 pts 5 to 7 years: = 6 pts 7 to 9 years: = 8 pts More than 9 years: = 10 pts	R	1-10	5 /50/100
3.2.2.28	The Proponent should demonstrate that each of the proposed Senior resources hold a College Diploma or University Degree in a discipline related to Information Management. No diploma = 0 pts College Diploma = 5 pts University diploma = 10 pts	R	1-10	5 /50/100

3.2.3   Statement of Requirements for Migration Services (I)

The Proponent will be required to provide technical migration specialists for the data migration services to successfully execute and support the migration of Lotus Notes corporate libraries and file shares to OpenText Content Server for CMHC's current InfoShare implementation.

As part of InfoShare - Phase 1, the migration tools for Lotus Notes corporate libraries and file shares were built using OpenText InfoFusion Integration Center (OTIC) version 10.3. Using this tool 81 Lotus Notes corporate libraries and approximately 500 GB of files from file shares were migrated to OpenText - Content Server. Similarly, a migration project was built for the migration of Physical Objects Data using the OpenText Object Importer. No production migration for Physical Objects was done during Phase 1.

3.2.3.1 Scope for Migration Services (I)

For the InfoShare Project Phase 2 – Corporate-Wide Deployment all the remaining Lotus Notes Corporate libraries and File shares will have to be migrated to OpenText Content Server.

CMHC requires resources to provide data migration services to successfully execute and support the migration of the following data to OpenText Content Server coordinated as part of the on-boarding of each business unit:

1. <u>Lotus Notes corporate libraries:</u> about 1500 Lotus Notes corporate libraries need to be migrated to OpenText Content server. These are Lotus Notes databases containing documents that may contain attachments, links and rich text content. The documents contain metadata and permissions assigned at the database and at the document level. The estimated total size of all Lotus Notes corporate libraries data is approximately 8 TB.

2. <u>File Shares:</u> approximately 8 TB of files from File shares need to be migrated to OpenText Content Server. These are files in various shared locations in the network that may have different permission levels assigned to them.

It is possible that some improvements and bug fixes will be necessary to the OTIC migration tool projects (built using OTIC script) for the Phase 2 of the InfoShare Project. When this is the case, resources with OTIC programming knowledge must be able to do necessary changes, and provide documentation and knowledge transfer to CMHC.

For Lotus Notes corporate libraries, the migration process also includes an extraction process, which is done using in-house built tools. Resources will be using these tools as part of the migration process to prepare Lotus Notes data to be migrated. For file shares, the migration process includes a staging process done using scripts. The resources assigned to the resulting contract will be using scripts as part of the migration process to prepare file shares data to be migrated.

The Proponent may propose the use of a different migration tool to provide migration services for the File shares migration and/or the Lotus Notes corporate libraries migration. In this case, the proposed tool will be analysed and, if the same deliverables can be met, the use of another tool replacing the current OTIC migration projects might be considered and approved.

3.2.3.2 Tasks/Technical Specifications/Skills for **Migration Services** (I)

The required services include, but are not limited to the following:

Migration Projects Design Updates:

a) Review and update of the migration tool projects for Lotus Notes corporate libraries, file shares (OpenText InfoFusion Integration Center (OTIC) migration projects and/or equivalent, if applicable);
b) Develop updates, enhancements and bug fixes, as needed;
c) Execute migrations, monitor results and performance, follow up on problems and manually process un-migrated content;
d) Develop test scripts and perform testing;
e) Comply with CMHC development process, documentation and knowledge transfer of any design changes;
f) Suggest improvements to better automate, execute and monitor migrations.

Migration Execution:

a) Perform the migration of approximately 1500 Lotus Notes corporate libraries;
  i. Identify the Lotus Notes corporate libraries to be migrated in the database repository (Lotus Notes database where all corporate libraries are listed) and in the production servers.
  ii. Identify the group in Content Server that will have access to the migrated content.
  iii. Update the database ACL (access control list), making sure the corporate library is set to read only mode for all users in the production servers.
  iv. Create a temporary extraction replica of the corporate library in a secondary server.
  v. Set up and run the first set of extraction scripts in Lotus Notes to extract document attachments, metadata and read/edit restrictions.
  vi. Set up and run the second set of extraction scripts to extract the main documents representation converted to Microsoft Word.
  vii. Verify the extracted content and make sure it is properly extracted before running the import scripts, while archiving the extraction logs.
  viii. If the extracted content is not satisfactory, identify issues, fix them and re-extract the database, as needed.
  ix. Make sure a records management classification is created and previously set up in Content Server for the corporate library being migrated. If not created, request Records Management to create it.
  x. Notify the InfoShare team and the DBA's that an OTIC migration will be run.
  xi. Set up and run the migration scripts in OpenText InfoFusion Integration Center (OTIC).

xii.   Verify the migrated content, archive the extraction logs and generate migration statistics (count of migrated documents and document migration fails).

xiii.   If the migrated content is not satisfactory, identify the issues, fix them and re-migrate the database as needed (at least 95% of the content of the database must be successfully migrated).

xiv.   Update the corporate library as "migrated" in the Database Repository.

xv.   Delete the temporary extraction replica in the temporary server.

xvi.   Deliver a report for the database migrated, including documents/attachments successfully migrated and fails during the extraction and migration process.

xvii.   Keep metrics on performance and success rates. Suggest improvements to process to improve metrics.

b)   Perform the migration of approximately 8 TB of File shares data;

     i.   Identify the business unit that owns the folders to be migrated.

    ii.   Identify the group in Content Server that will have access to the migrated content.

   iii.   Identify the file share folders to be migrated (provide a list of folders to the client, so the client can identify the content being migrated to Content Server).

    iv.   Create a folder for the business unit in the legacy area of Content Server and apply permissions and records management classification to it (if a classification is not created, request Records Management to create it).

     v.   Generate a text file with all folders identified to be migrated and the Content Server group who will have access to it.

    vi.   Run a script to add the read-only attribute to the selected for migration folders.

   vii.   Run a script to stage the content to the OTIC server, so file attributes are maintained in the stage copy.

  viii.   Notify the InfoShare team and the database administrator (DBA) that an OTIC migration will be run.

    ix.   Set up and run the migration scripts in OpenText InfoFusion Integration Center (OTIC): some variables and parameters will have to be updated in the OTIC tool before the migration is started.

     x.   Verify the migrated content, archive the logs and generate migration statistics (including the migrated files and the migration fails and exceptions).

    xi.   If the migrated content is not satisfactory, identify the issues, fix them and re-migrate the folders as needed (at least 95% of the data must be successfully migrated).

   xii.   Run a script to create a Uniform Resource Locator (URL) file on every folder migrated.

  xiii.   Verify if the URL file was properly created in the original file shares folders.

  xiv.   Delete the temporary staged data.

   xv.   Deliver a report for the data migrated, including files successfully migrated and fails during the staging and migration process.

  xvi.   Keep metrics on performance and success rates. Suggest improvements to process to improve metrics

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Quality assurance and Reporting:

   a) The migrated content requires that at least a minimum of 95% of the identified content
      is successfully migrated to InfoShare. The executions will require re-migrations until
      the minimum is met. The resource assigned to the contract shall be required to create
      and collect logs and reports.
   b) Creation of statistic reports for the migrated content, including data successfully
      migrated and migration fails during the extraction and migration process as well as
      identification of exceptions and percentage of migration success.
   c) Approval on report for the migration results and remaining data.

3.2.3.3   Deliverables for Migration Services (I)

 Deliverables for Lotus Notes corporate libraries migration & file shares migration

   a) Migration strategy and detailed plan, including the schedule of all activities, planned start
      and end date of activities, dependencies and resources responsible;
   b) For all changes (improvements or bug fixes) developed in the current migration tools,
      knowledge transfer and detailed documentation must be delivered to CMHC staff,
      detailing any changes made and impacts to the migration process;
   c) Lotus Notes corporate libraries: migration of about 1500 Lotus Notes corporate libraries
      documents, metadata and permissions to OpenText Content Server to be completed within
      the period of two (2) years from the start of the project, following the schedule defined by
      the project plan, with migration success rate of at least 95%;
   d) Report of migration statistics by business unit and all exceptions for extractions and
      migrations, delivered within each Lotus Notes corporate library migration and file share
      migration;
   e) Documentation and knowledge transfer of all design or process changes and updates to
      CMHC staff;
   f) File Shares: migration of approximately 8 TB of data from File shares to OpenText
      Content Server to be completed within the period of two (2) years from the start of the
      project, following the schedule defined by the project plan, with migration success rate of
      95%;
   g) Client Approvals for final migration reports and action plan for remaining content.

The tables below identify the resource categories that will be required to perform the migrations
and the skills needed. The successful Proponent will need to identify if other type of resources
are required to execute the resulting contract.

3.2.3.4   Requirements for Senior Data Migration Analyst (2 persons) (I)

CMHC requires the services of a data migration analyst to assist the project team with the
migration of its Lotus Notes repositories and File shares for the InfoShare Phase 2 – corporate
wide-deployment.

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The required services may include, but are not limited to the following:

a) Provide technical expertise for the migration while liaising with the technical team;
b) Review and update of the migration tool projects for Lotus Notes Corporate libraries, File shares (OpenText InfoFusion Integration Center (OTIC) migration projects and/or equivalent, if applicable);
c) Develop updates, enhancements and bug fixes, as needed;
d) Execute migrations, monitor results and performance, follow up on problems and manually process un-migrated content;
e) Report on progress;
f) Develop test scripts and perform testing;
g) Develop documentation and perform knowledge transfer with CMHC staff;
h) Develop and implement technical recommendations and configurations;
i) Assisting in the estimating, drafting and implementation of the technical solution; and
j) Comply with CMHC development process, documentation and knowledge transfer of any design changes.

The Proponent must provide demonstrated evidence of how each requirement is met.
(Include cross reference to resource resume as applicable)

Item #	Requirement	R/M/I	Points Available	Weight / max points available/ *2 persons
	3.2.3.5 **Senior Data Migration Analyst (2 persons)**			**920**
3.2.3.6	The Proponent must demonstrate that each of the proposed senior resources have a minimum of 10 years' experience in system analysis, design, development, conversion, documentation and reporting.	M	Pass / Fail	
3.2.3.7	The Proponent must demonstrate that each of the proposed senior resources have a minimum of 5 years' experience in designing and implementing data migration projects.	M	Pass / Fail	
3.2.3.8	The Proponent must demonstrate that each of the proposed senior resources have a minimum of 3 years' experience in the installation, configuration, support and/or maintenance of OpenText-Livelink and/or Content Server.	M	Pass / Fail	
3.2.3.9	The Proponent should demonstrate that each of the senior proposed resource holds a College Diploma or University Degree in a discipline related to Information Management/Information Technology. No diploma = 0 College Diploma = 5 pts University diploma = 10 pts	R	1-10	5 /50/100
3.2.3.10	The Proponent should demonstrate that each of the proposed senior resources has completed with success the following OpenText certification(s): • OpenText Content Server Developer Certification Program – OTCSSD	R	1-10	2 /20/40

	• OpenText Content Server Consultant Certification Program – OTCSBC • OpenText Content Server Administrator Certification Program – OTCSSA • OpenText Archive Server Certification Program – OTAS, 2.5 points per certification (must provide a copy of the certificate)			
3.2.3.11	The Proponent should demonstrate that each of the proposed senior resources have experience performing data migrations from systems and/or file share to OpenText Livelink and/or OpenText Content Server. Less than 2 year = 0 pts 2 to 4 years = 4 pts 4 to 6 years = 6 pts 6 to 8 years = 8 pts More than 8 years = 10 pts	R	1-10	10 /100/200
3.2.3.12	The Proponent should demonstrate that each of the proposed senior resources have experience working with OpenText InfoFusion Integration Center (OTIC) migration projects Less than 1 year = 0 pts 1 to 2 years = 5 pts 2 or more years = 10 pts	R	1-10	10 /100/200
3.2.3.13	The Proponent should demonstrate that each of the proposed senior resources have experience working with OpenText - OScript. Less than 1 year = 0 pts 1 to 2 years = 5 pts More than 2 years = 10 pts	R	1-10	2 /20/40
3.2.3.14	The Proponent should demonstrate that each of the proposed senior resources have experience working with web development technologies such as HTML5, XML and Java. Less than 1 year = 0 pts 1 to 2 years = 5 pts More than 2 years = 10 pts	R	1-10	2 /20/40
3.2.3.15	The Proponent should demonstrate that each of the proposed senior resources have experience in developing Content Server Web Reports for OpenText Livelink or Content Server. Less than 1 year = 0 pts 1 to 2 years = 5 pts More than 2 years = 10 pts	R	1-10	5 /50/100
3.2.3.16	The Proponent should demonstrate that each of the proposed senior resources have experience writing SQL scripts and stored procedures. Less than one year = 0 pts 1 to 2 years = 2 pts 2 to 4 years = 4 pts	R	1-10	10 /100/200

Item #	Requirement	R/M/I	Points Available	Weight / max points available/ *2 persons
	4 to 6 years = 6 pts 6 to 8 years = 8 pts More than 8 years = 10 pts			
	3.2.3.17 **Data Migration Analyst (2 persons)**			**1040**
3.2.3.18	The Proponent must demonstrate that each of the proposed resources have a minimum of 5 years' experience in system analysis, design, development, conversion, documentation and reporting.	M	Pass / Fail	
3.2.3.19	The Proponent must demonstrate that each of the proposed resources have a minimum of 5 years' experience in performing Quality Assurance activities.	M	Pass / Fail	
3.2.3.20	The Proponent should demonstrate that each of the proposed resources hold a College Diploma or University Degree in a discipline related to Information Management/Information Technology. No diploma = 0 pts College Diploma = 5 pts University diploma = 10 pts	R	1-10	2 /20/40
3.2.3.21	The Proponent should demonstrate that each of the proposed resources have experience performing data migrations from systems and/or file share to OpenText Livelink and/or OpenText Content Server. Less than one year = 0 pts 1 to 2 years = 2 pts 2 to 4 years = 4 pts 4 to 6 years = 6 pts 6 to 8 years = 8 pts More than 8 years = 10 pts	R	1-10	10 /100/200
3.2.3.22	The Proponent should demonstrate that each of the proposed resources have experience working with OpenText InfoFusion Integration Center (OTIC) migration projects Less than 3 months = 0 pts 3 months to 1 year = 2 pts 1 to 2 years = 4 pts 2 to 4 years = 6 pts 4 to 6 years = 8 pts More than 6 years = 10 pts	R	1-10	10 /100/200
3.2.3.23	The Proponent should demonstrate that each of the proposed resources have experience supporting and/or developing applications with Lotus Notes. Less than one year = 0 pts 1 to 2 years = 2 pts 2 to 4 years = 4 pts 4 to 6 years = 6 pts	R	1-10	10 /100/200

	6 to 8 years = 8 pts More than 8 years = 10 pts			
3.2.3.24	The Proponent should demonstrate that each of the proposed resources have experience writing complex batch processing scripts in Microsoft Windows. Less than one year = 0 pts 1 to 2 years = 2 pts 2 to 4 years = 4 pts 4 to 6 years = 6 pts 6 to 8 years = 8 pts More than 8 years = 10 pts	R	1-10	10 /100/200
3.2.3.25	The Proponent should demonstrate that each of the proposed resources have experience writing SQL scripts and stored procedures. Less than one year = 0 pts 1 to 2 years = 2 pts 2 to 4 years = 4 pts 4 to 6 years = 6 pts 6 to 8 years = 8 pts More than 8 years = 10 pts	R	1-10	10 /100/200

Item #	Requirement	R/M/I	Points Available	Weight / max points available/ *1 person
	3.2.3.26 **Requirements for Developer OTIC Specialist (1 person)** CMHC requires the services of a developer OTIC specialist to assist the project team with the migration of its Lotus Notes repositories and file shares for the InfoShare Phase 2 – corporate wide-deployment			**540**
3.2.3.27	The Proponent must demonstrate that the proposed resource has a minimum of 5 years' experience in system analysis, design, development, conversion, documentation and reporting.	M	Pass / Fail	
3.2.3.28	The Proponent must demonstrate that the proposed resource has a minimum of 5 years' experience in performing Quality Assurance activities.	M	Pass / Fail	
3.2.3.29	The Proponent must demonstrate that the proposed resource has a minimum of 5 years' experience writing SQL scripts and stored procedures.	M	Pass / Fail	
3.2.3.30	The Proponent must demonstrate that the proposed resource has 2 years' experience creating and performing data migrations using OpenText InfoFusion OTIC from systems and/or file share to OpenText Livelink and/or OpenText Content Server.	M	Pass / Fail	
3.2.3.31	The Proponent should demonstrate the proposed resource holds a College Diploma or University Degree in a discipline related to	R	1-10	2 /20

	Information Management/Information Technology. No diploma = 0 pts College Diploma = 5 pts University diploma = 10 pts			
3.2.3.32	The Proponent should demonstrate that the proposed resource has experience performing data migrations from systems and/or file share to OpenText Livelink and/or OpenText Content Server. Less than one year = 0 pts 1 to 2 years = 2 pts 2 to 4 years = 4 pts 4 to 6 years = 6 pts 6 to 8 years = 8 pts More than 8 years = 10 pts	R	1-10	10 /100
3.2.3.33	The Proponent should demonstrate of the proposed resource has experience working with OpenText InfoFusion Integration Center (OTIC) migration projects Less than 3 months = 0 pts 3 months to 1 year = 2 pts 1 to 2 years = 4 pts 2 to 4 years = 6 pts 4 to 6 years = 8 pts More than 8 years = 10 pts	R	1-10	10 /100
3.2.3.34	The Proponent should demonstrate that proposed resource has experience supporting and/or developing applications with Lotus Notes. Less than one year = 0 pts 1 to 2 years = 2 pts 2 to 4 years = 4 pts 4 to 6 years = 6 pts 6 to 8 years = 8 pts More than 8 years = 10 pts	R	1-10	10 /100
3.2.3.35	The Proponent should demonstrate that the proposed resource has experience writing complex batch processing scripts in Microsoft Windows. Less than one year = 0 pts 1 to 2 years = 2 pts 2 to 4 years = 4 pts 4 to 6 years = 6 pts 6 to 8 years = 8 pts More than 8 years = 10 pts	R	1-10	10 /100
3.2.3.36	The Proponent should demonstrate that the proposed resource has experience writing SQL scripts and stored procedures. Less than 5 year = 0 pts 5 to 7 years = 4 pts 7 to 9 years = 6 pts More than 9 years = 10 pts	R	1-10	10 /100

3.2.3.37	The Proponent should demonstrate that each of the proposed resource have experience working with OpenText - OScript. Less than 1 year = 0 pts 1 to 2 years = 5 pts 2 or more year = 10 pts	R	1-10	2 /20

3.2.4   Statement of Work for Technical Services (I)

As part of InfoShare - Phase 2 project, CMHC requires technical services to review and prepare the readiness of its technical architecture for its OpenText Content Server (InfoShare) corporate rollout and, the on-boarding of an additional 2000 users. Also, technical services are required to develop, integrate and implement, as part of the rollout, all CMHC'S business unit requirements to the InfoShare systems, its related support and configuration (accounts, folder structure, and permission/security). The resources assigned to this project will be required to consult and engage with CMHC Project Manager and the project team to conduct the deployment, coordination of activities and perform knowledge transfer, based on established CMHC methodology.

3.2.4.1   **Tasks/Technical Specifications/Skills for Technical Services (I)**

The required services may include, but are not limited to the following:

Architecture Review:
    a) Perform a global review (health check) of the current architecture to identify sources of contention, performance issues and possible miss-configurations;
    b) Recommend and address technical issues experienced during Phase 1;
    c) Upgrade and scale the existing environment for enterprise rollout (system readiness), to 2000 users (approximately 1000 at Nation Office and another 1000 dispersed country wide);
    d) Provide a sustainable strategy for the migration of large volumes of data from Lotus Notes databases and File shares while users are being on boarded;.
    e) Plan, schedule, implement and support all of the Phase 2 – enterprise rollout activities, including loading of configurations, groups and folder structure;
    f) Provide strategic advice, best practices and expertise in large deployments of OpenText ECM to conduct the rollout of InfoShare enterprise wide;
    g) Provide strategic advice, best practices, expertise and support with all activities related to the support, maintenance and management of the InfoShare infrastructure at CMHC;
    h) Analyze and evaluating alternative technology solutions to meet business needs;
    i) Ensure the integration of all aspects of technology solutions;
    j) Monitor industry trends to ensure that solutions fit with the industry directions for technology;
    k) Provide information, direction and support for emerging technologies;
    l) Perform impact analysis of technology changes;
    m) Provide support to applications and technical support teams in the proper application of existing infrastructure;
    n) Review and analyze the current architecture, application, system design, configuration and installation to improve efficiencies and performance;

o) Suggest improvements to better automate the on-boarding of users;
p) Develop and implement technical recommendations and configurations;
q) Assisting in the estimating, drafting and implementation of the technical solution;
r) Identifying and assessing the impact of emerging trends and existing and emerging technologies on present and future client IT requirements and provide expert advice on strategic directions; and
s) Mitigating the technical risks.

