



**RETURN BIDS TO:
RETOURNER LES SOUMISSIONS À:**

**Bid Receiving - PWGSC / Réception des
soumissions - TPSGC**

**11 Laurier St., / 11, rue Laurier
Place du Portage, Phase III
Core 0A1/Noyau 0A1**

**Gatineau
Québec
K1A 0S5**

Bid Fax: (819) 997-9776

**REQUEST FOR PROPOSAL
DEMANDE DE PROPOSITION**

**Proposal To: Public Works and Government
Services Canada**

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

**Proposition aux: Travaux Publics et Services
Gouvernementaux Canada**

Nous offrons par la présente de vendre à Sa Majesté la Reine du chef du Canada, aux conditions énoncées ou incluses par référence dans la présente et aux annexes ci-jointes, les biens, services et construction énumérés ici sur toute feuille ci-annexée, au(x) prix indiqué(s).

Comments - Commentaires

Title - Sujet RFP - NEW CONTRACT. VEHICLE 2014-15	
Solicitation No. - N° de l'invitation 47060-151006/A	Date 2015-11-03
Client Reference No. - N° de référence du client 1000321006	
GETS Reference No. - N° de référence de SEAG PW-\$SEL-609-29583	
File No. - N° de dossier 609e1.47060-151006	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2015-12-04	
Time Zone Fuseau horaire Eastern Daylight Saving Time EDT	
F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input type="checkbox"/> Other-Autre: <input type="checkbox"/>	
Address Enquiries to: - Adresser toutes questions à: Bastien, Josée	Buyer Id - Id de l'acheteur 609e1
Telephone No. - N° de téléphone (819) 956-6770 ()	FAX No. - N° de FAX () -
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction: Specified Herein Précisé dans les présentes	

Instructions: See Herein

Instructions: Voir aux présentes

Vendor/Firm Name and Address

**Raison sociale et adresse du
fournisseur/de l'entrepreneur**

Issuing Office - Bureau de distribution

Informatics Professional Services - EL Division/Services
professionnels en informatique - division EL
4C2, Place du Portage

Gatineau
Québec
K1A 0S5

Delivery Required - Livraison exigée See Herein	Delivery Offered - Livraison proposée
Vendor/Firm Name and Address Raison sociale et adresse du fournisseur/de l'entrepreneur	
Telephone No. - N° de téléphone Facsimile No. - N° de télécopieur	
Name and title of person authorized to sign on behalf of Vendor/Firm (type or print) Nom et titre de la personne autorisée à signer au nom du fournisseur/ de l'entrepreneur (taper ou écrire en caractères d'imprimerie)	
Signature	Date

**BID SOLICITATION
FOR A CONTRACT AGAINST A SUPPLY ARRANGEMENT FOR TASK-
BASED INFORMATICS PROFESSIONAL SERVICES (TBIPS) FOR
VARIOUS RESOURCE CATEGORIES – LEVEL 3
FOR THE CANADA BORDER SERVICES AGENCY (CBSA)**

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BID SOLICITATION

FOR A CONTRACT AGAINST A SUPPLY ARRANGEMENT FOR TASK-BASED INFORMATICS PROFESSIONAL SERVICES (TBIPS) FOR VARIOUS RESOURCE CATEGORIES – LEVEL 3

FOR

FOR THE CANADA BORDER SERVICES AGENCY (CBSA)

PART 1 - GENERAL INFORMATION

1.1 Introduction

This document states terms and conditions that apply to this bid no. 47060-151006. It is divided into seven parts plus attachments and annexes, as follows:

Part 1 General Information: provides a general description of the requirement;

Part 2 Bidder Instructions: provides the instructions, clauses and conditions applicable to the bid solicitation and states that the Bidder agrees to be bound by the clauses and conditions contained in all parts of the bid solicitation;

Part 3 Bid Preparation Instructions: provides Bidders with instructions on how to prepare their bid;

Part 4 Evaluation Procedures and Basis of Selection: indicates how the evaluation will be conducted, the evaluation criteria that must be addressed in the bid, if applicable, and the basis of selection;

Part 5 Certifications: includes the certifications to be provided;

Part 6 Security, Financial and Other Requirements: includes specific requirements that must be addressed by Bidders; and

Part 7 Resulting Contract Clauses: includes the clauses and conditions that will apply to any resulting contract.

The annexes include the Statement of Work and any other annexes.

1.2 Summary

- (a) This bid solicitation is being issued to satisfy the requirement of the Canada Border Services Agency (CBSA) (the "**Client**") for Task-Based Informatics Professional Services (TBIPS) under the TBIPS Supply Arrangement (SA) method of supply.
- (b) It is intended to result in the award of one contract, for two years plus one one-year irrevocable option allowing Canada to extend the term of the contract.
- (c) There is a security requirement associated with this requirement. For additional information, consult Part 6 - Security, Financial and Other Requirements, and Part 7 – Resulting Contract Clauses. For more information on personnel and organization security screening or security clauses, Bidders should refer to the Canadian Industrial Security Directorate (CISD), Industrial and Security Program of Public Works and Government Services Canada (<http://ssi-iss.tpsgc-pwgsc.gc.ca/index-eng.html>) website.

- (d) For services requirements, Bidders in receipt of a pension or a lump sum payment are to provide the required information as detailed in article 3 of Part 2 of the bid solicitation. Bidders are requested to include this information in the Bid Submission Form.
- (e) The requirement is subject to the provisions of the World Trade Organization Agreement on Government Procurement (WTO-AGP), the North American Free Trade Agreement (NAFTA), the Canada-Chile Free Trade Agreement (CCFTA), the Canada-Peru Free Trade Agreement (CPFTA), the Canada-Colombia Free Trade Agreement (CColFTA), and the Canada-Panama Free Trade Agreement (CPanFTA), and the Agreement on Internal Trade (AIT).
- (f) There is a Federal Contractor's Program (FCP) for employment equity requirement associated with this procurement; see Part 5 – Certifications, Part 7 – Resulting Contract Clauses and the annex named "Federal Contractor's Program for Employment Equity – Certification.
- (g) Only TBIPS SA Holders currently holding a TBIPS SA for Tier 2, in all Resource Categories and in the National Capital Region under the EN578-055605 series of SAs are eligible to compete. The TBIPS SA EN578-055605 is incorporated by reference and forms part of this bid solicitation, as though expressly set out in it, subject to any express terms and conditions contained in this bid solicitation. The capitalized terms not defined in this bid solicitation have the meaning given to them in the TBIPS SA.
- (h) SA Holders that are eligible to compete as a joint venture must submit a bid as that joint venture SA Holder, forming no other joint venture to bid. Any joint venture must be already qualified under the SA #EN578-055605 as that joint venture at the time of bid closing in order to submit a bid.
- (i) The Resource Categories described below are required on an as and when requested basis in accordance with the TBIPS SA Annex "A":

RESOURCE CATEGORY	LEVEL OF EXPERTISE	ESTIMATED NUMBER OF RESOURCES REQUIRED PER YEAR
Project Executive	Level 3	1
Project Manager – Business Intelligence (BI)	Level 3	2
Project Manager – Project Management Office (PMO) and Financial	Level 3	2
Project Manager - Generic	Level 3	4
Business Process Re-Engineering Consultant	Level 3	6
IM Architect – Data Warehouse	Level 3	1
IM Architect – Analytics	Level 3	1
Application/Software Architect	Level 3	4
Business Architect	Level 3	9

Business Transformation Architect	Level 3	1
Business System Analyst – Web Portals	Level 3	1
Business System Analyst – Electronic Data Interchange EDI	Level 3	1
Business System Analyst - Generic	Level 3	4
Test Coordinator	Level 3	1
Change Management Consultant	Level 3	7
Business Consultant	Level 3	2
Project Scheduler	Level 3	1
Business Analyst	Level 3	4

1.3 Debriefings

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

1.4 Conflict of Interest

Canada has employed the assistance of the following private sector contractors and resources. In order to avoid any real, apparent or potential conflict of interest, it is understood and agreed that the Contractor and resources, named below, will not directly or indirectly be eligible to bid.

Supplier Name	Consultant Name
Furlow Financial Corp and Strategic Relationships Solutions Inc.	Kermit Furlow

PART 2 - BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

- (a) All instructions, clauses and conditions identified in the bid solicitation by number, date and title are set out in the *Standard Acquisition Clauses and Conditions Manual* (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.
- (b) Bidders who submit a bid agree to be bound by the instructions, clauses and conditions of the bid solicitation and accept the clauses and conditions of the resulting contract(s).
- (c) The 2003 (2015-07-03) Standard Instructions - Goods or Services - Competitive Requirements are incorporated by reference into and form part of the bid solicitation. If there is a conflict between the provisions of 2003 and this document, this document prevails.
- (d) Subsection 3 of Section 01, Integrity Provisions - Bid of Standard Instructions 2003 incorporated by reference above is deleted in its entirety and replaced with the following:
 - 3. List of Names
 - a. Bidders who are incorporated or who are a sole proprietorship, including those bidding as a joint venture, have already provided a list of names of all individuals who are directors of the Bidder, or the name of the owner(s), at the time of submitting an arrangement under the Request for Supply Arrangement (RFSA).
 - b. These Bidders must immediately inform Canada in writing of any changes affecting the list of directors during this procurement process.
- (e) Subsection 5(4) of 2003, Standard Instructions – Goods and Services – Competitive Requirements is amended as follows:
 - (i) Delete: sixty (60) days
 - (ii) Insert: 180 days

2.2 Submission of Bids

- (a) Bids must be submitted only to the Public Works and Government Services Canada (PWGSC) Bid Receiving Unit by the date, time and at the PWGSC address indicated on page one of the bid solicitation.
- (b) Due to the nature of the bid solicitation, bids transmitted by facsimile or electronic mail to PWGSC will not be accepted.

2.3 Enquiries - Bid Solicitation

- (a) All enquiries must be submitted in writing to the Contracting Authority no later than 10 calendar days before the bid closing date. Enquiries received after that time may not be answered.
- (b) Bidders should reference as accurately as possible the numbered item of the bid solicitation to which the enquiry relates. Care should be taken by Bidders to explain each question in sufficient detail in order to enable Canada to provide an accurate answer. Technical enquiries that are of a proprietary nature must be clearly marked "proprietary" at each relevant item. Items identified as "proprietary" will be treated as such except where Canada determines that the enquiry is not of a proprietary nature. Canada may edit the questions or may request that the Bidder do so, so that the proprietary nature of the question is eliminated, and the enquiry can be answered to all

Bidders. Enquiries not submitted in a form that can be distributed to all Bidders may not be answered by Canada.

2.4 Former Public Servant

(a) Information Required

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

(b) Definitions

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

an individual;

an individual who has incorporated;

a partnership made of former public servants; or

a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.

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

"pension" means a pension or annual allowance paid under the Public Service Superannuation Act (PSSA), R.S., 1985, c.P-36, and any increases paid pursuant to the Supplementary Retirement Benefits Act, R.S., 1985, c.S-24 as it affects the PSSA. It does not include pensions payable pursuant to the Canadian Forces Superannuation Act, R.S., 1985, c.C-17, the Defence Services Pension Continuation Act, 1970, c.D-3, the Royal Canadian Mounted Police Pension Continuation Act, 1970, c.R-10, and the Royal Canadian Mounted Police Superannuation Act, R.S., 1985, c.R-11, the Members of Parliament Retiring Allowances Act, R.S., 1985, c.M-5, and that portion of pension payable to the Canada Pension Plan Act, R.S., 1985, c.C-8.

(c) Former Public Servant in Receipt of a Pension

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

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

name of former public servant;

date of termination of employment or retirement from the Public Service.

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

(d) Work Force Adjustment Directive

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

If so, the Bidder must provide the following information:

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

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

2.5 Applicable Laws

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

Note to Bidders: Bidders may, at their discretion, substitute the applicable laws of a Canadian province or territory of their choice without affecting the validity of its bid, by deleting the name of the Canadian province or territory specified and inserting the name of the Canadian province or territory of its choice. If no change is made, it acknowledges that the applicable laws specified are acceptable to the Bidder. Bidders are requested to indicate the Canadian province or territory they wish to apply to any resulting contract in their Bid Submission Form.

2.6 Improvement of Requirement During Solicitation Period

Should Bidders consider that the specifications or Statement of Work contained in the bid solicitation could be improved technically or technologically, Bidders are invited to make suggestions, in writing, to the Contracting Authority named in the bid solicitation. Bidders must clearly outline the suggested improvement as well as the reasons for the suggestion. Suggestions that do not restrict the level of competition nor favour a particular Bidder will be given consideration provided they are submitted to the Contracting Authority in accordance with the article entitled "Enquiries - Bid Solicitation". Canada will have the right to accept or reject any or all suggestions.

2.7 Volumetric Data

The estimated number of resources or level of effort data has been provided to Bidders to assist them in preparing their bids. The inclusion of this data in this bid solicitation does not represent a commitment by Canada that Canada's future usage of the service identified in this bid solicitation will be consistent with this data. It is provided purely for information purposes.

PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

- (a) **Copies of Bid:** Canada requests that bidders provide their bid in separately bound sections as follows:

- (i) Section I: Technical Bid (3 hard copies and 1 soft copy on a USB key).
- (ii) Section II: Financial Bid (1 hard copies).
- (iii) Section III: Certifications not included in the Technical Bid (1 hard copies)

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

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

- (b) **Format for Bid:** Canada requests that Bidders follow the format instructions described below in the preparation of their bid:

- (i) use 8.5 x 11 inch (216 mm x 279 mm) paper;
- (ii) use a numbering system that corresponds to the bid solicitation;
- (iii) include a title page at the front of each volume of the bid that includes the title, date, bid solicitation number, bidder's name and address and contact information of its representative; and
- (iv) include a table of contents.

- (c) **Canada's Policy on Green Procurement:** In April 2006, Canada issued a policy directing federal departments and agencies to take the necessary steps to incorporate environmental considerations into the procurement process. See the Policy on Green Procurement (<http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html>). To assist Canada in reaching its objectives, bidders should:

- (i) use paper containing fibre certified as originating from a sustainably-managed forest and/or containing a minimum of 30% recycled content; and
- (ii) use an environmentally-preferable format including black and white printing instead of colour printing, printing double sided/duplex, and using staples or clips instead of cerlox, duotangs or binders.

- (d) **Submission of Only One Bid :**

- (i) A Bidder, including related entities, will be permitted to submit only one bid in response to this bid solicitation. If a Bidder or any related entities participate in more than one bid (participating means being part of the Bidder, not being a subcontractor), Canada will provide those Bidders with 2 working days to identify the single bid to be considered by Canada. Failure to meet this deadline will result in all the affected bids being disqualified.
- (ii) For the purposes of this Article, regardless of the jurisdiction where any of the entities concerned is incorporated or otherwise formed as a matter of law (whether that entity is a natural person, corporation, partnership, etc), an entity will be considered to be "**related**" to a Bidder if:
 - (A) they are the same legal entity (i.e., the same natural person, corporation, partnership, limited liability partnership, etc.);

- (B) they are "related persons" or "affiliated persons" according to the Canada Income Tax Act;
 - (C) the entities have now or in the two years before bid closing had a fiduciary relationship with one another (either as a result of an agency arrangement or any other form of fiduciary relationship); or
 - (D) the entities otherwise do not deal with one another at arm's length, or each of them does not deal at arm's length with the same third party.
- (iii) Individual members of a joint venture cannot participate in another bid, either by submitting a bid alone or by participating in another joint venture.

(e) Joint Venture Experience:

- i. Where the Bidder is a joint venture with existing experience as that joint venture, it may submit the experience that it has obtained as that joint venture.

Example: A bidder is a joint venture consisting of members L and O. A bid solicitation requires that the bidder demonstrate experience providing maintenance and help desk services for a period of 24 months to a customer with at least 10,000 users. As a joint venture (consisting of members L and O), the bidder has previously done the work. This bidder can use this experience to meet the requirement. If member L obtained this experience while in a joint venture with a third party N, however, that experience cannot be used because the third party N is not part of the joint venture that is bidding.

- ii. A joint venture bidder may rely on the experience of one of its members to meet any given technical criterion of this bid solicitation.

Example: A bidder is a joint venture consisting of members X, Y and Z. If a solicitation requires: (a) that the bidder have 3 years of experience providing maintenance service, and (b) that the bidder have 2 years of experience integrating hardware with complex networks, then each of these two requirements can be met by a different member of the joint venture. However, for a single criterion, such as the requirement for 3 years of experience providing maintenance services, the bidder cannot indicate that each of members X, Y and Z has one year of experience, totaling 3 years. Such a response would be declared non-responsive.

- iii. Joint venture members cannot pool their abilities with other joint venture members to satisfy a single technical criterion of this bid solicitation. However, a joint venture member can pool its individual experience with the experience of the joint venture itself. Wherever substantiation of a criterion is required, the Bidder is requested to indicate which joint venture member satisfies the requirement. If the Bidder has not identified which joint venture member satisfies the requirement, the Contracting Authority will provide an opportunity to the Bidder to submit this information during the evaluation period. If the Bidder does not submit this information within the period set by the Contracting Authority, its bid will be declared non-responsive.

Example: A bidder is a joint venture consisting of members A and B. If a bid solicitation requires that the bidder demonstrate experience providing resources for a minimum number of 100 billable days, the bidder may demonstrate that experience by submitting either:

- Contracts all signed by A;
- Contracts all signed by B; or
- Contracts all signed by A and B in joint venture, or
- Contracts signed by A and contracts signed by A and B in joint venture, or
- Contracts signed by B and contracts signed by A and B in joint venture.

That show in total 100 billable days.

- iv. Any Bidder with questions regarding the way in which a joint venture bid will be evaluated should raise such questions through the Enquiries process as early as possible during the bid solicitation period.

3.2 Section I: Technical Bid

(a) The technical bid consists of the following:

- (i) **Bid Submission Form:** Bidders are requested to include the Bid Submission Form - Attachment 3.1 with their bids. It provides a common form in which Bidders can provide information required for evaluation and contract award, such as a contact name and the Bidder's Procurement Business Number, etc. Using the form to provide this information is not mandatory, but it is recommended. If Canada determines that the information required by the Bid Submission Form is incomplete or requires correction, Canada will provide the Bidder with an opportunity to do so.
- (ii) **Security Clearance:** Bidders are requested to submit the following security information for each of the proposed key resources with their bids on or before the bid closing date:

SECURITY INFORMATION	
Name of individual as it appears on security clearance application form	
Level of security clearance obtained	
Validity period of security clearance obtained	
Security Screening Certificate and Briefing Form file number	

If the Bidder has not included the security information in its bid, the Contracting Authority will provide an opportunity to the Bidder to submit the security information during the evaluation period. If the Bidder has not submitted the security information within the period set by the Contracting Authority, its bid will be declared non-responsive.

- (iii) **Substantiation of Technical Compliance:** The technical bid must substantiate the compliance with the specific articles of Attachment 4.1 and 4.2, which is the requested format for providing the substantiation. The substantiation must not simply be a repetition of the requirement(s), but must explain and demonstrate how the Bidder will meet the requirements and carry out the required Work. Simply stating that the Bidder or its proposed solution or resources comply is not sufficient. Where Canada determines that the substantiation is not complete, the Bidder will be considered non-responsive and disqualified. The substantiation may refer to additional documentation submitted with the bid - this information can be referenced in the "Bidder's Response" column of Attachment 4.1 and 4.2, where Bidders are requested to indicate where in the bid the reference material can be found, including the title of the document, and the page and paragraph numbers; where the reference is not sufficiently precise, Canada may request that the Bidder direct Canada to the appropriate location in the documentation.
- (iv) **Previous Similar Projects:** Where the bid must include a description of previous similar projects: (i) a project must have been completed by the Bidder itself (and cannot include the experience of any proposed subcontractor or any affiliate of the Bidder); (ii) a project must have been completed or commenced by the bid closing date; (iii) each project description must include, at minimum, the name and either the telephone number or e-mail address of a customer reference; and (iv) if more similar projects are provided than requested, Canada will decide in its discretion which projects will be evaluated.
- (v) **For Proposed Resources:** The technical bid must include résumés for the resources as identified in Attachment 4.2. The same individual must not be proposed for more than

one Resource Category. The Technical bid must demonstrate that each proposed individual meets the qualification requirements described (including any educational requirements, work experience requirements, and professional designation or membership requirements). With respect to the proposed resources:

- (A) Proposed resources may be employees of the Bidder or employees of a subcontractor, or these individuals may be independent contractors to whom the Bidder would subcontract a portion of the Work (refer to Part 5, Certifications).
- (B) For educational requirements for a particular degree, designation or certificate, PWGSC will only consider educational programmes that were successfully completed by the resource by the time of bid closing. If the degree, designation or certification was issued by an educational institution outside of Canada, the Bidder must provide a copy of the results of the academic credential assessment and qualification recognition service issued by an agency or organization recognized by the Canadian Information Centre for International Credentials (CICIC).
- (C) For requirements relating to professional designation or membership, the resource must have the required designation or membership by the time of bid closing and must continue, where applicable, to be a member in good standing of the profession or membership throughout the evaluation period and Contract Period. Where the designation or membership must be demonstrated through a certification, diploma or degree, such document must be current, valid and issued by the entity specified in this solicitation. If the entity is not specified, the issuer must have been an accredited or otherwise recognized body, institution or entity at the time the document was issued. If the degree, diploma or certification was issued by an educational institution outside of Canada, the Bidder must provide a copy of the results of the academic credential assessment and qualification recognition service issued by an agency or organization recognized by the Canadian Information Centre for International Credentials (CICIC).
- (D) For work experience, PWGSC will not consider experience gained as part of an educational programme, except for experience gained through a formal co-operative programme at a post-secondary institution.
- (E) For any requirements that specify a particular time period (e.g., 2 years) of work experience, PWGSC will disregard any information about experience if the technical bid does not include the relevant dates (month and year) for the experience claimed (i.e., the start date and end date). Canada will evaluate only the duration that the resource actually worked on a project or projects (from his or her start date to end date), instead of the overall start and end date of a project or a combination of projects in which a resource has participated.
- (F) For work experience to be considered by Canada, the technical bid must not simply indicate the title of the individual's position, but must demonstrate that the resource has the required work experience by explaining the responsibilities and work performed by the individual while in that position. In situations in which a proposed resource worked at the same time on more than one project, the duration of any overlapping time period will be counted only once toward any requirements that relate to the individual's length of experience.