Research, Analysis, Planning and Design - Technical Services
a) Perform a detailed analysis of the current CMHC InfoShare technical architecture, system configuration and information architecture in light of Phase 2 scope;
b) Develop recommendations, strategies and approaches to ensure "system readiness" for Phase 2 enterprise wide deployment, in consultation with internal I&T and IM CMHC staff;
c) Develop an implementation project schedule for the technical activities in view of "system readiness"
d) Develop the strategy and timeline for scaling (horizontally and/or vertically) the architecture in light of the deployment schedule of users and data migration volumes;
e) Submit the project schedule and strategy and approach to CMHC Project Manager for review and approval;
f) Detail technical environment requirements to prepare, test and execute on the deployment based on approved strategies/approaches;
g) Recommend and plan the implementation a System Development LifeCycle (SDLC) and maintenance release program for the InfoShare service at CMHC;
h) Review and update the architecture for OpenText Everywhere deployment to Blackberry Mobile Devices at CMHC (potential of 800 mobile devices);
i) Review and provide advice, recommendations on delineation rationalization of system settings.

Implementation:
a) Execute the implementation plan for system readiness and environment scaling;
b) Implement processes to sustain fixed release system maintenance, upgrades and patches in line with CMHC's Change Management operations;
c) Develop and execute test scripts and migration/upgrade scripts;
d) Develop/provide tools to facilitate the automation of system support and on-boarding of users and their requirements gathered for the configuration of Content Server (folder structure, security, metadata, etc.);
e) perform technical and functional testing.

Maintenance and Support:
a) Provide technical expertise for the implementation of OpenText Content Server at CMHC while liaising with the technical team
b) Document and resolve problems related to the sustainment of deployment process;
c) Coordinate technical activities with CMHC staff;
d) Execute migration/upgrade scripts and tools;
e) Process problems into solutions;

f) Collect and analyze information and present findings on complex issues, carrying out or coordinating work as required and preparing reports;

g) Assist CMHC staff with identifying problems and providing solutions for both technical and other project related issues;

h) Prepare and present findings, status and other relevant matters;

i) Coordinate and work in collaboration to develop and conduct User Acceptance Testing with CMHC staff;

j) Resolve issues found by CMHC testers.

Documentation and Close-out:

a) Create and update technical document all design and all technical details for maintenance purposes;

b) Prepare various reports (recommendation approvals, progress reviews, risk assessments);

c) Provide technical documentation on the deployment;

d) Provide build books and/or documentation updates, architected diagrams ;

e) Perform knowledge transfer sessions and documents to CMHC staff during all phases of the project;

f) Provide Test scripts and testing results.

3.2.4.2 **Deliverables for Technical Services (I)**

Deliverables for Research, Analysis, Planning and Design:

a) Detailed analysis report in the form of a "Health Check" on CMHC's Phase 1 current architecture including SQL Server instance(s);

b) Recommendations to address contention and performance issues (current and in light of Phase 2 enterprise rollout) in the form of an action / implementation plan;

c) Recommend and develop plan and implementation to improve InfoShare high availability;

d) Review Backup and DR procedures and recommend improvements;

e) Train staff on how best to use new features in Content Server 10.5;

f) Strategy and timeline for scaling environment in light of Phase 2 on-boarding and data migration schedule;

g) Implementation plan and timeline for execution of recommendations to address contention and performance issues;

h) Updated architecture diagrams of all environments (DEV, SYS, EIT, PROD/DR and Training);

i) Proposal and presentation of a SDLC and maintenance program for the InfoShare infrastructure;

j) Proposal and presentation of recommended best practices activities for operational monitoring and reporting on system usage, response times, performance (Logs, SolarWinds, Monitoring Module, LiveReports, WebReports);

k) Develop test scripts, sample data and validation scripts for enterprise rollout activities;

l) Knowledge transfer to CMHC staff by way of presentations, documentation with an official sign-off;

m) Provide weekly status reports, or as required to CMHC Project Manager.

Deliverables for Implementation:
   a) Execution and coordination with CMHC I&T Staff of the implementation plan for system readiness;
   b) Execution and coordination with CMHC I&T Staff of the implementation plan for scaling activities;
   c) Execution and coordination with CMHC I&T Staff of the process and procedures related to SDLC and maintenance release;
   d) For each business unit implementation, perform system configuration (information, community and security models) as per business requirements in OpenText Content Server using the approved tools;
   e) Perform system installation and configuration following CMHC procedures and governance;
   f) Execution and coordination with CMHC I&T staff of the processes and activities related to on-boarding of users and data migrations (Lotus Notes and file shares).

Deliverables for Maintenance and Support:
   a) Creation of Web reports as needed
   b) Improvements to site Branding and look & feel through the use of Appearances and Active view;
   c) Support implementation of OpenText monitoring using SolarWinds and OpenText monitoring module;
   d) Run various scripts for testing, on-boarding and migration activities;
   e) Track problems and document solutions;
   f) Identify and resolve issues of ongoing operations;
   g) Scale environment as defined in strategy plan.

Deliverables for Documentation and Close-out:
   a) Presentations and reports of strategies and recommendations;
   b) Project schedule and implementation plans; and
   c) Updates to risk registry including the provision of risk mitigation strategies.

The Proponent must provide demonstrated evidence of how each requirement is met.
(Include cross reference to resource resume as applicable)

Item #	Requirement	R/M/I	Points Available	Weight / max points available/ *1 person
	3.2.4.3 **Requirements for Senior Technical Architect (1 person)**			**450**
3.2.4.4	The Proponent must demonstrate that the proposed resource has a minimum of 10 years' experience working as a Technology Architect, Technical Architect or Enterprise Architect in the IT industry for a government or other large organization of over 1,000 employees.	M	Pass / Fail	

3.2.4.5	The Proponent must demonstrate that the proposed resource has a minimum of 10 years' experience in defining requirements, translating business requirements to IT solutions and analyzing alternatives and recommending solutions; and providing ongoing development, maintenance and support of business applications.	M	Pass / Fail	
3.2.4.6	The Proponent must demonstrate that the proposed resource has at least two similar projects, experience in the installation, configuration, design and implementation of OpenText Livelink and/or Content Server. Similar project is defined as size and complexity: 2000 users or more and in a dispersed architecture with regional offices	M	Pass / Fail	
3.2.4.7	The Proponent should demonstrate that the proposed resource holds a College Diploma or University Degree in a discipline related to Information Management/Information Technology. No diploma = 0 pts College Diploma = 5 pts University diploma = 10 pts	R	1-10	10 /100
3.2.4.8	The Proponent should demonstrate that the proposed resource has completed with success the following OpenText certification(s): • OpenText Content Server Developer Certification Program – OTCSSD • OpenText Content Server Consultant Certification Program – OTCSBC • OpenText Content Server Administrator Certification Program – OTCSSA • OpenText Archive Server Certification Program – OTAS, 2.5 points per certification (must provide a copy of the certificate)	R	1-10	10 /100
3.2.4.9	The Proponent should demonstrate that the proposed resource has experience in the installation, configuration, design and implementation of OpenText Livelink and/or Content Server. Less than one year = 0 pts 1 to 2 years = 2 pts 2 to 4 years = 4 pts 4 to 6 years = 6 pts 6 to 8 years = 8 pts More than 8 years = 10 pts	R	1-10	10 /100
3.2.4.10	The Proponent should demonstrate that the proposed resource has experience with VMware virtualization technologies. Less than one year = 0 pts 1 to 2 years = 2 pts 2 to 4 years = 4 pts 4 to 6 years = 6 pts 6 to 8 years = 8 pts More than 8 years = 10 pts	R	1-10	5 /50

Item #	Requirement	R/M/I	Points Available	Weight / max points available/ *5 persons
3.2.4.11	The Proponent should demonstrate that the proposed resource has experience with Network Attached Storage (NAS) and Storage Area Network (SAN) infrastructure. Less than one year = 0 pts 1 to 2 years = 2 pts 2 to 4 years = 4 pts 4 to 6 years = 6 pts 6 to 8 years = 8 pts More than 8 years = 10 pts	R	1-10	5 /50
3.2.4.12	The Proponent should demonstrate that the proposed resource has experience in network design and architecture with load balancer technologies Less than one year = 0 pts 1 to 2 years = 2 pts 2 to 4 years = 4 pts 4 to 6 years = 6 pts 6 to 8 years = 8 pts More than 8 years = 10 pts	R	1-10	5 /50
Item #	**Requirement**	**R/M/I**	**Points Available**	**Weight / max points available/ *5 persons**
	3.2.4.13 **Requirements for Technical Analyst (5 persons)**			**2725**
3.2.4.14	The Proponent must demonstrate that each of the proposed resources have a minimum of 2 years' experience in the installation, configuration, support and maintenance of OpenText Livelink and/or Content Server	M	Pass / Fail	
3.2.4.15	The Proponent must demonstrate that each of the proposed resources have a minimum of 3 years ' experience working with Web servers and HTML (MS IIS, Tomcat)	M	Pass / Fail	
3.2.4.16	The Proponent must demonstrate that each of the proposed resources have a minimum of 3 years' experience working within a Windows Operating System	M	Pass / Fail	
3.2.4.17	The Proponent must demonstrate that each of the proposed resources have a minimum of 3 years' experience working with SQL Server 2008 or higher	M	Pass / Fail	
3.2.4.18	The Proponent should demonstrate that each of the proposed resources holds a College Diploma or University Degree in a discipline related to Information Management/Information Technology. No diploma = 0 pts College Diploma = 5 pts University diploma = 10 pts	R	1-10	10 /100/500
3.2.4.19	The Proponent should demonstrate that each of the proposed resources have experience in the installation, configuration, support and maintenance of OpenText Livelink and/or Content Server. Less than one year = 0 pts	R	1-10	10 /100/500

	1 to 2 years = 2 pts 2 to 4 years = 4 pts 4 to 6 years = 6 pts 6 to 8 years = 8 pts More than 8 years = 10 pts			
3.2.4.20	The Proponent should demonstrate that each of the proposed resources have completed with success the following OpenText certification(s): - OpenText Content Server Developer Certification Program – OTCSSD - OpenText Content Server Consultant Certification Program – OTCSBC - OpenText Content Server Administrator Certification Program – OTCSSA - OpenText Archive Server Certification Program – OTAS. 2.5 point per certification (must provide a copy of the certificate)	R	1-10	10 /100/500
3.2.4.21	The Proponent should demonstrate that each of the proposed resources have a minimum of one (1) year experience with the installation, configuration and integration of a variety of non-core modules in OpenText Content Server such as: 1. Records Management, 2. Classifications, 3. Web Reports, 4. ActiveView, 5. Object Importer/Exporter, 6. Template Workspaces, 7. Security Clearance, 8. XML Workflow extensions, and 9. Physical Objects. 1 point per module	R	1-9	5 /45/225
3.2.4.22	The Proponent should demonstrate that each of the proposed resources have experience using OpenText Oscript. Less than one year = 0 pts 1 to 2 years = 2 pts 2 to 4 years = 4 pts 4 to 6 years = 6 pts 6 to 8 years = 8 pts More than 8 years = 10 pts	R	1-10	10 /100/500
3.2.4.23	The Proponent should demonstrate that each of the proposed resource have experience using Object Importer / Exporter WebReports and ActiveView. Less than one year = 0 pts 1 to 2 years = 2 pts	R	1-10	10 /100/500

| | 2 to 4 years = 4 pts
4 to 6 years = 6 pts
6 to 8 years = 8 pts
More than 8 years = 10 pts | | | |

3.2.5 Statement of Work for Project Management Services (I)

CMHC requires the Proponent to provide services of a project manager to manage the resources, activities, scope and budget assigned as part of the resulting contract, and act as liaison between the Proponent and CMHC's Project Manager.

The required services may include, but are not limited to the following:

a) Manage, monitor and forecast project execution; take corrective action as required to deliver project within scope, quality, time and budget;
b) Ensure internal and external stakeholders management through effective communication;
c) Lead and / or assist in fit-gap, risk management, and issue management identification, analysis, resolution, and monitoring;
d) Identify and advise CMHC Project Manager of priority activities, conflicts and critical path activities;
e) Develop appropriate strategies and project management deliverables;
f) Manage or assist CMHC Project Manager with the implementation of scope management, change management, requirements traceability, and quality management processes related to potential transition activities;
g) Interact with CMHC's InfoShare project team to provide background information, technical documentation, information on specific projects and/or IT services, etc.;
h) Lead and / or assist in managing the review of deliverables in accordance to CMHC's Project Management Framework and Policy, and the acceptance of deliverables;
i) Assist CMHC Project Manager in planning, organizing and coordinating activities related to interaction with CMHC's community;
j) Assist CMHC Project Manager in discussions and negotiations with other sectors for their participation and commitment to service delivery and transition activities of the project;
k) Assist CMHC Project Manager in the development and coordination of presentation materials in response to scheduled and unscheduled reports to update senior management of project progress and areas of concern; and
l) Provide weekly status reports, or as required, to CMHC Project Manager.

3.2.5.1 Deliverables - Project Manager:

a) Development of project plan indicating accountabilities, project milestones, project governance and overall timetable for completion of deliverables;
b) Coordination of project activities (including development, implementation, migration and training with various stakeholders;
c) Bi-weekly progress reports and timesheets;
d) Identifications of risks including the provision of risk mitigation strategies, issues, change in schedule, scope and budget; and

e) Final report and "lessons learned" documentation which will include the results of the projects, level of success, issues and challenges, areas requiring improvement/revision, as well as recommendations.

The Proponent must provide demonstrated evidence of how each requirement is met.
(Include cross reference to resource resume as applicable)

Item #	Requirement	R/M/I	Points Available	Weight / max points available/ *1 person
	3.2.5.2 **Requirements for Project Manager (1 person)**			**350**
3.2.5.3	The Proponent must demonstrate that the proposed resource has a minimum of 5 years' experience working as a Project Manager in the IM/IT industry.	M	Pass / Fail	
3.2.5.4	The Proponent must demonstrate the proposed resource has 10 years' experience in managing 2 or more IM/IT projects, valued at a minimum of $5Million or more per project.	M	Pass / Fail	
3.2.5.5	The Proponent should demonstrate that the proposed resource has 5 years' experience using the following project management tools to develop, update and maintain project schedules and work plan activities, as well as other software tools for processing documentation, reports, spreadsheets and presentations. MS Project; MS Word; MS Excel; MS Power Point	M	Pass / Fail	
3.2.5.6	The Proponent should demonstrate that the proposed resource has completed a post-secondary education from a recognized institution, in a related field of IM/IT or project management. Points for proof of education, as follow: No diploma provided = 0 College diploma copy provided = 5 pts University diploma copy provided = 10 pts	R	1-10	10 /100
3.2.5.7	The Proponent should demonstrate that the proposed resource has a Project Management Professional (PMP) designation or an industry recognized Project Management (PM) certification. No certification provided = 0 Per Project Management certification copy provided = 2 pts	R	1-10	10 /100
3.2.5.8	The Proponent should demonstrate that the proposed resource has experience using the following software in managing projects: EDRM/ OpenText edocs and/or Livelink/Content Server. EDRM/Lotus Notes Points will be allocated as follows: 5 points for each software package to a maximum of 10	R	1-10	5/50

3.2.5.9	The Proponent should demonstrate that the proposed resource has project management experience in managing similar IM/IT projects such as RDIMS (e-docs) and/or GCDOCS (OpenText Content Server/ Livelink). Points will be allocated as follows: 2 points for each project up to a maximum of 10pts	R	1-10	10 /100

3.2.6   General Requirements for Stream 1 (I)

CMHC requires the Proponent to provide expertise to perform the rollout of OpenText Content Server corporate wide for 2000 users by proposing resources, solutions, plans, strategies, processes and tools to support CMHC's implementation of InfoShare. It is expected that the Proponent will provide a complete implementation solution and approach including the implementation tools than can be accessible and used by all resources working on the InfoShare project (consultants and CMHC employees).

As such, the resources assigned to the resulting contract will integrate and work jointly with CMHC staff working on the project, to ensure that coordination of activities and knowledge transfer is executed in a manner that sustains post-implementation services (ongoing support and maintenance).

All resources assigned to this project will be required to consult and engage with CMHC Project Manager, the InfoShare project team, the IM team and the In-Service support team to conduct, coordinate the project activities and perform knowledge transfers, based on the established CMHC methodology. The resources will participate actively in project meetings, provide weekly status reports and/or as required, raise risks and issues and develop written documentation to support all deliverables that will be stored in CMHC InfoShare (under development drafts and final copies). They will provide expert advice and options that are in the best interest of CMHC.

Requirement: CMHC implementation of InfoShare – Phase 2 project encompasses developing strategies, approaches, methodologies, and tools as well as to conduct InfoShare implementation within CMHC business sectors.

It is expected that processes and tools for business requirement gathering will be provided by the selected Proponent and that CMHC's on-boarding process will be reviewed to identify improvement and/or streamlining opportunities.

The Proponent must provide demonstrated evidence of how each requirement is met.
(Include cross reference to resource resume as applicable)

Item #	Requirement	R/M/I	Points Available	Weight / max points available
	3.2.6.1 **Requirements for Proponent**			**840**
3.2.6.2	The Proponent must describe in a maximum of 4 pages the strategies, approaches, methodologies, tools, processes and solution that they will be using to perform the implementation of InfoShare at CMHC to 2000 employees across all sectors at the National Office and regional offices.	M	Pass / Fail	
3.2.6.3	**Escalation Procedures** The Proponent must ensure that appropriate measures are in place within its organization to react to or handle issues that arise during the term of the ensuing Agreement as brought to attention of the Proponent by CMHC designates.	M	Pass / Fail	
3.2.6.4	**Invoicing** The Proponent must provide CMHC with a detailed paper or electronic invoice for all products, services and support, monthly fee of charges. The invoice must include a reference to the CMHC purchase order numbers or task number. Please provide a description of the services available and samples of invoices illustrating this capability. All invoices for billable hours must include the details of the work completed for the number of hours being. All invoices for task based invoices must include the details of the task completed. If used the Time sheets from CMHC system may also be required. CMHC shall provide written notice to the Proponent within thirty (30) days of receipt of an invoice if the above conditions have not been met or a dispute of the amount charged.	M	Pass / Fail	
3.2.6.5	**Payment Disputes** Upon receipt of a dispute notification from CMHC, the Proponent shall conduct an investigation of the dispute and shall advise CMHC of the results within forty-five (45) business days or less. No interest charges will be applied during the forty-five (45) business day investigation period. If the amount to be paid is different than the amount originally billed, the Proponent shall issue a corrected invoice with a new thirty (30) day due date.	M	Pass / Fail	
3.2.6.6	The processes, methodologies and tools proposed by the Proponent to on-board the users should be simple (at the opposite of being complex) and complete, promoting change realization and meeting business unit's and IM requirements.	R	1-10	10 /100

	2.5 pts: for demonstrating processes, methodologies and tools are simple and easy to use and understand for all stakeholders 2.5 pts: for demonstrating processes, methodologies, tools that promote change realization with all stakeholders 2.5 pts: for demonstrating processes, methodologies and tools that meet IM requirements and business unit focus 2.5 pts: for demonstrating processes, methodologies and tools is tailored for CMHC specific needs.			
3.2.6.7	The implementation methodologies and processes that the Proponent is proposing integrates CMHC staff and consultants, makes efficient use of resources and engages all stakeholders, including the business units. 3 pts: for demonstrating processes and methodologies that promote knowledge transfer to CMHC staff. 3 pts: for demonstrating processes and methodologies, that take into consideration each business unit specific needs. 3 pts: for demonstrating processes and methodologies that use sufficient engagement and communication with all stakeholders during all phases of the implementation and on-boarding process.	R	1-9	10 /90
3.2.6.8	The approaches proposed by the Proponent include all aspects of the project (business analysis, training, migration, configuration, testing, integration, support, communication, change management, etc.) excellent match: = 8-10 pts good match: = 6-7 pts fair match: = 3-5 pts poor match: = 1-2 pts Not able to assess: 0 pts	R	1-10	5 /50
3.2.6.9	The tools proposed by the Proponent to upload business unit's configuration during the on-boarding process should integrate within CMHC's technical environment and be accessible by all resources working as part of the InfoShare project team (consultants and employees) 5 pts: the Proponent provides full access (release all intellectual property (IP) rights to CMHC) to tools to upload and configure OpenText Content Server to all InfoShare project team (consultants and employees) free of charge. 5 pts: demonstrate that the tools proposed is compatible with CMHC environment and will not require more than 1 week of installation and configuration; and not more than 1 day training for CMHC staff to use it.	R	1-10	10 /100
3.2.6.10	**Support References** The Proponent should provide evidence of their ability and commitment to provide ongoing service and support for comparable implementations by referencing two (2) large projects completed in the past two years which have been supported by the Proponent acting in the role of prime Proponent.	R	1-10	10 /100

	For each reference, Proponents should include as a minimum;			
	1. Name of client organization;			
	2. Name, title, phone numbers and fax numbers of client contacts;			
	3. Extent and complexity of support provided to the client;			
	4. Indication of client satisfaction with the Proponent's performance.			
3.2.6.11	**Escalation Steps**			
	Please describe your escalation procedures based on CMHC's requirements below. Additional points will be given to Proponents who provide additional value to CMHC by exceeding its requirements.			
	The following steps should be taken to ensure an efficient and effective problem resolutions:			
	Level 1: The CMHC's project manager notifies Proponent's project manager of problem with implementation. The situation is discussed and resolve at this level. If no resolution can be find the issue is brought to level 2.			
	Level 2: The respective project managers will notify their direct management of the problem and the inability to solve at their level. The respective management will discuss solution with their project manages to resolve at this level. If no resolution can be find the issue is brought to level 3.	R	1-10	10 /100
	Level 3: If the situation cannot be resolved in Level 2, the Proponent's Management Authority at successive levels to the President if necessary will be notified to take the necessary action to resolve the situation. CMHC higher level management will also be informed. CMHC shall have the option to request meetings to discuss and possible post-mortem report or convene a post-mortem meeting.			
	The Proponent shall provide an Escalation procedure with their response to this RFP listing the names and level of management within their organization. Full list of contact information will be required by the winning the Proponent			
	This escalation procedure should be reviewed and updated if required on a monthly basis or when required.			

3.2.6.12	**Travel and living expenses** The Proponent should agree to be bound by the Travel guide in Appendix "F" Point will be award as follows: Full compliance to guide line = 10pts Changes to rates = minus 4pts Changes to rules = minus 4pts No agreement to be bound by the guide line = 0pts	R	1-10	30 /300

3.3   Stream 2 - InfoShare Physical Object Implementation (I)

The Proponent will provide resources to develop configure and implement OpenText – Physical Object (PO). The resources assigned to the project will perform the migration from the File Retrieval System (FRS), a Lotus Approach database to OpenText – PO and rollout the solution to approximately 500 users.

3.3.1   Scope (I)

The replacement of the FRS (Records Management system used to manage paper files and documents) with the OpenText - Physical Object encompasses:

a) The development of the OpenText - Physical Object system including user functionalities;
b) The development of an implementation strategy including communications and client engagement, tools and training;
c) The implementation of OpenText - Physical Object to approximately 500 end-users across Canada; and
d) The development of the migration strategy and tools from the FRS system to Physical Object and the execution of the migration including testing and quality control.

3.3.2 Summary of Resourcing Requirements Stream 2 (I)

CMHC has a requirement for the following resources to support the InfoShare Physical Object Implementation

Category	Start Date	End Date	Minimum No of Resources	Estimated Total Effort
Business Analyst - Physical Object Specialist			1	230 days
Developer/Migration Physical Object Specialist			1	230 days
Physical Object Trainer			2	100 days
Project Manager			1	70 days
		Total	5	630 days

3.3.3 Statement of Work for Physical Object Implementation and Migration Services (I)

The File Retrieval System (FRS) is a Lotus Approach database designed to manage and facilitates the transfer to and retrieval of records stored at offsite locations, and in some cases on site. The FRS provides an electronic inventory and tracking capability at both the storage box and file folder level that allows clients to independently search and retrieve files.

There are close to 2,500,000 records identified in the FRS, and 501 users across CMHC. The FRS is the only mechanism clients have to manage their off-site paper files, including retrievals and returns. Without the system the entire inventory in off-site storage is inaccessible.

The FRS design, development and maintenance have been done in-house by CMHC employees in the Records Management group. The table below depicts the current location of the FRS users.

For Physical Objects, migration tools were built using Perl scripts and Import Control Files (ICF) for the OpenText Object Importer during the Phase 1 of InfoShare Project. These tools were tested but not yet used for production migrations.

It is possible that some improvements and bug fixes will be necessary to the Physical Objects migration tools for the Phase 2 of the InfoShare Project. When this is the case, resources with Perl programming and OpenText Object Importer knowledge must be able to do necessary changes, and provide documentation and knowledge transfer to CMHC.

Region	No. Of FRS Users by Region	City (Site) * offices closing in 2015	No. of Users
Atlantic	28	Charlottetown PEI	5
		Fredericton NB	1
		Halifax NS	21
		St. John's NF	1
British Columbia	44	Granville Island BC	5
		Kelowna BC	0
		Prince George BC *	0
		Vancouver BC	38
		Victoria BC *	1
Ontario	94	Hamilton ON *	1
		London ON *	5
		Oshawa ON	0
		Ottawa ON - Point of Serv.	3
		Sudbury ON *	6
		Thunder Bay ON	4
		Toronto ON	75
National Office	209	Ottawa ON	209
Prairies and Territories	54	Calgary	37
		Edmonton	4
		Regina *	0

		Saskatoon	6
		Whitehorse *	2
		Winnipeg	5
Québec	72	Montreal	66
		Quebec	6
Total Number of Users	501		

As part of the InfoShare- Phase 1 project, the development of the OpenText - Physical Object(PO) solution and the script to migrate the FRS databases PO was started for the eventual cut-over to production. The intent is to incorporate FRS functionality and client requirements into OpenText Content Server – Physical Objects (currently in development using advanced configuration).   Some test migration has also been completed successfully.

3.3.4 Statement of Requirements Components (I)

There are several services components within stream 2 Statement of Requirements:

       a) Implementation services (detailed in subsection 3.3.5)
       b) Migration services (detailed in subsection 3.3.6)
       c) Technical services (detailed in subsection 3.3.7)
       d) Project Management services (detailed in subsection 3.3.8)

3.3.5 Statement of Work for Implementation Services (I)

CMHC requires IM business analysts with experience in records management to work with CMHC Record's Office and the InfoShare project team to plan, develop strategies and approaches, develop the solutions and implement the OpenText – Physical Object in the production environment. The process will cover the functional requirement validation to the implementation of the solution in the InfoShare (OpenText Content Server) to all identified users across the regional business centers and the points of service locations.

3.3.5.1   Tasks/Technical Specifications/Skills (I)

The role requires the IM Business Analyst to have superior oral and written communication skills, an organized and analytical approach to problem solving and business analysis, as well as a team attitude in the achievement of milestones. The IM Business Analyst may serves as a back-up resource for the delivery of OpenText Physical Object training as required. The proposed resource should have proven experience as a business analyst and change realization/business change management, in gathering business requirements, in evaluating business needs, developing and applying best practices to assist in developing and implementation of a record management system. They also require strong knowledge of Information Management practices and policies.

The required services may include, but are not limited to the following:

_____

Requirement Definition
   a) Validate functionalities against requirements including: Container structures, objects/physical item types (i.e. folder, volume, box, microfilm/microfiche), metadata (i.e. item properties and category attributes);
   b) Define and document business processes specific to Physical Objects (i.e. new item creation, circulation management – internal and to off-site storage, transfers, etc.);
   c) Define reports and labels requirements;
   d) Define Non-functional requirements (i.e. usability, performance, etc.);
   e) Facilitate information gathering session and acting as facilitator during workshops*;*
   f) Translate the business requirements into System/Functional requirements;
   g) Analyze and documenting the business requirements and delivering work products through the life cycle;
   h) Consult stakeholders (individually or by means of facilitating group sessions) to identify comprehensive business requirements;
   i) Document business requirements for all stakeholders;
   j) Provide support in analyzing, evaluating and controlling risks, especially related to requirements.

Development of the solution:
   a) Develop test cases and perform testing;
   b) Documents functional and operational processes;
   c) Develop required IM procedures in accordance with existing CMHC IM standards and strategies, and needs of the various user communities;
   d) Vet the drafts within the peer review group;
   e) Test the procedures using appropriate applications / training material;
   f) Make recommendations and providing advice for improvements and assisting in developing solutions, scenarios and implementing recommendations;
   g) Prepare and present findings, status and other relevant matters
   h) Collect and analyzing information and presenting findings on complex issues, carrying out or coordinating research as required and preparing reports;
   i) Identify and researching best practices;
   j) Process problems into solutions or new opportunities/initiatives;
   k) Analyze, advising on, and implementing business processes, strategies and functions;
   l) Advise on business decisions;
   m) Propose process improvements *(e.g., initiating redesign to promote increased efficiencies and reduce overall costs, implementing improvements to automation of process);*
   n) Participate in functional and technical design reviews, perform integration/functional and system testing, and verify test results;
   o) Define business strategy and process in support of transformation and change

    p) management activities;

Implementation/Rollout:

    a) Develop an implementation strategy and plans that includes client engagement throughout the process and the cut-over process;

    b) Manage the implementation of an organizational improvement plan to identify, analyze, plan, track and control organizational improvements on a continuous basis;

    c) Contribute to project management deliverables, project schedule, etc;

    d) Coordinate the implementation of existing data from FRS with the migration team;

    e) Provide initial support relating to user implementation within each site/region;

    f) Obtain corporate Information Management review and approvals;

    g) Develop a training strategy that will address the 501 users across the country.

     The strategy will include communications, training manuals and any other materials or tools required as part of the training.

3.3.5.2 Deliverables - Implementation Services (I)

    a) Establish communication channels to ensure that users are informed of the initiative;

    b) Complete the development as per the approved requirements the Physical Object solution;

    c) Development of a Physical Object system guide including the operational and functional processes;

    d) Document implementation and training strategy, a detailed plan, including the schedule of all activities, planned start and end date of activities, dependencies and resources responsible;

    e) Implementation of a Physical Object solution in InfoShare – including the coordination of the migrated data from FRS and the go-live implementation by region/site/business units as per the approved schedule;

    f) Documentation and knowledge transfer of all design or process changes and updates to CMHC staff.

The Proponent must provide demonstrated evidence of how each requirement is met.
(Include cross reference to resource resume as applicable)

Item #	Requirement	R/M/I	Points Available	Weight / max points available
	3.3.5.3 Requirements for Business Analyst - Physical Object Specialist (1 person)			**800**
3.3.5.4	The Proponent must demonstrate that the proposed resource has a minimum of 1 year experience using records and document management products such as OpenText Physical Object	M	Pass / Fail	
3.3.5.5	The Proponent must demonstrate that the proposed resource has a minimum of 2 years' experience developing IM business procedures to support record management services.	M	Pass / Fail	

3.3.5.6	The Proponent must demonstrate that the proposed resource has a minimum of 5 years' experience working as a business or systems analyst for IM systems	M	Pass / Fail	
3.3.5.7	The Proponent must demonstrate that the proposed resource has a minimum of 5 years' experience developing test cases, executing testing and documenting results	M	Pass / Fail	
3.3.5.8	The Proponent must demonstrate that the proposed resource has a minimum of 3 years' experience with the implementation of an electronic and document management applications such as OpenText solutions (OpenText (edocs) and/or Livelink/Content Server)	M	Pass / Fail	
3.3.5.9	The Proponent should demonstrate that the proposed resource has experience with leading focus groups/working groups. Less than one year = 0 pts 1 to 5 years = 4 pts 5 to 8 years = 8 pts More than 8 years = 10 pts	R	1-10	5 /50
3.3.5.10	The Proponent should demonstrate that the proposed resource has experience working with OpenText Livelink and/or Content Server. Less than 1 year: = 0 pts 1 to 3 years: = 3 pts 3 to 5 years: = 7 pts More than 5 years: = 10 pts	R	1-10	10 /100
3.3.5.11	The Proponent should demonstrate that the proposed resource has experience with test scenario development, functional testing and data and application correction. Less than 5 year: = 0 pts 5 to 7 years: = 3 pts 7 to 8 years: = 5 pts 8 to 10 years: = 8 pts More than 10 years: = 10 pts	R	1-10	10 /100
3.3.5.12	The Proponent should demonstrate that the proposed resource is able to communicate effectively, orally and in writing, in both official languages (English and French). English OR French only: = 5 pts English and French : = 10 pts	R	1-10	20 /200
3.3.5.13	The Proponent should demonstrate that the proposed resource has experience defining functional requirements for Record Management systems. Less than 1 year: = 0 pts 1 to 3 years: = 3 pts 3 to 5 years: = 7 pts More than 5 years: = 10 pts	R	1-10	10 /100
3.3.5.14	The Proponent should demonstrate that the proposed resource has experience establishing business rules for Information Management and/or record management system. Less than 2 year: = 0 pts	R	1-10	10 /100

	2 to 4 years: = 3 pts 4 to 6 years: = 7 pts More than 6 years: = 10 pts			
3.3.5.15	The Proponent should demonstrate that the proposed resource have experience in developing and implementing Records Filing/Classification Systems at the corporate/departmental level in a national organization. Less than 1 year: = 0 pts 1 to 3 years: = 3 pts 3 to 5 years: = 7 pts More than 5 years: = 10 pts	R	1-10	10 /100
3.3.5.16	The Proponent should demonstrate that each of the propose resource hold a College Diploma or University Degree in a discipline related to Information Management. No diploma = 0 pts College Diploma = 5 pts University diploma = 10 pts	R	1-10	5 /50

3.3.6 Statement of Work for Technical and Migration Services (I)

CMHC requires the service of a Developer/Migration – Physical Object specialist to work with CMHC Record's Office and the InfoShare project team to plan, develop strategies and approaches, develop the solutions and implement the OpenText – Physical Object in the production environment. The process will cover the review of functional requirements to the implementation and data migration of the solution in the InfoShare (OpenText Content Server) to all identified users across the regional business centers and the points of service locations.

The required services may include, but are not limited to the following:

3.3.6.1 **Tasks/Technical Specifications/Skills (I)**

The resource(s) assigned to this initiative will provide technical services in the development of the replacement of the FRS system with OpenText Physical Object solution and its migration.

The required services may include, but are not limited to the following:

Development of Technical Solution:
- a) Review and update folder structure;
- b) Review all processes (custom and out-of-the box);
- c)   Review/update existing Web reports;
- d) Develop/implement new Web reports;
- e) Review and update custom modules;
- f) Review and update existing migration solution or present alternative migration solution;
- g) Develop test scripts and perform testing;
- h) Develop technical documentation;
  - i. Document installation procedures;
  - ii. Document migration procedures;
- i) Perform knowledge transfer to CMHC staff; and

    j)   Perform code reviews with CMHC staff.

Migration of FRS data to Physical Objects:
    a)   Coordinate the migration activities with the various project activities (i.e. training, on-boarding of users) for the implementation of the Physical Objects solution in Content Server;
    b)   Identify the office to be migrated to Content Server;
    c)   Gather the databases from the File Retrieval System (FRS) for the identified office and all related information (FRS is an in-house system built in Lotus Approach that uses databases in DBF format);
    d)   Convert the FRS databases to tab delimited text files, making sure not supported special characters are removed from the target text files;
    e)   Run a script to generate the Import Control Files for each taxonomy (there are four taxonomies for each office: 8-Digit, Alphanumeric, Box Level and Subject);
    f)   Verify the Import Control Files and make sure they were properly created;
    g)   If the files generated are not satisfactory, identify issues, fix them and re-generate the files, as needed;
    h)   Update the migration configuration files with the office information;
    i)   Notify the InfoShare team and the DBA's that an Object Importer migration will be run;
    j)   Set up and run the Object Importer migration following a defined precedence for importing: All Boxes, All Boxed Content Items – non-charged out, All Boxed Content Items – charged out, All Box Charge-outs, All Shelved Content Items – non-charged out, and then All Shelved Content Items – charged out;
    k)   Verify the migrated content, archive the logs and generate migration statistics (including the migrated records and the migration fails and exceptions);
    l)   Identify migration issues, fix them and re-migrate the data as needed (at least 95% of the data must be successfully migrated);
    m)   Delete the temporary text files and scripts;
    n)   Deliver a report for the data migrated, including records successfully migrated and fails during the script conversion and migration process.

3.3.6.2   **Deliverables Technical Specifications (I)**

    a)   Migration strategy and detailed plan, including the schedule of all activities, planned start and end date of activities, dependencies and resources responsible;
    b)   For all changes (improvements or bug fixes) developed in the current migration tools, knowledge transfer and detailed documentation must be delivered to CMHC staff, detailing any changes made and impacts to the migration process;
    c)   Physical Objects: migration of about 2,500,000 records related to 25 offices from a legacy Physical Objects application to OpenText Content Server to be completed within the period of two (2) years from the start of the project, following the schedule defined by the project plan, with migration success rate of 95%;
    d)   Report of migration statistics and all exceptions for script executions and migrations, delivered within each round of Physical Objects migration;
    e)   Documented system configuration and installation procedures (build books);
    f)   OpenText Physical Object developed, installed and configured as per the functional requirements; and

g) Setup of all required technical environments to support CMHC's SDLC.

The Proponent must provide demonstrated evidence of how each requirement is met.
(Include cross reference to resource resume as applicable)

Item #	Requirement	R/M/I	Points Available	Weight / max points available
	3.3.6.3 **Requirements for Developer/Migration Physical Object Specialist (1 person)**			**820**
3.3.6.4	The Proponent must demonstrate that the proposed resource has a minimum of 2 years' experience working as a Systems Integrator in the IT industry.	M	Pass / Fail	
3.3.6.5	The Proponent must demonstrate that the proposed resource has a minimum of 3 years' experience, in Systems Analysis, Design, integration and development.	M	Pass / Fail	
3.3.6.6	The Proponent should demonstrate that the proposed resource holds a College Diploma or University Degree in a discipline related to Information Management/Information Technology. No diploma = 0 pts College Diploma = 5 pts University diploma = 10 pts	R	1-10	2 /20
3.3.6.7	The Proponent should demonstrate that the proposed resource has experience working with OpenText Physical Objects Less than one year = 0 pts 1 to 5 years = 4 pts 5 to 8 years = 8 pts More than 8 years = 10 pts	R	1-10	10 /100
3.3.6.8	The Proponent should demonstrate that the proposed resource has experience with XML, SQL and advanced Microsoft Office knowledge. Less than one year = 0 pts 1 to 5 years = 4 pts 5 to 8 years = 8 pts More than 8 years = 10 pts	R	1-10	5 /50
3.3.6.9	The Proponent should demonstrate that the proposed resource has experience performing data migrations to Open Text Content Server. Less than one year = 0 pts 1 to 5 years = 4 pts 5 to 8 years = 8 pts More than 8 years = 10 pts	R	1-10	10 /100
3.3.6.10	The Proponent should demonstrate that the proposed resource has experience in performing Quality Assurance testing. Less than one year = 0 pts 1 to 5 years = 4 pts 5 to 8 years = 8 pts	R	1-10	5 /50

	More than 8 years = 10 pts			
3.3.6.11	The Proponent should demonstrate that the proposed resource has experience in developing OpenText Web Reports. Less than one year = 0 pts 1 to 5 years = 4 pts 5 to 8 years = 8 pts More than 8 years = 10 pts	R	1-10	10 /100
3.3.6.12	The Proponent should demonstrate that the proposed resource has experience in the installation, configuration and development of Content Server Workflow. Less than one year = 0 pts 1 to 5 years = 4 pts 5 to 8 years = 8 pts More than 8 years = 10 pts	R	1-10	10 /100
3.3.6.13	The Proponent should demonstrate that the proposed resource has experience in developing solution with Opentext Oscript. Less than one year = 0 pts 1 to 5 years = 4 pts 5 to 8 years = 8 pts More than 8 years = 10 pts	R	1-10	10 /100
3.3.6.14	The Proponent should demonstrate that the proposed resource has experience in using HTML 5. Less than one year = 0 pts 1 to 5 years = 4 pts 5 to 8 years = 8 pts More than 8 years = 10 pts	R	1-10	5 /50
3.3.6.15	The Proponent should demonstrate that the proposed resource has experience working with jQuery. Less than one year = 0 pts 1 to 5 years = 4 pts 5 to 8 years = 8 pts More than 8 years = 10 pts	R	1-10	5 /50
3.3.6.16	The Proponent should demonstrate that the proposed resource has experience working with OpenText Object Importer / Exporter. Less than one year = 0 pts 1 to 5 years = 4 pts 5 to 8 years = 8 pts More than 8 years = 10 pts	R	1-10	10 /100

3.3.7 Statement of Requirements for Training Services (I)

CMHC requires the service of Physical Object trainers to work with CMHC Record's Office and the InfoShare project team to plan, develop provide training as part of the implementation of the OpenText – Physical Object at CMHC.

3.3.7.1 Tasks/Technical Specifications/Skills (I)

The resource assigned to this initiative will develop training materials and provide training to all identified users across the regional business centers and the points of service locations. Some travel may be required for user training.

The required services may include, but are not limited to the following:

a) Assessing the relevant characteristics of a target audience;
b) Developing, reviewing and modifying training materials and aids using various technologies;
c) Delivering courses, potentially using visual aids including computers, videos, satellite transmissions, flip charts, complete projection equipment and slides;
d) Evaluating instruction, program and process;
e) Communicating effectively by visual, oral and written form with individuals, small groups, and in front of large audiences;
f) Managing class time;
g) Prioritizing material and changing course directions to meet needs;
h) Providing in-class training, coaching and one-on-on sessions;
i) Coordinating training activities, attendances and producing reports.

3.3.7.2 Deliverables - Training Physical Object (I)

a) Training on OpenText Physical Object for approximately 500 users across all CMHC's locations;
b) Coaching and one-on-one sessions;
c) Training materials, tools and user guides;
d) Training attendance log; and
e) Course evaluation.