(vi) **Customer Reference Contact Information:**

- (A) In conducting its evaluation of the bids, Canada may, but will have no obligation to request that a bidder provide customer references. If Canada sends such a written request, the bidder will have 2 working days to provide the necessary information to Canada. Failure to meet this deadline will result in the bid being declared non-responsive. These customer references must each confirm if requested by PWGSC, the information required of Attachment 4.1 and 4.2.

- (B) The form of question to be used to request confirmation from customer references is as follows:

[Sample Question to Customer Reference: "Has [the bidder] provided your organization with [describe the services and, if applicable, describe any required time frame within which those services must have been provided]?"

___ Yes, the bidder has provided my organization with the services described above.

___ No, the bidder has not provided my organization with the services described above.

___ I am unwilling or unable to provide any information about the services described above.

3.3 Section II: Financial Bid

- (a) **Pricing:** Bidders must submit their financial bid in accordance with the Pricing Schedule provided in Attachment 4.3. The total amount of Applicable Taxes must be shown separately, if applicable. Unless otherwise indicated, Bidders must include a single, firm, all-inclusive per diem rate quoted in Canadian dollars in each cell requiring an entry in the pricing tables.
- (b) **All Costs to be Included:** The financial bid must include all costs for the requirement described in the bid solicitation for the entire Contract Period, including any option periods. The identification of all necessary equipment, software, peripherals, cabling and components required to meet the requirements of the bid solicitation and the associated costs of these items is the sole responsibility of the Bidder.
- (c) **Blank Prices:** Bidders are requested to insert "\$0.00" for any item for which it does not intend to charge or for items that are already included in other prices set out in the tables. If the Bidder leaves any price blank, Canada will treat the price as "\$0.00" for evaluation purposes and may request that the Bidder confirm that the price is, in fact, \$0.00. No Bidder will be permitted to add or change a price as part of this confirmation. Any Bidder who does not confirm that the price for a blank item is \$0.00 will be declared non-responsive.

3.4 Section III: Certifications

It is a requirement that bidders submit the certifications identified under Part 5.

ATTACHMENT 3.1

BID SUBMISSION FORM	
Bidder's full legal name	
Authorized Representative of Bidder for evaluation purposes (e.g., clarifications)	Name
	Title
	Address
	Telephone #
	Fax #
	Email
Bidder's Procurement Business Number (PBN) [see the Standard Instructions 2003] [Note to Bidders: Please ensure that the PBN you provide matches the legal name under which you have submitted your bid. If it does not, the Bidder will be determined based on the legal name provided, not based on the PBN, and the Bidder will be required to submit the PBN that matches the legal name of the Bidder.]	
Jurisdiction of Contract: Province or territory in Canada the Bidder wishes to be the legal jurisdiction applicable to any resulting contract (if other than as specified in solicitation)	
Bidder's Proposed Site(s) or Premises Requiring Safeguard Measures. See Part 3 for instructions.	Address of proposed site or premise: _____ City: _____ Province: _____ Postal Code: _____ Country: _____
Former Public Servants See the Article in Part 2 of the bid solicitation entitled Former Public Servant for a definition of "Former Public Servant".	Is the Bidder a FPS in receipt of a pension as defined in the bid solicitation? Yes ____ No ____ If yes, provide the information required by the Article in Part 2 entitled "Former Public Servant"
	Is the Bidder a FPS who received a lump sum payment under the terms of the Work Force Adjustment Directive? Yes ____ No ____ If yes, provide the information required by the

	Article in Part 2 entitled "Former Public Servant"	
<p>Security Clearance Level of Bidder</p> <p>[include both the level and the date it was granted]</p> <p>[Note to Bidders: Please ensure that the security clearance matches the legal name of the Bidder. If it does not, the security clearance is not valid for the Bidder.]</p>		
<p>On behalf of the Bidder, by signing below, I confirm that I have read the entire bid solicitation including the documents incorporated by reference into the bid solicitation and I certify that:</p> <ol style="list-style-type: none"> 1. The Bidder considers itself and its proposed resources able to meet all the mandatory requirements described in the bid solicitation; 2. This bid is valid for the period requested in the bid solicitation; 3. All the information provided in the bid is complete, true and accurate; and 4. If the Bidder is awarded a contract, it will accept all the terms and conditions set out in the resulting contract clauses included in the bid solicitation. 		
Signature of Authorized Representative of Bidder		

3.0

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

- (a) Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria. There are several steps in the evaluation process, which are described below. Even though the evaluation and selection will be conducted in steps, the fact that Canada has proceeded to a later step does not mean that Canada has conclusively determined that the Bidder has successfully passed all the previous steps. Canada may conduct steps of the evaluation in parallel.
- (b) An evaluation team composed of representatives of the Client and PWGSC will evaluate the bids on behalf of Canada. Canada may hire any independent consultant, or use any Government resources, to evaluate any bid. Not all members of the evaluation team will necessarily participate in all aspects of the evaluation.
- (c) In addition to any other time periods established in the bid solicitation:
 - (i) **Requests for Clarifications:** If Canada seeks clarification or verification from the Bidder about its bid, the Bidder will have 2 working days (or a longer period if specified in writing by the Contracting Authority) to provide the necessary information to Canada. Failure to meet this deadline will result in the bid being declared non-responsive.
 - (ii) **Requests for Further Information:** If Canada requires additional information in order to do any of the following pursuant to the Section entitled "Conduct of Evaluation" in 2003, Standard Instructions - Goods or Services - Competitive Requirements:
 - (A) verify any or all information provided by the Bidder in its bid; or
 - (B) contact any or all references supplied by the Bidder (e.g., references named in the résumés of individual resources) to verify and validate any information submitted by the Bidder,the Bidder must provide the information requested by Canada within 2 working days of a request by the Contracting Authority.
 - (iii) **Extension of Time:** If additional time is required by the Bidder, the Contracting Authority may grant an extension in his or her sole discretion.

4.2 Technical Evaluation

- (a) **Mandatory Technical Criteria:**
 - (i) Each bid will be reviewed for compliance with the mandatory requirements of the bid solicitation. Any element of the bid solicitation that is identified specifically with the words "must" or "mandatory" is a mandatory requirement. Bids that do not comply with each and every mandatory requirement will be declared non-responsive and be disqualified.
 - (ii) The mandatory technical criteria are described in Attachment 4.1 and 4.2.
- (b) **Point-Rated Technical Criteria:**
 - (i) Each bid will be rated by assigning a score to the rated requirements, which are identified in the bid solicitation by the word "rated" or by reference to a score. Bidders who fail to submit complete bids with all the information requested by this bid solicitation will be rated accordingly.
 - (ii) The rated requirements are described in Attachment 4.1 and 4.2.
- (c) **Number of Resources Evaluated:**

Only a certain number of resources per Resource Category will be evaluated as part of this bid solicitation as identified in Attachment 4.2. Additional Resources will only be assessed after contract award once specific tasks are requested of the Contractor. After contract award, the Task Authorization process will be in accordance with Part 7 – Resulting Contract Clauses, the Article titled “Task Authorization”. When a Task Authorization Form (TA Form) is issued, the Contractor will be requested to propose a resource to satisfy the specific requirement based on the TA Form’s Statement of Work. The proposed resource will then be assessed against the criteria identified in the Contract’s Statement of Work in accordance with Appendix B of Annex B.

(d) **Reference Checks:**

- (i) For reference checks, Canada will conduct the reference check in writing by email. Canada will send all email reference check requests to contacts supplied by all the Bidders on the same day using the email address provided in the bid. Canada will not award any points and/or a bidder will not meet the mandatory experience requirement (as applicable) unless the response is received within 5 working days of the date that Canada’s email was sent.
- (ii) If Canada does not receive a response from the contact person within the 5 working days, Canada will not contact the Bidder and will not permit the substitution of an alternate contact person.
- (iii) Wherever information provided by a reference differs from the information supplied by the Bidder, the information supplied by the reference will be the information evaluated.
- (iv) Points will not be allocated and/or a bidder will not meet the mandatory experience requirement (as applicable) if (1) the reference customer states he or she is unable or unwilling to provide the information requested, or (2) the customer reference is not a customer of the Bidder itself (for example, the customer cannot be the customer of an affiliate of the Bidder instead of being a customer of the Bidder itself). Nor will points be allocated or a mandatory met if the customer is itself an affiliate or other entity that does not deal at arm’s length with the Bidder.
- (v) Whether or not to conduct reference checks is discretionary. However, if PWGSC chooses to conduct reference checks for any given rated or mandatory requirement, it will check the references for that requirement for all bidders who have not, at that point, been found non-responsive.

4.3 Financial Evaluation

- (a) The financial evaluation will be conducted using the firm per diem rates provided by the responsive bid(s).
- (b) There are two possible financial evaluation methods for this requirement. The first method will be used if three or more bids are determined responsive (see (c) Financial Evaluation - Method A below). The second method will be used if fewer than three bids are determined responsive (see (d) Financial Evaluation - Method B below).
- (c) **Financial Evaluation - Method A:** The following financial evaluation method will be used if three or more bids are determined responsive:
 - (i) **STEP 1 - ESTABLISHING THE LOWER AND UPPER MEDIAN BAND LIMITS FOR EACH PERIOD AND EACH RESOURCE CATEGORY:** The Contracting Authority will establish, for each period and each Resource Category, the median band limits based on the firm per diem rates provided by the technically responsive bids. For each such Resource Category the median will be calculated using the median function in Microsoft Excel and will represent a range that encompasses any rate to a value of minus (-) 20% of the median, and an upper median rate to a value of plus (+) 30% of the median. When an even number of technically responsive bids have been determined, an average of the middle two rates will be used to calculate the median band limits and for an odd number of technically responsive bids, the middle rate will be used.

- (ii) **STEP 2 - POINTS ALLOCATION:** For each period and each Resource Category points will be allocated as follows:
- (A) A Bidder's proposed firm per diem rate that is either lower than the established lower median band limit or higher than the established upper median band limit for that period and Resource Category will be allocated 0 points.
 - (B) A Bidder's proposed firm per diem rate falling within the upper and lower median band limits, for that period and Resource Category, will be allocated points using the following calculation, which will be rounded to two decimal places:

$$\frac{\text{Lowest proposed firm per diem rate within the median band limits}}{\text{Bidder's proposed firm per diem rate within the median band limits}} \times \text{Maximum Points Assigned at Table 1 below}$$
 - (C) A Bidder's proposed firm per diem rate falling within the established median band limits which is the lowest proposed firm per diem rate will be allocated the applicable maximum points assigned at Table 1 below.

TABLE 1			
RESOURCE CATEGORIES	INITIAL (2 YEARS) CONTRACT PERIOD	OPTION PERIOD 1	TOTAL POINTS
Project Executive – Level 3	2000	1000	3000
Project Manager, Business Intelligence (BI) – Level 3	2000	1000	3000
Project Manager, Project Management Office (PMO) and Financial – Level 3	2000	1000	3000
Project Manager, Generic – Level 3	1600	800	2400
Business Process Re-Engineering Consultant – Level 3	1600	800	2400
IM Architect, Data Warehouse – Level 3	1600	800	2400
IM Architect, Analytics – Level 3	1600	800	2400
Application/Software Architect – Level 3	1000	500	1500
Business Architect – Level 3	1600	800	2400
Business Transformation Architect – Level 3	1600	800	2400
Business System Analyst, Web Portals – Level 3	1000	500	1500
Business System Analyst, Electronic	1000	500	1500

Data Interchange EDI – Level 3			
Business System Analyst, Generic – Level 3	1000	400	1400
Test Coordinator – Level 3	1600	800	2400
Change Management Consultant – Level 3	1600	800	2400
Business Consultant – Level 3	1600	700	2300
Project Scheduler – Level 3	1000	400	1400
Business Analyst – Level 3	1000	400	1400
TOTAL	26400	12800	39200

(iii) **STEP 3 - FINANCIAL SCORE:** Points allocated under STEP 2 for each period and Resource Category will be added together and rounded to two decimal places to produce the Financial Score. Bidders will find below an example of a financial evaluation using Method A.

(iv) **EXAMPLE OF A FINANCIAL EVALUATION USING METHOD A**

TABLE 2 - EXAMPLE OF A FINANCIAL EVALUATION USING METHOD A:							
Resource Category	Max. Points	Bidder 1		Bidder 2		Bidder 3	
		Year 1	Year 2	Year 1	Year 2	Year 1	Year 2
Programmer	150 (75 pts. per year)	\$400.00	\$400.00	\$420.00	\$450.00	\$450.00	\$450.00
Business Analyst	100 (50 pts. per year)	\$600.00	\$600.00	\$600.00	\$620.00	\$650.00	\$820.00
Project Manager	50 (25 pts. per year)	\$555.00	\$900.00	\$750.00	\$800.00	\$700.00	\$800.00
TOTAL	300						
STEP 1 - Establishing the lower and upper median band limits for each year and each resource category							
(Median 1)	For the Programmer Resource Category, the year 1 median would be \$420.00. The lower median band limit would be \$336.00 and higher median band limit would be \$546.00.						
(Median 2)	For the Programmer Resource Category, the year 2 median would be \$450.00. The lower median band limit would be \$360.00 and higher median band limit would be \$585.00.						
(Median 3)	For the Business Analyst Resource Category, the year 1 median would be \$600.00. The lower median band limit would be \$480.00 and higher median band limit would be \$780.00.						
(Median 4)	For the Business Analyst Resource Category, the year 2 median would be \$620.00. The lower median band limit would be \$496.00 and higher median band limit would be \$806.00.						
(Median 5)	For the Project Manager Resource Category, the year 1 median would be \$700.00. The lower median band limit would be \$560.00 and higher median band limit would be \$910.00.						
(Median 6)	For the Project Manager Resource Category, the year 2 median would be \$800.00. The lower median band limit would be \$640.00 and higher median band limit would be \$1,040.00.						
STEP 2 - Points Allocation:							
Bidder 1:							

Programmer Year 1 =	75 points (lowest rate within the lower and upper median band limits)
Programmer Year 2 =	75 points (lowest rate within the lower and upper median band limits)
Business Analyst Year 1 =	50 points (lowest rate within the lower and upper median band limits)
Business Analyst Year 2 =	50 points (lowest rate within the lower and upper median band limits)
Project Manager Year 1 =	0 points (outside the lower and higher median band limits)
Project Manager Year 2 =	22.22 points (based on the following calculation = (Lowest rate of \$800.00 / Bidder's proposed rate of \$900.00) Multiplied by 25 pts)
Bidder 2:	
Programmer Year 1 =	71.43 points (based on the following calculation = (Lowest rate of \$400.00 / Bidder's proposed rate of \$420.00) Multiplied by 75 pts)
Programmer Year 2 =	66.67 points (based on the following calculation = (Lowest rate of \$400.00 / Bidder's proposed rate of \$450.00) Multiplied by 75 pts)
Business Analyst Year 1 =	50 points (lowest price within the lower and upper median band limits)
Business Analyst Year 2 =	48.39 points (based on the following calculation = (Lowest rate of \$600.00 / Bidder's proposed rate of \$620.00) Multiplied by 50 pts)
Project Manager Year 1 =	23.33 points (based on the following calculation = (Lowest rate of \$700.00 / Bidder's proposed rate of \$750.00) Multiplied by 25 pts)
Project Manager Year 2 =	25 points (lowest price within the lower and upper median band limits)
Bidder 3:	
Programmer Year 1 =	66.67 points (based on the following calculation = (Lowest rate of \$400.00 / Bidder's proposed rate of \$450.00) Multiplied by 75 pts)
Programmer Year 2 =	66.67 points (based on the following calculation = (Lowest rate of \$400.00 / Bidder's proposed rate of \$450.00) Multiplied by 75 pts)
Business Analyst Year 1 =	46.15 points (based on the following calculation = (Lowest rate of \$600.00 / Bidder's proposed rate of \$650.00) Multiplied by 75 pts)
Business Analyst Year 2 =	0 points (outside the lower and higher median band limits)
Project Manager Year 1 =	25 points (lowest price within the lower and upper median band limits)
Project Manager Year 2 =	25 points (lowest price within the lower and upper median band limits)
STEP 3 - Financial Score:	
Bidder 1:	$75 + 75 + 50 + 50 + 0 + 22.22 =$ Total Financial Score of 272.22 points out of a possible 300 points
Bidder 2:	$71.43 + 67.67 + 50 + 48.39 + 23.33 + 25 =$ Total Financial Score of 284.82 points out of a possible 300 points
Bidder 3:	$66.67 + 66.67 + 46.15 + 0 + 25 + 25 =$ Total Financial Score of 229.49 points out of a possible 300 points

(d) **Financial Evaluation - Method B:** The following financial evaluation method will be used if less than three bids are determined responsive:

(i) **STEP 1 - POINTS ALLOCATION:** For each period and each Resource Category points will be allocated as follows:

(A) Points will be established based on the following calculation, with points rounded to two decimal places:

$$\frac{\text{Lowest proposed firm per diem rate}}{\text{Bidder's proposed firm per diem rate}} \times \text{Maximum Points Assigned at Table 3 below}$$

(B) The Bidder with the lowest proposed firm per diem rate will be allocated the applicable maximum points assigned at Table 3 below.

TABLE 3			
RESOURCE CATEGORIES	INITIAL (2 YEARS) CONTRACT PERIOD	OPTION PERIOD 1	TOTAL POINTS
Project Executive – Level 3	2000	1000	3000
Project Manager, Business Intelligence (BI) – Level 3	2000	1000	3000
Project Manager, Project Management Office (PMO) and Financial – Level 3	2000	1000	3000
Project Manager, Generic – Level 3	1600	800	2400
Business Process Re-Engineering Consultant – Level 3	1600	800	2400
IM Architect, Data Warehouse – Level 3	1600	800	2400
IM Architect, Analytics – Level 3	1600	800	2400
Application/Software Architect – Level 3	1000	500	1500
Business Architect – Level 3	1600	800	2400
Business Transformation Architect – Level 3	1600	800	2400
Business System Analyst, Web Portals – Level 3	1000	500	1500
Business System Analyst, Electronic Data Interchange EDI – Level 3	1000	500	1500
Business System Analyst, Generic – Level 3	1000	400	1400
Test Coordinator – Level 3	1600	800	2400
Change Management Consultant – Level 3	1600	800	2400
Business Consultant – Level 3	1600	700	2300
Project Scheduler – Level 3	1000	400	1400
Business Analyst – Level 3	1000	400	1400
TOTAL	26400	12800	39200

- (ii) **STEP 2 - FINANCIAL SCORE:** Points allocated under STEP 1, for each period and each Resource Category, will be added together and rounded to two decimal places to produce the Financial Score.

(e) Substantiation of Professional Services Rates

In Canada's experience, bidders will from time to time propose rates at the time of bidding for one or more categories of resources that they later refuse to honour, on the basis that these rates do not allow them to recover their own costs and/or make a profit. When evaluating the rates bid for professional services, Canada may, but will have no obligation to, require price support in accordance with this Article. If Canada requests price support, it will be requested from all otherwise responsive bidders who have proposed a rate that is at least 20% lower than the median rate bid by all responsive bidders for the relevant resource category or categories. If Canada requests price support, the following information is required:

- (i) an invoice (referencing a contract serial number or other unique contract identifier) that shows that the Bidder has provided and invoiced a customer (with whom the Bidder deals at arm's length) for services performed for that customer similar to the services that would be provided in the relevant resource category, where those services were provided for at least three months within the twelve months before the bid solicitation closing date, and the fees charged were equal to or less than the rate offered to Canada;
- (ii) in relation to the invoice in (i), evidence from the bidder's customer that the services identified in the invoice include at least 50% of the tasks listed in the Statement of Work for the category of resource being assessed for an unreasonably low rate. This evidence must consist of either a copy of the contract (which must describe the services to be provided and demonstrate that at least 50% of the tasks to be performed are the same as those to be performed under the Statement of Work in this bid solicitation) or the customer's signed certification that the services subject to the charges in the invoice included at least 50% of the same tasks to be performed under the Statement of Work in this bid solicitation;
- (iii) in respect of each contract for which an invoice is submitted as substantiation, a résumé for the resource that provided the services under that contract that demonstrates that, in relation to the resource category for which the rates are being substantiated, the resource would meet the mandatory requirements and achieve any required pass mark for any rated criteria; and
- (iv) the name, telephone number and, if available, e-mail address of a contact person at the customer who received each invoice submitted under (i), so that Canada may verify any information provided by the Bidder.

Once Canada requests substantiation of the rates bid for any resource category, it is the sole responsibility of the Bidder to submit information (as described above and as otherwise may be requested by Canada, including information that would allow Canada to verify information with the resource proposed) that will allow Canada to determine whether it can rely, with confidence, on the Bidder's ability to provide the required services at the rates bid. If Canada determines that the information provided by the Bidder does not adequately substantiate the unreasonably low rates, the bid will be declared non-responsive.

4.4 Basis of Selection

(a) Evaluation of Bid

Selection Process: The following selection process will be conducted:

- (i) A bid must comply with the requirements of the bid solicitation, meet all mandatory evaluation criteria and obtain the required pass marks for the point rated criteria identified in this bid solicitation to be declared responsive.

- (ii) The responsive bid that obtains the highest Total Bidder Score will be recommended for award of a contract. For any given Bidder, the greatest possible Total Technical Score is 70 while the greatest possible Total Financial Score is 30.
- (A) Calculation of Total Technical Score: the Total Technical Score will be computed for each responsive bid by converting the Technical Score obtained for the point-rated technical criteria using the following formula, rounded to two decimal places:
- $$\frac{\text{Technical Score}}{\text{Maximum Technical Points (697 points)}} \times 70 = \text{Total Technical Score}$$
- (B) Calculation of Total Financial Score: the Total Financial Score will be computed for each responsive bid by converting the Financial Score obtained for the financial evaluation using the following formula rounded to two decimal places:
- $$\frac{\text{Financial Score}}{\text{Total Maximum Points Assigned (39,200 points)}} \times 30 = \text{Total Financial Score}$$
- (C) Calculation of the Total Bidder Score: the Total Bidder Score will be computed for each responsive bid in accordance with the following formula:
- $$\text{Total Technical Score} + \text{Total Financial Score} = \text{Total Bidder Score}$$
- (iii) In the event of identical Total Bidder Scores occurring, then the bid with the highest Total Financial Score will become the top-ranked bidder.
- (iv) Bidders should note that all contract awards are subject to Canada's internal approvals process, which includes a requirement to approve funding in the amount of any proposed contract. Despite the fact that the Bidder may have been recommended for contract award, a contract will only be awarded if internal approval is granted according to Canada's internal policies. If approval is not granted, no contract will be awarded.

ATTACHMENT 4.1

CORPORATE EVALUATION CRITERIA

1.0 CORPORATE MANDATORY REQUIREMENTS

		BIDDER'S RESPONSE
ITEM #	MANDATORY REQUIREMENT	DEMONSTRATED EXPERIENCE (BIDDERS TO INSERT DATA)
M1	<p>The Bidder must demonstrate, using Appendix B of Attachment 4.1, that it has been awarded one Informatics Professional Services contracts, within the last seven years prior to solicitation closing date, that met the following criteria:</p> <p>(1) The contract was in support of a Major Crown Project. Major Crown Project is defined as having an overall budget of \$100M dollars or more;</p> <p>(2) The contract was in support of an International Trade Project. International Trade Project is defined as a project that is involved in the transportation of goods across international borders that involves the transmission of procurement or trade data such as importer and exporter information, carrier, description of goods or services, courier or carrier information, Harmonized classification of the goods or services shipped;</p> <p>(3) The Informatics Professional Services invoiced was for \$15 Million dollars or more.</p> <p>The following must also be included with the bid for each contract:</p> <p>(1) a letter from its client (referencing a contract serial number or other unique contract identifier) that shows that the Bidder has provided and invoiced a customer (with whom the Bidder deals at arm's length) for such services in the amount of \$15,000,000.00; and</p> <p>(2) the name, telephone number and, if available, e-mail address of a contact person at the customer who was responsible to approve the services received under (1) above. Canada may verify any information provided by the Bidder.</p>	

M2	<p>The Bidder must have demonstrated contract experience in supplying all of the following resource categories, for the required Minimum Billable Days per category, over the same five years period within the last seven years prior to solicitation closing date. The services provided must have been provided under a maximum of two contracts. Such two contracts must meet the following criteria:</p> <p>(1) The contract was in support of a Major Crown Project. Major Crown Project is defined as having an overall budget of \$100M dollars or more;</p> <p>(2) The contract was in support of an International Trade Project. International Trade Project is defined as a project that is involved in the transportation of goods across international borders that involves the transmission of procurement or trade data such as importer and exporter information, carrier, description of goods or services, courier or carrier information, Harmonized classification of the goods or services shipped;</p> <p>* Bidders must complete both Appendix A and Appendix B of Attachment 4.1 for each resource category.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: center;">#</th> <th style="text-align: center;">Resource Category</th> <th style="text-align: center;">Minimum Billable Days per Resource Category</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">1</td> <td>Project Executive – Level 3</td> <td style="text-align: center;">1000</td> </tr> <tr> <td style="text-align: center;">2</td> <td>Project Manager – Level 3</td> <td style="text-align: center;">2500</td> </tr> <tr> <td style="text-align: center;">3</td> <td>Business Process Re-Engineering Consultant – Level 3</td> <td style="text-align: center;">2500</td> </tr> <tr> <td style="text-align: center;">4</td> <td>IM Architect - Level 3</td> <td style="text-align: center;">2000</td> </tr> <tr> <td style="text-align: center;">5</td> <td>Application/Software Architect - Level 3</td> <td style="text-align: center;">2000</td> </tr> <tr> <td style="text-align: center;">6</td> <td>Business Architect – Level 3</td> <td style="text-align: center;">5000</td> </tr> </tbody> </table> <p>The Bidder must demonstrate that each resource proposed for any given resource category has at least 50% of the tasks for such category as detailed in section 5.0 of Annex A - Statement of Work (SOW).</p>	#	Resource Category	Minimum Billable Days per Resource Category	1	Project Executive – Level 3	1000	2	Project Manager – Level 3	2500	3	Business Process Re-Engineering Consultant – Level 3	2500	4	IM Architect - Level 3	2000	5	Application/Software Architect - Level 3	2000	6	Business Architect – Level 3	5000
#	Resource Category	Minimum Billable Days per Resource Category																				
1	Project Executive – Level 3	1000																				
2	Project Manager – Level 3	2500																				
3	Business Process Re-Engineering Consultant – Level 3	2500																				
4	IM Architect - Level 3	2000																				
5	Application/Software Architect - Level 3	2000																				
6	Business Architect – Level 3	5000																				

APPENDIX A OF ATTACHMENT 4.1

RFP BILLABLE DAYS RESPONSE TABLE

By providing a response, the bidder certifies that billable days provided occurred during the billing period indicated above for all of the resource categories listed.

Bidder's Name: _____

Billing Period (5 consecutive years) between ___/___/___ to ___/___/___
(dd/mm/yy) (dd/mm/yy)

STREAM 1 – PROJECT ARCHITECTURE

RESOURCE CATEGORY	NUMBER OF BILLABLE DAYS		
	Cross Reference to Contract Reference # _____	Cross Reference to Contract Reference # _____	Total
Project Executive – Level 3			
Project Manager – Level 3			
Business Process Re-Engineering Consultant – Level 3			
IM Architect - Level 3			
Application/Software Architect - Level 3			
Business Architect – Level 3			

APPENDIX B OF ATTACHMENT 4.1

RESOURCE REFERENCE FORM

This Appendix B must be used to demonstrate M1 and M2 of Attachment 4.1.

Bidder Name: _____

Bidder Contract Reference #: _____

SECTION 1: CLIENT INFORMATION

Government client (Yes/No)

Client Organization Name

Address

Client Reference Contact Name

Telephone

Fax

E-mail

SECTION 2: CONTRACT INFORMATION

Contract Value

Award Date

Expiry Date

Contract Title and description:

SECTION 3: RESOURCE DETAILS

Category of Personnel and Level

Tasks performed under the contract with a cross reference to each specific SOW associated task

Category of Personnel and Level	Tasks performed under the contract with a cross reference to each specific SOW associated task

ATTACHMENT 4.2

CORE RESOURCES EVALUATION CRITERIA

1. PROJECT EXECUTIVE - LEVEL 3

1.1 MANDATORY REQUIREMENTS – PROJECT EXECUTIVE – LEVEL 3

PROJECT EXECUTIVE – LEVEL 3		
Name of proposed resource: _____		
The Bidder must demonstrate that the proposed resource has:		
Criteria	Mandatory Requirements	Bidder's Response
		Demonstrated experience (Bidders to insert data
M1	A minimum of ten years of experience, within the last fifteen years prior to the solicitation closing date, in liaising with stakeholders and management and providing risk management on IT enabled projects which were governed and managed through a staged review gating approach.	
M2	Experience managing one IT enabled project involving 2 or more stakeholders. The project must have a minimum duration of six months and a total project expenditure of \$100M or more.	

1.2 POINT RATED CRITERIA - PROJECT EXECUTIVE - LEVEL 3

PROJECT EXECUTIVE – LEVEL 3			
Name of proposed resource: _____			
The Bidder should demonstrate that the proposed resource has:			
#	Rated Criteria	Score / Points MAX	Demonstrated experience (Bidders to insert
R1	<p>Experience providing executive level briefings on the project status of IT enabled projects. Executive level includes Chief Information Officer, Chief Financial Officer, Vice President, Minister, and Assistant Deputy Minister</p> <p>0 to 5 years = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+years = 10 points</p>	10	
R2	<p>Experience implementing an IT enabled project that lasted for 6 months or more and incorporated the use of World Customs Organization standards such as the SAFE framework of standards.</p> <p>No demonstrated experience = 0 points Demonstrated experience = 10 points</p>	10	
R3	<p>Experience leading and managing IT enabled projects where the number of resources on the project team was in excess of 100 resources.</p> <p>0 to 5 years = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points</p>	10	
R4	<p>Experience leading and managing IT enabled projects that were implemented nationally and required high availability.</p> <p>High Availability: a system that is expected to operate reliably 24 hours per day, 365 days per year and an associated implementation that ensures a minimum of 99% operational continuity per year.</p> <p>The system must be rolled out across a minimum of 20 locations across the country and be implemented for 2,000 or more users.</p> <p>0 to 10 years = 0 point</p>	20	

PROJECT EXECUTIVE – LEVEL 3

Name of proposed resource: _____

The Bidder should demonstrate that the proposed resource has:

#	Rated Criteria	Score / Points MAX	Demonstrated experience (Bidders to insert)
	10+ to 12 years = 10 points 12+ to 15 years = 15 points 15+ to 20 years = 20 points		
R5	Experience leading and managing IT project(s) that support the shared business needs of 2 or more Government of Canada departments or agencies, and project(s) involving 2 or more stakeholders who are responsible for the movement of goods or people across international boundaries. 0 to 5 years = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points	10	
R6	Experience performing assessments on project complexity and project in accordance with TBS Policy on the Management of Projects (PoMP) and consistent with the corresponding Project Complexity and Risk Assessments standard. 0 to 5 years = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points	10	
MAX. AVAILABLE POINTS		70	
MIN. POINTS REQUIRED		45	
POINTS ACHIEVED			
Note: Bids that do not meet the above minimum points require will be found non-responsive.			

2. PROJECT MANAGER, BUSINESS INTELLIGENCE (BI) – LEVEL 3

2.1 MANDATORY REQUIREMENTS – PROJECT MANAGER (BI) – LEVEL 3

PROJECT MANAGER (BI) – LEVEL 3		
Name of proposed resource: _____		
The Bidder must demonstrate that the proposed resource has:		
Criteria	Mandatory Requirement	Bidder's Response
		Demonstrated experience (Bidders to insert data)
M1	A minimum of ten years of experience managing a project during the development, implementation and operations using knowledge, skills, tools, and techniques to manage project activities to meet the project requirements.	
M2	Experience defining and documenting objectives, goals and deliverables for a minimum of one project which had a 24 hours per day and 7 days per week operational mandate and a total project expenditure of \$100 Million or more.	
M3	A minimum of one year of experience establishing procedures and leading in the development of business requirements on data warehouse projects involving the use of Cognos reporting tools (Report Writer or Impromptu) and SPSS Clementine/Modeller.	

2.2 POINT RATED CRITERIA – PROJECT MANAGER (BI) – LEVEL 3

PROJECT MANAGER (BI) – LEVEL 3			
Name of proposed resource: _____			
The Bidder should demonstrate that the proposed resource has:			
#	Rated Criteria	Score / Points MAX	Demonstrated experience (Bidders to insert)
R1	<p>Experience over and above the minimum ten years of experience identified in mandatory requirement M1.</p> <p>0 to 10 years = 0 point 10+ to 12 years = 2 points 12+ to 15 years = 5 points 15+ years = 10 points</p>	10	
R2	<p>A minimum of 1 year experience applying project Management Financial methodologies to the management of IM/IT projects.</p> <p>No demonstrate experience = 0 points Demonstrate experience = 5 points</p>	5	
R3	<p>Experience managing the implementation of Business Intelligence reporting systems used for assessing risks associated with the movement of goods in support of the Canadian economy.</p> <p>0 to less than 6 months = 0 point 6 months to 1 year = 5 points 1+ year = 10 points</p>	10	
R4	<p>Experience working with Microsoft Project for the purpose of reporting against project milestones.</p> <p>0 to 5 years = 0 points 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points</p>	10	
R5	<p>A valid Information Technology Information Library (ITIL) Certification.</p> <p>To obtain points a copy of the certification is to be included with the bid.</p> <p>No valid certification = 0 point Valid ITIL certification = 5 points</p>	5	
R6	<p>Experience in developing project plans, including</p>	5	

PROJECT MANAGER (BI) – LEVEL 3			
Name of proposed resource: _____			
The Bidder should demonstrate that the proposed resource has:			
#	Rated Criteria	Score / Points MAX	Demonstrated experience (Bidders to insert)
	defining the project scope, budget and schedule, for a project with 2 or more stakeholders who are responsible for the movement of goods or people. 0 to 5 years = 0 point 5+ years = 5 points		
R7	A valid Project Management Professional (PMP) certification from the Project Management Institute (PMI). To obtain points a valid copy of the certification is to be included with the bid. No valid certification = 0 point Valid PMP certification = 10 points	10	
MAX. AVAILABLE POINTS		55	
MIN. POINTS REQUIRED		36	
POINTS ACHIEVED			
Note: Bids that do not meet the above minimum points require will be found non-responsive.			

3. PROJECT MANAGER, PROJECT MANAGEMENT OFFICE (PMO) AND FINANCIAL – LEVEL 3

3.1 MANDATORY REQUIREMENTS- PROJECT MANAGER – PMO AND FINANCIAL - LEVEL 3

PROJECT MANAGER – PMO AND FINANCIAL - LEVEL 3		
Name of proposed resource: _____		
The Bidder must demonstrate that the proposed resource has:		
Criteria	Mandatory Requirement	Bidder's Response
		Demonstrated experience (Bidders to insert data)
M1	A minimum of ten years of experience leading a team and stakeholders from an Information Technology and Business perspective while maintaining project work plans, deliverables, project status reporting and managing the assigned project schedule, risks, issues, scope, and budget.	
M2	Experience defining and documenting objectives, goals and deliverables for a minimum of one project which had 24 hours per day and 7 days per week operational	

	mandate and a total project expenditure of \$100 Million or more.	
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3.2 POINT RATED CRITERIA – PROJECT MANAGER - PMO AND FINANCIAL - LEVEL 3

PROJECT MANAGER – PMO AND FINANCIAL - LEVEL 3			
Name of proposed Resource: _____			
The Bidder SHOULD demonstrate that the proposed resource has:			
#	Rated Criteria	Score/ Points MAX	Demonstrated experience (Bidders to insert)
R1	Experience defining and documenting objectives, goals and deliverables on an IM/IT project(s) in a 24 hour per day, 7 days per week environment involving 2 or more stakeholders who are responsible for the movement of goods or people with an a total project expenditure of \$100 Million or more. 0 to 1 year = 0 point 1+ year = 5 points	5	
R2	Experience evaluating the measurement of project performance and progress in accordance with the concepts of the Earned Value Management project management technique. 0 to 1 year = 0 point 1+ year to 2 years = 2 points 2+ years to 3 years = 5 points 3+ years = 10 points	10	
R3	Experience performing project financial management, including: <ul style="list-style-type: none"> • Overseeing the project’s budget management; • Briefing senior management on project financials; and • Conducting financial planning and reporting 0 to 5 years = 0 point 5+ years = 5 points	5	
R4	Experience in developing and managing detailed project schedules and financial plans for IM/IT projects. 0 to 5 years = 0 point 5+ years = 5 points	5	
R5	Experience conducting financial reporting risk assessments.	5	

	0 to 2 years = 0 point 2+ years = 5 points		
R6	<p>One or more professional certification(s), designations or accreditations as follows:</p> <ol style="list-style-type: none"> 1. A valid Project Management Professional (PMP) certification from the Project Management Institute (PMI). 2. A valid and recognized professional accounting designation (Chartered Accountant (CA), Certified General Accountant (CGA) or Certified Management Accountant (CMA) or Certified Professional Accountant (CPA)). 3. A valid Certified Information Systems Auditor (CISA) from the Information Systems Audit and Control Association (ISACA). 4. A valid Prince 2 certification To obtain points a valid copy of the certification is to be included with the bid. <p>To obtain points a valid copy of the certification is to be included with the bid.</p> <p>No valid certification = 0 point</p> <p>5 points per certification, designation or accreditation to a maximum of 10 points.</p>	10	
MAX. AVAILABLE POINTS		40	
MIN. POINTS REQUIRED		26	
POINTS ACHIEVED			
Note: Bids that do not meet the above minimum points require will be found non-responsive.			

4. BUSINESS PROCESS RE-ENGINEERING CONSULTANT – LEVEL 3

4.1 MANDATORY REQUIREMENTS - BUSINESS PROCESS RE-ENGINEERING CONSULTANT - LEVEL 3

BUSINESS PROCESS RE-ENGINEERING CONSULTANT - LEVEL 3		
Name of proposed resource: _____		
The Bidder must demonstrate that the proposed resource has:		
Criteria	Mandatory Requirement	Bidder's Response
		Demonstrated experience (Bidders to insert data)
M1	A minimum of ten years of experience analyzing business functional requirements to identify information, procedures and	

BUSINESS PROCESS RE-ENGINEERING CONSULTANT - LEVEL 3		
Name of proposed resource: _____		
The Bidder must demonstrate that the proposed resource has:		
Criteria	Mandatory Requirement	Bidder's Response
		Demonstrated experience (Bidders to insert data)
	decision flows on IM/IT business transformation initiatives.	
M2	Experience analyzing business functional requirements to identify information, procedures and decision flows on a minimum of one IM/IT project involving a 24 hours per day, 7 days per week operational mandate and a total project expenditure of \$100 million or more that involved 2 or more stakeholders.	
M3	A minimum of one year experience designing business rules for risk assessment using the IBM application Operational Decision Manager (ODM).	
M4	A minimum of two years of experience documenting business processes of an organization involved in the international movement of goods and people.	
M5	A minimum of five years of experience in conducting interviews and workshops with business and technical communities.	

4.2 POINT RATED CRITERIA – BUSINESS PROCESS RE-ENGINEERING CONSULTANT - LEVEL 3

BUSINESS PROCESS RE-ENGINEERING CONSULTANT - LEVEL 3			
Name of proposed resource: _____			
The Bidder should demonstrate that the proposed resource has:			
#	Rated Criteria	Score / Points MAX	Demonstrated experience (Bidders to insert data)
R1	Experience over and above the minimum ten years of experience identified in mandatory requirement M1. 0 to 10 years = 0 point 10+ years to 12 years = 2 points 12+ years to 15 years = 5 points	10	

BUSINESS PROCESS RE-ENGINEERING CONSULTANT - LEVEL 3			
Name of proposed resource: _____			
The Bidder should demonstrate that the proposed resource has:			
#	Rated Criteria	Score / Points MAX	Demonstrated experience (Bidders to insert)
	15+ years = 10 points		
R2	<p>Experience over and above the minimum five years of experience in conducting interviews and workshops with business and technical communities identified in mandatory requirement M5.</p> <p>0 to 5 years = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points</p>	10	
R3	<p>A valid Lean Certification (Six Sigma or Lean FOCUS for Transactional or Services Environment)</p> <p>To obtain points a valid copy of the certification is to be included with the bid.</p> <p>No valid certification = 0 point Valid Six Sigma or Lean FOCUS for Transactional or Services Environment = 10 points</p> <p>If a certification needs to be approved by a specific institution, this needs to be made clear directly in the criterion.</p>	10	
R4	<p>Experience over and above the minimum two years of experience identified in mandatory requirement M4.</p> <p>0 to 2 years = 0 point 2+ year to 3 years = 2 points 3+ years = 5 points</p>	5	
R5	<p>Experience employing Treasury Board's Business Transformation Enablement Program (BTEP) tools and practices to provide an integrated approach for strategic management and alignment, and business transformation.</p> <p>0 to 1 year = 0 point 1+ year to 2 years = 2 points 2+ years to 3 years = 5 points 3+ years = 10 points</p>	10	

BUSINESS PROCESS RE-ENGINEERING CONSULTANT - LEVEL 3			
Name of proposed resource: _____			
The Bidder should demonstrate that the proposed resource has:			
#	Rated Criteria	Score / Points MAX	Demonstrated experience (Bidders to insert)
R6	Experience developing and integrating processes and information models for nomenclature, enforcement and compliance, and procedures and facilitation relative to the World Customs Organization frameworks or agreements. 1+ year of experience = 10 points	10	
R7	Experience analyzing business functional requirements to identify information, procedures and decision flows on a project(s) involving a 24 hours per day, 7 days per week operational mandate and a total project expenditure of \$100 million or more that involved 2 or more stakeholders who are responsible for the movement of goods or people. 0 to 1 year = 0 point 1+ year = 5 points	5	
R8	Experience working on new business processes for risk management using IBM Operational Decision Manager (ODM) or Master Data Management (MDM) 0 to 1 year = 0 point 1+ years to 3 years = 5 points 3+ years = 10 points	10	
MAX. AVAILABLE POINTS		70	
MIN. POINTS REQUIRED		45	
POINTS ACHIEVED			
Note: Bids that do not meet the above minimum points require will be found non-responsive.			