The Proponent must provide demonstrated evidence of how each requirement is met.
(Include cross reference to resource resume as applicable)

Item #	Requirement	R/M/I	Points Available	Weight / max points available/ * 2 persons
	3.3.7.3 **Requirements for Trainer – Physical Object Specialist (2 persons)**			**800**
3.3.7.4	The Proponent must demonstrate that each of the proposed resources have a minimum of 1 years' experience as a Trainer on Information Management System such as OpenText edocs and/or Livelink/Content Server.	M	Pass / Fail	
3.3.7.5	The Proponent must demonstrate that each of the proposed resources have a minimum of 3 years' experience in providing classroom training for IM/IT systems.	M	Pass / Fail	

3.3.7.6	The Proponent must demonstrate that each of the proposed resources are fluent in both official languages (English and French)	M	Pass / Fail	
3.3.7.7	The Proponent should demonstrate that each of the proposed resources have experience with creating/maintaining/reviewing training documentation Less than one year = 0 pts 1 to 5 years = 4 pts 5 to 8 years = 8 pts More than 8 years = 10 pts	R	1-10	10 /100/200
3.3.7.8	The Proponent should demonstrate that each of the proposed resources have experience using OpenText – Physical Object Less than one year = 0 pts 1 to 5 years = 4 pts 5 to 8 years = 8 pts More than 8 years = 10 pts	R	1-10	5 /50/100
3.3.7.9	The Proponent should demonstrate that each of the proposed resources have experience using OpenText Livelink/Content Server Less than one year = 0 pts 1 to 5 years = 4 pts 5 to 8 years = 8 pts More than 8 years = 10 pts	R	1-10	5 /50/100
3.3.7.10	The Proponent should demonstrate that each of the proposed resources have experience as a Trainer on OpenText Livelink and/or Content Server Less than 1 year: 0 pts 1 to 3 years: = 3 pts 3 to 5 years: = 7 pts More than 5 years: = 10 pts	R	1-10	10 /100/200
3.3.7.11	The Proponent should demonstrate that each of the proposed resources have experience as a Trainer on OpenText – Physical Object Less than 1 year: 0 pts 1 to 3 years: = 3 pts 3 to 5 years: = 7 pts More than 5 years: = 10 pts	R	1-10	10 /100/200

3.3.8   Statement of Work for Project Management Services (I)

3.3.8.1   Tasks/Technical Specifications/Skills for Project Management Services (I)

The resource assigned to this initiative will develop plans and schedule, coordinate activities and report on progress for the implementation of Physical Object solution.

The required services may include, but are not limited to the following:

a) Manage, monitor and forecast project execution; take corrective action as required to deliver project within scope, quality, time and budget;

b) Ensure internal and external stakeholders management through effective communication;

c) Lead and / or assist in fit-gap, risk management, and issue management identification, analysis, resolution, and monitoring;

d) Identify and advise CMHC Project Manager of priority activities, conflicts and critical path activities;

e) Develop appropriate strategies and project management deliverables;

f) Manage or assist CMHC Project Manager with the implementation of scope management, change management, requirements traceability, and quality management processes related to potential transition activities;

g) Interact with CMHC's InfoShare project team to provide background information, technical documentation, information on specific projects and/or IT services, etc.;

h) Lead and / or assist in managing the review of deliverables in accordance to CMHC's Project Management Framework and Policy, and the acceptance of deliverables;

i) Assist CMHC Project Manager in planning, organizing and coordinating activities related to interaction with CMHC'S community;

j) Assist CMHC Project Manager in discussions and negotiations with other sectors for their participation and commitment to service delivery and transition activities of the project;

k) Assist CMHC Project Manager in the development and coordination of presentation materials in response to scheduled and unscheduled reports to update senior management of project progress and areas of concern;

l) Provide weekly status reports, or as required, to CMHC Project Manager.

3.3.8.2 **Deliverables - Project Manager (I)**

a) Development of project plan indicating accountabilities, project milestones, project governance and overall timetable for completion of deliverables;

b) Coordination of project activities, including development, implementation, migration and training with various stakeholders;

c) Weekly progress reports and timesheets;

d) Identifications of risks, issues, change in schedule, scope and budget; and

e) Final report and "lessons learned" documentation which will include the results of the projects, level of success, issues and challenges, areas requiring improvement/revision, as well as recommendations.

The Proponent must provide demonstrated evidence of how each requirement is met.
(Include cross reference to resource resume as applicable)

Item #	Requirement	R/M/I	Points Available	Weight / max points available
	3.3.8.3 **Requirements for the Project Manager (1 person)**			**350**
3.3.8.4	The Proponent must demonstrate that the proposed resource has a minimum of 5 years' experience working as a Project Manager in the	M	Pass / Fail	

Item #	Requirement	R/M/I	Points Available	Weight / max points available
	IT industry.			
3.3.8.5	The Proponent must demonstrate that the proposed resource has 10 years' experience, in managing 2 or more IM/IT projects, valued at a minimum of $1Million or more per project.	M	Pass / Fail	
3.3.8.6	The Proponent must demonstrate that the proposed resource has 5 years' experience using the following project management tools to develop, update and maintain project schedules and work plan activities, as well as other software tools for processing documentation, reports, spreadsheets and presentations. MS Project; MS Word; MS Excel; MS Power Point	M	Pass / Fail	
3.3.8.7	The Proponent should demonstrate that the proposed resource has completed a post-secondary education from a recognized institution, in a related field of IM/IT or project management. No diploma provided = 0 pts College diploma copy provided = 5 pts University diploma copy provided = 10 pts	R	1-10	10 /100
3.3.8.8	The Proponent should demonstrate that each of the proposed resource has a Project Management Professional (PMP) designation or an industry recognized Project Management (PM) certification. No certification provided = 0 pts Per Project Management certification copy provided = 2 pts	R	1-10	10 /100
3.3.8.9	The Proponent should demonstrate that the proposed resource has experience using the following software in managing projects: EDRM/OpenText Content Server/Livelink or OpenText edocs EDRM/Lotus Notes Points will be allocated as follows: 5 points for each software package to a maximum of 10 pts	R	1-10	5 /50
3.3.8.10	The Proponent should demonstrate that the proposed resource have project management experience in managing similar IM/IT projects such as RDIMS (e-docs) and/or GCDOCS (OpenText Content Server, Livelink). Points will be allocated as follows: 2 points for each project up to a maximum of 10 pts	R	1-10	10 /100

3.3.9   General Requirements for Stream 2 (I)

The Proponent must provide demonstrated evidence of how each requirement is met.

(Include cross reference to resource resume as applicable)

Item #	Requirement	R/M/I	Points Available	Weight / max points available

	3.3.9.1 **Requirements for Proponent**			**840**
3.3.9.2	The Proponent must describe in a maximum of 2 pages the strategies, approaches, methodologies, tools, processes and solution that they will be using to perform the InfoShare Physical Object Implementation to 500 employees across all sectors at the National Office and regional offices.	M	Pass / Fail	
3.3.9.3	**Escalation Procedures** The Proponent must ensure that appropriate measures are in place within its organization to react to or handle issues that arise during the term of the ensuing Agreement as brought to attention of the Proponent by CMHC designates.	M	Pass / Fail	
3.3.9.4	**Invoicing** The Proponent must provide CMHC with a detailed paper or electronic invoice for all products, services and support, monthly fee of charges. The invoice must include a reference to the CMHC purchase order numbers or task number. Please provide a description of the services available and samples of invoices illustrating this capability. All invoices for billable hours must include the details of the work completed for the number of hours being. All invoices for task based invoices must include the details of the task completed. If used the Time sheets from CMHC system may also be required. CMHC shall provide written notice to the Proponent within thirty (30) days of receipt of an invoice if the above conditions have not been met or a dispute of the amount charged.	M	Pass / Fail	
3.3.9.5	**Payment Disputes** Upon receipt of a dispute notification from CMHC, the Proponent shall conduct an investigation of the dispute and shall advise CMHC of the results within forty-five (45) business days or less. No interest charges will be applied during the forty-five (45) business day investigation period. If the amount to be paid is different than the amount originally billed, the Proponent shall issue a corrected invoice with a new thirty (30) day due date.	M	Pass / Fail	
3.3.9.6	The processes, methodologies and tools proposed by the Proponent to on-board the users should be simple (at the opposite of being complex) and complete, promoting change realization and meeting business unit's and IM requirements. 2.5 pts: for demonstrating processes, methodologies and tools are simple and easy to use and understand for all stakeholders	R	1-10	10 /100

	2.5 pts: for demonstrating processes, methodologies, tools that promote change realization with all stakeholders 2.5 pts: for demonstrating processes, methodologies and tools that meet IM requirements and business unit focus 2.5 pts: for demonstrating processes, methodologies and tools is tailored for CMHC specific needs.			
3.3.9.7	The implementation methodologies and processes that the Proponent is proposing integrates CMHC staff and consultants, makes efficient use of resources and engages all stakeholders, including the business units. 3 pts: for demonstrating processes and methodologies that promote knowledge transfer to CMHC staff. 3 pts: for demonstrating processes and methodologies, that take into consideration each business unit specific needs. 3 pts: for demonstrating processes and methodologies that use sufficient engagement and communication with all stakeholders during all phases of the implementation and on-boarding process.	R	1-9	10 /90
3.3.9.8	The approaches proposed by the Proponent should include all aspects of the project (business analysis, training, migration, configuration, testing, integration, support, communication, change management, etc.) excellent match: = 8-10 pts good match: = 6-7 pts fair match: = 3-5 pts poor match: = 1-2 pts Not able to assess: 0 pts	R	1-10	5 /50
3.3.9.9	The tools proposed by the Proponent to upload business unit's configuration during the on-boarding process should integrate within CMHC's technical environment and be accessible by all resources working as part of the InfoShare project team (consultants and employees) 5 pts: the Proponent provides full access (release all intellectual property (IP) rights to CMHC) to tools to upload and configure OpenText Content Server to all InfoShare project team (consultants and employees) free of charge. 5 pts: demonstrate that the tools proposed is compatible with CMHC environment and will not require more than 1 week of installation and configuration; and not more than 1 day training for CMHC staff to use it.	R	1-10	10 /100
3.3.9.10	**Support References** The Proponent should provide evidence of their ability and commitment to provide ongoing service and support for comparable implementations by referencing two (2) large projects completed in the past two years which have been supported by the Proponent acting in the role of prime Proponent. For each reference, Proponents should include as a minimum; 1. Name of client organization;	R	1-10	10 /100

	2. Name, title, phone numbers and fax numbers of client contacts; 3. Extent and complexity of support provided to the client; 4. Indication of client satisfaction with the Proponent's performance.			
3.3.9.11	**Escalation Steps** Please describe your escalation procedures based on CMHC's requirements below. Additional points will be given to Proponents who provide additional value to CMHC by exceeding its requirements. The following steps should be taken to ensure an efficient and effective problem resolutions: **Level 1**: The CMHC's project manager notifies Proponent's project manager of problem with implementation. The situation is discussed and resolve at this level. If no resolution can be find the issue is brought to level 2. **Level 2**: The respective project managers will notify their direct management of the problem and the inability to solve at their level. The respective management will discuss solution with their project manages to resolve at this level. If no resolution can be find the issue is brought to level 3. **Level 3**: If the situation cannot be resolved in Level 2, the Proponent's Management Authority at successive levels to the President if necessary will be notified to take the necessary action to resolve the situation. CMHC higher level management will also be informed. CMHC shall have the option to request meetings to discuss and possible post-mortem report or convene a post-mortem meeting. The Proponent shall provide an Escalation procedure with their response to this RFP listing the names and level of management within their organization. Full list of contact information will be required by the winning the Proponent This escalation procedure should be reviewed and updated if required on a monthly basis or when required.	R	1-10	10 /100
3.3.9.12	**Travel and living expenses** The Proponent should agree to be bound by the Travel guide in Appendix "F"	R	1-10	30 /300

Point will be award as follows:			
Full compliance to guide line = 10pts			
Changes to rates = minus 4pts			
Changes to rules = minus 4pts			
No agreement to be bound by the guide line = 0pts			

3.4 Stream 3 – InfoShare Training for CMHC Staff (I)

The successful Proponents will provide resources to deliver training services to support the deployment of InfoShare to approximately 2000 employees in various locations and deliver additional training, as required, for the deployment of Physical Object to 500 employees across Canada.

3.4.1 Scope (I)

The Proponent(s) will provide on and "as and when requested" basis as detailed in a task authorization form, signed by CMHC contracting officer and CMHC project authority.

3.4.2 Summary of Resourcing Requirements - Stream 3 (I)

CMHC has a requirement for the following resources to support the training activities for InfoShare Implementation

Category	Start Date	End Date	Minimum No of Resources	Estimated Total Effort
InfoShare Trainer (Bilingual)	xxx	xxxx	3	300 days
InfoShare Trainer (English only)	xxx	xxx	2	200 days
Training Developer	xxx	xxx	1	130 days
		Total	6	630 days

3.4.3 Stream 3: Statement of Work Components for Training Services (I)

As part of the implementation of InfoShare – Phase 2, CMHC will require services of trainers with experience delivering in-class training on OpenText – Content Server for approximately 2000 end-users, OpenText – Physical Object for 500 end-users and "Boot Camp" training for end-users located at the National Office in Ottawa and in all other office locations across Canada. In addition to in-class training, the assigned resource(s) will be required to provide coaching and one-on-one sessions.   There is a requirement to deliver training in both official languages, as some training classrooms will be conducted in French and others in English.

3.4.4 Tasks/Technical Specifications/Skills (I)

The required services may include, but are not limited to the following:

a) Assessing the relevant characteristics of a target audience;
b) Developing, reviewing and modifying training materials and aids using various technologies;
c) Delivering courses, potentially using visual aids including computers, videos, satellite transmissions, flip charts, complete projection equipment and slides;
d) Evaluating instruction, program and process;
e) Communicating effectively by visual, oral and written form with individuals, small groups, and in front of large audiences;
f) Managing class time;
g) Prioritizing material and changing course directions to meet needs;
h) Providing in-class training, coaching and one-on-on sessions;
i) Coordinating training activities, tracking, communications, attendances, and facilities/logistics;
j) Producing reports on session evaluations, attendance/absentee by business unit.

3.4.5 Deliverables (I)

a) Training on InfoShare for approximately 2000 users across all CMHC's locations;
b) Training on OpenText Physical Object for approximately 500 users across all CMHC's locations;
c) Coaching and one-on-one sessions;
d) Training materials, tools and user guides;
e) Training attendance log; and
f) Course Evaluation.

The Proponent must provide demonstrated evidence of how each requirement is met.
(Include cross reference to resource resume as applicable)

Item #	Requirement	R/M/I	Points Available	Weight / max points available/ *6 persons
	3.4.6 Requirements for InfoShare Trainer & Training Developer (6 persons)			**2400**
3.4.6.1	The Proponent must demonstrate that each of the proposed resources have a minimum of 2 year's experience as a trainer on Information Management System such as OpenText edocs and/or Livelink/Content Server.	M	Pass / Fail	
3.4.6.2	The Proponent must demonstrate that each of the proposed resources have a minimum of 3 years' experience in providing classroom training for IM/IT systems.	M	Pass / Fail	
3.4.6.3	The Proponent must demonstrate that each of the proposed resources have a minimum of 1 year's experience using OpenText Livelink/Content Server	M	Pass / Fail	
3.4.6.4	The Proponent must demonstrate that 50% of the proposed resources are fluent in both official languages (English and French)	M	Pass / Fail	M

Item #	Requirement	R/M/I	Points Available	Weight / max points available
3.4.6.5	The Proponent should demonstrate that each of the proposed resources have experience with creating/ maintaining/ reviewing training documentation Less than one year = 0 pts 1 to 5 years = 4 pts 5 to 8 years = 8 pts More than 8 years = 10 pts	R	1-10	10 /100/600
3.4.6.6	The Proponent should demonstrate that each of the proposed resources have experience as a trainer on OpenText Livelink and/or Content Server Less than one year = 0 pts 1 to 5 years = 4 pts 5 to 8 years = 8 pts More than 8 years = 10 pts	R	1-10	10 /100/600
3.4.6.7	The Proponent should demonstrate that each of the proposed resources have experience as a Trainer on OpenText – Physical Object Less than one year = 0 pts 1 to 5 years = 4 pts 5 to 8 years = 8 pts More than 8 years = 10 pts	R	1-10	10 /100/600
3.4.6.8	The Proponent should demonstrate that each of the proposed resources have experience with creating/maintaining/reviewing training in multimedia formats. Less than one year = 0 pts 1 to 5 years = 4 pts 5 to 8 years = 8 pts More than 8 years = 10 pts	R	1-10	10 /100/600

3.4.7 General Requirements for Stream 3 (I)

The Proponent must provide demonstrated evidence of how each requirement is met.
(Include cross reference to resource resume as applicable)

Item #	Requirement	R/M/I	Points Available	Weight / max points available
	3.4.7.1 **Requirements for Proponent**			**840**
3.4.7.2	The Proponent must describe in a maximum of 2 pages the strategies, approaches, methodologies, tools, processes and solution that they will be using to perform the InfoShare training to 2000 employees across all sectors at the National Office and regional offices.	M	Pass / Fail	
3.4.7.3	**Escalation Procedures** The Proponent must ensure that appropriate measures are in place within its organization to react to or handle issues that arise during the term of the ensuing Agreement as brought to attention of the Proponent	M	Pass / Fail	

	by CMHC designates.			
3.4.7.4	**Invoicing**	M	Pass / Fail	
	The Proponent must provide CMHC with a detailed paper or electronic invoice for all products, services and support, monthly fee of charges. The invoice must include a reference to the CMHC purchase order numbers or task number. Please provide a description of the services available and samples of invoices illustrating this capability.			
	All invoices for billable hours must include the details of the work completed for the number of hours being. All invoices for task based invoices must include the details of the task completed. If used the Time sheets from CMHC system may also be required.			
	CMHC shall provide written notice to the Proponent within thirty (30) days of receipt of an invoice if the above conditions have not been met or a dispute of the amount charged.			
3.4.7.5	**Payment Disputes**	M	Pass / Fail	
	Upon receipt of a dispute notification from CMHC, the Proponent shall conduct an investigation of the dispute and shall advise CMHC of the results within forty-five (45) business days or less. No interest charges will be applied during the forty-five (45) business day investigation period. If the amount to be paid is different than the amount originally billed, the Proponent shall issue a corrected invoice with a new thirty (30) day due date.			
3.4.7.6	The processes, methodologies and tools proposed by the Proponent to on-board the users should be simple (at the opposite of being complex) and complete, promoting change realization and meeting business unit's and IM requirements.			
	2.5 pts: for demonstrating processes, methodologies and tools are simple and easy to use and understand for all stakeholders 2.5 pts: for demonstrating processes, methodologies, tools that promote change realization with all stakeholders 2.5 pts: for demonstrating processes, methodologies and tools that meet IM requirements and business unit focus 2.5 pts: for demonstrating processes, methodologies and tools is tailored for CMHC specific needs.	R	1-10	10 /100
3.4.7.7	The implementation methodologies and processes that the Proponent is proposing integrates CMHC staff and consultants, makes efficient use of resources and engages all stakeholders, including the business units.			
	3 pts: for demonstrating processes and methodologies that promote knowledge transfer to CMHC staff. 3 pts: for demonstrating processes and methodologies, that take into consideration each business unit specific needs.	R	1-9	10 /90

	3 pts: for demonstrating processes and methodologies that use sufficient engagement and communication with all stakeholders during all phases of the implementation and on-boarding process.			
3.4.7.8	The approaches proposed by the Proponent include all aspects of the project (business analysis, training, migration, configuration, testing, integration, support, communication, change management, etc.) excellent match: = 8-10 pts good match: = 6-7 pts fair match: = 3-5 pts poor match: = 1-2 pts Not able to assess: 0 pts	R	1-10	5 /50
3.4.7.9	The tools proposed by the Proponent to upload business unit's configuration during the on-boarding process should integrate within CMHC's technical environment and be accessible by all resources working as part of the InfoShare project team (consultants and employees) 5 pts: the Proponent provides full access (release all intellectual property (IP) rights to CMHC) to tools to upload and configure OpenText Content Server to all InfoShare project team (consultants and employees) free of charge. 5 pts: demonstrate that the tools proposed is compatible with CMHC environment and will not require more than 1 week of installation and configuration; and not more than 1 day training for CMHC staff to use it.	R	1-10	10 /100
3.4.7.10	**Support References** The Proponent should provide evidence of their ability and commitment to provide ongoing service and support for comparable implementations by referencing two (2) large projects completed in the past two years which have been supported by the Proponent acting in the role of prime Proponent. For each reference, Proponents should include as a minimum; 1. Name of client organization; 2. Name, title, phone numbers and fax numbers of client contacts; 3. Extent and complexity of support provided to the client; 4. Indication of client satisfaction with the Proponent's performance.	R	1-10	10 /100
3.4.7.11	**Escalation Steps** Please describe your escalation procedures based on CMHC's requirements below. Additional points will be given to Proponents who provide additional value to CMHC by exceeding its requirements. The following steps should be taken to ensure an efficient and effective problem resolutions:	R	1-10	10 /100

	Level 1: The CMHC's project manager notifies Proponent's project manager of problem with implementation. The situation is discussed and resolve at this level. If no resolution can be find the issue is brought to level 2. **Level 2**: The respective project managers will notify their direct management of the problem and the inability to solve at their level. The respective management will discuss solution with their project manages to resolve at this level. If no resolution can be find the issue is brought to level 3. **Level 3**: If the situation cannot be resolved in Level 2, the Proponent's Management Authority at successive levels to the President if necessary will be notified to take the necessary action to resolve the situation. CMHC higher level management will also be informed. CMHC shall have the option to request meetings to discuss and possible post-mortem report or convene a post-mortem meeting. The Proponent shall provide an Escalation procedure with their response to this RFP listing the names and level of management within their organization. Full list of contact information will be required by the winning the Proponent This escalation procedure should be reviewed and updated if required on a monthly basis or when required.			
3.4.7.12	**Travel and living expenses** The Proponent should agree to be bound by the Travel guide in Appendix "F" Point will be award as follows: Full compliance to guide line = 10pts Changes to rates = minus 4pts Changes to rules = minus 4pts No agreement to be bound by the guide line = 0pts	R	1-10	30 /300

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4   SECTION 4   PROPOSAL REQUIREMENTS

4   Overview of Section 4

Proposal responses are to be organized and submitted in accordance with the instructions listed below:

#	Item
4.3	Covering Letter
4.4	Table of Contents
4.5	Executive Summary
4.6	Proponent's Qualifications
4.7	Response to Statement of Requirements (following the numbering structure of section 3)
4.8	Project Management Plan
4.9	Financial Information
4.10	Other Information
4.11	Pricing Proposal

Elaborate or unnecessarily voluminous proposals are not desired. Proponents are encouraged to take care in completely answering questions and proposal requirements and to avoid submitting extraneous materials that do not show how the Proponent intends to meet requirements.

Requirements for each Response Item are detailed below.

4.1   Mandatory Proposal Requirements

Certain requirements in section 4 are identified as mandatory. See Section 1.6 Mandatory Requirements for a description of mandatory requirements.

4.2   Covering Letter

One page, on Proponent's letterhead, introducing the Proponent, signed by a person(s) duly authorized to sign on behalf of the Proponent and bind the Proponent to statements made in response to the RFP, and should include the following:
(a) A description of the company or joint venture/consortium.
(b) The names of the individuals who are the principals of the Proponent.
(c) Contact information for the primary contact person with respect to this RFP including: the individual's name, address, contact numbers by phone and fax, and contact e-mail address, if available.
(d) The locations of primary office, and all other offices that would be servicing any ensuing Agreement.

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4.3   Table of Contents

The Proponent should include a table of contents using the response item headings and numbering system identified in this section of the RFP. The response should be paginated for easy referencing by the evaluation committee.

4.4   Executive Summary

The Proponent's proposal should include an executive summary of the Proponent's proposal, including key features of the proposal, features that make the proposal superior or advantageous for CMHC, innovative approaches to meeting the requirement and cost-saving opportunities, and a brief statement of the Proponent's qualifications to meet CMHC's stated requirements.

4.5   Proponent's Qualifications

The Proponent's proposal should include information about the Proponent's qualifications as follows:
(a) A description of the Proponent's organization, its history, legal status, number of full-time employees and areas of specialization.
(b) Resumés for all personnel who would be assigned to the project, including subcontractors, if any.
(c) Information about the office location(s) answering these questions: If awarded an Agreement, which office would provide support services? How many personnel are located in this office and what is their specific experience with the proposed Solution?

4.6   Response to Statement of Requirements (M)

In this section, the Proponent must provide detailed information relative to the specifications listed in Section 3, The Statement of Requirements.

Proponents must provide a detailed point by point response to each section of the Statement of Requirements. Responses must clearly indicate Compliance or Non-Compliance with each applicable section and provide a statement which justifies their compliance, and give a reference to attached supporting documentation. . References to attached documentation must be as clear and direct as possible. Any substantiating documentation which cannot be found by the evaluation team may be deemed to be non-compliant.

Responses such as "Understood" or "Read and Understood" to mandatory requirements are unacceptable and will be deemed to be a non-compliant response. See section 1.6.1

 A numbering scheme for responses must match the numbering scheme in the statement of requirements.

4.7   Project Management Plan

The Proponent should describe its project management plan including:

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(a)   Project Management Approach. The Proponent should describe its project management
       approach and the project management organizational structure including reporting levels
       and lines of authority.
(b)   Quality Control. The Proponent should describe its approach to quality control including:
       1. details of the methods used in ensuring quality of the work, and
       2. response mechanisms in the case of errors, omissions, delays, etc.
(c)   Status Reporting to CMHC. The Proponent should describe its status reporting
       methodology, including details of written and oral progress reporting methods.
(d)   Work Schedule. The Proponent should describe the method it will use to ensure
       compliance with the work schedule.
(e)   Interface with CMHC. The Proponent should describe and explain

       1. its intended interface points with CMHC
       2. all available interface mechanisms, and
       3. how interface issues and difficulties will be resolved.

(f) The Proponent's plan for ensuring continuous improvement of its practices and procedures
     for delivering the services.

4.8   Financial Information (M)

4.8.1 Credit Check

Sole proprietorships and partnerships must provide a statement contained within their proposal
giving written permission for CMHC to perform a credit check as required.

4.8.2 Financial Capacity (M)

CMHC reserves the right to conduct an assessment of the financial capacity of the lead
Proponent(s). Should a Proponent be selected as a lead Proponent following the RFP evaluation
process, CMHC shall request the necessary financial documentation to confirm the financial
capacity of the Proponent. At that time, the Lead Proponent(s) must provide to CMHC the
following information, within 72 hours of CMHC's request to permit an analysis of the financial
capacity of the lead Proponent(s):

Partnerships, Corporations, Joint Ventures and Consortiums:

The Proponent must provide a complete set of signed, detailed, audited financial
statements for each of the last three (3) years of your firm. The Proponent agrees to
provide any other financial information that CMHC may subsequently request. The
auditor's report must be signed by an appropriate officer of the audit firm. In the case that
your financial statements are not audited, CMHC will only accept them if they are
accompanied by a signed review engagement report for each year. A complete set of
financial statements consists of all the following items:

1.   Auditor's Report (or Review Engagement Report),
2.   Balance Sheet,
3.   Income Statement,
4.   Cash Flow Statement,
5.   The Notes to the Financial Statements, and

In the case of a joint venture or consortium, each and all members of the joint venture or consortium must provide the information required for their legal form as indicated above for partnerships or corporations. For partnerships of individuals (as opposed to partnerships of corporations), each individual must provide written permission for CMHC to perform a credit check on them as individuals.

Sole Proprietorships

Proponents that are organized as sole proprietorships must provide a statement contained within their proposal giving written permission for CMHC to perform a credit check as required. Where financial statements are available, they should accompany the foregoing statement.

4.9 Other

Proponent(s) may provide other relevant information here, but is not obligated to.

4.10 Pricing Proposal (M)

The Proponent must provide the pricing of its proposed solution in a detailed manner in Section 7.5 APPENDIX E – Financial Cost Sheet Table

All prices and amounts of money in the proposal are to be quoted in **Canadian dollars** and be exclusive of the Goods and Services Tax (GST), Harmonized Sales Tax (HST), and Provincial Sales Tax (PST), as applicable, unless otherwise indicated.

Any price proposal which is submitted in currency other than CAD will be converted at a rate determined by CMHC for evaluation purposes.

The GST, HST or PST, whichever is applicable, shall be extra to the price quoted by the Proponent and will be paid by CMHC.

The Proponent must submit a fixed (firm) price for the products, consulting, training, implementation, per diem rates, and maintenance for the term of any ensuing Agreement. In addition, the Proponent must submit pricing information that indicates how the fixed price was calculated. Proponents may state price increases after the initial year or term of the Agreement in their proposal.

Any variable costs must be specifically identified in the pricing proposal.

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5   SECTION 5   EVALUATION AND SELECTION

5.1   Overview of Section 5

Section 5 describes the process CMHC will use to evaluate proposals, select a lead Proponent and negotiate an Agreement.

The lowest cost proposal will <u>not</u> necessarily be accepted. CMHC reserves the right to accept any proposal in whole or in part, to reject all proposals or to terminate the evaluation process and re-issue the RFP at a later date.

Upon notice to all Proponents, CMHC reserves the right to alter the stated requirements based on operational needs and to accept an alternate proposal included in any Proponent's response.

CMHC will conduct the RFP process in a visibly fair manner and will treat all Proponents equitably. To this end, it has established objective standards and evaluation criteria which will be applied uniformly to all Proponents. By submitting a proposal, Proponents accept the methodology set out in the RPP.   No Proponent shall have any cause of action against CMHC arising out of the elimination of one or more proposals from consideration, CMHC's failure to award an Agreement, or the methods by which proposals are assessed.

5.2   Limitation of Damages

The Proponent, by submitting a proposal and subject to section 2.12 entitled "No Liability", agrees that under no circumstances will it claim damages in excess of the reasonable costs incurred by the Proponent in preparing its proposal. The Proponent waives any claim for loss of profits or other indirect or special damages
.

5.3   Evaluation Table

The Evaluation Table as provided in Appendix B lists all the criteria upon which each proposal will be evaluated. The criteria are based on the requirements as provided in this RFP.

5.4   Evaluation Methodology

Each proposal will be examined to determine compliance with each mandatory requirement identified in this RFP. A proposal must comply with all of the mandatory requirements in order to proceed in the evaluation process. A proposal which is deemed by CMHC to be non-compliant in one or more mandatory requirements will be eliminated from further consideration. A proposal which meets all the mandatory requirements will be deemed compliant and will proceed in the evaluation process. However, CMHC reserves the right to waive any mandatory requirements if it deems fit and appropriate to meet the interests of, and provide best value to CMHC.

Evaluators will evaluate and numerically score each proposal in accordance with the evaluation criteria as shown in the table below to be entered in the Evaluation Table, Appendix B. Once individual evaluations are complete, the Evaluation Committee will discuss and agree upon a final score for each proposal.

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Rating	Description	Points Available
Exceptional	Exceeds the requirements of the criteria in superlative and beneficial ways	10
Excellent	Exceeds the requirements of the criteria in ways which add additional value to CMHC's stated requirements	9
Very Good	Exceeds the requirements of the criteria in a manner which may not add additional value to the stated requirements	8
Fully Meets	Fully meets all requirements of the criteria	7
Average	Adequately meets most of the requirements of the criteria. May be lacking in some areas which are not critical	6
Average to Poor	Barely meets most of the requirements of the criteria to the minimum acceptable level and lacking in areas which are not critical	5
Poor	Addresses most, but not all of the requirements of the criteria to the minimum acceptable level	4
Poor to Very Poor	Barely addresses any of the requirements of the criteria and completely lacking in critical areas	3-2
Unsatisfactory		1

A proposal must meet the minimum upset score in each section (as shown on the Evaluation Table, Appendix B) to remain in the evaluation.

Each compliant proposal that meets the minimum upset scores in each category will then be award **pricing** points relative to the 'best price' submitted. Proponents will be awarded points as a percentage of the best cost submitted on a compliant proposal:

$$\text{Formula:} \quad 1 - \frac{(VP - BP)}{VP}$$

Where: **VP is the Vendor Price**
　　　　BP is the Best Price

Example 1: Vendor Price:　　$1,000.00
　　　　　　Best Price:　　　$1,000.00

$$\text{Formula:} \quad 1 - \frac{(1,000 - 1000)}{1,000} = 1 - 0 = 1 = 100\% \text{ of allocated points}$$

Example 2: Vendor Price:　　$2,000.00
　　　　　　Best Price:　　　$1,000.00

$$\text{Formula:} \quad 1 - \frac{(2,000 - 1000)}{2,000} = 1 - \frac{(1000)}{2,000} = 1 - .5 = 50\% \text{ of allocated points}$$

Note: all applicable costs must be included in the financial proposal, so that CMHC can determine the full life cycle cost of the solution over the entire three (3) years of the Agreement. This should include the initial costs and any licensing (include the number of licences being

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offered in the price) maintenance or labour required for upgrading, along with any increase costs after the initial year or term of the Agreement.

Each compliant proposal that meets all the mandatory criteria and achieves minimum scores of **6,999 out of 11,665** for Stream **1**, **2,076 out of 3,460** for Stream **2**, **2.304 out of 3,840** for Stream **3**, will be considered for short listing. CMHC may, at its sole discretion, further shortlist the top two (2) proposals based on the top scores, which will include the price points, call upon a Proponent to prepare A Best and Final Offer of the cost sheets for final consideration. The total cost of a vendors proposal will be used to evaluate the total price points.

5.5   Financial Evaluation

CMHC shall carry out a credit check and/or a financial capacity on the lead Proponent before beginning contract discussions. This is a pass/fail test. Pass means that contract discussions begin. Fail means that the lead Proponent may not enter into contract discussions and is disqualified from further consideration. The financial evaluation will be based on the information supplied by the Proponent as per Section 4.8 of this RFP.

5.6   Proponent Selection

Once a lead proponent has passed the financial evaluation, CMHC has the option of entering into negotiations with that Proponent to incorporate some or its entire proposal into an agreement.

If at any time CMHC decides that the lead Proponent cannot satisfy CMHC's requirements, CMHC may terminate negotiations. If at this time CMHC feels that the secondary Proponent may meet the requirements, CMHC will continue the process with the secondary Proponent and so on.

By submitting a proposal, Proponents agree that if they are selected as lead Proponent, they will enter into contract negotiations in a timely manner and in good faith, and within the framework of the RFP and the Proponent's response to the RFP.

Announcement of the successful Proponent will be made to all Proponents following the signing of an Agreement.

6   SECTION 6   PROPOSED TERMS AND CONDITIONS

6.1   Overview of Section 6

Attached in Section 6.2 is a draft agreement containing terms and conditions that will form the basis of the agreement resulting from this RFP. CMHC reserves the right to add, delete or revise terms and conditions during negotiations.

Terms and conditions identified as "Mandatory" in the RFP or draft agreement must be included in the agreement.

Submission of a proposal constitutes acknowledgement that the Proponent has read and, unless otherwise stated in the Proponent's proposal, agrees to be bound by the terms and conditions in the draft agreement in the event that the Proponent is selected by CMHC to enter into an agreement.

For the purposes of this section the term "Contractor" and "Vendor" both refer to the successful Proponent with whom CMHC enters into an agreement.

6.2   Terms and Conditions to be incorporated into the resulting Agreement

<div align="center">**DRAFT SERVICES AGREEMENT**</div>

CMHC FILE No. **201500471**

THIS AGREEMENT (the "Agreement")

BETWEEN   **CANADA MORTGAGE AND HOUSING CORPORATION**
                     National Office
                     700 Montreal Road
                     Ottawa, Ontario, Canada
                     K1A 0P7
                     (hereinafter referred to as "CMHC")

AND   **Click here to enter text.**

                     (hereinafter referred to as "the Contractor")
                      (individually a "Party", collectively the "Parties")

WITNESSES THAT in consideration of the respective covenants and agreements of the parties, CMHC and the Contractor mutually covenant and agree as follows:

1   Article 1.0 - The Services

1.1   The Contractor covenants and agrees to provide Click here to enter text. in accordance with the Statement of Work attached as Appendix "A" (the "Services"). (*Provide general description of services*)

1.2   The Contractor represents that it possesses the requisite skills and experience to perform the Services in accordance with the terms and conditions of the Agreement. The Contractor warrants that the Services will be performed in a professional manner and in accordance with accepted industry standards.

1.3   CMHC's sites to be serviced are: All CMHC locations across Canada as listed in Schedule "D".

2   Article 2.0 - Term of the Agreement

2.1   The term of the Agreement shall be for a period of Click here to enter text.commencing on Click here to enter text. and terminating onClick here to enter text.. (the "Initial Term") and can be renewed in accordance to article 2.2 (the "Renewal Term") collectively hereinafter referred to as (the "Term")

2.2 Renewal
The Agreement may be renewed at CMHC's sole discretion for Click here to enter text. additional, Click here to enter text. year terms, (if required) however in no way shall the renewal exceed the cumulative total of Click here to enter text. years and/or the financial liability outlined in article 3.1 of the Agreement.

2.3 **Termination**

No fault termination

Notwithstanding articles 2.1 and 2.2 above, CMHC may terminate the Agreement for any reason with no penalty or charge by giving thirty (30) days written notice at any time during the Term.

Notwithstanding articles 2.1 and 2.2 above, CMHC may terminate any resource(s) assigned to this Agreement for any reason with no penalty or charge by giving ten (10) days written notice at any time during the Term.

Termination for Default of Contractor

CMHC may, by giving 10 days prior written notice to the Contractor, terminate this Agreement without penalty or charge for any of the following reasons:

1. The Contractor commits a material breach of its duties under this Agreement, unless the Contractor cures such breach and indemnifies CMHC for any resulting damage or loss, both in a manner satisfactory to CMHC in its sole, absolute and non-reviewable discretion, within twenty (20) calendar days of receipt of written notice of breach from CMHC;

2. The Contractor commits numerous breaches of its duties under this Agreement that collectively constitute a material breach;

3. There is a change in control of the Contractor where such control is acquired, directly or indirectly, in a single transaction or series of related transactions, or all or substantially all of the assets of the Contractor are acquired by any entity, or the Contractor is merged with or into another entity to form a new entity, unless the Contractor demonstrates to the satisfaction of CMHC that such event will not adversely affect its ability to perform the services under this Agreement; or

4. The Contractor becomes bankrupt or insolvent, or a receiving order is made against the Contractor, or any assignment is made for the benefit of the creditors, or if an order is made or a resolution passed for the winding up of the Contractor.

CMHC may terminate this Agreement without notice if the Contractor commits gross misconduct, fraud or other unlawful acts.

CMHC's Obligations upon Termination

In the event that a notice of termination is given, and subject to the deduction of any claim which CMHC may have against the Contractor arising out of the Agreement or its termination, CMHC will be obliged to make payment for the value of all Services performed to the date of the notice, such value to be determined in accordance with the rate(s) specified in the Agreement. CMHC will make payment within thirty (30) days of the date of the notice or receipt of an invoice submitted by the Contractor, whichever is later. Upon such payment, it shall have no further obligation or liability of any kind to the Contractor.

Contractor's Obligations upon Termination

Upon termination of this Agreement or upon delivery of notice of intent to terminate this Agreement, the Contractor shall promptly review all work in progress and forward it to CMHC. The Contractor shall provide CMHC with reasonable transitional assistance at the rates specified in the Agreement, or if no rates are specified at the contractor's standard rates.

2.4   **Termination Assistance**
Commencing six (6) months prior to expiration of the Term or on such earlier date as CMHC may request, or commencing upon any notice of termination or non-renewal of this Agreement, the Contractor shall provide CMHC with reasonable termination assistance as requested by CMHC to allow the services to continue without interruption or adverse effect and to facilitate the orderly transfer of the services to CMHC or its designee.

3   **Article 3.0 – Financial**

3.1   In consideration of the performance of the services, as described in Article 1.0, CMHC agrees to pay the Contractor an amount based on the Contractor's rates attached as Schedule "C". Notwithstanding the foregoing, under no circumstances shall CMHC's total financial liability under the Agreement exceed $ Click here to enter text. for Services provided during the initial term of the Agreement.   CMHC's total financial liability under the terms and conditions of the Agreement shall not exceed $ Click here to enter text. for the maximum three (3) year Term of the Agreement.

3.2   The amount payable to the Contractor by CMHC pursuant to article 3.1 is inclusive of all taxes, assessments, duties or other levies that may be payable, including any goods and services tax/harmonized sales tax (GST/HST) or retail sales tax (RST) or Quebec Sales Tax (QST).   No other taxes, assessments, duties or other levies shall be payable to the Contractor unless specifically agreed in writing by the Contractor and CMHC.

3.3   Subject to article 3.2 above, GST/HST or RST, to the extent applicable and required to be collected, shall be collected by the Contractor and shown as a separate item on each invoice. Where the Contractor is required to collect the GST/HST, the invoice issued by the Contractor shall show the Contractor's GST/HST number. Where the Contractor is also required to collect the Quebec Sales Tax (QST), the invoice shall show the QST number.

The Contractor shall duly remit to the Canada Revenue Agency or the appropriate provincial taxing authorities all taxes payable on the Services.

Services with a non-resident of Canada.

Any payments made to the Contractor by CMHC pursuant to article 3.1 in respect of services rendered in Canada to an non-resident of Canada will be subject to a 15% withholding tax as required pursuant to Regulation 105 of the *Income Tax Act*. If any such withholding taxes are required to be withheld from amounts payable to the Contractor, CMHC shall make such withholdings and duly and promptly remit the amount withheld to the Canada Revenue Agency.

3.4   Invoicing

The Contractor shall submit detailed invoices to CMHC at regular intervals during the Term, and at least on a quarterly basis, describing the Services provided during the period covered by the invoice. The Contractor must allow thirty (30) days from delivery of invoice for payment without interest charges. The Contractor cannot invoice prior to performance of the Service.