5. IM ARCHITECT - DATA WAREHOUSE – LEVEL 3

5.1 MANDATORY REQUIREMENTS - IM ARCHITECT - DATA WAREHOUSE - LEVEL 3

IM ARCHITECT - DATA WAREHOUSE - LEVEL 3

Name of proposed resource: _____

The Bidder must demonstrate that the proposed resource has:

Criteria	Mandatory Requirement	Bidder's Response
		Demonstrated experience (Bidders to insert data)
M1	A minimum of ten years of experience developing, analysing and evaluating IM/IT initiatives, requirements or processes.	
M2	A minimum of one project developing, analysing and evaluating requirements and processes on an IM/IT project involving a 24 hours per day, 7 days per week operational mandate, with a dollar value in excess of a \$100 million budget, that involved 2 or more stakeholders.	
M3	A minimum of five years of experience working on data warehousing projects with an overall budget of \$15M Canadian funds (or equivalent) or more which relies on DB2/UDB as a primary source or store.	
M4	A minimum of five years of experience with Large-Scale* data management and data modeling concepts, with both relational and dimensional data models with an overall budget of \$10M Canadian funds (or equivalent) or more. *Large-Scale is defined as an organization with over 10,000 employees.	
M5	A minimum of five years of experience designing and implementing ETL processes, using IBM Data stage.	
M6	A minimum of two years of experience with the IBM SPSS Modeller application to support the development and implementation of data warehouse initiatives.	
M7	A minimum of five years of experience working on data warehouse systems that runs on an IBM OS390 operating system environment.	

5.2 POINT RATED CRITERIA – IM ARCHITECT (DATA WAREHOUSE) - LEVEL 3

IM ARCHITECT - DATA WAREHOUSE - LEVEL 3			
Name of proposed resource: _____			
The Bidder should demonstrate that the proposed resource has:			
#	Rated Criteria	Score / Points MAX	Demonstrated experience (Bidders to insert)
R1	Experience over and above the minimum ten years of experience identified in mandatory requirement M1. 0 to 10 years = 0 point 10+ years to 12 years = 2 points 12+ years to 15 years = 5 points 15+ years = 10 points	10	
R2	Experience over and above the minimum five years of experience identified in mandatory requirement M3. 0 to 5 years = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points	10	
R3	Experience with the development of business driven data governance methodologies for Business Intelligence initiatives. 0 to 5 years = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points	10	
R4	Experience over and above the minimum of two years of experience identified in mandatory requirement M6. 0 to 2 years = 0 point 2+ years to 3 years = 5 points 3+ years = 10 points	10	
R5	Experience working with the application DBFit to automate ETL test scripts and test cases. 0 to 1 year = 0 point 1+ year = 5 points	5	
R6	Experience developing, analysing and evaluating data warehouse initiatives that rely on DB2 as a primary data source or store.	10	

IM ARCHITECT - DATA WAREHOUSE - LEVEL 3

Name of proposed resource: _____

The Bidder should demonstrate that the proposed resource has:

#	Rated Criteria	Score / Points MAX	Demonstrated experience (Bidders to insert)
	0 to 5 year = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points		
R7	Previous working experience on CBSA Commercial Systems or initiatives such as: <ul style="list-style-type: none"> • ACROSS • TITAN • CMRS • DAN • RAUS (previously RAUD) • RAPM • SWI 1 to 2 systems = 1 points 3 to 5 systems = 2.5 points 5+ systems = 5 points	5	
MAX. AVAILABLE POINTS		60	
MIN. POINTS REQUIRED		39	
POINTS ACHIEVED			
Note: Bids that do not meet the above minimum points require will be found non-responsive.			

6. IM ARCHITECT - ANALYTICS – LEVEL 3

6.1 MANDATORY REQUIREMENTS - IM ARCHITECT - ANALYTICS - LEVEL 3

IM ARCHITECT - ANALYTICS - LEVEL 3		
Name of proposed Resource: _____		
The Bidder MUST demonstrate that the proposed resource has:		
Criteria	Mandatory Requirement	Bidder's Response
		Demonstrated experience (Bidders to insert data)
M1	A minimum of ten years of experience analysing existing capabilities and developing and documenting detailed statements of requirements that are focused specifically on IM/IT systems that provide data analytics or quantitative analysis capabilities.	
M2	A minimum of one project analysing existing capabilities and developing and documenting detailed statements of requirements on an IM/IT project involving a 24 hours per day, 7 days per week operational mandate, with a dollar value in excess of a \$100 million budget that involved 2 or more stakeholders.	
M3	A minimum of three years of experience researching, designing and implementing analytical formulas to conduct quantitative risk assessments.	
M4	A minimum of two years of hands-on experience working with the IBM SPSS Modeller application to support the development of predictive analytics for organizations involved in the international movement of goods.	

6.2 POINT RATED CRITERIA – IM ARCHITECT - ANALYTICS - LEVEL 3

IM ARCHITECT - ANALYTICS - LEVEL 3			
Name of proposed Resource: _____			
The Bidder SHOULD demonstrate that the proposed resource has:			
#	Rated Criteria	Score / Points MAX	Demonstrated experience (Bidders to insert o
R1	Experience applying predictive analytics to the development of IM/IT systems. 0 to 10 years = 0 point	10	

IM ARCHITECT - ANALYTICS - LEVEL 3

Name of proposed Resource: _____

The Bidder SHOULD demonstrate that the proposed resource has:

#	Rated Criteria	Score / Points MAX	Demonstrated experience (Bidders to insert)
	10+ years to 12 years = 2 points 12+ years to 15 years = 5 points 15+ years = 10 points		
R2	Experience researching, designing and implementing analytical formulas to conduct quantitative risk assessment of trade goods. 0 to 3 years = 0 point 3+ years to 5 years = 5 points 5+ years = 10 points	10	
R3	Hands-on experience over and above the minimum two years of experience identified in mandatory requirement M4. 0 to 2 years of experience = 0 point 2+ years to 3 years = 5 points 3+ years = 10 points	10	
R4	Experience analysing existing capabilities and developing and documenting detailed statements of requirements in a project that incorporates the use of World Customs Organization standards. 0 to 6 months = 0 point 6+ months to 1 year = 5 points 1+ years = 10 points	10	
R5	Experience analysing existing capabilities and developing and documenting detailed statements of requirements on an IM/IT project involving a 24 hours per day, 7 days per week operational mandate, with a dollar value in excess of a \$100 million budget that involved 2 or more stakeholders who are responsible for the movement of goods or people across international borders. 0 to 1 year = 0 point 1+ year = 5 points	5	
MAX. AVAILABLE POINTS		45	
MIN. POINTS REQUIRED		29	
POINTS ACHIEVED			
Note: Bids that do not meet the above minimum points require will be found non-responsive.			

7. APPLICATION/SOFTWARE ARCHITECT – LEVEL 3

7.1 MANDATORY REQUIREMENTS – APPLICATION/SOFTWARE ARCHITECT – LEVEL 3

APPLICATION/SOFTWARE ARCHITECT – LEVEL 3		
Name of proposed Resource: _____		
The Bidder MUST demonstrate that the proposed resource has:		
Criteria	Mandatory Requirements	Bidder's Response
		Demonstrated experience (Bidders to insert data)
M1	A minimum of ten years of experience developing technical architectures, frameworks and strategies, to meet business and application requirements.	
M2	A minimum of one project developing technical architectures, frameworks and strategies on an IM/IT project involving a 24 hours per day, 7 days per week operational mandate, with a dollar value in excess of a \$100 million budget that involved 2 or more stakeholders.	
M3	A minimum of five years of experience designing and applying risk assessment concepts as it relates to analyzing risk profiles for organizations involved in the international movement of goods or people.	
M4	A minimum of one year experience designing systems that incorporate a minimum of 2 of the 4 following systems: <ul style="list-style-type: none"> • IBM Master Data Management (MDM) • IBM Quality Stage Address Verification Interface (AVI) • IBM LanguageWare • IBM Operational Decision Management (ODM) 	
M5	A minimum of three years of experience designing systems that use IBM Websphere MQ (MQSeries) to integrate and transport data from disparate systems.	

7.2 POINT RATED CRITERIA – APPLICATION/SOFTWARE ARCHITECT – LEVEL 3

APPLICATION/SOFTWARE ARCHITECT – LEVEL 3			
Name of proposed Resource: _____			
The Bidder SHOULD demonstrate that the proposed resource has:			
#	Rated Criteria	Score/ Points MAX	Demonstrated experience (Bidders to insert d
R1	<p>Experience designing systems that provide secure access to a minimum of 100 external or independent businesses.</p> <p>0 to 1 year = 0 point 1+ year to 3 years = 2 points 3+ years to 5 years = 5 points 5+ years = 10 points</p>	10	
R2	<p>Experience designing and supporting applications for any of the following CBSA systems or initiatives:</p> <ul style="list-style-type: none"> • TITAN • ACROSS • Single Window <p>3 points per system or initiative to a maximum of 9 points</p>	9	
R3	<p>Experience designing systems that support a minimum of 500,000 transactions per day.</p> <p>0 to 1 year = 0 point 1+ year to 3 years = 2 points 3+ years to 5 years = 5 points 5+ years = 10 points</p>	10	
R4	<p>Experience in the last 10 years designing systems that are based on Java front-ends accessing OS/390 operating environments.</p> <p>0 to 1 year = 0 points 1+ year to 3 years = 2 points 3+ years to 5 years = 5 points 5+ years = 10 points</p>	10	
R5	<p>Experience analyzing and implementing risk scoring or assessment algorithms as it relates to the movement of commercial goods across international borders.</p> <p>0 to 1 year = 0 point 1+ year to 3 years = 2 points 3+ years to 5 years = 5 points</p>	10	

APPLICATION/SOFTWARE ARCHITECT – LEVEL 3			
Name of proposed Resource: _____			
The Bidder SHOULD demonstrate that the proposed resource has:			
#	Rated Criteria	Score/ Points MAX	Demonstrated experience (Bidders to insert d
	5+ years = 10 points		
MAX. AVAILABLE POINTS		49	
MIN. POINTS REQUIRED		32	
POINTS ACHIEVED			
Note: Bids that do not meet the above minimum points require will be found non-responsive.			

8. BUSINESS ARCHITECT – LEVEL 3

8.1 MANDATORY REQUIREMENTS – BUSINESS ARCHITECT – LEVEL 3

BUSINESS ARCHITECT – LEVEL 3		
Name of proposed Resource: _____		
The Bidder MUST demonstrate that the proposed resource has:		
Criteria	Mandatory Requirements	Bidder's Response Demonstrated experience (Bidders to insert data)
M1	A minimum of ten years of experience developing policies and rules to support an organization's mandate and functional responsibilities.	
M2	A minimum of one project developing specifications, presentations and use cases on an IM/IT project involving a 24 hours per day, 7 days per week operational mandate, with a dollar value in excess of a \$100 million budget that involved 2 or more stakeholders.	
M3	A minimum of five years of experience developing and coordinating policies, processes and systems related to the assessment of risk and operational surveillance for organizations involved in the international movement of goods or people.	
M4	A minimum of two years of experience in the development of data acquisition strategies and statement of requirements.	

8.2 POINT RATED CRITERIA – BUSINESS ARCHITECT – LEVEL 3

BUSINESS ARCHITECT – LEVEL 3			
Name of proposed Resource: _____			
The Bidder SHOULD demonstrate that the proposed resource has:			
#	Rated Criteria	Score / Points Max	Demonstrated experience (Bidders to insert d
R1	Experience developing specifications, presentations and use cases involving a 24 hours per day, 7 days per week operational mandate, with a dollar value in excess of a \$100 million budget that involved 2 or more stakeholders who are responsible for the movement of goods or people. 1 project = 5 points 2 or more projects = 10 points	10	
R2	Experience assessing business needs and translating requirements into system functional specifications. 0 to 10 years = 0 point 10+ years to 12 years = 2 points 12+ years to 15 years = 5 points 15+ years = 10 points	10	
R3	Experience documenting business processes using IBM WebSphere Business Process Model Notation (BPMN). 0 to 1 year = 0 point 1+ years to 3 years = 2 points 3+ years to 5 years = 5 points 5+ years = 10 points	10	
R4	Experience over and above the minimum five years of experience identified in mandatory requirement M3. 0 to 5 years = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points	10	
MAX. AVAILABLE POINTS		40	
MIN. POINTS REQUIRED		26	
POINTS ACHIEVED			
Note: Bids that do not meet the above minimum points require will be found non-responsive.			

9. BUSINESS TRANSFORMATION ARCHITECT – LEVEL 3

9.1 MANDATORY REQUIREMENTS – BUSINESS TRANSFORMATION ARCHITECT – LEVEL 3

BUSINESS TRANSFORMATION ARCHITECT – LEVEL 3		
Name of proposed Resource: _____		
The Bidder MUST demonstrate that the proposed resource has:		
Criteria	Mandatory Requirements	Bidder's Response
		Demonstrated experience (Bidders to insert data)
M1	A minimum of ten years of experience analysing and developing architecture requirements design, process development, and process mapping.	
M2	A minimum of one project analysing and developing architecture requirements design, process development, and process mapping on an IM/IT project involving a 24 hours per day, 7 days per week operational mandate, with a dollar value in excess of a \$100 million budget, that involved 2 or more stakeholders.	
M3	A minimum of two years of experience in the development of data acquisition strategies or statement of requirements.	
M4	A minimum of four years of experience defining and negotiating business and program requirements with personnel in headquarters, and personnel in one of: A) regional offices in Canada; or B) International offices	

9.2 POINT RATED CRITERIA – BUSINESS TRANSFORMATION ARCHITECT

BUSINESS TRANSFORMATION ARCHITECT – LEVEL 3			
Name of proposed Resource: _____			
The Bidder SHOULD demonstrate that the proposed resource has:			
#	Rated Criteria	Score/ Points MAX	Demonstrated experience (Bidders to insert d
R1	Experience analysing and developing architecture requirements design, process development, and process mapping involving a 24 hours per day, 7 days per week operational mandate, with a dollar value in excess of a \$100 million budget that involved 2 or more stakeholders who are responsible for the movement of goods or people across international borders.	10	

BUSINESS TRANSFORMATION ARCHITECT – LEVEL 3			
Name of proposed Resource: _____			
The Bidder SHOULD demonstrate that the proposed resource has:			
#	Rated Criteria	Score/ Points MAX	Demonstrated experience (Bidders to insert d
	1 project = 5 points 2 or more projects = 10 points		
R2	Experience on initiatives involving collaboration or liaison with federal government departments or agencies or liaise with foreign government representatives. 0 to 1 year = 0 point 1+ year to 3 years = 2 points 3+ years to 5 years = 5 points	5	
R3	Experience working with World Customs Organization frameworks or agreements (including but not limited to nomenclature, enforcement and compliance, and procedures and facilitation). 0 to 1 year = 0 point 1+ year = 10 points	10	
MAX. AVAILABLE POINTS		25	
MIN. POINTS REQUIRED		16	
POINTS ACHIEVED			
Note: Bids that do not meet the above minimum points require will be found non-responsive.			

10. BUSINESS SYSTEMS ANALYST, WEB PORTALS – LEVEL 3

10.1 MANDATORY REQUIREMENTS – BUSINESS SYSTEM ANALYST - WEB PORTAL – LEVEL 3

BUSINESS SYSTEM ANALYST - WEB PORTAL – LEVEL 3		
Name of proposed Resource: _____		
The Bidder MUST demonstrate that the proposed resource has:		
Criteria	Mandatory Requirements	Bidder's Response
		Demonstrated experience (Bidders to insert data)
M1	A minimum of ten years of experience developing and documenting detailed statement of requirements and performing business analyses of functional requirements.	
M2	A minimum of one project developing and documenting detailed statement of requirements and performing business	

BUSINESS SYSTEM ANALYST - WEB PORTAL – LEVEL 3		
Name of proposed Resource: _____		
The Bidder MUST demonstrate that the proposed resource has:		
Criteria	Mandatory Requirements	Bidder's Response
		Demonstrated experience (Bidders to insert data)
	analyses of functional requirements on an IM/IT involving a 24 hours per day, 7 days per week operational mandate, with a dollar value in excess of a \$100 million budget that involved 2 or more stakeholders.	
M3	A minimum of five years of experience in analyzing, evaluating and developing business processes for eServices web portals servicing businesses in Large-Scale* environments. *Large-Scale is defined as an organization with over 10,000 employees.	

10.2 POINT RATED CRITERIA – BUSINESS SYSTEM ANALYST - WEB PORTAL – LEVEL 3

BUSINESS SYSTEM ANALYST - WEB PORTAL – LEVEL 3			
Name of proposed Resource: _____			
The Bidder SHOULD demonstrate that the proposed resource has:			
#	Rated Criteria	Score / Points MAX (MIN.)	Demonstrated experience (Bidders to insert d
R1	Experience over and above the minimum ten years of experience identified in mandatory requirement M1. 0 to 10 year = 0 point 10+ years to 12 years = 2 points 12+ years to 15 years = 5 points 15+ years = 10 points	10	
R2	Experience over and above the minimum five years of experience identified in mandatory requirement M3. 0 to 5 years = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points	10	

BUSINESS SYSTEM ANALYST - WEB PORTAL – LEVEL 3			
Name of proposed Resource: _____			
The Bidder SHOULD demonstrate that the proposed resource has:			
#	Rated Criteria	Score / Points MAX (MIN.)	Demonstrated experience (Bidders to insert d
3	<p>Experience designing and documenting business requirements and detailed specifications associated with risk assessment as it relates to movement of commercial goods across international borders.</p> <p>Reference projects must be a minimum of 12 months in duration to be awarded points.</p> <p>1 project = 3 points 2 projects = 5 points 3 or more projects = 7 points</p>	7	
R4	<p>Experience developing business number registrations or identification systems.</p> <p>0 to 5 years = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points</p>	10	
R5	<p>Experience liaising with stakeholders from other government agencies or private sector organizations.</p> <p>0 to 5 years = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points</p>	10	
R6	<p>Experience designing and documenting business requirements and detailed specifications in a project that incorporates the use of World Customs Organization standards.</p> <p>0 to 6 months = 0 point 6+ months = 10 points</p>	10	
R7	<p>Experience providing expert advice regarding both supply chain logistics business processes and the technical details of electronically transmitted commercial trade data.</p> <p>0 to 1 year = 0 point 1+ year to 2 years = 2 points 2+ year to 3 years = 5 points 3+ years = 10 points</p>	10	

BUSINESS SYSTEM ANALYST - WEB PORTAL – LEVEL 3			
Name of proposed Resource: _____			
The Bidder SHOULD demonstrate that the proposed resource has:			
#	Rated Criteria	Score / Points MAX (MIN.)	Demonstrated experience (Bidders to insert d
MAX. AVAILABLE POINTS		67	
MIN. POINTS REQUIRED		44	
POINTS ACHIEVED			
Note: Bids that do not meet the above minimum points require will be found non-responsive.			

11. BUSINESS SYSTEMS ANALYST, ELECTRONIC DATA INTERCHANGE (EDI) – LEVEL 3

11.1 MANDATORY REQUIREMENTS – BUSINESS SYSTEM ANALYST (EDI) – LEVEL 3

BUSINESS SYSTEM ANALYST (EDI) – LEVEL 3		
Name of proposed Resource: _____		
The Bidder MUST demonstrate that the proposed resource has:		
Criteria	Mandatory Requirements	Bidder's Response
		Demonstrated experience (Bidders to insert data)
M1	A minimum of ten years of experience developing and documenting statement of requirements and performing business analyses of functional requirements for IM/IT initiatives.	
M2	A minimum of one project developing and documenting statement of requirements and performing business analyses of functional requirements on an IM/IT project involving a24 hours per day, 7 days per week operational mandate, with a dollar value in excess of a \$100 million budget, that involved 2 or more stakeholders.	
M3	A minimum of five years of experience in analyzing, evaluating and developing business processes for web applications in Large-Scale* environments for organizations involved in the international movement of goods or people. *Large-Scale is defined as an organization with over 10,000 employees.	

BUSINESS SYSTEM ANALYST (EDI) – LEVEL 3		
Name of proposed Resource: _____		
The Bidder MUST demonstrate that the proposed resource has:		
Criteria	Mandatory Requirements	Bidder's Response
		Demonstrated experience (Bidders to insert data)
M4	A minimum one year experience in developing automated risk assessment systems.	
M5	A minimum of one year of experience mapping ANSI-X12 and EDIFACT/GOVCBR inbound and outbound standards to the World Customs Organization V 3.3 data model.	