All invoices must make reference to this Agreement by quoting CMHC file number 201500471 and be forwarded to CMHC at the following address:

Canada Mortgage and Housing Corporation
Name: Hardware Procurement
Title: I&T payments
Building "C" Floor "3"
700 Montreal Road
Ottawa, Ontario
K1A 0P7

Before advancing any amount to the Contractor, CMHC reserves the right to determine, in its sole discretion, whether the Services were performed in accordance with the terms and conditions of the Agreement. In the event that the Services do not meet the standards set out in the Agreement, CMHC may take such action as reasonably necessary to correct the Contractor's default, including, without limitation, the following:

a)   directing the Contractor to redo the work that was not completed in accordance with the Agreement;
b)   withholding payment;
c)   setting off any expenses incurred by CMHC in remedying the default of Contractor against payment for payment due to the Contractor;
d)   terminating the Agreement for default.

3.5   Method of Payment

3.5.1

All payments due under the Agreement will be made by means of Electronic Funds Transfer ("EFT"). The Contractor is responsible for providing CMHC with all the information set out in section 3.5.2 to allow EFT to be effected and for keeping the information up to date. In the event that CMHC is unable to make payment by EFT, the Contractor agrees to accept payment by cheque or another mutually agreeable method of payment.

3.5.2   Direct Deposit and Income Tax Reporting Requirement

As a federal Crown Corporation, CMHC is obliged under the Income Tax Act and Regulations to report payments to suppliers of goods and/or services by using a T1204 supplementary slip. CMHC must therefore obtain the necessary information from suppliers, including the Contractor's social insurance number and/or corporate identification number, in order to allow CMHC to make payment by EFT and to complete the T1204 supplementary slip. The Contractor is required to complete and sign a Supplier - Direct Deposit and Tax Information Form (CMHC/SCHL 3085) prior to commencement of the Term. Throughout the Term, the Contractor is required to ensure that the information provided remains accurate and up to date. The Contractor assumes full responsibility for any errors in payments or tax reporting that arise because the information supplied is inaccurate or out of date.

3.6   Audit

The Contractor shall maintain proper and standard records and accounts during the Term and for a period of three (3) years following the end of the Term. The Contractor agrees to allow CMHC's internal and external auditors and regulators the right to examine, at any reasonable time, any and all records relating to the services identified herein.

The Contractor agrees to provide the CMHC's internal or external auditors and regulators with sufficient original documents in order to conduct any audit procedures. Any audit may be conducted without prior notice; however the CMHC agrees to cooperate with the Contractor in the course of conducting any audit in order to avoid disruption in day-to-day operations and to preserve confidentiality of any proprietary information that is disclosed.

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4   Article 4.0 - General Terms and Conditions

4.1   Intellectual Property Rights
All material, reports and other work product produced under the Agreement will become
the sole property of CMHC upon coming into existence and CMHC will hold all
intellectual property rights therein. The Contractor warrants that it has sufficient rights to
satisfy this term, and that any necessary waivers of moral rights have been obtained, as
provided for in the law of copyright. Upon the material coming into existence, the
Contractor hereby assigns all rights in the material to CMHC and agrees to execute any
document requested by CMHC acknowledging CMHC's ownership of the material and
work product and the waiver of moral rights therein.

Nothing in this Agreement is intended to affect the pre-existing Intellectual Property Rights
of the Parties, and all personal information, whether or not it is marked as confidential.

4.2   Confidentiality and Non-Disclosure of CMHC Information
In this section, "CMHC Information" refers to any and all information of a confidential
nature, including all personal information that is in the care or control of CMHC, and is
managed, accessed, collected, used, disclosed, retained, received, created or disposed of in
relation to the provision of the Services, however the information is obtained. Without
limiting the generality of the foregoing, CMHC Information includes data in any format
and information obtained directly or indirectly by the Contractor.

The Contractor understands the sensitive nature of the CMHC Information and agrees to
treat all CMHC Information as proprietary, confidential and sensitive during the Term and
following termination of the Agreement, unless otherwise specifically agreed to in writing
by CMHC. The Contractor further agrees to restrict access to CMHC Information to those
persons who have a need to know this information in order to perform the Services and
who are bound by an obligation of confidentiality that is as strict as that contained in this
Agreement.

In the event that a breach of confidentiality occurs, the Contractor will immediately notify
CMHC and co-operate with CMHC to the extent required to remedy the breach.

Where the Services are sensitive in nature, CMHC may require that the Contractor provide
an Oath of Secrecy for each of its employees or persons engaged in performing the
Services.

The Contractor further acknowledges and understands that CMHC considers all CMHC
information to be under its custody and control at all times, and that all information in the
care and control of CMHC is subject to federal laws on privacy and access to information.

Any documents provided to the Contractor in the performance of the Services shall be
returned, uncopied to CMHC or destroyed by the Contractor immediately following the
termination of this Agreement. For documents not returned to CMHC, the Contractor shall
provide specific proof under oath of their destruction.

The Contractor shall ensure that CMHC Information shall remain in Canada and expressly agrees to segregate CMHC Information, whether in electronic format or in hard copy, from other information by physical or electronic means. Without limiting the generality of the foregoing, the Contractor shall not release, share or otherwise divulge CMHC Information to any other entity including subsidiaries, branch offices, partners of the Contractor or subcontractors without the prior written consent of CMHC and the Proponent shall ensure the same of any subcontractor, reseller, agent or any other person engaged to perform any part of the Services.

4.3   Contractor's Indemnification

The Contractor agrees to indemnify, defend and hold harmless CMHC, its officers, employees and agents, for all loss, damages, costs, expenses, claims, demands, actions, suits or other proceedings of every nature and kind, including legal fees, arising from or in consequence of an act or omission of the Contractor related to the performance of the Services. To the extent that CMHC's actions contribute to the loss or damages, CMHC shall be responsible for its proportionate share of the liability. The indemnification applies whether the actions, suits or proceedings are brought in the name of CMHC or in the name of the Contractor. The Contractor shall be fully responsible to CMHC for the acts and omissions (including negligence) of its subcontractors and of persons directly or indirectly engaged by such subcontractors as if such acts and omissions were those of the Contractor.

CMHC shall have the right to assume control of its own defence at any time, provided that it assumes the costs of its defence.

4.4   Independent Contractor

It is understood by the Parties that the Contractor shall act as an independent contractor for the purposes of the Agreement. It and its employees, officers, agents and contractors are not engaged as employees of CMHC. The Contractor agrees to so advise its employees, officers, agents and contractors.

Without limiting the generality of the foregoing, the Contractor shall retain complete control of and accountability for its employees, agents and contractors. The Contractor shall prepare and process the payroll for its employees directly, and shall withhold and/or pay all applicable employment taxes and statutory payroll deductions required in respect of its employees. All personnel employed by the Contractor at the beginning of the Term shall, at all times, and for all purposes, remain solely in the employment of the Contractor.

4.5   Contractor's Authority

The Contractor agrees that it has no authority to give any guarantee or warranty whatsoever expressed or implied on behalf of CMHC and that it is in no way the legal representative or agent of CMHC and that it has no right or authority to create any obligation on behalf of CMHC or to bind CMHC in any way.

4.6   Corporation Identification

It is agreed that the Contractor will make no use whatsoever of CMHC's name, logo or other official marks without the express written consent of CMHC.

4.7   Conflict of Interest -   **Mandatory**
The Contractor and its principals, employees, agents and subcontractors shall avoid any real, potential or apparent conflict of interest during the Term and shall declare any real, potential or apparent conflict of interest to CMHC immediately upon becoming aware of the conflict. The Contractor shall, upon direction of CMHC, take steps to eliminate any conflict, potential conflict or perception that a conflict of interest exists.

The Contractor must not provide any services to any third party in circumstances that might reasonably give rise to a conflict of interest between the Contractor's duties to that third party and the Contractor's duties to CMHC.

In the event that a conflict of interest, real, potential or perceived, cannot be resolved to the satisfaction of CMHC, CMHC shall have the right to immediately terminate the Agreement. All work product that has been completed at the date of termination shall be forwarded to CMHC and CMHC shall be liable for payment to the Contractor of an amount which, in the sole opinion of CMHC, constitutes reasonable payment for the partial performance of the Contractor's obligations under the Agreement. Upon such payment, CMHC shall have no further obligation of any nature or kind to the Contractor.

Any public office holder or former public office holder must be in compliance with the provisions of the *Conflict of Interest Act* in order to derive a direct benefit from any Agreement which may arise from this request for proposal.

4.8   Insurance
A. The Contractor will provide and maintain Commercial General Liability insurance for a limit of $5,000,000 per occurrence for bodily injury, or damage to property including loss of use of such property. This policy shall include the following extensions:

   a) cross liability including severability of interest clause
   b) personal injury
   c) broad form property damage & completed operations
   d) blanket contractual
   e) Canada Mortgage and Housing Corporation to be added as additional insured
   f) non-owned automobile
   g) employer's liability (or confirmation that all employees are covered by WSIB) or the equivalent in other provinces
   h) Contractor's liability to include operations of independent contractors (if not provided then each subcontractor must provide a Certificate of Insurance confirming that they have liability insurance)
   i) Thirty (30) days prior written notice of cancellation to Senior Advisor, Corporate Insurance, 700 Montreal Road, Ottawa, Ontario K1A 0P7

B. **Automobile Insurance**

   The Contractor will provide and maintain Automobile Insurance with an insurer

licensed to do business in Canada with limits of not less than $2,000,000. Third Party Liability for all motor vehicles used by the Contractor in the performance of this Agreement.

C. **Fidelity Bond/Employee Dishonesty Insurance**

The Contractor shall carry a fidelity bond/employee dishonesty insurance with an insurer licensed to do business in Canada the policy shall extend to include a third party extension (client coverage). Insurance is to include a third party extension for a limit of not less than $10,000,000.

D. **Network Security Liability and Privacy Liability**

The Contractor will provide and maintain Network Security Liability and Privacy Liability insurance with an insurer licensed to do business in Canada with a limit of not less than $10,000,000. The policy will provide thirty (30) days prior written notice of cancellation to Senior Advisor, Corporate Insurance, 700 Montreal Road, Ottawa, Ontario K1A 0P7. Coverage is to include Contractors' and subcontractors' employees and Contractor's contract employees (if applicable) as named insured. The Contractor shall ensure that the policy is renewed continuously for a minimum period of three (3) years following the expiration or early termination of this Agreement.

E. **Other conditions:**

If there are material changes in the scope of Services provided under this Agreement, CMHC may, via the service level change procedures, request changes to the minimum insurance coverage set out above.

All insurance policies required to be maintained by Contractor pursuant to this Section 4.8 shall be primary with respect to this Agreement and any valid and collectible insurance of CMHC shall be excess of Contractor's insurance and shall not contribute to it.

All Certificate of Insurance shall mention that insurers will provide CMHC with at least thirty (30) days' written notice prior to cancellation of any insurance referred to under this Section 4.8. In addition Contractor shall provide written notice to CMHC forthwith upon learning that an insurer described in this Section 4.8 intends to cancel, or intends to make or has made a material change to, any insurance referred to in this Section 4.8.

A Certificate of Insurance meeting the above requirements shall be delivered to CMHC upon execution of this Agreement and for each renewal thereafter.

Without in any way restricting CMHC's direction to grant or withhold its consent to a request to subcontract pursuant to Section 4.8, the Contractor agrees that it shall contractually obligate any subcontractor or independent contractor retained in connection with this Agreement to maintain insurance against such risks and in such amounts that having regard to such subcontractor's or independent contractor's involvement in the provision of the Services could reasonably be expected to be carried

by persons acting prudently and in a similar business to that of such subcontractor or independent contractor.

It shall be the sole responsibility of the Contractor to decide whether or not any other insurance coverage, in addition to the insurance requirements stipulated herein, is necessary for its own protection or to fulfill its obligation under this Agreement. All insurance policies shall be provided and maintained by the Contractor at its own expense.

4.9   No Limitation
No specific remedy expressed in the Agreement is to be interpreted as limiting the rights and remedies which CMHC may be entitled to under any Agreement or otherwise in law.

4.10   Non-Waiver
Failure by either party to assert any of its rights under the Agreement shall not be construed as a waiver thereof.

4.11   Force Majeure
In the event that a Party is prevented from fulfilling its obligations under the terms of the Agreement by a force majeure or act of God (an event or effect that cannot be reasonably anticipated or controlled), the impacted Party shall notify the other Party in writing as soon as reasonably possible. The written notice shall be sent by registered mail and shall outline the circumstances that constitute a force majeure or an act of God, which a may include, but are not limited to, war, serious public disturbances, impediments arising from orders or prohibitions of public authority, actions of public enemies, strikes, lockouts and other labour disputes, riots, flooding, hurricane, fire, explosion or any other natural disasters over which the Party has no reasonable control.

Where CMHC concludes, in its sole discretion, that the Contractor will not be able to fulfill its obligations under the Agreement, CMHC may secure the services of other qualified Contractors to perform the Services without further compensation or obligation to the Contractor.

4.12   Non-Compliance
If the Contractor fails to comply with a direction or decision of CMHC properly given under the terms of the Agreement, CMHC may take such actions and incur such costs that are reasonably required to implement its direction including, without limitation, the engagement of another contractor and withholding of payment due to the Contractor for Services rendered, which moneys may be set off by CMHC against any expenses that it may incur in remedying a default or failures as described above.

4.13   Laws Governing Agreement
This Agreement shall be governed by and construed in accordance with the laws of the Province of Ontario and the laws of Canada as applicable.   The parties attorn to the jurisdiction of the Federal Court or the courts of the Province of Ontario as appropriate in the circumstances.

The Contractor shall give all notices and obtain all licenses, permits and authorizations required to perform the Services. The Contractor shall comply with all the laws applicable to the services or the performance of the Agreement.

4.14 Final Report

Where a final report is to be prepared, it shall be in a form acceptable to CMHC and suitable for reproduction or publication. More particularly,

a) the body of the report shall include the main factual and analytical information and policy recommendations shall be separated to minimize potential restriction;
b) policy recommendations and supporting materials shall be attached as appendices; and
c) the report shall stipulate that the copyright remains with CMHC.

Upon request, the Contractor will supply, an executive summary of the main findings and recommendations of the final report and a copy of the report in any standard format that CMHC may prescribe, in accordance with CMHC's information technology requirements.

4.15 Publication

In the case of a report that is in the nature of a research report, CMHC is under no obligation to publish all or part of the final report. CMHC has the right to edit or publish the final report, in part or in its entirety and shall be the sole judge of those parts of the final report, or those materials and reports, which it considers for publication. CMHC may, at its sole discretion, delete references to the Contractor in the edited version of the final report.

Where the Contractor wishes to publish the final report or its associated materials, the Contractor must request written permission from CMHC to publish all or part of the final reports. The Contractor must also acknowledge the ownership of copyright by CMHC and, if requested by CMHC must include the following disclaimer:

"This project was funded (*or partially funded*) by Canada Mortgage and Housing Corporation (CMHC), but the views expressed are the personal views of the author(s). CMHC makes no representations as to the accuracy or fitness of the contents for any particular purpose".

4.16 Official Languages   Mandatory

The Contractor acknowledges and understands that CMHC is governed by the *Official Languages Act* and follows related Treasury Board Policies. The Contractor agrees to take any measures necessary to ensure compliance with the *Act* and those policies. When providing services to or communicating with CMHC employees, in person, over the phone or in writing (including electronic correspondence), the Contractor must actively offer bilingual services in and indicate clearly by verbal and/or visual means that employees can communicate with and obtain available services in either English or French. The Contractor must also ensure that there is sufficient capacity to provide services that are comparable in terms of quality and timeliness in both official languages.

4.17 Access to CMHC Property or access to CMHC Technical Network Environment

a. Where reasonably necessary for the performance of the Services, CMHC agrees to permit access by the Contractor's principals and/or employees onto CMHC premises or have access to the CMHC technical environment for the purpose of fulfilling its obligations as per the terms of this Agreement. However, CMHC reserves the right to refuse entry to or remove from CMHC premises or remove access to the CMHC technical environment any of the Contractor's principals or employees where reasonably necessary. Removal will be reasonably necessary in the case of an emergency, violation of safety and/or security regulations, incompetence on the part of the principal or employee or other violation or concern of a serious nature.

b. For greater certainty, the Contractor shall be fully responsible to CMHC for the acts and omissions (including negligence) of its employees, subcontractors and of persons directly or indirectly engaged by such subcontractors as if such acts and omissions were those of the Contractor.

4.18 Security Clearance   Mandatory

The Contractor agrees that it and any other persons for which it is responsible who are to perform the Contractor's obligations hereunder shall, at the request of CMHC, apply to CMHC's Corporate Security Centre for purposes of obtaining a security clearance. Specifically any person required to perform any Services on CMHC property or have access to the CMHC technical environment must be provided with a security clearance by CMHC exclusively. The Contractor's personnel will not be held responsible for delays due to the security clearance process. Additionally, the Contractor will not be responsible for any additional costs incurred by the security clearance requirement.

The Contractor further agrees that it and any other persons for which it is responsible who are to perform the Contractor's obligations hereunder shall, forward a copy of the fully signed Security Screening Certificate and Briefing Form (TBS 330-47 to CMHC's Human Resources office confirming the secret security clearance. The form must be signed by all parties to be considered valid. The Contractor will also inform all persons involved with this Agreement must forward a copy of a picture ID with their address (e.g. driver's licences, passport with a utility bill, etc) along with the security certificate and that each person will be expected to sign an Oath of Fidelity and Secrecy on their first day as they are provided their security badge.

4.19 Suspension of Services and Changes in Specifications

CMHC may, at any time and from time to time, order a suspension of the Services in whole or in part, and make modifications of, changes in or additions to the specifications of the type of Services offered and methods of delivery. All directions given by CMHC in writing with respect to the foregoing shall be complied with by the Contractor. If any such suspension, modification, change or addition results in an increase or decrease in the cost of the Services, the amount in Section 3.1 shall be adjusted accordingly, provided that the Contractor shall in no event be entitled to compensation for any loss of anticipated profits and provided further that minor increases or decreases in cost shall be disregarded.

4.20 Extras

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Except as otherwise provided in the Agreement, no payment for extras shall be made unless such extras and the price thereof have been authorized in writing by CMHC.

4.21 Assignment of the Agreement   **Mandatory**
The Agreement shall not be assigned in whole or in part by the Contractor without the prior written consent of CMHC, which may be withheld for any reason.

It is understood and agreed that the Contractor may engage other entities to assist with the Contractor in providing of the Services, provided that the Contractor shall at all times retain full responsibility for the provision and quality of the Services and acts in a manner which fully recognizes and respects the confidential nature of the Services.   No purported assignment of the Agreement shall relieve the Contractor from any obligation under the Agreement or impose any liability upon CMHC.

4.22 Closure of CMHC Offices or Suspension of Operations
    a) Where CMHC premises become inaccessible due to evacuation or closure because of events or circumstances beyond the control of CMHC, where the health or safety of persons on the premises may be reasonably determined by CMHC, in its sole judgment, to be at risk, or where CMHC operations are suspended, payment to the Contractor may be suspended or modified. Payment will be suspended in full after forty-eight (48) hours written notice unless the Contractor provides satisfactory evidence to CMHC that the Contractor will continue to incur monetary obligations to others directly as a result of its undertakings under this Agreement and is unable to mitigate its losses due to such obligations. Based on such evidence and the extent to which the Contractor is able to mitigate, CMHC may continue payment in full (subject to clause (b) below), or at a reduced amount, or suspend payment completely. CMHC may continue payment in full, or at a reduced amount, or suspend payment completely.

    b) Notwithstanding clause (a) above, if closure is continued beyond one calendar week, payment under this Agreement may be suspended in full immediately, on further written notice to the Contractor, until reopening permits the Services to continue.

4.23 Severability
If any part of the Agreement is determined to be unenforceable by a competent authority, it may be severed from the Agreement so as to preserve the intentions of the Parties to the extent possible.

4.24 Scope of Agreement
This Agreement contains all of the agreements of the Parties and no other representations or warranties, verbal or otherwise, exist between the Parties except those set out herein or attached as Specifications, Conditions and Addendum and signed by both Parties. In case of conflicts between the Contractor's documents and CMHC's documents, the latter shall govern.

4.25 Binding
This Agreement shall be binding upon the Parties, their heirs, executors, administrators, successors and assigns.

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4.26 Parking

CMHC has limited on-site parking for the Contractor. The availability of on-site parking is not guaranteed and the allocation of parking will be determined by CMHC in its sole discretion on a case by case basis. Each day that the Contractor wishes to access the on-site parking, the Contractor must notify CMHC Security and, if parking is available, register its vehicles. In the event that on-site parking is not available, it is the sole responsibility of the Contractor to make alternative arrangements for its staff and representatives and to assume all related costs. CMHC will not reimburse the Contractor's costs associated with parking and transportation to and from a CMHC premises or while at the CMHC premises.

4.27 Provision of Personnel

The Contractor shall name a project manager who will be responsible for providing scheduled status reports to the CMHC Project Manager.

The Contractor shall ensure the provision of sufficient personnel beyond the Core personnel identified in Schedule "C", to efficiently meet the Contractor's obligations at all times.

The Contractor shall ensure that trained relief personnel are available to substitute for regular personnel during absence of any personnel for any reason whatsoever.

The Contractor shall not replace any of the personnel to perform the services without the prior written consent of CMHC which consent shall not be unreasonably withheld.