11.2 POINT RATED REQUIREMENTS – BUSINESS SYSTEM ANALYST (EDI) – LEVEL 3

BUSINESS SYSTEM ANALYST (EDI) – LEVEL 3			
Name of proposed Resource: _____			
The Bidder SHOULD demonstrate that the proposed resource has:			
#	Rated Criteria	Score / Points MAX (MIN.)	Demonstrated experience (Bidders to insert d
R1	Experience modeling electronic transactions for cross-border trade. 0 to 1 year = 0 point 1+ year to 2 years = 2 points 2+ year to 3 years = 5 points 3+ years = 10 points	10	
R2	Experience providing expert advice regarding both supply chain logistics business processes and the technical details of electronically transmitted commercial trade data. 0 to 1 year = 0 point 1+ year to 2 years = 2 points 2+ year to 3 years = 5 points 3+ years = 10 points	10	
R3	Experience working on systems development projects, modeling business processes and documenting business requirements in business application IT projects.	10	

BUSINESS SYSTEM ANALYST (EDI) – LEVEL 3

Name of proposed Resource: _____

The Bidder SHOULD demonstrate that the proposed resource has:

#	Rated Criteria	Score / Points MAX (MIN.)	Demonstrated experience (Bidders to insert d
	0 to 5 years = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points		
R4	Experience developing automated risk assessment methodologies and implementing them within case and workflow systems. 0 to 5 years = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points	10	
R5	Experience documenting reporting requirements to support operational needs senior management reporting and performance measurement criteria. 0 to 5 years = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points	10	
R6	Experience over and above the minimum one year of experience identified in mandatory requirement M5. 0 to 1 year = 0 point 1+ year to 2 years = 5 points 2+ years = 10 points	10	
R7	Experience developing and documenting statement of requirements and performing business analyses of functional requirements on an IM/IT project involving a 24 hours per day, 7 days per week operational mandate, with a dollar value in excess of a \$100 million budget that involved 2 or more stakeholders who are responsible for the movement of goods or people. 1 project = 3 points 2 or more projects = 5 points	5	

BUSINESS SYSTEM ANALYST (EDI) – LEVEL 3			
Name of proposed Resource: _____			
The Bidder SHOULD demonstrate that the proposed resource has:			
#	Rated Criteria	Score / Points MAX (MIN.)	Demonstrated experience (Bidders to insert d
	MAX. AVAILABLE POINTS	65	
	MIN. POINTS REQUIRED	43	
	POINTS ACHIEVED		
Note: Bids that do not meet the above minimum points require will be found non-responsive.			

12. BUSINESS CONSULTANT – LEVEL 3

12.1 MANDATORY REQUIREMENTS – BUSINESS CONSULTANT – LEVEL 3

BUSINESS CONSULTANT – LEVEL 3		
Name of proposed Resource: _____		
The Bidder MUST demonstrate that the proposed resource has:		
Criteria	Mandatory Requirements	Bidder's Response
		Demonstrated experience (Bidders to insert data)
M1	A minimum of one project managing business requirements by translating business objectives into systems requirements on an IM/IT project involving a24 hours per day, 7 days per week operational mandate, with a dollar value in excess of a \$100 million budget, that involved 2 or more stakeholders.	
M2	A minimum of ten years of experience providing business consulting services to support business improvements and information technology initiatives.	
M3	A minimum of two years of experience defining requirements and business processes and managing issues and risks related to the implementation of software applications for organizations involved in the international movement of goods or people.	

12.2 POINT RATED CRITERIA – BUSINESS CONSULTANT – LEVEL 3

BUSINESS CONSULTANT – LEVEL 3

Name of proposed Resource: _____

The Bidder SHOULD demonstrate that the proposed resource has:

#	Rated Criteria	Score / Points MAX	Demonstrated experience (Bidders to insert d
R1	<p>Experience conceiving, gathering requirements, documenting and leading the implementation of web portals.</p> <p>0 to 2 years = 0 point 2+ years to 3 years = 2 points 3+ years to 5 years = 5 points 5+ years = 10 points</p>	10	
R2	<p>Experience defining requirements and business processes and managing issues and risks related to the implementation of software applications in support of commercial risk assessment for projects involving the movement of goods across borders.</p> <p>0 to 2 years = 0 point 2+ years to 3 years = 2 points 3+ years to 5 years = 5 points 5+ years = 10 points</p>	10	
R3	<p>Experience coordinating IT security functions, including threat and risk assessments and statements of sensitivity.</p> <p>0 to 2 years = 0 point 2+ years to 3 years = 2 points 3+ years to 5 years = 5 points 5+ years = 10 points</p>	10	
R4	<p>Experience on projects requiring the development and review of testing strategies and approaches for portals and web-based information systems supporting both internal and external users.</p> <p>0 to 2 year = 0 point 2+ years to 3 years = 2 points 3+ years to 5 years = 5 points 5+ years = 10 points</p>	10	
R5	<p>Experience in the identification and design of service level objectives (SLO) for operations in a 24 hours per day, 7 days per week work environment.</p> <p>0 to 1 year = 0 point 1+ year to 2 years = 5 points 2+ years = 10 points</p>	10	

R6	Experience working with World Customs Organization frameworks or agreements (including, but not limited to nomenclature, enforcement and compliance, and procedures and facilitation). 0 to 1 year = 0 point 1+ year of experience = 10 points	10	
R7	A valid Business Analyst Professional (CBAP) designation. To obtain points a valid copy of the designation is to be included with the bid No valid designation = 0 point Valid Business Analyst Professional Designation = 5 points.	5	
MAX. AVAILABLE POINTS		65	
MIN. POINTS REQUIRED		43	
POINTS ACHIEVED			
Note: Bids that do not meet the above minimum points require will be found non-responsive.			

13. TEST COORDINATOR – LEVEL 3

13.1 MANDATORY REQUIREMENTS – TEST COORDINATOR - LEVEL 3

TEST COORDINATOR - LEVEL 3		
Name of proposed Resource: _____		
The Bidder MUST demonstrate that the proposed resource has:		
Criteria	Mandatory Requirements	Bidder's Response
		Demonstrated experience (Bidders to insert data)
M1	A minimum of ten years of experience overseeing and managing the testing and deployment of a nationally distributed system.	
M2	A minimum of one project developing and executing systems integration tests, specialized tests, and user acceptance testing on an IM/IT project involving a 24 hours per day, 7 days per week operational mandate, with a dollar value in excess of a \$100 million budget, that involved 2 or more stakeholders.	
M3	A minimum of five years of experience overseeing the scoping and implementation of testing and integration planning for a	

TEST COORDINATOR - LEVEL 3		
Name of proposed Resource: _____		
The Bidder MUST demonstrate that the proposed resource has:		
Criteria	Mandatory Requirements	Bidder's Response
		Demonstrated experience (Bidders to insert data)
	nationally distributed system.	

13.2 POINT RATED CRITERIA – TEST COORDINATOR - LEVEL 3

TEST COORDINATOR - LEVEL 3			
Name of proposed Resource: _____			
The Bidder SHOULD demonstrate that the propose resource has:			
#	Rated Criteria	Score/ Points MAX	Demonstrated experience (Bidders to insert d
R1	Experience with managing and overseeing the testing, integration and deployment of systems used nationally. 0 to 1 year = 0 point 1+ year to 3 years = 2 points 3+ years to 5 years = 5 points 5+ years = 10 points	10	
R2	Experience defining and developing test cases and test strategies for application architectures for high availability IM/ IT environments (operating 24 hours per day, 7 days per week). 0 to 1 year = 0 point 1+ year to 3 years = 2 points 3+ years to 5 years = 5 points 5+ years = 10 points	10	
R3	Experience with automated testing tools and test processes for IM/IT environments (operating 24 hours per day, 7 days per week). 0 to 1 year = 0 point 1+ year to 3 years = 2 points 3+ years to 5 years = 5 points 5+ years = 10 points	10	
R4	Experience overseeing the testing and implementation of systems that comply with the standards of the World Customs Organization.	5	

TEST COORDINATOR - LEVEL 3			
Name of proposed Resource: _____			
The Bidder SHOULD demonstrate that the propose resource has:			
#	Rated Criteria	Score/ Points MAX	Demonstrated experience (Bidders to insert d
	0 to 2 year = 0 point 2+ years to 3 years = 2 points 3+ years to 4 years = 3 points 4+ years = 5 points		
MAX. AVAILABLE POINTS		35	
MIN. POINTS REQUIRED		23	
POINTS ACHIEVED			
Note: Bids that do not meet the above minimum points require will be found non-responsive.			

Glossary of Terms

- **IM/IT Project** - A project is a defined undertaking with a beginning and an end to be executed to create a unique product or result.

Business Projects - IT-Enabled are either:

- New solution projects which develop new solutions to achieve efficient and effective business processes and service delivery that are facilitated by Information Technology; some of these projects may transform business practices.
 - Maintenance projects which implement changes to existing products, results, services, applications or systems.
 - Business Process - A business process is a collection of linked tasks which find their end in the delivery of a service or product to a client. A business process has also been defined as a set of activities and tasks that, once completed, will accomplish an organizational goal
- **Gated Process** - A phase-gate model, also referred to as a phase-gate process, is a project management technique in which an initiative or project (e.g., new product development, process improvement, business change) is divided into stages or phases, separated by gates for a decision making stage
 - **Risk Assessment** - Risk assessment includes both the identification of potential risk and the evaluation of the potential impact of the risk
managing risks on projects is a process that includes risk assessment and a mitigation strategy for those risks.
 - **Large-Scale Work Environment** - defined as an organization with over 10,000 employees
 - **Systems**
 - ACROSS - Accelerated Commercial Release Operations Support System
 - TITAN - An automated risk assessment tool used to screen marine commercial shipments
 - CMRS - Consolidated Management Reporting System

- RAUS – Risk Assessment User Services
- RAPM – Risk Assessment Program Maintenance
- SWI – Single Window Initiative
- **EManifest** - eManifest is modernizing and improving cross-border commercial processes and, when fully implemented, will require all carriers, freight forwarders and importers to send advance commercial information electronically to the CBSA.

The eManifest Project is managed by the Commercial Projects Directorate of the Information, Science and Technology Branch, in close collaboration with the Programs and Operations Branches.

- **World Customs Organization** - Independent intergovernmental body whose mission is to improve the administration of customs
 - **Safe Framework** - Framework set out by the World Customs Organization, http://www.wcoomd.org/en/topics/facilitation/instrument-and-tools/tools/safe_package.aspx
 - **Data Model** - Data modeling is often the first step in database design and object-oriented programming as the designers first create a conceptual model of how data items relate to each other. Data modeling involves a progression from conceptual model to logical model to physical schema.
 - **Relational data model** - the primary data model, which is used for data storage and processing.
 - **Dimensional data model** – is a design technique for databases intended to support end-user queries in a data warehouse.
 - **Business Intelligence** - the applications, infrastructure and tools, and best practices that enable access to and analysis of information to improve and optimize decisions and performance.
- Hands-on experience** – active participation in the operation, as distinguished from mere observation or study.

**ATTACHMENT 4.3
PRICING SCHEDULE**

FOR THE INITIAL CONTRACT PERIOD (2 YEARS)		
Category of Personnel	Level	Firm Per Diem Rate
Project Executive	3	
Project Manager – Business Intelligence (BI)	3	
Project Manager – Project Management Office (PMO) and Financial	3	
Project Manager - Generic	3	
Business Process Re-Engineering Consultant	3	
IM Architect – Data Warehouse	3	
IM Architect – Analytics	3	
Application/Software Architect	3	
Business Architect	3	
Business Transformation Architect	3	
Business System Analyst – Web Portals	3	
Business System Analyst – Electronic Data Interchange (EDI)	3	
Business System Analyst - Generic	3	
Test Coordinator	3	
Change Management Consultant	3	
Business Consultant	3	
Project Scheduler	3	
Business Analyst	3	

FOR THE OPTION YEAR 1 (1 YEAR)		
Category of Personnel	Level	Firm Per Diem Rate
Project Executive	3	
Project Manager – Business Intelligence (BI)	3	
Project Manager – Project Management Office (PMO) and Financial	3	
Project Manager - Generic	3	
Business Process Re-Engineering Consultant	3	
IM Architect – Data Warehouse	3	
IM Architect – Analytics	3	
Application/Software Architect	3	
Business Architect	3	
Business Transformation Architect	3	
Business System Analyst – Web Portals	3	
Business System Analyst – Electronic Data Interchange	3	
Business System Analyst - Generic	3	
Test Coordinator	3	
Change Management Consultant	3	
Business Consultant	3	
Project Scheduler	3	
Business Analyst	3	

PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

Bidders must provide the required certifications and additional information to be awarded a contract.

The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Unless stated otherwise, Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.

The Contracting Authority will have the right to ask for additional information to verify Bidder's certifications. Failure to comply and to cooperate with any request or requirement imposed by the Contracting Authority will render the bid non-responsive or constitute a default under the Contract.

5.1 Certifications Precedent to Contract Award and Additional Information

The certifications and additional information listed below should be submitted with the bid, but may be submitted afterwards. If any of these required certifications or additional information is not completed and submitted as requested, the Contracting Authority will inform the Bidder of a time frame within which to provide the information. Failure to provide the certifications or the additional information listed below within the time frame provided will render the bid non-responsive.

(a) Federal Contractors Program for Employment Equity - Bid Certification

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "[FCP Limited Eligibility to Bid](http://www.labour.gc.ca/eng/standards_equity/eq/emp/fcp/list/inelig.shtml)" list (http://www.labour.gc.ca/eng/standards_equity/eq/emp/fcp/list/inelig.shtml) available from Employment and Social Development Canada (ESDC) - Labour's website.

Canada will have the right to declare a bid non-responsive if the Bidder, or any member of the Bidder if the Bidder is a Joint Venture, appears on the "[FCP Limited Eligibility to Bid](#)" list at the time of contract award.

Canada will also have the right to terminate the Contract for default if a Contractor, or any member of the Contractor if the Contractor is a Joint Venture, appears on the "[FCP Limited Eligibility to Bid](#)" list during the period of the Contract.

The Bidder must provide the Contracting Authority with a completed Attachment 5.1, Federal Contractors Program for Employment Equity - Certification, before contract award. If the Bidder is a Joint Venture, the Bidder must provide the Contracting Authority with a completed Attachment Federal Contractors Program for Employment Equity - Certification, for each member of the Joint Venture.

(b) Professional Services Resources

By submitting a bid, the Bidder certifies that, if it is awarded a contract as a result of the bid solicitation, every individual proposed in its bid will be available to perform the Work as required by Canada's representatives and at the time specified in the bid solicitation or agreed to with Canada's representatives.

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

- (ii) If a Bidder has proposed any individual who is not an employee of the Bidder, by submitting a bid, the Bidder certifies that it has the permission from that individual to propose his/her services in relation to the Work to be performed and to submit his/her résumé to Canada. The Bidder must, upon request from the Contracting Authority, provide a written confirmation, signed by the individual, of the permission given to the Bidder and of his/her availability. Failure to comply with the request may result in the bid being declared non-responsive.

(c) Submission of Only One Bid

By submitting a bid, the Bidder is certifying that it does not consider itself to be related to any other bidder.

ATTACHMENT 5.1

FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY - CERTIFICATION

I, the Bidder, by submitting the present information to the Contracting Authority, certify that the information provided is true as of the date indicated below. The certifications provided to Canada are subject to verification at all times. I understand that Canada will declare a bid non-responsive, or will declare a contractor in default, if a certification is found to be untrue, whether during the bid evaluation period or during the contract period. Canada will have the right to ask for additional information to verify the Bidder's certifications. Failure to comply with any request or requirement imposed by Canada may render the bid non-responsive or constitute a default under the Contract.

For further information on the Federal Contractors Program for Employment Equity visit [Employment and Social Development Canada \(ESDC\) - Labour's website](#).

Date: _____ (YYYY/MM/DD) (If left blank, the date will be deemed to be the bid solicitation closing date.)

Complete both A and B.

A. Check only one of the following:

- A1. The Bidder certifies having no work force in Canada.
- A2. The Bidder certifies being a public sector employer.
- A3. The Bidder certifies being a federally regulated employer being subject to the [Employment Equity Act](#).
- A4. The Bidder certifies having a combined work force in Canada of less than 100 employees (combined work force includes: permanent full-time, permanent part-time and temporary employees [temporary employees only includes those who have worked 12 weeks or more during a calendar year and who are not full-time students]).
- A5. The Bidder has a combined workforce in Canada of 100 or more employees; and
 - A5.1 The Bidder certifies already having a valid and current [Agreement to Implement Employment Equity \(AIEE\)](#) in place with ESDC-Labour.

OR

- A5.2 The Bidder certifies having submitted the Agreement to Implement Employment Equity (LAB1168) to ESDC-Labour. As this is a condition to contract award, proceed to completing the form Agreement to Implement Employment Equity (LAB1168), duly signing it, and transmit it to ESDC-Labour.

B. Check only one of the following:

- B1. The Bidder is not a Joint Venture.

OR

- B2. The Bidder is a Joint venture and each member of the Joint Venture must provide the Contracting Authority with a completed annex Federal Contractors Program for Employment Equity - Certification. (Refer to the Joint Venture section of the Standard Instructions).

PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS

6.1 Security Requirement

- (a) Before award of a contract, the following conditions must be met:
 - (i) the Bidder must hold a valid organization security clearance as indicated in Part 7 - Resulting Contract Clauses;
- (b) Bidders are reminded to obtain the required security clearance promptly. Any delay in the award of a contract to allow the successful bidder to obtain the required clearance will be at the entire discretion of the Contracting Authority.
- (c) For additional information on security requirements, bidders should refer to the Canadian Industrial Security Directorate (CISD), Industrial Security Program of Public Works and Government Services Canada (<http://ssi-iss.tpsgc-pwgsc.gc.ca/index-eng.html>) website.
- (d) In the case of a joint venture Bidder, each member of the joint venture must meet the security requirements.

6.2 Financial Capability

- (a) SACC Manual clause A9033T (2012-07-16) Financial Capability applies, except that subsection 3 is deleted and replaced with the following: "If the Bidder is a subsidiary of another company, then any financial information required by the Contracting Authority in 1(a) to (f) must be provided by each level of parent company, up to and including the ultimate parent company. The financial information of a parent company does not satisfy the requirement for the provision of the financial information of the Bidder; however, if the Bidder is a subsidiary of a company and, in the normal course of business, the required financial information is not generated separately for the subsidiary, the financial information of the parent company must be provided. If Canada determines that the Bidder is not financially capable but the parent company is, or if Canada is unable to perform a separate assessment of the Bidder's financial capability because its financial information has been combined with its parent's, Canada may, in its sole discretion, award the contract to the Bidder on the condition that the parent company grant a performance guarantee to Canada."
- (b) In the case of a joint venture bidder, each member of the joint venture must meet the financial capability requirements.

PART 7 - RESULTING CONTRACT CLAUSES

The following clauses apply to and form part of any contract resulting from the bid solicitation.

7.1 Requirement

- (a) _____ (the "**Contractor**") agrees to supply to the Client the services described in the Contract, including the Statement of Work, in accordance with, and at the prices set out in, the Contract. This includes providing professional services as and when requested by Canada, to one or more locations to be designated by Canada, excluding any locations in areas subject to any of the Comprehensive Land Claims Agreements.
- (b) **Client:** Under the Contract, the "**Client**" is the Canada Border Services Agency (CBSA).
- (c) **Reorganization of Client:** The Contractor's obligation to perform the Work will not be affected by (and no additional fees will be payable as a result of) the renaming, reorganization, reconfiguration, or restructuring of any Client. The reorganization, reconfiguration and restructuring of the Client includes the privatization of the Client, its merger with another entity, or its dissolution, where that dissolution is followed by the creation of another entity or entities with mandates similar to the original Client. In connection with any form of reorganization, Canada may designate another department or government body as the Contracting Authority or Technical Authority, as required to reflect the new roles and responsibilities associated with the reorganization.
- (d) **Defined Terms:** Words and expressions defined in the General Conditions or Supplemental General Conditions and used in the Contract have the meanings given to them in the General Conditions or Supplemental General Conditions. Any reference to an Identified User in the Supply Arrangement is a reference to the Client. Also, any reference to a "deliverable" or "deliverables" includes all documentation outlined in this Contract. A reference to a "local office" of the Contractor means an office having at least one full time employee that is not a shared resource working at that location.

7.2 Task Authorization

- (a) **As-and-when-requested Task Authorizations:** The Work to be performed under the Contract will be on an "as and when requested basis" using a Task Authorization (TA). The Work described in the TA must be in accordance with the scope of the Contract. The Contractor must not commence work until a validly issued TA has been issued by Canada and received by the Contractor. The Contractor acknowledges that any work performed before such issuance and receipt will be done at the Contractor's own risk.
- (b) **Assessment of Resources Proposed at TA Stage:** Processes for issuing, responding to and assessing Task Authorizations are further detailed in Appendices A, B and C of Annex B.
- (c) **Form and Content of draft Task Authorization:**
 - (i) The Technical Authority will provide the Contractor with a description of the task in a draft Task Authorization using the form specified in Annex B.
 - (ii) The draft Task Authorization will contain the details of the activities to be performed, and must also contain the following information:
 - (A) the task number;
 - (B) The date by which the Contractor's response must be received (which will appear in the draft Task Authorization, but not the issued Task Authorization);
 - (C) the details of any financial coding to be used;
 - (D) the categories of resources and the number required;

- (E) a description of the work for the task outlining the activities to be performed and identifying any deliverables (such as reports);
 - (F) the start and completion dates;
 - (G) milestone dates for deliverables and payments (if applicable);
 - (H) the number of person-days of effort required;
 - (I) whether the work requires on-site activities and the location;
 - (J) the language profile of the resources required;
 - (K) the level of security clearance required of resources;
 - (L) the price payable to the Contractor for performing the task, with an indication of whether it is a firm price or a maximum TA price (and, for maximum price task authorizations, the TA must indicate how the final amount payable will be determined; where the TA does not indicate how the final amount payable will be determined, the amount payable is the amount, up to the maximum, that the Contractor demonstrates was actually worked on the project, by submitting time sheets filled in at the time of the work by the individual resources to support the charges); and
 - (M) any other constraints that might affect the completion of the task.
- (d) **Contractor's Response to Draft Task Authorization:** The Contractor must provide to the Technical Authority, within 5 working days of receiving the draft Task Authorization (or within any longer time period specified in the draft TA), the proposed total price for performing the task and a breakdown of that cost, established in accordance with the Basis of Payment specified in the Contract. The Contractor's quotation must be based on the rates set out in the Contract. The Contractor will not be paid for preparing or providing its response or for providing other information required to prepare and validly issue the TA.
- (e) **Task Authorization Limit and Authorities for Validly Issuing Task Authorizations:**
- (i) To be validly issued, a TA must include the following signatures:
 - (A) for any TA, inclusive of revisions, with a value less than or equal to \$300,000.00 (including Applicable Taxes), the TA must be signed by:
 - (1) the Technical Authority
 - (B) for any TA, inclusive of revisions, with a value greater than this amount, a TA must include the following signatures:
 - (1) the Technical Authority; and
 - (2) the Contracting Authority.
- Any TA that does not bear the appropriate signatures is not validly issued by Canada. Any work performed by the Contractor without receiving a validly issued TA is done at the Contractor's own risk. If the Contractor receives a TA that is not appropriately signed, the Contractor must notify the Contracting Authority. By providing written notice to the Contractor, the Contracting Authority may suspend the Client's ability to issue TA's at any time, or reduce the dollar value threshold described in subarticle (A) above; any suspension or reduction notice is effective upon receipt.
- (f) **Periodic Usage Reports:**
- (i) The Contractor must compile and maintain records on its provision of services to the federal government under Task Authorizations validly issued under the Contract. The Contractor must provide this data to Canada in accordance with the reporting requirements detailed below. If some data is not available, the reason must be indicated. If services are not provided during a given period, the Contractor must still provide a

"NIL" report. The data must be submitted on a quarterly basis to the Contracting Authority. From time to time, the Contracting Authority may also require an interim report during a reporting period.

(ii) The quarterly periods are defined as follows:

- (A) 1st quarter: April 1 to June 30;
- (B) 2nd quarter: July 1 to September 30;
- (C) 3rd quarter: October 1 to December 31; and
- (D) 4th quarter: January 1 to March 31.

The data must be submitted to the Contracting Authority no later than 10 calendar days after the end of the reporting period.

(iii) Each report must contain the following information for each validly issued TA (as amended):

- (A) the Task Authorization number and the Task Authorization Revision number(s), if applicable;
- (B) a title or a brief description of each authorized task;
- (C) the name, Resource category and level of each resource involved in performing the TA, as applicable;
- (D) the total estimated cost specified in the validly issued TA of each task, exclusive of Applicable Taxes;
- (E) the total amount, exclusive of Applicable Taxes, expended to date against each authorized task;
- (F) the start and completion date for each authorized task; and
- (G) the active status of each authorized task, as applicable (e.g., indicate whether work is in progress or if Canada has cancelled or suspended the TA, etc.).

(iv) Each report must also contain the following cumulative information for all the validly issued TA's (as amended):

- (A) the amount, exclusive of Applicable Taxes, specified in the Contract (as last amended, as applicable) as Canada's total liability to the Contractor for all validly issued TA's; and
- (B) the total amount, exclusive of Applicable Taxes, expended to date against all validly issued TA's.

(g) **Consolidation of TA's for Administrative Purposes:** The Contract may be amended from time to time to reflect all validly issued Task Authorizations to date, to document the Work performed under those TA's for administrative purposes.

7.3 Minimum Work Guarantee

(a) In this clause,

- (i) **"Maximum Contract Value"** means the amount specified in the **"Limitation of Expenditure"** clause set out in the Contract (excluding Applicable Taxes); and
- (ii) **"Minimum Contract Value"** means 3% of the Maximum Contract Value on the date the contract is first issued.

(b) Canada's obligation under the Contract is to request Work in the amount of the Minimum Contract Value or, at Canada's option, to pay the Contractor at the end of the Contract in accordance with subarticle (c), subject to subarticle (d). In consideration of such obligation, the Contractor agrees to stand in readiness throughout the Contract Period to perform the Work described in the

- Contract. Canada's maximum liability for work performed under the Contract must not exceed the Maximum Contract Value, unless an increase is authorized in writing by the Contracting Authority.
- (c) In the event that Canada does not request work in the amount of the Minimum Contract Value during the Contract Period, Canada must pay the Contractor the difference between the Minimum Contract Value and the total cost of the Work requested.
- (d) Canada will have no obligation to the Contractor under this article if Canada terminates the entire Contract
- (i) for default;
 - (ii) for convenience as a result of any decision or recommendation of a tribunal or court that the contract be cancelled, re-tendered or awarded to another supplier; or
 - (iii) for convenience within thirty business days of Contract award.

7.4 Standard Clauses and Conditions

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

(a) **General Conditions:**

- (i) 2035 (2015-07-03), General Conditions - Higher Complexity - Services, apply to and form part of the Contract.

With respect to Section 30 - Termination for Convenience, of General Conditions 2035, Subsection 04 is deleted and replaced with the following Subsections 04, 05 and 06:

4. The total of the amounts, to which the Contractor is entitled to be paid under this section, together with any amounts paid, due or becoming due to the Contractor must not exceed the Contract Price.
5. Where the Contracting Authority terminates the entire Contract and the Articles of Agreement include a Minimum Work Guarantee, the total amount to be paid to the Contractor under the Contract will not exceed the greater of:
 - (a) the total amount the Contractor may be paid under this section, together with any amounts paid, becoming due other than payable under the Minimum Revenue Guarantee, or due to the Contractor as of the date of termination, or
 - (b) the amount payable under the Minimum Work Guarantee, less any amounts paid, due or otherwise becoming due to the Contractor as of the date of termination.
6. The Contractor will have no claim for damages, compensation, loss of profit, allowance arising out of any termination notice given by Canada under this section except to the extent that this section expressly provides. The Contractor agrees to repay immediately to Canada the portion of any advance payment that is unliquidated at the date of the termination.

(b) **Supplemental General Conditions:**

The following Supplemental General Conditions:

- (i) 4002 (2010-08-16), Supplemental General Conditions - Software Development or modification Services;
- (ii) 4006 (2010-08-16), Supplemental General Conditions - Contractor to Own Intellectual Property Rights in Foreground Information;

apply to and form part of the Contract.

7.5 Security Requirement

- (a) The Contractor must, at all times during the performance of the Contract, hold a valid Facility Security Clearance at the level of SECRET, issued by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC).
- (b) The Contractor personnel requiring access to PROTECTED/CLASSIFIED information, assets or sensitive work site(s) must EACH hold a valid personnel security screening at the level of **RELIABILITY STATUS, CONFIDENTIAL** or **SECRET** as required, granted or approved by CISD/PWGSC.
- (c) The Contractor **MUST NOT** remove any PROTECTED/CLASSIFIED information from the identified work site(s), and the Contractor must ensure that its personnel are made aware of and comply with this restriction.
- (d) Subcontracts which contain security requirements are **NOT** to be awarded without the prior written permission of CISD/PWGSC.
- (e) The Contractor must comply with the provisions of the:
 - (i) Security Requirements Check List and security guide (if applicable), attached at Annex D;
 - (ii) *Industrial Security Manual* (Latest Edition).
- (f) **ADDITIONAL SECURITY REQUIREMENT:** The Canada Border Services Agency will conduct its own personnel Reliability Status assessment on the recommended Contractor and its personnel as per the Treasury Board Secretariat of Canada's (TBS) "Security and Contracting Management Standard" and the Policy on Government Security – Personnel Security Standard, irrespective of whether such assessment has already been conducted under any such policies. The Reliability Status assessment conducted by the CBSA will include a credit check performed by an authorized security official with the CBSA's "Personnel Security Screening Section" (PSSS), which is independent of the Public Works and Government Services Canada's (PWGSC), "Canadian Industrial Security Directorate" (CISD) and the "International Industrial Security Directorate" (IISD).
- (g) For each proposed resource, the recommended Contractor must submit a completed signed original TBS 330-23 Form – Personnel Screening Consent and Authorization (<http://www.tbs-sct.gc.ca/tbsf-fsct/330-23-eng.pdf>) upon request of the Contracting Authority prior to Contract Award.
- (h) Until the credit check and all other security screening processes required by this Request for Proposal have been completed and the recommended Contractor and its personnel is considered suitable by the CBSA, no contract will be awarded and the recommended Contractor (specifically the Contractor personnel) shall **not** be permitted access to Protected / Classified information or assets, and further, shall **not** be permitted to enter sites where such information or assets are kept.
- (i) In the event the recommended Contractor (specifically the Contractor personnel) does not pass the security screening process required by the CBSA, the said Contractor's proposal will be considered non-responsive and the next ranked bidder will be contacted. If only one bid was

obtained and the proposed bidder does not meet the security requirement, then, the contracting officer will determine the next steps in order to ensure all requirements are met.

- (j) Contractor personnel can include in some instances landlords, property management employees and principles of companies when the latter have access to the premises where the CBSA designated or classified information\assets are kept.

7.6 Contract Period

- (a) **Contract Period:** The "**Contract Period**" is the entire period of time during which the Contractor is obliged to perform the Work, which includes:
 - (i) The "**Initial Contract Period**", which begins on the date the Contract is awarded and ends two years later; and
 - (ii) The period during which the Contract is extended, if Canada chooses to exercise any options set out in the Contract.
- (b) **Option to Extend the Contract:**
 - (i) The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to one additional one-year period under the same terms and conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions set out in the Basis of Payment.
 - (ii) Canada may exercise this option at any time by sending a written notice to the Contractor before the expiry date of the Contract. The option may only be exercised by the Contracting Authority, and will be evidenced, for administrative purposes only, through a contract amendment.

7.7 Authorities

(a) Contracting Authority

The Contracting Authority for the Contract is:

Name: Josée Bastien
Title: Supply Specialist
Public Works and Government Services Canada
Acquisitions Branch
Directorate: Informatics and Telecommunications Systems Procurement Directorate
Address: 11 Laurier St., Gatineau, Québec
Telephone: (819) 956-6770
E-mail address: josee.bastien@tpsgc-pwgsc.gc.ca

The Contracting Authority is responsible for the management of the Contract and any changes to the Contract must be authorized in writing by the Contracting Authority. The Contractor must not perform work in excess of or outside the scope of the Contract based on verbal or written requests or instructions from anybody other than the Contracting Authority.

(b) Technical Authority (To be determined at contract award)

The Technical Authority for the Contract is:

Name: _____
Title: _____
Organization: _____
Address: _____
Telephone: _____
Facsimile: _____
E-mail address: _____

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

(c) **Contractor's Representative**

(To be determined at contract award)

7.8 Proactive Disclosure of Contracts with Former Public Servants

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

7.9 Payment

(a) **Basis of Payment**

- (i) **Professional Services provided under a Task Authorization with a Maximum Price:** For professional services requested by Canada, in accordance with a validly issued Task Authorization, Canada will pay the Contractor, in arrears, up to the Maximum Price for the TA, for actual time worked and any resulting deliverables in accordance with the firm all-inclusive per diem rates set out in Annex C, Basis of Payment, Applicable Taxes extra. Partial days will be prorated based on actual hours worked based on a 7.5-hour workday.
- (ii) **Travel and Living Expenses – National Joint Council Travel Directive** The Contractor will be reimbursed its authorized travel and living expenses reasonably and properly incurred in the performance of the Work, at cost, without any allowance for profit and/or administrative overhead, in accordance with the meal, private vehicle and incidental expenses provided in Appendices B, C and D of the National Joint Council Travel Directive and with the other provisions of the directive referring to “travellers”, rather than those referring to “employees”. All travel must have the prior authorization of the Technical Authority. All payments are subject to government audit.
- (iii) **Competitive Award:** The Contractor acknowledges that the Contract has been awarded as a result of a competitive process. No additional charges will be allowed to compensate for errors, oversights, misconceptions or underestimates made by the Contractor when bidding for the Contract.
- (iv) **Professional Services Rates:** In Canada's experience, bidders from time to time propose rates at the time of bidding for one or more Resource Categories that they later refuse to honour, on the basis that these rates do not allow them to recover their own costs and/or make a profit. This denies Canada of the benefit of the awarded contract. If the Contractor does not respond or refuses to provide an individual with the qualifications described in the Contract within the time described in the Contract (or proposes instead to provide someone from an alternate category at a different rate), whether or not Canada terminates the Contract as a whole or in part or chooses to exercise any of the rights provided to it under the general conditions, Canada may impose sanctions or take other measures in accordance with the PWGSC Vendor Performance Corrective Measure Policy (or equivalent) then in effect, which measures may include an assessment that results in conditions applied against the Contractor to be fulfilled before doing further business with Canada, or full debarment of the Contractor from bidding on future requirements.

- (v) **Purpose of Estimates:** All estimated costs contained in the Contract are included solely for the administrative purposes of Canada and do not represent a commitment on the part of Canada to purchase goods or services in these amounts. Any commitment to purchase specific amounts or values of goods or services is described elsewhere in the Contract.
- (b) **Limitation of Expenditure**
- (i) Canada's total liability to the Contractor under the Contract must not exceed the amount set out on page 1 of the Contract, less any Applicable taxes. With respect to the amount set out on page 1 of the Contract, Customs duties are included and Applicable Taxes are included. Any commitments to purchase specific amounts or values of goods or services are described elsewhere in the Contract.
- (ii) No increase in the total liability of Canada or in the price of the Work resulting from any design changes, modifications or interpretations of the Work, will be authorized or paid to the Contractor unless these design changes, modifications or interpretations have been approved, in writing, by the Contracting Authority before their incorporation into the Work. The Contractor must not perform any work or provide any service that would result in Canada's total liability being exceeded before obtaining the written approval of the Contracting Authority. The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:
- (A) when it is 75 percent committed, or
- (B) 4 months before the Contract expiry date, or
- (C) as soon as the Contractor considers that the contract funds provided are inadequate for the completion of the Work,
- whichever comes first.
- (iii) If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority a written estimate for the additional funds required. Providing this information does not increase Canada's liability.
- (c) **Method of Payment for Task Authorizations with a Maximum Price:** For each Task Authorization validly issued under the Contract that contains a maximum price:
- (i) Canada will pay the Contractor no more frequently than once a month in accordance with the Basis of Payment. The Contractor must submit time sheets for each resource showing the days and hours worked to support the charges claimed in the invoice.
- (ii) Once Canada has paid the maximum TA price, Canada will not be required to make any further payment, but the Contractor must complete all the work described in the TA, all of which is required to be performed for the maximum TA price. If the work described in the TA is completed in less time than anticipated, and the actual time worked (as supported by the time sheets) at the rates set out in the Contract is less than the maximum TA price, Canada is only required to pay for the time spent performing the work related to that TA.
- (d) **Time Verification**
- Time charged and the accuracy of the Contractor's time recording system are subject to verification by Canada, before or after payment is made to the Contractor. If verification is done after payment, the Contract must repay any overpayment, at Canada's request.
- (e) **Payment Credits**
- (i) **Failure to Provide Resource:**
- (A) If the Contractor does not provide a required professional services resource that has all the required qualifications within the time prescribed by the Contract, the Contractor must credit to Canada an amount equal to the per diem rate (based on

a 7.5-hour workday) of the required resource for each day (or partial day) of delay in providing the resource, up to a maximum of 10 days.

(B) **Corrective Measures:** If credits are payable under this Article for two consecutive months or for three months in any 12-month period, the Contractor must submit a written action plan describing measures it will implement or actions it will undertake to eliminate the recurrence of the problem. The Contractor will have five working days to deliver the action plan to the Client and the Contracting Authority and 20 working days to rectify the underlying problem.

(C) **Termination for Failure to Meet Availability Level:** In addition to any other rights it has under the Contract, Canada may terminate the Contract for default in accordance with the General Conditions by giving the Contractor three months' written notice of its intent, if any of the following apply:

- (1) the total amount of credits for a given monthly billing cycle reach a level of 10% of the total billing for that month; or
- (2) the corrective measures required of the Contractor described above are not met.

This termination will be effective when the three month notice period expires, unless Canada determines that the Contractor has implemented the corrective measures to Canada's satisfaction during those three months.

(ii) **Credits Apply during Entire Contract Period:** The Parties agree that the credits apply throughout the Contract Period.

(iii) **Credits represent Liquidated Damages:** The Parties agree that the credits are liquidated damages and represent their best pre-estimate of the loss to Canada in the event of the applicable failure. No credit is intended to be, nor will it be construed as, a penalty.

(iv) **Canada's Right to Obtain Payment:** The Parties agree that these credits are a liquidated debt. To collect the credits, Canada has the right to hold back, draw back, deduct or set off from and against any money Canada owes to the Contractor from time to time.

(v) **Canada's Rights & Remedies not Limited:** The Parties agree that nothing in this Article limits any other rights or remedies to which Canada is entitled under the Contract (including the right to terminate the Contract for default) or under the law generally.

(vi) **Audit Rights:** The Contractor's calculation of credits under the Contract is subject to verification by government audit, at the Contracting Authority's discretion, before or after payment is made to the Contractor. The Contractor must cooperate fully with Canada during the conduct of any audit by providing Canada with access to any records and systems that Canada considers necessary to ensure that all credits have been accurately credited to Canada in the Contractor's invoices. If an audit demonstrates that past invoices contained errors in the calculation of the credits, the Contractor must pay to Canada the amount the audit reveals was required to be credited to Canada, plus interest, from the date Canada remitted the excess payment until the date of the refund (the interest rate is the Bank of Canada's discount annual rate of interest in effect on the date the credit was first owed to Canada, plus 1.25% per year). If, as a result of conducting an audit, Canada determines that the Contractor's records or systems for identifying, calculating or recording the credits are inadequate, the Contractor must implement any additional measures required by the Contracting Authority.

(f) **No Responsibility to Pay for Work not performed due to Closure of Government Offices**

(i) Where the Contractor, its employees, subcontractors, or agents are providing services on government premises under the Contract and those premises are inaccessible because of the evacuation or closure of government offices, and as a result no work is performed,

Canada is not responsible for paying the Contractor for work that otherwise would have been performed if there had been no evacuation or closure.

- (ii) If, as a result of any strike or lock-out, the Contractor or its employees, subcontractors or agents cannot obtain access to government premises and, as a result, no work is performed, Canada is not responsible for paying the Contractor for work that otherwise would have been performed if the Contractor had been able to gain access to the premises

7.10 Invoicing Instructions

- (a) The Contractor must submit invoices in accordance with the information required in the General Conditions.
- (b) The Contractor's invoice must include a separate line item for each subparagraph in the Basis of Payment provision, and must show all applicable Task Authorization numbers.
- (c) By submitting invoices, the Contractor is certifying that the goods and services have been delivered and that all charges are in accordance with the Basis of Payment provision of the Contract, including any charges for work performed by subcontractors.
- (d) The Contractor must provide the original and two copies of each invoice to the Technical Authority, and a copy to the Contracting Authority.

7.11 Certifications

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

7.12 Federal Contractors Program for Employment Equity - Default by Contractor

The Contractor understands and agrees that, when an Agreement to Implement Employment Equity (AIEE) exists between the Contractor and Employment and Social Development Canada (ESDC)-Labour, the AIEE must remain valid during the entire period of the Contract. If the AIEE becomes invalid, the name of the Contractor will be added to the "FCP Limited Eligibility to Bid" list. The imposition of such a sanction by ESDC will constitute the Contractor in default as per the terms of the Contract.

7.13 Applicable Laws

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

7.14 Priority of Documents

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

- (a) these Articles of Agreement, including any individual SACC clauses incorporated by reference in these Articles of Agreement;
- (b) Supplemental General Conditions, in the following order:
 - (i) 4002 (2010-08-16), Supplemental General Conditions - Software Development or Modification Services;
 - (ii) 4006 (2010-08-16), Supplemental General Conditions - Contractor to Own Intellectual Property Rights in Foreground Information;

- (c) General Conditions 2035 (2015-07-03);
- (d) Annex A, Statement of Work;
- (e) Annex B – Tasking Assessment Procedure, including its Appendices as follows:
 - (i) Appendix A to Annex B - Task Authorization (TA) Form;
 - (ii) Appendix B to Annex B - Resource Assessment Criteria and Response Table;
 - (iii) Appendix C to Annex B - Certifications at the TA stage;
- (f) Annex C, Basis of Payment;
- (g) Annex D, Security Requirements Check List;
- (h) the validly issued Task Authorizations and any required certifications (including all of their annexes, if any);
- (i) Supply Arrangement Number EN578-055605/xxx/EI (the "Supply Arrangement"); and
- (j) the Contractor's bid dated [REDACTED] (*insert date of bid*), as clarified on "or" as amended [REDACTED].