CMHC reserves the right to review the Contractor's list of proposed personnel who will deliver the services to the CMHC office locations and either accept the list as presented, or request that the Contractor submit résumés of alternate candidates for each position identified by CMHC. The Contractor will be allowed up to seven (7) working days to submit résumés for alternative candidates that would be acceptable to CMHC. Final Agreement approval will be dependent on CMHC's acceptance of the final proposed personnel list.

The Contractor will notify CMHC thirty (30) days in advance of their intention to replace any personnel assigned to CMHC and provide résumés of proposed alternative personnel to fill the affected position(s). CMHC reserves the right to accept or reject the proposed personnel and to request a résumé(s) for the alternative candidate(s) for any position(s).

Should a medical emergency or other unforeseen circumstance result in a sudden departure of a Contractor's personnel assigned to CMHC, the Contractor shall submit a plan that is acceptable to CMHC within seven (7) business days describing how they will address the situation to resume normal services for the position in the shortest possible time and with an acceptable level of service to CMHC.

_____

4.28 Regular Hours of Operation

CMHC Office hours of Operation:

Except where otherwise noted, CMHC's regular hours of operation are 7:30 a.m. to 5:30 p.m., local time, Monday to Friday. The Contractor will be required to remain available for service during these hours, excluding statutory holidays when CMHC offices are closed. CMHC remains open on Family Day in Ontario. Québec offices are closed for Saint Jean Baptiste day and remain open on August 1.

4.29 Miscellaneous
a) The Contractor's obligations under Articles 3.6 "Audit", 4.1 "Intellectual Property Rights", 4.2 "Confidentiality and Non-Disclosure of CMHC Information", 4.3 "Contractor's Indemnification", 4.8 "Insurance", and 4.13 "Laws Governing Agreement", shall survive the expiry or termination of the Agreement regardless of the method or manner in which it is terminated.

b) No amendment, supplement or restatement of any provision of the Agreement is binding unless it is in writing and signed by each of the Parties to the Agreement.

c) The Agreement and any amendment, supplement or restatement of any provision of the Agreement may be executed and delivered in any number of counterparts, each of which when executed and delivered is an original but all of which taken together constitute one and the same instrument

Article 5.0 - Agreement Administration

5.1   Contract Administrator

Each Party shall assign a contract administrator that will be responsible for overseeing the Agreement.   The individuals named in section 5.2 are the initial agreement administrators.

The Parties shall notify the other in writing in the event that the contract administrator is changed. CMHC will notify the Contractor in writing of the names of any CMHC representatives who are authorized to assign jobs and approve payments with respect to the work carried out under this Agreement.

5.2   Notices

All invoices and notices issued under the Agreement shall be in writing and shall be forwarded via mail, courier or e-mail:

To CMHC at the following address:

Canada Mortgage and Housing Corporation
Name Click here to enter text.
Title Click here to enter text.
Room Click here to enter text.
700 Montreal Road
Ottawa, Ontario
K1A 0P7

Phone:
Email:

        Click here to enter text.Click here to enter text.
To the Contractor at the following address:

Click here to enter text.

Click here to enter text.
Click here to enter text.

Phone: (Click here to enter text.) Click here to enter text.

Fax: (Click here to enter text.) Click here to enter text.

E-mail: Click here to enter text.

Article 6.0 - Documents comprising the Agreement

6.1   The documents which comprise the entire agreement between the Parties with respect to this matter consist of the following:

        (a)   This form of Agreement as executedClick here to enter text.;
        (b)   CMHC's Request for Proposal dated Click here to enter text.; *{if applicable}*
        (c)   The Contractor's submitted Proposal dated*Click here to enter text.;{if applicable}*
        and

        together with all written change notices issued by CMHC hereunder and such further specifications and documents as the parties may agree in writing.

6.2   The documents comprising the Agreement are complementary and what is called for in any one shall be binding as if called for by all. The Agreement documents shall be interpreted as a whole and the intent of the whole shall govern. In the event of a conflict between them, the Agreement documents shall have precedence among themselves in the order as listed above.

IN WITNESS WHEREOF this Agreement has been executed by duly authorized officers of the Parties as follows:

THE CONTRACTOR CANADA MORTGAGE AND
                                  HOUSING CORPORATION
Click here to enter text.

_____   _____
Click here to enter text. Click here to enter text.

_____ _____
Click here to enter text. Click here to enter text.

Date: _____   Date:_____

<u>**SCHEDULE "A"**</u>

TERMS OF REFERENCE

1.   Statement of Work
(Clearly and fully outline the deliverables which the Contractor will have to supply to fulfill his obligations under the Agreement and receive payment. The date of commencement and completion of the work as set out in Article 2.1 of the Agreement should be reiterated.)

(If the work and payment are to be in phases, the dates for completion of each phase must be specified, and the work and deliverable required at each phase completion date must be specified.)

(If specific individuals are to perform/supervise the work on behalf of the Contractor, they should be set out here.)

2.   Project Management *{Optional, if necessary for administrative purposes}*

3.   Schedule of Tasks and Allocation of Staff by Phases *{optional, if necessary for administrative purposes}*

SCHEDULE "B"

MANNER OF PAYMENT

If the Contractor is not in breach of any of its (his, her) obligations under this Agreement, the Contractor will be paid in accordance with the following schedule:

{All payments should be made contingent upon the Services being performed to the satisfaction of CMHC.}

{The phases should follow the phases set out in Schedule "A".}

1.   Upon the contractor having completed *(work, e.g. "Phase 1 of the work as set out in Schedule "A")* and upon submission and acceptance to the full satisfaction of CMHC of Click here to enter text. by Click here to enter text.. $Click here to enter text.

<u>**SCHEDULE "C"**</u>

CONTRACTOR PERSONNEL

The Contractor may identify additional requirements including, but not limited to, roles/responsibilities in order to effectively provide CMHC with level of service required to complete this Agreement. For the purpose of clarity, such services are included within the flat rate monthly pricing reflected in Schedule B (Manner of Payment) and shall be pre-approved by CMHC prior to providing such additional services.

<u>Core Team</u>

Name of the resources presented in the RFP and brief description of their experience. and roll on this Agreement

7   SECTION 7 APPENDICES

7.1 Certificate of Submission   **MANDATORY**
APPENDIX A

_____   _____hereby:

| Company Name | Procurement Business Number (PBN) |

I. offers to provide services and/or products to CMHC, as described in this proposal, on and if, as and when required basis, all in accordance with the Request for Proposal;

II. offers the terms as set out in this proposal, including any pricing proposal for a period one hundred and twenty days (120) as specified in section 2 of the RFP;

III. certifies that, at the time of submitting this bid, is in full compliance with all tax statutes administered by all provincial, territorial and federal Ministries of Finance and that, in particular, all returns required to be filed under all provincial and federal tax statutes have been filed, and all taxes due and payable under those statutes have been paid or satisfactory arrangements for their payment have been made and maintained;

IV. represents and warrants that in submitting the proposal or performing the Agreement, there is no actual or perceived conflict of interest;

V. represents and warrants that in preparing the proposal, there was no actual or perceived unfair advantage due to the receipt of information regarding the RFP that was not made available to other Proponents;

VI. certifies that this proposal was independently arrived at, without collusion;

VII. certifies that no gratuities or gifts in kind were offered to any CMHC employee, Board member or Governor-in-Council appointee; and intended, by the gratuity, to obtain an Agreement or favourable treatment under an Agreement;

VIII. authorizes CMHC to conduct such investigation as it deems appropriate to verify the contents of the proposal;

IX. certifies, unless explicitly outlined in the proposal, that all pricing information is based on service provision which, at a minimum, fully meets all of the existing service standards as outlined in the Statement of Requirements;

X. agrees to comply with the terms and conditions set out in Section 6, other than as specifically noted in the proposal;

XI. (for sole proprietorships and partnerships) provide permission herewith to CMHC to undertake credit checks on the individuals listed below (names, signatures and home addresses of each must be provided).

XII. agrees that, in the event of acceptance of this proposal, it will enter agreement negotiations in accordance with the RFP, and upon entry into an Agreement with CMHC, it will commit to providing the full scope of services identified in the Agreement.

XIII. agrees that all responses and related materials become the property of CMHC, will not be returned and CMHC will not reimburse the Proponent for any work related to, travel or materials supplied in the preparation of the RFP response.

XIV. agrees that it and any other persons for which it is responsible, who are to perform the Work as stated in this RFP, at the request of CMHC will comply with security screening as deemed appropriate;

Signed this _____ day of _____, 2015 at _____, Canada.

Corporations are not required to provide a corporate seal. The signature of one witness is required for the signature of each Owner/Signing Authority.

Corporation/Individual:

_____   _____
Signature of Signing Authority   Name and Title of Signing Authority

Declaration: I am an authorized signing officer.

7.2 Evaluation Table

APPENDIX B

Stream 1	M/R	Weighted Points Available	Minimum Point Requirement	Weights	% of total Section points
Requirements for IM Business Analyst – Intermediate (6 persons)					
3.2.2.8 — The Proponent should demonstrate experience with leading	R	300		5	6.67%
3.2.2.9 — The Proponent should demonstrate working with OpenText Livelink and/or Content Server.	R	600		10	13.33%
3.2.2.10 — The Proponent should demonstrate experience with test scenario development, functional testing	R	600		10	13.33%
3.2.2.11 — The Proponent should demonstrate communicate effectively, orally and in writing, in both official	R	1200		20	26.67%
3.2.2.12 — The Proponent should demonstrate experience defining functional requirements for the RDIMS	R	600		10	13.33%
3.2.2.13 — The Proponent should demonstrate business rules for the Government of Canada RDIMS core	R	600		10	13.33%
3.2.2.14 — The Proponent should demonstrate developing and implementing Records Filing/Classification	R	300		5	6.67%
3.2.2.15 — The Proponent should demonstrate a College Diploma or University Degree	R	300		5	6.67%
Total Section:		**4500**	**2700**		**100%**
Requirements for IM Business Analyst – Senior (2 persons)					
3.2.2.21 — The Proponent should demonstrate Senior resources leading focus groups/working groups.	R	100		5	6.67%
3.2.2.22 — The Proponent should demonstrate Senior resources with OpenText Livelink and/or Content	R	200		10	13.33%
3.2.2.23 — The Proponent should demonstrate Senior resources test scenario development, functional	R	200		10	13.33%
3.2.2.24 — The Proponent should demonstrate Senior resources communicate in both official languages	R	400		5	26.67%
3.2.2.25 — The Proponent should demonstrate Senior resources with RDIMS core applications	R	200		10	13.33%

3.2.2.26	The Proponent should demonstrate Senior resources establishing business rules	R	200		10	13.33%
3.2.2.27	The Proponent should demonstrate Senior resources developing and implementing Records	R	100		5	6.67%
3.2.2.28	The Proponent should demonstrate Senior resources College Diploma or University Degree	R	100		5	6.67%
	Total Section:		**1500**	**900**		**100%**
	Senior Data Migration Analyst (2 persons)					
3.2.3.9	The Proponent should demonstrate senior resource College Diploma or University Degree	R	100		5	10.87%
3.2.3.10	The Proponent should demonstrate senior resources have OpenText certification(s)	R	40		2	4.35%
3.2.3.11	The Proponent should demonstrate senior resources performing data migrations	R	200		10	21.74%
3.2.3.12	The Proponent should demonstrate senior resources OpenText InfoFusion Integration	R	200		10	21.74%
3.2.3.13	The Proponent should senior resources OpenText - OScript.	R	40		2	4.35%
3.2.3.14	The Proponent should demonstrate senior resources web development technologies	R	40		2	4.35%
3.2.3.15	The Proponent should demonstrate senior resources developing Content Server	R	100		5	10.87%
3.2.3.16	The Proponent should demonstrate senior resources writing SQL scripts	R	200		10	21.74%
	Total Section:		**920**	**552**		**100%**
	Data Migration Analyst (2 persons)					
3.2.3.20	The Proponent should demonstrate a College Diploma or University Degree	R	40		2	3.85%
3.2.3.21	The Proponent should demonstrate experience performing data migrations from	R	200		10	19.23%
3.2.3.22	The Proponent should demonstrate experience working with OpenText InfoFusion Integration	R	200		10	19.23%
3.2.3.23	The Proponent should demonstrate experience supporting and/or developing applications	R	200		10	19.23%
3.2.3.24	The Proponent should demonstrate experience writing complex batch processing	R	200		10	19.23%
3.2.3.25	The Proponent should demonstrate experience writing SQL scripts and stored procedures.	R	200		10	19.23%

		Total Section:		**1040**	**624**		**100%**
		Requirements for Developer OTIC Specialist (1person)					
3.2.3.31	The Proponent should demonstrate College Diploma or University Degree	R	20		2	3.70%
3.2.3.32	The Proponent should demonstrate experience performing data migrations from systems	R	100		10	18.52%
3.2.3.33	The Proponent should demonstrate experience working with OpenText InfoFusion Integration	R	100		10	18.52%
3.2.3.34	The Proponent should demonstrate experience supporting and/or developing applications	R	100		10	18.52%
3.2.3.35	The Proponent should demonstrate experience writing complex batch processing scripts	R	100		10	18.52%
3.2.3.36	The Proponent should demonstrate experience writing SQL scripts and stored procedures.	R	100		10	18.52%
3.2.3.37	The Proponent should demonstrate experience working with OpenText - OScript.	R	20		2	3.70%
		Total Section:		**540**	**324**		**100%**
		Requirements for Senior Technical Architect (1 person)					
3.2.4.7	The Proponent should demonstrate College Diploma or University Degree	R	100		10	22.22%
3.2.4.8	The Proponent should demonstrate that the proposed resource has OpenText certification(s)	R	100		10	22.22%
3.2.4.9	The Proponent should demonstrate experience in the installation, configuration, design	R	100		10	22.22%
3.2.4.10	The Proponent should demonstrate experience with VMware virtualization technologies.	R	50		5	11.11%
3.2.4.11	The Proponent should demonstrate experience with Network Attached Storage (NAS)	R	50		5	11.11%
3.2.4.12	The Proponent should demonstrate experience in network design and architecture	R	50		5	11.11%
		Total Section:		**450**	**270**		**100%**
		Requirements for Technical Analyst (5 persons)					
3.2.4.18	The Proponent should demonstrate College Diploma or University Degree	R	500		10	18.35%

3.2.4.19	The Proponent should demonstrate experience in the installation, configuration, support	R	500		10	18.35%
3.2.4.20	The Proponent should demonstrate resources have OpenText certification(s a copy of the certificate)	R	500		10	18.35%
3.2.4.21	The Proponent should demonstrate experience with the installation, configuration and integration	R	225		5	8.26%
3.2.4.22	The Proponent should demonstrate experience using OpenText Oscript.	R	500		10	18.35%
3.2.4.23	The Proponent should demonstrate experience using Object Importer / Exporter	R	500		10	18.35%
	Total Section:		**2725**	**1635**		**100%**
	Requirements for Project Manager (1person)					
3.2.5.6	The Proponent should demonstrate completed a post-secondary education in IM/IT or PM	R	100		10	28.57%
3.2.5.7	The Proponent should demonstrate Project Management designation	R	100		10	28.57%
3.2.5.8	The Proponent should demonstrate experience using EDRM/ OpenText edocs, Livelink/Content	R	50		5	14.29%
3.2.5.9	The Proponent should demonstrate project management experience in IM/IT projects	R	100		10	28.57%
	Total Section:		**350**	**210**		**100%**
	Requirements for Proponent					
3.2.6.6	The processes, methodologies and tools proposed by the Proponent to on-board the users should	R	100		10	11.90%
3.2.6.7	The implementation methodologies and processes that the Proponent is proposing integrates CMHC	R	90		10	10.71%
3.2.6.8	The approaches proposed by the Proponent include all aspects of the project (business	R	50		5	5.95%
3.2.6.9	The tools proposed by the Proponent to upload business unit's configuration during	R	100		10	11.90%
3.2.6.10	The Proponent should provide evidence of their ability and commitment to provide ongoing	R	100		10	11.90%
3.2.6.11	Escalation Steps Please describe your escalation procedures	R	100		10	11.90%
3.2.6.12	Travel and living expenses The Proponent should agree to be bound by the	R	300		30	35.71%

	Total Section:	840	504		100%
	Grand Total Stream 1:	12,865	7,719		

	4.10 Pricing Proposal - Vendors Total Price	19,700			
	Grand Total of all points Stream 1:	32,565			

	Stream 2	M/R	Weighted Points Available	Minimum Point Requirement	Weights	% of total Section points
	Requirements for Business Analyst - Physical Object Specialist (1 person)					
3.3.5.9	The Proponent should demonstrate experience with leading focus groups/working groups.	R	50		5	6.25%
3.3.5.10	The Proponent should demonstrate experience working with OpenText Livelink and/or Content	R	100		10	12.50%
3.3.5.11	The Proponent should demonstrate experience with test scenario development, functional testing	R	100		10	12.50%
3.3.5.12	The Proponent should demonstrate communicate orally and in writing, in both official languages	R	200		20	25.00%
3.3.5.13	The Proponent should demonstrate experience defining functional requirements	R	100		10	12.50%
3.3.5.14	The Proponent should demonstrate experience establishing business rules	R	100		10	12.50%
3.3.5.15	The Proponent should demonstrate experience developing and implementing Records	R	100		10	12.50%
3.3.5.16	The Proponent should demonstrate College Diploma or University Degree	R	50		5	6.25%
	Total Section:		**800**	**480**		**100%**
	Requirements for Developer/Migration Physical Object Specialist (1 person)					
3.3.6.6	The Proponent should demonstrate College Diploma or University Degree	R	20		2	2.44%
3.3.6.7	The Proponent should demonstrate experience working with OpenText Physical Objects	R	100		10	12.20%
3.3.6.8	The Proponent should demonstrate experience with XML, SQL and advanced Microsoft Office	R	50		5	6.10%
3.3.6.9	The Proponent should demonstrate experience performing data migrations to Open Text Content	R	100		10	12.20%
3.3.6.10	The Proponent should demonstrate experience in performing Quality Assurance testing.	R	50		5	6.10%
3.3.6.11	The Proponent should demonstrate experience in developing OpenText Web Reports.	R	100		10	12.20%
3.3.6.12	The Proponent should experience installation, configuration and development of Content Server	R	100		10	12.20%
3.3.6.13	The Proponent should demonstrate experience in developing solution with Opentext Oscript.	R	100		10	12.20%

3.3.6.14	The Proponent should demonstrate has experience in using HTML 5.	R	50		5	6.10%
3.3.6.15	The Proponent should demonstrate has experience working with jQuery.	R	50		5	6.10%
3.3.6.16	The Proponent should experience working with OpenText Object Importer / Exporter.	R	100		10	12.20%
	Total Section:		**820**	**492**		**100%**
	Requirements for Trainer – Physical Object Specialist (2 persons)					
3.3.7.7	The Proponent should demonstrate experience with creating/maintaining/reviewing training	R	200		10	25.00%
3.3.7.8	The Proponent should demonstrate experience using OpenText – Physical Object	R	100		5	12.50%
3.3.7.9	The Proponent should demonstrate experience using OpenText Livelink/Content Server	R	100		5	12.50%
3.3.7.10	The Proponent should demonstrate experience as a Trainer on OpenText Livelink and/or Content	R	200		10	25.00%
3.3.7.11	The Proponent should demonstrate experience as a Trainer on OpenText – Physical Object	R	200		10	25.00%
	Total Section:		**800**	**480**		**100%**
	Requirements for the Project Manager (1 person)					
3.3.8.7	The Proponent should demonstrate post-secondary education IM/IT or PM	R	100		10	28.57%
3.3.8.8	The Proponent should demonstrate Project Management designation	R	100		10	28.57%
3.3.8.9	The Proponent should demonstrate experience using EDRM/OpenText Content Server/Livelink	R	50		5	14.29%
3.3.8.10	The Proponent should demonstrate project management experience IM/IT projects	R	100		10	28.57%
	Total Section:		**350**	**210**		**100%**
	Requirements for Proponent					
3.3.9.6	The processes, methodologies and tools proposed by the Proponent to on-board the users should be	R	100		10	11.90%

3.3.9.7	The implementation methodologies and processes that the Proponent is proposing integrates CMHC	R	90		10	10.71%
3.3.9.8	The approaches proposed by the Proponent include all aspects of the project	R	50		5	5.95%
3.3.9.9	The tools proposed by the Proponent to upload business unit's configuration during the	R	100		10	11.90%
3.3.9.10	Support References - The Proponent should provide evidence of their ability and commitment	R	100		10	11.90%
3.3.9.11	Escalation Steps Please describe your escalation procedures based on CMHC's requirements	R	100		10	11.90%
3.3.9.12	Travel and living expenses The Proponent should agree to be bound by the	R	300		30	35.71%
	Total Section:		840	504		100%
	Grand Total Stream 2:		3,610	2,166		
	4.10 Pricing Proposal - Vendors Total Price		5,500			
	Grand Total of all points		9,110			