7.15 Foreign Nationals (Canadian Contractor)

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

7.16 Insurance Requirements

(a) Compliance with Insurance Requirements

- (i) The Contractor must comply with the insurance requirements specified in this Article. The Contractor must maintain the required insurance coverage for the duration of the Contract. Compliance with the insurance requirements does not release the Contractor from or reduce its liability under the Contract.
- (ii) The Contractor is responsible for deciding if additional insurance coverage is necessary to fulfill its obligation under the Contract and to ensure compliance with any applicable law. Any additional insurance coverage is at the Contractor's expense, and for its own benefit and protection.
- (iii) The Contractor should forward to the Contracting Authority within ten (10) days after the date of award of the Contract a Certificate of Insurance evidencing the insurance coverage. Coverage must be placed with an Insurer licensed to carry out business in Canada and the Certificate of Insurance must confirm that the insurance policy complying with the requirements is in force. If the Certificate of Insurance has not been completed and submitted as requested, the Contracting Authority will so inform the Contractor and provide the Contractor with a time frame within which to meet the requirement. Failure to comply with the request of the Contracting Authority and meet the requirement within the time period will constitute a default under the General Conditions. The Contractor must, if requested by the Contracting Authority, forward to Canada a certified true copy of all applicable insurance policies.

(b) Commercial General Liability Insurance

- (i) The Contractor must obtain Commercial General Liability Insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature, but for not less than \$2,000,000 per accident or occurrence and in the annual aggregate.
- (ii) The Commercial General Liability policy must include the following:
 - (A) Additional Insured: Canada is added as an additional insured, but only with respect to liability arising out of the Contractor's performance of the Contract. The

interest of Canada should read as follows: Canada, as represented by Public Works and Government Services Canada.

- (B) Bodily Injury and Property Damage to third parties arising out of the operations of the Contractor.
- (C) Products and Completed Operations: Coverage for bodily injury or property damage arising out of goods or products manufactured, sold, handled, or distributed by the Contractor and/or arising out of operations that have been completed by the Contractor.
- (D) Personal Injury: While not limited to, the coverage must include Violation of Privacy, Libel and Slander, False Arrest, Detention or Imprisonment and Defamation of Character.
- (E) Cross Liability/Separation of Insured: Without increasing the limit of liability, the policy must protect all insured parties to the full extent of coverage provided. Further, the policy must apply to each Insured in the same manner and to the same extent as if a separate policy had been issued to each.
- (F) Blanket Contractual Liability: The policy must, on a blanket basis or by specific reference to the Contract, extend to assumed liabilities with respect to contractual provisions.
- (G) Employees and, if applicable, Volunteers must be included as Additional Insured.
- (H) Employers' Liability (or confirmation that all employees are covered by Worker's compensation (WSIB) or similar program)
- (I) Broad Form Property Damage including Completed Operations: Expands the Property Damage coverage to include certain losses that would otherwise be excluded by the standard care, custody or control exclusion found in a standard policy.
- (J) Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of policy cancellation.
- (K) If the policy is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.
- (L) Owners' or Contractors' Protective Liability: Covers the damages that the Contractor becomes legally obligated to pay arising out of the operations of a subcontractor.
- (M) Advertising Injury: While not limited to, the endorsement must include coverage for piracy or misappropriation of ideas, or infringement of copyright, trademark, title or slogan.

(c) **Errors and Omissions Liability Insurance**

- (i) The Contractor must obtain Errors and Omissions Liability (a.k.a. Professional Liability) insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature but for not less than \$1,000,000 per loss and in the annual aggregate, inclusive of defence costs.
- (ii) If the Professional Liability insurance is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.
- (iii) The following endorsement must be included:
Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of cancellation.

7.17 Limitation of Liability - Information Management/Information Technology

- (a) This section applies despite any other provision of the Contract and replaces the section of the general conditions entitled "Liability". Any reference in this section to damages caused by the Contractor also includes damages caused by its employees, as well as its subcontractors, agents, and representatives, and any of their employees. This section applies regardless of whether the claim is based in contract, tort, or another cause of action. The Contractor is not liable to Canada with respect to the performance of or failure to perform the Contract, except as described in this section and in any section of the Contract pre-establishing any liquidated damages. The Contractor is only liable for indirect, special or consequential damages to the extent described in this Article, even if it has been made aware of the potential for those damages.
- (b) **First Party Liability:**
- (i) The Contractor is fully liable for all damages to Canada, including indirect, special or consequential damages, caused by the Contractor's performance or failure to perform the Contract that relate to:
- (A) any infringement of intellectual property rights to the extent the Contractor breaches the section of the General Conditions entitled "Intellectual Property Infringement and Royalties";
- (B) physical injury, including death.
- (ii) The Contractor is liable for all direct damages caused by the Contractor's performance or failure to perform the Contract affecting real or tangible personal property owned, possessed, or occupied by Canada.
- (iii) Each of the Parties is liable for all direct damages resulting from any breach of confidentiality under the Contract. Each of the Parties is also liable for all indirect, special or consequential damages in respect of any unauthorized disclosure of the other Party's trade secrets (or trade secrets of a third party provided by one Party to another under the Contract) relating to information technology.
- (iv) The Contractor is liable for all direct damages relating to any encumbrance or claim relating to any portion of the Work for which Canada has made any payment. This does not apply to encumbrances or claims relating to intellectual property rights, which are addressed under (i)(A) above.
- (v) The Contractor is also liable for any other direct damages to Canada caused by the Contractor's performance or failure to perform the Contract that relate to:
- (A) any breach of the warranty obligations under the Contract, up to the total amount paid by Canada (including any applicable taxes) for the goods and services affected by the breach of warranty; and
- (B) Any other direct damages, including all identifiable direct costs to Canada associated with re-procuring the Work from another party if the Contract is terminated either in whole or in part for default, up to an aggregate maximum for this subparagraph (B) of the greater of .75 times the total estimated cost (meaning the dollar amount shown on the first page of the Contract in the cell titled "Total Estimated Cost" or shown on each call-up, purchase order or other document used to order goods or services under this instrument), or \$1,000,000.00.
- In any case, the total liability of the Contractor under subparagraph (v) will not exceed the total estimated cost (as defined above) for the Contract or \$1,000,000.00, whichever is more.
- (vi) If Canada's records or data are harmed as a result of the Contractor's negligence or willful act, the Contractor's only liability is, at the Contractor's own expense, to restore

Canada's records and data using the most recent back-up kept by Canada. Canada is responsible for maintaining an adequate back-up of its records and data.

(c) **Third Party Claims:**

- (i) Regardless of whether a third party makes its claim against Canada or the Contractor, each Party agrees that it is liable for any damages that it causes to any third party in connection with the Contract as set out in a settlement agreement or as finally determined by a court of competent jurisdiction, where the court determines that the Parties are jointly and severally liable or that one Party is solely and directly liable to the third party. The amount of the liability will be the amount set out in the settlement agreement or determined by the court to have been the Party's portion of the damages to the third party. No settlement agreement is binding on a Party unless its authorized representative has approved the agreement in writing.
- (ii) If Canada is required, as a result of joint and several liability or joint and solidarily liable, to pay a third party in respect of damages caused by the Contractor, the Contractor must reimburse Canada by the amount finally determined by a court of competent jurisdiction to be the Contractor's portion of the damages to the third party. However, despite Sub-article (i), with respect to special, indirect, and consequential damages of third parties covered by this Section, the Contractor is only liable for reimbursing Canada for the Contractor's portion of those damages that Canada is required by a court to pay to a third party as a result of joint and several liability that relate to the infringement of a third party's intellectual property rights; physical injury of a third party, including death; damages affecting a third party's real or tangible personal property; liens or encumbrances on any portion of the Work; or breach of confidentiality.
- (iii) The Parties are only liable to one another for damages to third parties to the extent described in this Sub-article (c).

7.18 Joint Venture Contractor

- (a) The Contractor confirms that the name of the joint venture is [REDACTED] and that it is comprised of the following members: *[list all the joint venture members named in the Contractor's original bid]*.
- (b) With respect to the relationship among the members of the joint venture Contractor, each member agrees, represents and warrants (as applicable) that:
 - (i) [REDACTED] has been appointed as the "representative member" of the joint venture Contractor and has fully authority to act as agent for each member regarding all matters relating to the Contract;
 - (ii) by giving notice to the representative member, Canada will be considered to have given notice to all the members of the joint venture Contractor; and
 - (iii) all payments made by Canada to the representative member will act as a release by all the members.
- (c) All the members agree that Canada may terminate the Contract in its discretion if there is a dispute among the members that, in Canada's opinion, affects the performance of the Work in any way.
- (d) All the members are jointly and severally or solidarily liable for the performance of the entire Contract.
- (e) The Contractor acknowledges that any change in the membership of the joint venture (i.e., a change in the number of members or the substitution of another legal entity for an existing member) constitutes an assignment and is subject to the assignment provisions of the General Conditions.

- (f) The Contractor acknowledges that all security and controlled goods requirements in the Contract, if any, apply to each member of the joint venture Contractor.

Note to Bidders: *This Article will be deleted if the bidder awarded the contract is not a joint venture. If the contractor is a joint venture, this clause will be completed with information provided in its bid.*

7.19 Professional Services - General

- (a) The Contractor must provide professional services on request as specified in this Contract. All resources provided by the Contractor must meet the qualifications described in the Contract (including those relating to previous experience, professional designation, education, language proficiency and security clearance) and must be competent to provide the required services by any delivery dates described in the Contract.
- (b) If the Contractor fails to deliver any deliverable (excluding delivery of a specific individual) or complete any task described in the Contract on time, in addition to any other rights or remedies available to Canada under the Contract or the law, Canada may notify the Contractor of the deficiency, in which case the Contractor must submit a written plan to the Technical Authority within ten working days detailing the actions that the Contractor will undertake to remedy the deficiency. The Contractor must prepare and implement the plan at its own expense.
- (c) In General Conditions 2035, the Article titled "Replacement of Specific Individuals" is deleted and the following applies instead:

Replacement of Specific Individuals

- (i) If the Contractor is unable to provide the services of any specific individual identified in the Contract to perform the services, the Contractor must within five working days of the individual's departure or failure to commence Work (or, if Canada has requested the replacement, within ten working days of Canada's notice of the requirement for a replacement) provide to the Contracting Authority:

- (A) the name, qualifications and experience of a proposed replacement immediately available for Work; and
- (B) security information on the proposed replacement as specified by Canada, if applicable.

The replacement must have qualifications and experience that meet or exceed those obtained for the original resource.

- (ii) Subject to an Excusable Delay, where Canada becomes aware that a specific individual identified under the Contract to provide services has not been provided or is not performing, the Contracting Authority may elect to:
- (A) exercise Canada's rights or remedies under the Contract or at law, including terminating the Contract in whole or in part for default under the Article titled "Default of the Contractor", or
- (B) assess the information provided under (c) (i) above or, if it has not yet been provided, require the Contractor propose a replacement to be rated by the Technical Authority. The replacement must have qualifications and experience that meet or exceed those obtained for the original resource and be acceptable to Canada. Upon assessment of the replacement, Canada may accept the replacement, exercise the rights in (ii) (A) above, or require another replacement in accordance with this subarticle (c).

Where an Excusable Delay applies, Canada may require (c) (ii) (B) above instead of terminating under the "Excusable Delay" Article. An Excusable Delay does not include resource unavailability due to allocation of the resource to another Contract or project (including those for the Crown) being performed by the Contractor or any of its affiliates.

- (iii) The Contractor must not, in any event, allow performance of the Work by unauthorized replacement persons. The Contracting Authority may order that an original or replacement resource stop performing the Work. In such a case, the Contractor must immediately comply with the order. The fact that the Contracting Authority does not order a resource to stop performing the Work does not relieve the Contractor from its responsibility to meet the requirements of the Contract.
- (iv) The obligations in this article apply despite any changes that Canada may have made to the Client's operating environment.

7.20 Safeguarding Electronic Media

- (a) Before using them on Canada's equipment or sending them to Canada, the Contractor must use a regularly updated product to scan electronically all electronic media used to perform the Work for computer viruses and other coding intended to cause malfunctions. The Contractor must notify Canada if any electronic media used for the Work are found to contain computer viruses or other coding intended to cause malfunctions.
- (b) If magnetically recorded information or documentation is damaged or lost while in the Contractor's care or at any time before it is delivered to Canada in accordance with the Contract, including accidental erasure, the Contractor must immediately replace it at its own expense.

7.21 Representations and Warranties

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

7.22 Access to Canada's Property and Facilities

Canada's property, facilities, equipment, documentation, and personnel are not automatically available to the Contractor. If the Contractor would like access to any of these, it is responsible for making a request to the Technical Authority. Unless expressly stated in the Contract, Canada has no obligation to provide any of these to the Contractor. If Canada chooses, in its discretion, to make its property, facilities, equipment, documentation or personnel available to the Contractor to perform the Work, Canada may require an adjustment to the Basis of Payment and additional security requirements may apply.

7.23 Identification Protocol Responsibilities

The Contractor will be responsible for ensuring that each of its agents, representatives or subcontractors (hereinafter referred to as Contractor Representatives) complies with the following self-identification requirements:

- (a) Contractor Representatives who attend a Government of Canada meeting (whether internal or external to Canada's offices) must identify themselves as Contractor Representatives prior to the commencement of the meeting, to ensure that each meeting participant is aware of the fact that the individual is not an employee of the Government of Canada;
- (b) During the performance of any Work at a Government of Canada site, each Contractor Representative must be clearly identified at all times as being a Contractor Representative; and
- (c) If a Contractor Representative requires the use of the Government of Canada's e-mail system in the performance of the Work, then the individual must clearly identify him or herself as an agent or subcontractor of the Contractor in all electronic mail in the signature block as well as under

"Properties." This identification protocol must also be used in all other correspondence, communication, and documentation.

- (d) If Canada determines that the Contractor is in breach of any obligation stated in this Article, upon written notice from Canada the Contractor must submit a written action plan describing corrective measures it will implement to eliminate the recurrence of the problem. The Contractor will have five working days to deliver the action plan to the Client and the Contracting Authority, and twenty working days to rectify the underlying problem.
- (e) In addition to any other rights it has under the Contract, Canada may terminate the Contract for default if the corrective measures required of the Contractor described above are not met.

ANNEX A
STATEMENT OF WORK (SOW)

1.0 TITLE:

Canada Border Services Agency (CBSA) requires Informatics Professional Services resources, on an as-and-when-requested basis, to perform various functions within the eManifest project, a component of CBSA's Advance Commercial Information Initiative (ACI).

2.0 BACKGROUND

In April 2000, the ACI initiative was named as a priority for the CBSA. This initiative provides CBSA officers with the electronic transmission of pre-arrival data regarding marine, air, highway and rail commercial shipments entering Canada, allowing CBSA to use an automated system to better assess risks posed by commercial traffic and direct scrutiny upon arrival to best protect the health, safety and security of Canadians.

ACI is being implemented in phases, Phase I (marine) and Phase II (Air), and Phase III (Highway and Rail). Phase III, also called the eManifest project, will introduce the mandatory electronic submission of advance commercial information from all carrier, freight forwarders and importers (i.e. trade chain partners), in the highway and rail modes of transportation.

3.0 OBJECTIVES

The eManifest project is a large scale, information technology development Major Crown initiative that will re-engineer the current state of our commercial borders. Current state business processes require trade chain partners to present paper manifests declaring all commercial data related to the shipment and conveyance to the CBSA upon arrival at the border. This information is risk assessed and a decision is rendered by Border Services Officers to allow entry into the country or to proceed to examination for further assessment. Upon successful implementation of eManifest, the CBSA will move toward a multi-modal electronic manifest, whereby all trade chain partners will be required to submit their commercial data related to the shipment and conveyance in electronic format to the CBSA in advance of arrival at the border.

The eManifest project will re-engineer current internal systems and create new applications, to deliver program requirements, including an internet portal for electronic communication with clients; electronic data interchange to receive and transmit large volumes of data with clients as passage function will provide a graphic user interface for border services Officers at the border; a risk assessment system to target threats to Canadian health and safety; business intelligence tools and applications to better predict patterns and trends in information, and a data warehouse that will house received information for use by other systems.

The eManifest project team is comprised of CBSA personnel and contracted resources, who will together design, develop, and implement the eManifest project and its associated requirements using a project management methodology. The Contractor must ensure that both internal and external stakeholders including, but not limited to, border services Officers and trade chain partners are consulted, informed and prepared for project implementation. Furthermore, as a the project must report monthly to Treasury Board Secretariat (TBS) as well as The Chief Information Officer Branch (CIOB) and has special reporting requirements and must follow the Policy on Management of Projects (PoMP) on Management of Projects as Published by TBS.

The Contractor will use the following design principles:

- (i) Standard project management methodology and process, such as the Rational Unified Process (RUP); and
- (ii) Building upon the blocks of technology already implemented into CBSA applications during Phases I and II, to ensure that the overall business processes and maps for all modes of transportation i.e. air and marine, are consistent with each other.

The Contractor will use the following basic project management software tools such as:

- (i) MS Project and Visio;
- (ii) Microsoft Office
- (iii) Adobe Distiller & Acrobat; and
- (iv) Other data modelling software

The Contractor's resources will assist, but not be limited to the development of the following components of the eManifest project:

REPORTING

The automated risk assessment of all electronic data is a key component of the project.

PASSAGE

A Graphical User Interface (GUI) will be used at the Primary Inspection Line to streamline, integrate, and facilitate user-friendly border processing.

DATA WAREHOUSE AND BUSINESS INTELLIGENCE

An additional key component of the eManifest project is the Data Warehouse and Business Intelligence infrastructure and tools, which will be used to refine and enhance automated risk assessment on outgoing basis through pattern detection, trend identification and analysis and integration of examination results.

This tool will allow for compliance management and management information reporting through the ongoing monitoring of data quality from trade chain participants, addressing issues of non-compliance as required, and the provision of automated reports to monitor program effectiveness.

INFORMATION TECHNOLOGY (IT) PRE-REQUISITES AND PRODUCTION CAPACITY

A final key component of the eManifest project is the provision of the following three information technology elements (i) testing and training infrastructure, which includes multiple independent testing environments and independent training environments, (ii) application: which provides for decoupling and line-of-business independence, and (iii) automation, which permits enhanced development, testing and deployment of software and tools.

4.0 SCOPE

The Contractor will provide following informatics professional services resource categories on an as and when requested basis for the purpose of supporting the eManifest project team in the design, development, implementation and management of the eManifest project and its associated requirements:

PROJECT EXECUTIVE – LEVEL 3
PROJECT MANAGER, BUSINESS INFORMATION (BI) – LEVEL 3

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PROJECT MANAGER, PROJECT MANAGEMENT OFFICE (PMO) AND FINANCIAL – LEVEL 3
 BUSINESS PROCESS RE-ENGINEERING CONSULTANT – LEVEL 3
 IM ARCHITECT, DATA WAREHOUSE – LEVEL 3
 IM ARCHITECT, ANALYTICS – LEVEL 3
 APPLICATION/SOFTWARE ARCHITECT – LEVEL 3
 BUSINESS ARCHITECT – LEVEL 3
 BUSINESS TRANSFORMATION ARCHITECT – LEVEL 3
 BUSINESS SYSTEMS ANALYST, WEB PORTALS – LEVEL 3
 BUSINESS SYSTEMS ANALYST, ELECTRONIC DATA INTERCHANGE (EDI) – LEVEL 3
 BUSINESS CONSULTANT – LEVEL 3
 TEST COORDINATOR – LEVEL 3

ADDITIONAL RESOURCES (MAY OR MAY NOT BE REQUIRED)

PROJECT MANAGER, GENERIC – LEVEL 3
 BUSINESS SYSTEMS ANALYST, GENERIC – LEVEL 3
 BUSINESS ANALYST – LEVEL 3
 CHANGE MANAGEMENT CONSULTANT – LEVEL 3
 PROJECT SCHEDULER – LEVEL 3

5.0 TASKS

5.1 PROJECT EXECUTIVE – LEVEL 3

The Project Executive will be responsible for, but not limited to, doing the following:

- 5.1.1 Define and document project objectives, determine budget requirements;
- 5.1.2 Meet with CBSA executives to ensure all (internal and external) stakeholders are committed and moving forward on project goals;
- 5.1.3 Manage and mentor project managers;
- 5.1.4 Lead Critical Design Review(s) of IT enabled projects through various phases of project gating (project gating represents key decision point in a project lifecycle phase) and approval processes;
- 5.1.5 Authorise or reject proposed changes to cost or timescale beyond tolerance levels and all proposed changes to scope, checking for possible effects on the Business Case;
- 5.1.6 Maintain awareness and provide strategic direction for implementation of the World Customs Organization Standards;
- 5.1.7 Ensure Risks and Issues are being tracked and mitigated and resolved;
- 5.1.8 Liaise with Program or Corporate Management on progress;
- 5.1.9 Organise and chair meetings of the Project Board and report to Project Director;
- 5.1.10 Advise on the project's continuance or early closure at stage review gate meetings of the Project Board;
- 5.1.11 Document formal closure of the project; and
- 5.1.12 Hold a Post-Project Review to ensure benefits are realised.