	Stream 3	M/R	Weighted Points Available	Minimum Point Requirement	Weights	% of total Section points
	Requirements for InfoShare Trainer & Training Developer (6 persons)					
3.4.6.5	The Proponent should demonstrate experience with creating/ maintaining/ reviewing training	R	600		10	25.00%
3.4.6.6	The Proponent should demonstrate experience as a trainer on OpenText Livelink and/or Content Server	R	600		10	25.00%
3.4.6.7	The Proponent should demonstrate experience as a Trainer on OpenText – Physical Object	R	600		10	25.00%
3.4.6.7	The Proponent should demonstrate experience with creating/maintaining/reviewing training in	R	600		10	25.00%
	Total Section:		**2400**	**2440**		**100%**
	Requirements for Proponent					
3.4.7.6	The processes, methodologies and tools proposed by the Proponent to on-board the users should be	R	100		10	11.90%
3.4.7.7	The implementation methodologies and processes that the Proponent is proposing integrates CMHC	R	90		10	10.71%
3.4.7.8	The approaches proposed by the Proponent include all aspects of the project (business analysis,	R	50		5	5.95%
3.4.7.9	The tools proposed by the Proponent to upload business unit's configuration during the	R	100		10	11.90%
3.4.7.10	Support References - The Proponent should provide evidence of their ability and commitment to provide	R	100		10	11.90%
3.4.7.11	Escalation Steps Please describe your escalation procedures based on CMHC's requirements below.	R	100		10	11.90%
3.4.7.12	Travel and living expenses The Proponent should agree to be bound by the	R	300		30	35.71%
	Total Section:		**840**	**504**		**100%**
	Grand Total Stream 2:		**3,240**	**1,944**		

| | **4.10 Pricing Proposal - Vendors Total Price** | | 4,800 | | | |

| | **Grand Total of all points** | | 8,040 | | | |

7.3 Mandatory Compliance Checklist

APPENDIX C

❑	Certificate of Submission	Section 2.2 & 2.3
❑	Submission Deadline	Section 2.3 & 2.4
❑	Detailed Item by Item Responses	Section 2.3
❑	Compliance Checklist	Section 2.3
❑	Complete Financial Cost Sheet Tables	Section 2.3
❑	Offering Period	Section 2.8
❑	Security Clearance	Section 2.20
❑	All Costs	Section 3.1.1
❑	Statement of Requirements	Section 3.1.3
❑	5 years experience for the Business Analyst	Section 3.2.2.4
❑	5 years experience analyzing business requests	Section 3.2.2.5
❑	3 years experience gathering requirements	Section 3.2.2.6
❑	3 years experience with EDRM or RDIMS	Section 3.2.2.7
❑	10 years experience for the senior Business Analyst	Section 3.2.2.17
❑	10 years experience for the senior Business Analyst, analyzing business requests	Section 3.2.2.18
❑	5 years experience for the senior Business Analyst, gathering requirements	Section 3.2.2.19
❑	5 years experience for the senior Business Analyst, with EDRM or RDIMS	Section 3.2.2.20
❑	10 years experience for the senior Data Migration Analyst, system analysis, design, ...	Section 3.2.3.6
❑	5 years experience for the senior Data Migration Analyst, implementation data migration	Section 3.2.3.7
❑	3 years experience for the senior Data Migration Analyst, OpenText-Livelink/Content Server.	Section 3.2.3.8

❑ 5 years experience for the Data Migration Analyst, system analysis, design, ...　　　　Section 3.2.3.18

❑ 5 years experience for the Data Migration Analyst, system analysis, Quality Assurance activities　　　　Section 3.2.3.19

❑ 5 years experience for the OTIC Specialist, system analysis, design, ...　　　　Section 3.2.3.27

❑ 5 years experience for the OTIC Specialist, system analysis, Quality Assurance activities　　　　Section 3.2.3.28

❑ 5 years experience for the OTIC Specialist, writing SQL scripts　　　　Section 3.2.3.29

❑ 2 years experience for the OTIC Specialist, data migrations using OpenText　　　　Section 3.2.3.30

❑ 10 years experience for the Senior Technical Architect in the IT industry　　　　Section 3.2.4.4

❑ 10 years experience for the Senior Technical Architect, defining requirements ...　　　　Section 3.2.4.5

❑ Senior Technical Architect two similar projects, implementation of OpenText Livelink　　　　Section 3.2.4.6

❑ 2 years experience for the Technical Analyst, OpenText installations,...　　　　Section 3.2.4.14

❑ 3 years experience for the Technical Analyst, Web servers and HTML (MS IIS, Tomcat)　Section 3.2.4.15

❑ 3 years experience for the Technical Analyst, Windows Operating System　　　　Section 3.2.4.16

❑ 3 years experience for the Technical Analyst, with SQL Server 2008 or higher　　　　Section 3.2.4.17

❑ 5 years experience for the Project Manager, IM/IT industry　　　　Section 3.2.3.3

❑ 10 years experience for the Project Manager, managing projects, valued at $5Million or more　Section 3.2.3.4

❑ 5 years experience for the Project Manager, using project management tools　　　　Section 3.2.3.5

❑ Proponent must describe strategies, approaches,　Section 3.2.6.2

❑ Escalation Procedures　　　　Section 3.2.6.3

❑	Invoicing	Section 3.2.6.4
❑	Payment Disputes	Section 3.2.6.5
❑	1 year experience for the Physical Object Specialist, records & document management	Section 3.3.5.4
❑	2 years experience for the Physical Object Specialist, developing IM business procedures	Section 3.3.5.5
❑	5 years experience for the Physical Object Specialist, working as a business analyst	Section 3.3.5.6
❑	5 years experience for the Physical Object Specialist, developing test cases,	Section 3.3.5.7
❑	3 years experience for the Physical Object Specialist, electronic document management apps	Section 3.3.5.8
❑	2 years experience for the Developer, as a Systems Integrator	Section 3.3.6.4
❑	3 years experience for the Developer, in Systems Analysis, Design,...	Section 3.3.6.5
❑	1 year experience for the Trainer, in Information Management System	Section 3.3.7.4
❑	3 years experience for the Trainer, classroom training for IM/IT systems	Section 3.3.7.5
❑	Trainer must be fluent in both official languages (English and French)	Section 3.3.7.6
❑	5 years experience for the Project Manager, IT industry	Section 3.3.8.4
❑	10 years experience for the Project Manager, managing projects, valued at $1Million or more	Section 3.3.8.5
❑	5 years experience for the Project Manager, using project management tools	Section 3.3.8.6
❑	Proponent must describe strategies, approaches,	Section 3.3.9.2
❑	Escalation Procedures	Section 3.3.9.3
❑	Invoicing	Section 3.3.9.4
❑	Payment Disputes	Section 3.3.9.5
❑	2 years experience for the InfoShare Trainer,	

	in Information Management System	Section 3.4.6.1
❑	3 years experience for the Trainer, classroom training for IM/IT systems	Section 3.4.6.2
❑	Proponent must demonstrate 50% of the proposed resources are fluent in both official languages,	Section 3.4.6.4
❑	Proponent must describe strategies, approaches,	Section 3.4.7.2
❑	Escalation Procedures	Section 3.4.7.3
❑	Invoicing	Section 3.4.7.4
❑	Payment Disputes	Section 3.4.7.5
❑	Response to Statement of Requirements	Section 4.8
❑	Financial Information	Section 4.10
❑	Pricing Proposal	Section 4.11
❑	Mandatorys' in Terms and Conditions	Section 6.2
❑	7.1 Certificate of Submission	Appendix A

7.4 CMHC Technology Environment Overview (I)

APPENDIX D

It is highly preferred that the Proponent's proposed solution operates within the overall CMHC Information Technology Environment, which is as follows:

CMHC Operates 5 distinctive computer Environments

Production	All business functions/applications are operated in this Environment with full production data.
Disaster Recovery	Non-active copy of the Production environment which consists of identical hardware, platforms and mission critical software. Mirroring the Production environment ensures failover and high availability in the event of a disaster; the DR environment is only used in this event.
Development	Program developers use this environment to create code and user interfaces if required, using limited test data. Used to test the application when first received and new updates or patches.
System Test	Modifications to production version that are migrated from Development are tested by business clients in this environment. Performance testing of the application is conducted in this environment. Client acceptance of the software in this environment triggers promotion to EIT.
External Integration Testing (EIT)	Integration testing of application with other applications found in the production environment. Successful testing triggers promotion to production.

Development environment to the other CMHC environments – System Test, External Integration Testing and Production

Client and Server Network Environment

Server Hardware	- Intel Pentium and Xeon Class Servers – IBM eServer xSeries - Storage Area Network (SAN) environment - IBM Total Storage DS8100,DS5100,DS4700 - Disk and Total Storage 3584 tape systems.
Functional Domain	- Windows Server 2003 Domain - Windows Server 2008 R2
Operating Systems	Windows 2008 (64 bit, R2)
Server Technology	- VMWare ESXi - Vmware Vsphere 4 - Blade Servers - Tivioli Storage Manger (TSM)
Network	Ethernet

Infrastructure	• CISCO router-based networking • WiFi - Cisco Access Points & Controllers • TCP IP Primary Protocol v4 & v6 • SSL VPN and IPSec VPN Remote Access • Application Delivery Controller (aka. Load Balancing) - F5 Big IP LTM • WAN Optimization/Acceleration - Citrix Repeater • Primary and secondary MPLS circuit providers
Voice Services	• Main Telephone System - Avaya CS • Voice Mail Services & Server- Avaya Call Pilot Voicemail • Contact Centre Functionality - Avaya Contact Centre Suite • Monitoring and Status Technology - Witness Quality Monitoring, • NETIQ voice monitoring, PRI Monitor and Solar Winds. • Chat, video and presence information - Avaya Aura Unified Communications Infrastructure.
Video services	• Polycom Bridge • Polycom Converged Management Application CMA 4000 • Video Conferencing Units use Polycom VSX and HDX.

Mainframe Environment

Operating System	• z/OS 1.12

Desktop Environment

Hardware	Various desktops and laptops provided by multiple manufactures. specification minimums are: • USD 2.3 and 3.0 • 4 Gig of RAM • No optical readers • Dual Core • 120Gig hard drive • DVD drive
Standard Desktop Software	• Microsoft Windows7 (32bit) • Virtual Applications (Citrix Xenapps 6.5) • Lotus Notes Client R8.5 • Lotus Smartsuite Millenium Edition (Word Pro, Freelance, Lotus 1-2-3, Organizer, Approach) • Microsoft Office Standard Edition 2007, 2013 and 365 (Excel,

	Word, PowerPoint, Access) • Attachmate Reflection 2008 • Symantec Anti-Virus • Microsoft Internet Explorer V 8 or V 9 • Single Sign On (third party – Oracle V 11) • .NET Framework V4.5
COTS Applications	• Finance Core Financials (Infor SmartStream) • Warehouse and Order Desk (SAP R/3 OPIMS ECC6, Group1) • Treasury Systems (Finance Kit WallStreet Suite) • Document Management (IBM DB2 Enterprise Content Management (ECM)) • Library System (Symphony) • Online Surveys (LimeSurvey) • Photo Library System (KE Emu) • Pension Fund Accounting System (Accpac Accounting) • Pension Fund Management System (CAMRA Portfolio Management System) • Financial Authorities System (Intellera WorkflowGen Software) • Access to Information (ATIP) tracking system (Privasoft) • Document Management (IBM DB2 Enterprise Content Management (ECM) • WebTrends • Finance Corporate Performance Management (SAP Business Planning and Consolidation)

IT Service and Software Management

IT Service and Software Management	• Marval Pursuit and Trakit software (Asset and Financial Management, Change Management, Problem Management, and Service Request Management) • LANDesk software distribution and inventory management

Database Technologies

Mainframe Database Platforms	• DB2 for z/os
Client server Database Platforms	• SQL Server • DB2 LUW for Windows
Lotus Notes Database Platforms	• Domino

Development Languages

.NET	• Visual Studio • .NET Framework V4.5 • ASP.Net and ASP.Net MVCVBA and VBScript • Silverlight 4
ColdFusion	• ColdFusion • CommonSpot Winter 2012
Java	• Java (SP, Struts) • Java 6
Mainframe	• IBM Enterprise COBOL for z/OS
Web	• HTML (4, 5), CSS, Javascript, XML
Lotus Notes	• Lotus Notes
Other	• SAP ECC 6/ABAP
Source Control	• Team Foundation Server (TFS) • Rational Team Concert (RTC)

Reporting Tools

Cognos Tools	• Cognos Impromptu • Cognos Powerplay • Cognos ReportNet
Microsoft SQL Tools	• Microsoft SQL Server (Reporting, Analysis, Integration Services)
SAS Tools	• SAS Mainframe • SAS PC • Crystal Reporting
Other	• Crystal Reporting • Microsoft Project • IBM enterprise content management – being replaced by OpenText in the near and long range CMHC business plans

7.5   Financial cost Sheet Table (M)

APPENDIX E

Instructions: Complete information in Yellow boxes below: Proponents are fee to add or reduce the number of resources and days required, which will form the bases of number of resource, time required to complete and costs CMHC will pay to the successful Proponent under the ensuing agreement.

The total cost of a vendor's proposal will be used to evaluate the total price points.

Stream 1- InfoShare Implementation and Related Professional Services				
Category	**Effort** (# of days)	**Cost per diem ($)**	**Minimum No of Resources**	**Estimated Total Cost**
IM Business Analyst (Intermediate)	440 days			
IM Business Analyst (Intermediate)	440 days			
IM Business Analyst (Intermediate)	440 days			
IM Business Analyst (Intermediate)	440 days			
IM Business Analyst (Intermediate)	440 days			
IM Business Analyst (Intermediate)	440 days			
Total IM Business Analyst (Intermediate)	**2640 days**		**6**	
IM Business Analyst (Senior)	440 days			
IM Business Analyst (Senior)	440 days			
Total IM Business Analyst (Senior)	**880 days**		**2**	
Senior Technical Architect	60 days		**1**	
Technology Analyst	440 days			
Technology Analyst	440 days			
Technology Analyst	440 days			

Technology Analyst	440 days	 		
Technology Analyst	440 days	 		
Total Technology Analyst	**2200 days**		**5**	
		 		
Developer OTIC Specialist	350 days	 	**1**	
Data Migration Analyst	440 days	 		
Data Migration Analyst	440 days	 		
Total Data Migration Analyst	**880 days**		**2**	
Senior Data Migration Analyst	440 days	 		
Senior Data Migration Analyst	440 days	 		
Total Senior Data Migration Analyst	**880 days**		**2**	
		 		
Project Manager	440 days	 	**1**	
Total estimated days required	8330 days			
Administrative or Management fees		 		
Travel / living expenses		 		
Total estimated cost			20	

Stream 2 - InfoShare Physical Object Implementation

Category	Effort (# of days)	Cost per diem ($)	Minimum No of Resources	Estimated Total Cost
Business Analyst - Physical Object Specialist	230 days		1	
Developer/Migration Physical Object Specialist	230 days		1	
Physical Object Trainer	50 days			
Physical Object Trainer	50 days			
Total Physical Object Trainer	**100 days**		**2**	
Project Manager	70 days		1	
Total estimated days required	630 days			
Administrative or Management fees				
Travel / living expenses				
Total estimated cost			5	

Stream 3 – InfoShare Training for CMHC Staff				
Category	**Effort** (# of days)	**Cost per diem ($)**	**Minimum No of Resources**	**Estimated Total Cost**
InfoShare Trainer (Bilingual)	100 days			
InfoShare Trainer (Bilingual)	100 days			
InfoShare Trainer (Bilingual)	100 days			
Total InfoShare Trainer (Bilingual)	**300 days**		**3**	
InfoShare Trainer (English only)	100 days			
InfoShare Trainer (English only)	100 days			
Total InfoShare Trainer (English only)	**200 days**		**2**	
Training Developer	130 days		1	
Total estimated days required	630 days			
Administrative or Management fees				
Travel / living expenses				
Total estimated cost			6	

7.6   Travel Guide Line

APPENDIX F

NO PAYMENTS WILL BE MADE TO THE PROPONENT IN RELATION TO THE RFP – PAYMENTS DESCRIBED BELOW WILL BE ASSOCIATED TO THE ENSUING AGREEMENT ONLY.

This Appendix "F" outlines CMHC's policy for Proponent travel reimbursement. Unless otherwise agreed in writing by CMHC, the Proponent shall be reimbursed in accordance to policy herein.

1. GENERAL

All travel requirements must be pre-approved prior to travel commitments.   In addition, CMHC reserves the right, at their sole discretion to refuse payment for any travel exceeding the allotted costs and/or rates outlined in this Appendix "F"

1.1 ADMINISTRATION
CMHC will reimburse Proponent for actual costs incurred for travel and accommodation where;
(a)   such costs are approved by CMHC in writing in advance of the travel expense being incurred; and that
(b)   Costs and/or rates are in accordance to values set forth in this Appendix "F"

1.2 PROCESS FOR SUBMITTING EXPENSES
For reimbursement by Proponent for expenses incurred, in connection with approved travel, Proponent shall:
(a) Submit the invoice within thirty (30) days of the completion of travel to CMHC site.
(b) Invoice must reference the applicable contract file number : 201500471
(c) Invoice must itemize the expenses on the invoice under following categories, when applicable:
- Air Transportation,
- Ground Transportation,
- Accommodations,
- Meals; and
(d) Attach true copies of original receipts to the invoice.

1.3 RECEIPTS
Receipts must be a true copy of the original and must detail:
- Date,
- Location (name of establishment),
- Amount,

- Taxes (including HST, as applicable), and
- Description of the expense.

NOTE:
- Meal receipts in the form of a credit card receipt are not acceptable. Receipt books and hand written cheque receipts or proofs of payment will also not be accepted.
- Hotel receipts must be submitted for hotel charges.
- Expenses for air transportation must be accompanied by the receipt (electronic receipt for e-tickets) and the boarding pass.

1.4 REIMBURSEMENT
Prior to the reimbursement, the expenses will be reviewed by CMHC to confirm;
(a) Amount of actual expenses incurred;
(b) Rates and claims for such expenses are in accordance to this Appendix "F".

2. AIR TRANSPORTATION
CMHC will reimburse Proponent for economy or business class fares. Air fare must be booked seven (7) days prior to departure unless otherwise approved by CMHC.

2.1 RESCHEDULING AND AIR TRANSPORTATION
In the event of rescheduling by Proponent, any related fees shall be paid by Proponent.

2.2 DISCOUNTED AIRFARE
From time-to-time, airlines offer various inducements to travelers. These inducements, which should be used wherever possible, include discounted airfare, bulk ticket purchases, cash in return for alternate flights, etc. If any monies or coupons are received directly by Proponent, they must be forwarded to CMHC for processing.

3. GROUND TRANSPORTATION
3.1. CAR RENTAL
A rented car must be used only when it makes economic sense and not as a matter of personal convenience. Automobile rentals must be used when public transportation or personal vehicles are unavailable or inadequate. Information listed below is subject to change and is made available via the following link, http://acrd-rehelv.pwgsc-tpsgc.gc.ca/rechercher-search-4-eng.aspx enter in your particulars for the city you will be staying in to find a list of car rental companies. Vehicles must be mid-size or smaller unless special circumstances warrant a larger vehicle, for example when there are several people sharing a vehicle, when transporting excess baggage or equipment that warrants a larger vehicle, or when travelling to remote areas warrants a specific type of vehicle. Rental of any vehicle with a value of more than $85,000 are not permitted.

4. ACCOMMODATIONS

It is CMHC's policy to reimburse the actual lodging expenses incurred for accommodations. Proponent should ensure they are only charged the stated rate on their travel itinerary when checking out, and challenge inconsistent rates at that time. Information listed below is subject to change and is made available via the following link, http://acrd-rehelv.pwgsc-tpsgc.gc.ca/rechercher-search-eng.aspx enter in your particulars for the city you will be staying in to find a list of accommodations.

5. MEALS AND INCIDENTAL ALLOWANCES

CMHC shall pay Proponent as per the table below for the first thirty days of travel then seventy-five percent (75%) of the meal and incidental allowances shall be paid starting on the thirty first consecutive calendar day of travel status while at the same location when corporate residences and or apartment hotels are available to Proponent in the area surrounding the workplace, or the Proponent chooses to stay in private accommodation.

As of April 15, 2015

Description	Canadian $ (taxes included) Up to a Maximum
Breakfast - 100%	**16.00**
Breakfast - 75% (31st day onward)	*12.00*
Lunch - 100%	**16.00**
Lunch - 75% (31st day onward)	*12.45*
Dinner - 100%	**42.80**
Dinner - 75% (31st day onward)	*32.10*
Meal Allowance Total - 100%	**75.40**
Meal Allowance Total - 75% (31st day onward)	*56.55*

Description	Canadian $ (taxes included) **Up to a Maximum**
Incidental Allowance - 100%	**17.30**
Incidental Allowance - 75% (31st day onward)	*13.00*
Daily Total	
Meals and Incidentals - 100%	**92.70**
Meals and Incidentals - 75% (31st day onward)	*69.55*

Note: Proponent can claim incidentals only if they have an overnight stay while in travel status. This is an allowance to cover the costs of items which can be attributed to a period in travel, but for which no other reimbursement or allowance is provided under this policy and to help off-set some of the expenses incurred as a result of having to travel. It includes but is not limited to such items as gratuities (not to exceed 15%), laundry, dry cleaning, bottled water, phone calls home.