5.2 PROJECT MANAGER, BUSINESS INFORMATION (BI) – LEVEL 3

The Project Manager (Business Information) will be responsible for, but not limited to, doing the following:

- 5.2.1 Manage the project during the development, implementation and operations start-up by ensuring that resources are made available and that the project is developed and is fully operational within previously agreed time, cost and performance parameters;
- 5.2.2 Formulate statements of problems; establishes procedures for the development and implementation of significant, new or modified project elements to solve these problems, and obtains approval thereof;

- 5.2.3 Define and document the objectives for the project; determine budgetary requirements, the composition, roles and responsibilities and terms of reference for the project team;
- 5.2.4 Report progress of the project on an ongoing basis and at scheduled points in the life cycle;
- 5.2.5 Meets in conference with stakeholders and other project managers and states problems in a form capable of being solved;
- 5.2.6 Prepare plans, charts, tables and diagrams to assist in analyzing or displaying problems; work with a variety of project management tools;
- 5.2.7 Facilitate project sign-off;
- 5.2.8 Lead business requirements and modeling workshop facilitation sessions with internal and external stakeholders;
- 5.2.9 Develop eManifest external client documentation;
- 5.2.10 Develop electronic data sets and the associated business rules;
- 5.2.11 Develop enhanced electronic status notifications – used to communicate with external trade partners;
- 5.2.12 Develop standardized tools, templates and methods for the gathering of business requirements and modeling of the business architecture;
- 5.2.13 Lead and manage business intelligence projects, including the development and management of governance models, data stewardship programs and data warehouses; and
- 5.2.14 Constant training and provision of guidance of CBSA junior staff who are working on Project, which includes transfer of knowledge.

5.3 PROJECT MANAGER, PROJECT MANAGEMENT OFFICE (PMO) AND FINANCIAL – LEVEL 3

The Project Manager (PMO and Financial) will be responsible for, but not limited to, doing the following:

- 5.3.1 Manage the project during the development, implementation and operations start-up by ensuring that resources are made available and that the project is developed and is fully operational within previously agreed time, cost and performance parameters;
- 5.3.2 Formulate statements of problems; establishes procedures for the development and implementation of significant, new or modified project elements to solve these projects, and obtains approval thereof;
- 5.3.3 Define and document the objectives for the project; determine budgetary requirements, the composition, roles and responsibilities and terms of reference for the project team;
- 5.3.4 Report progress of the project on an ongoing basis and at scheduled points in the life cycle;
- 5.3.5 Meets in conference with stakeholders and other project managers and states problems in a form capable of being solved;
- 5.3.6 Prepare plans, charts, tables and diagrams to assist in analyzing or displaying problems; work with a variety of project management tools;
- 5.3.7 Facilitate project sign-off;
- 5.3.8 Lead business requirements and modeling workshop facilitation sessions with internal and external stakeholders;
- 5.3.9 Lead and manage business intelligence projects, including the development and management of governance models, data stewardship and programs and data warehouses;
- 5.3.10 Develop eManifest external client documentation;
- 5.3.11 Develop electronic data sets and associated business rules;
- 5.3.12 Develop enhanced electronic status notifications – used to communicate with external trade partners;
- 5.3.13 Develop standardized tools, templates and methods for gathering of business requirements and modeling of the business architecture;
- 5.3.14 Develop, lead and assist in the methodologies and actions to capture, analyze and report project financials;
- 5.3.15 Provide advice and Guidance regarding project Earned Value Management and other project performance indicators like Cost and Schedule Variances as well as ratios of Project performance such as schedule performance and Cost performance indicators;
- 5.3.16 Conduct financial reporting risk assessments; and

5.3.17 Constant training and provision of guidance of CBSA junior staff who are working on project, which includes knowledge transfer.

5.4 BUSINESS PROCESS RE-ENGINEERING CONSULTANT – LEVEL 3

The Business Process Re-engineering Consultant will be responsible for, but not limited to, doing the following:

- 5.4.1 Review existing work processes and organizational structure;
- 5.4.2 Analyze business functional requirements to identify information, procedures and decision flows;
- 5.4.3 Identify candidate processes for re-design; prototype potential solutions provide trade-off information and suggest a recommended course of action. Identify the modifications to the automated processes;
- 5.4.4 Provide expert advice in defining new requirements and opportunities for applying efficient and effective solutions;
- 5.4.5 Identify and provide preliminary costs of potential options;
- 5.4.6 Provide expert advice in developing and integrating process and information models between processes to eliminate information and process redundancies;
- 5.4.7 Identify and recommend new processes and organizational structures;
- 5.4.8 Provide expert advice on and assist in implementing new processes and organizational changes;
- 5.4.9 Document workflows;
- 5.4.10 Use business, workflow and organizational modeling software tools;
- 5.4.11 Lead discussions, conduct interviews and workshops to document models, diagrams and use cases related to the "As-Is" and the "To-Be" business processes;
- 5.4.12 Constant training and provision of guidance of CBSA junior staff who are working on Project, which includes transfer of knowledge; and
- 5.4.13 Analyze operational risks and implement new surveillance scenarios.

5.5 IM ARCHITECT, DATA WAREHOUSE – LEVEL 3

The IM Architect (Data Warehouse) will be responsible for, but not limited to, doing the following:

- 5.5.1 Analyse existing capabilities and requirements, develop redesigned frameworks and recommend areas for improved capability and integration;
- 5.5.2 Develop and document detailed statements of requirements;
- 5.5.3 Evaluate existing procedures and methods, identify and document database content, structure, and application subsystems, and develop data dictionary;
- 5.5.4 Define and document interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems;
- 5.5.5 Prototype potential solutions, provide trade-off information and suggest recommended courses of action;
- 5.5.6 Perform information modelling in support of Business Process Re-engineering implementation;
- 5.5.7 Perform cost and benefit analysis of implementing new processes and solutions;
- 5.5.8 Provide advice in developing and integrating process and information models between business processes to eliminate information and process redundancies;
- 5.5.9 Provide advice in defining new requirements and opportunities for applying efficient and effective solutions; identify and provide preliminary costs of potential options; and
- 5.5.10 Constant training and provision of guidance of CBSA junior staff who are working on Project, which includes transfer of knowledge.

5.6 IM ARCHITECT, ANALYTICS – LEVEL 3

The IM Architect (Analytics) will be responsible for, but not limited to, doing the following:

- 5.6.1 Analyse existing capabilities and requirements, develop redesigned frameworks and recommend areas for improved capability and integration;

- 5.6.2 Develop and document detailed statements of requirements;
- 5.6.3 Evaluate existing procedures and methods, identify and document database content, structure, and application subsystems, and develop data dictionary;
- 5.6.4 Define and document interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems;
- 5.6.5 Provide advice and guidance relating to quantitative risk analytics;
- 5.6.6 Prototype potential solutions, provide trade-off information and suggest recommended courses of action;
- 5.6.7 Perform information modelling in support of Business Process Re-engineering implementation;
- 5.6.8 Provide analytical input to data architecting;

- 5.6.9 Design frameworks for information reporting metrics;
- 5.6.10 Provide strategic advice regarding enterprise business needs in analytics and opportunities for applying efficient and effective solutions; identify and provide preliminary costs of potential options; and
- 5.6.11 Provide strategic advice in developing and integrating process and information models between business processes to eliminate information and process redundancies.

5.7 APPLICATION/SOFTWARE ARCHITECT – LEVEL 3

The Application/Software Architect will be responsible for, but not limited to, doing the following:

- 5.7.1 Design technical architectures for high volume enterprise-wide systems for a national (country wide) implementation;
- 5.7.2 Develop, frameworks and strategies, either for an organization or for a major application area, to meet the business and application requirements;
- 5.7.3 Identify the policies and requirements that drive out a particular solution;
- 5.7.4 Analyze and evaluate alternative technology solutions to meet business problems;
- 5.7.5 Ensures the integration of all aspects of technology solutions;
- 5.7.6 Monitor industry trends to ensure that solutions fit with government and industry directions for technology;
- 5.7.7 Analyze functional requirements to identify information, procedures and decision flows;
- 5.7.8 Evaluate existing procedures and methods, identify and document database content, structure, and application sub-systems, and develop data dictionary;
- 5.7.9 Define and document interfaces of manual to automated operations within application sub-systems, to external systems and between new and existing systems;
- 5.7.10 Define input and output sources, including detailed plan for technical design phase, and obtain approval of the system proposal; and
- 5.7.11 Identify and document system specific standards relating to programming, documentation and testing, covering program libraries, data dictionaries, naming conventions, etc.

5.8 BUSINESS ARCHITECT – LEVEL 3

The Business Architect will be responsible for, but not limited to doing the following:

- 5.8.1 Develop policies and rules that allow an organization to carry out its mandate and functional responsibilities, and that govern the organization's actual and planned capabilities in terms of computers, data, information, human resources, communication facilities, software and management responsibilities;
- 5.8.2 Provide advice on the creation and implementation of commercial business processes;
- 5.8.3 Develop business architecture to align organization with strategic objectives;
- 5.8.4 Develop the specifications for where, how and why the various organizational components fit together as they do, and how they support the organization's mandate;
- 5.8.5 Create presentations and use cases; consult and present to various stakeholders, and facilitate meetings and discussions;
- 5.8.6 Constant training and provision of guidance of CBSA staff who are working on Project, which includes transfer of knowledge;

- 5.8.7 Develop and coordinate policies, processes and systems related to the assessment of risk and operational surveillance; and
- 5.8.8 Perform mapping of World Custom Organization data model and the EDIFACT standards.

5.9 BUSINESS TRANSFORMATION ARCHITECT – LEVEL 3

The Business Transformation Architect will be responsible for, but not limited to, doing the following:

- 5.9.1 Analysis and development of business success “critical success factors”;
- 5.9.2 Analysis and development of architecture requirements design, process development, process mapping and training;
- 5.9.3 Responsible for leading other functional staff to define business strategy and processes in support of transformation and change management activities;
- 5.9.4 Participate in change impact analysis and change management activities;
- 5.9.5 Participate in organizational realignment (job re-design organizational re-structuring);
- 5.9.6 Coordinate development of training and coordination with other stakeholders;
- 5.9.7 Create presentations and present to various stakeholders, and facilitate meetings and discussions;
- 5.9.8 Provide or modify the business contextual details required to develop systems to automate key business processes and will allow the proper evaluation of the impacts of the new technology on the Business in order to plan and design a successful implementation plan;
- 5.9.9 Depict, through a series of models, diagrams and use cases the “As-Is” and the “To-Be” Business process; and
- 5.9.10 Constant training and provision of guidance of CBSA junior staff who are working on Project, which includes transfer of knowledge.

5.10 BUSINESS SYSTEMS ANALYST, WEB PORTALS – LEVEL 3

The Business Systems Analyst (Web Portal) will be responsible for, but not limited to, doing the following:

- 5.10.1 Develop and document a detailed statement of requirements for the proposed alternative recommended in the preliminary analysis report;
- 5.10.2 Perform business analyses of functional requirements to identify information, procedures, and decision flows;
- 5.10.3 Evaluate existing procedures and methods, identify and documents items such as database content, structure, application subsystems, and develop data dictionary;
- 5.10.4 Define and document interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems; Identify candidate business processes for re-design, prototype potential solutions, provide trade-off information and suggest a recommended course of action;
- 5.10.5 Identify the modifications to the automated processes;
- 5.10.6 Establish acceptance test criteria with client;
- 5.10.7 Support and use the selected departmental methodologies; and
- 5.10.8 Constant training and provision of guidance of CBSA junior staff who are working on Project, which includes transfer of knowledge.

5.11 BUSINESS SYSTEMS ANALYST – ELECTRONIC DATA INTERCHANGE (EDI)– LEVEL 3

The Business Systems Analyst (Electronic Data Interchange) will be responsible for, but not limited to doing the following:

- 5.11.1 Develop and document a detailed statement of requirements for the proposed alternative recommended in the preliminary analysis report;
- 5.11.2 Perform business analyses of functional requirements to identify information, procedures, and decision flows;

- 5.11.3 Evaluate existing procedures and methods, identify and documents items such as database content, structure, application subsystems, and develop data dictionary;
- 5.11.4 Define and document interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems;
- 5.11.5 Identify candidate business processes for re-design, prototype potential solutions, provide trade-off information and suggest a recommended course of action. Identify the modifications to the automated processes;
- 5.11.6 Establish acceptance test criteria with client; and
- 5.11.7 Support and use the selected departmental methodologies.

5.12 BUSINESS CONSULTANT – LEVEL 3

The Business Consultant will be responsible for, but not limited to, doing the following:

- 5.12.1 Analyze, evaluate, develop business processes (financial, operational, systems, etc.);
- 5.12.2 Identify organizational and project business opportunities for improvement and streamlining of business processes;
- 5.12.3 Identify and evaluate critical success parameters, factors and performance measurements;
- 5.12.4 Assist other stakeholders in development and implementation of business improvement processes and programs;
- 5.12.5 Managing eManifest portal business requirements by translating business objectives into systems requirements;
- 5.12.6 Managing interim state as the portal evolves from current state to its final end-state vision;
- 5.12.7 Developing eManifest external client documentation – user guides and training manuals;
- 5.12.8 Developing practical and sound research methods for the Internet portal through its development; including research into the US ACE Secure Data Portal;
- 5.12.9 Developing and assisting with a test strategy for the Internet portal;
- 5.12.10 Develop Portal deployment plans and Release schedules;
- 5.12.11 Provide coaching and guidance to Portal team; including the sharing of best practices and knowledge transfer; and
- 5.12.12 Constant training and provision of guidance of CBSA junior staff who are working on Project, which includes transfer of knowledge.

5.13 TEST COORDINATOR – LEVEL 3

The Test Coordinator will be responsible for, but not limited to, doing the following:

- 5.13.1 Provide advice, guidance and coordination efforts for test strategies and plans, selection of automated testing tools, and identification of resources required for testing; and
- 5.13.2 Plan, organize, and schedule testing efforts for large systems, including the execution of systems integration tests, specialized tests, and user acceptance testing (e.g., stress tests).

5.14 PROJECT MANAGER, GENERIC – LEVEL 3

The Project Manager (Generic) will be responsible for, but not limited to, doing the following:

- 5.14.1 Manage the project during the development, implementation and operations start-up by ensuring that resources are made available and that the project is developed and is fully operational within previously agreed time, cost and performance parameters;
- 5.14.2 Formulate statements of problems; establishes procedures for the development and implementation of significant, new or modified project elements to solve these problems, and obtains approval thereof;
- 5.14.3 Define and document the objectives for the project; determine budgetary requirements, the composition, roles and responsibilities and terms of reference for the project team;
- 5.14.4 Report progress of the project on an ongoing basis and at scheduled points in the life cycle;

- 5.14.5 Meets in conference with stakeholders and other project managers and states problems in a form capable of being solved;
- 5.14.6 Prepare plans, charts, tables and diagrams to assist in analyzing or displaying problems; work with a variety of project management tools;
- 5.14.7 Facilitate project sign-off;
- 5.14.8 Lead business requirements and modeling workshop facilitation sessions with internal and external stakeholders;
- 5.14.9 Develop eManifest external client documentation;
- 5.14.10 Develop electronic data sets and the associated business rules;
- 5.14.11 Develop enhanced electronic status notifications – used to communicate with external trade partners;
- 5.14.12 Develop standardized tools, templates and methods for the gathering of business requirements and modeling of the business architecture; and
- 5.14.13 Constant training and provision of guidance of CBSA junior staff who are working on Project, which includes transfer of knowledge.

5.15 BUSINESS SYSTEMS ANALYST, GENERIC – LEVEL 3

The Business Systems Analyst (Generic) will be responsible for, but not limited to, doing the following:

- 5.15.1 Develop and document a detailed statement of requirements for the proposed alternative recommended in the preliminary analysis report;
- 5.15.2 Perform business analyses of functional requirements to identify information, procedures, and decision flows;
- 5.15.3 Evaluate existing procedures and methods, identify and documents items such as database content, structure, application subsystems, and develop data dictionary;
- 5.15.4 Define and document interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems;
- 5.15.5 Identify candidate business processes for re-design, prototype potential solutions, provide trade-off information and suggest a recommended course of action. Identify the modifications to the automated processes;
- 5.15.6 Establish acceptance test criteria with client; and
- 5.15.7 Support and use the selected departmental methodologies.

5.16 BUSINESS ANALYST – LEVEL 3

The Business Analyst will be responsible for, but not limited to, doing the following:

- 5.16.1 Develop and document statements of requirements for considered alternatives;
- 5.16.2 Perform business analyses of functional requirements to identify information, procedure, and decision flows;
- 5.16.3 Conduct interviews and workshops with both business and technical communities;
- 5.16.4 Evaluate existing procedures and methods, identify and document items such as database content, structure, application subsystems;
- 5.16.5 Develop data dictionary;
- 5.16.6 Define and document interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems;
- 5.16.7 Identify candidate business processes for re-design, prototype potential solutions, provide trade-off information and suggest a recommended course of action;
- 5.16.8 Identify the modifications to the automated processes;
- 5.16.9 Establish acceptance test criteria with client;
- 5.16.10 Support and use the selected departmental methodologies;
- 5.16.11 Develop project charters, plans and schedules; and
- 5.16.12 Constant training and provision of guidance of CBSA junior staff who are working on Project, which includes transfer of knowledge.

5.17 CHANGE MANAGEMENT CONSULTANT – LEVEL 3

The Change Management Consultant will be responsible for, but not limited to, doing the following:

- 5.17.1 Analysis and development of business “critical success factors”;
- 5.17.2 Analysis and development of architecture requirements design, process development, process mapping and training;
- 5.17.3 Responsible for defining business strategy and processes in support of transformation and change management activities;
- 5.17.4 Participate in change impact analysis and change management activities;
- 5.17.5 Participate in organizational realignment (job re-design organizational re-structuring);
- 5.17.6 Coordinate development of training and coordination with other stakeholders;
- 5.17.7 Create presentations and present to various stakeholders, and facilitate meetings and discussions; and
- 5.17.8 Constant training and provision of guidance of CBSA junior staff who are working on Project, which includes transfer of knowledge.

5.18 PROJECT SCHEDULER – LEVEL 3

The Project Scheduler will be responsible for, but not limited to doing the following:

- 5.18.1 Develop and support project schedules;
- 5.18.2 Develop, update and maintain the Work Breakdown Structure and Work Breakdown Structure Dictionary;
- 5.18.3 Produce appropriate reports and identify scheduling and dependency issues;
- 5.18.4 Conduct and provide critical path analysis;
- 5.18.5 Assist in schedule co-ordination efforts with internal and external project stakeholders;
- 5.18.6 Develop business relationship with the various projects teams;
- 5.18.7 Gather project status information;
- 5.18.8 Develop, update and maintain the Master Project Schedule;
- 5.18.9 Assist in the identification, assessment and documentation of project risks and issues; and
- 5.18.10 Constant training and provision of guidance of CBSA junior staff who are working on Project, which includes transfer of knowledge.

6. CLIENT SUPPORT

CBSA will provide the resources with a workstation, computer and telephones, email address (where applicable and available) and all necessary materials to perform their functions. Some resources may be required to work off-site, which may require the use of a CBSA laptop or other computer.

7. DELIVERABLES

The Contractor will provide various reports, plans, work breakdown structures, schedules and other related documents as specified in the applicable Task Authorization.

8. SERVICE LEVELS

Normal Working Hours

Normal working hours will be no earlier than 7:00am to no later than 6:00pm EST Monday through Friday (with the exception of statutory holidays as defined by the province of work). The Contractor will be expected to work 7.5 hours a day within normal working hours, unless arrangements are made ahead of time with the Technical Authority. The Technical Authority will authorize additional hours of work in advance, at the same per diem rate included in the contract. The Contractor will normally work during regular business hours, on CBSA's site, unless otherwise agreed upon by the Contractor and the

Technical Authority. For the duration of the Contract all resources must be available to work outside normal office hours as required.

Outside Normal Working Hours and Callback

The Contractor's resources might also be requested to work outside normal working hours or during week-ends to perform urgent tasks, fix production, pre-production, or proof-of-concept tasks and problems. All time work will be compensated in accordance with Annex B.

Work Location

The Work will be performed on CBSA premises located at 333 North River Road, Ottawa, Ontario, K1A 0L8 or on alternate location within the National Capital Region. Over the duration of the Contract, the main location of business of CBSA's various locations or Branches may change but will remain in the National Capital Region (NCR), and no costs will be paid by CBSA to the Contractor to compensate for any costs associated with transition from one Work location to another. There may be occasional meetings at other locations in the NCR or at other GC premises, but no significant travel will be required. All expenses for travel within the NCR are to be paid by the Contractor.

ANNEX B

TASKING ASSESSMENT PROCEDURE

1. Where a requirement for a specific task is identified, a draft Task Authorization Form (TA Form) as attached at Appendix B to Annex B will be provided to the Contractor. Once a draft TA Form is received, the Contractor must submit to the Technical Authority a quotation of rates to supply the requested Resource Categories based on the information identified in the TA Form. The quotation must be signed and submitted to Canada within the time for response identified in the TA Form. The Contractor will be given a minimum of 4 days turnaround time to submit a quotation.
2. For each proposed resource the Contractor must supply a résumé, the requested security clearance information and must complete the Response Tables at Appendix B of Annex B applicable to the Resource Categories identified in the draft TA. The same individual must not be proposed for more than one Resource Category. The résumés must demonstrate that each proposed individual meets the qualification requirements described (including any educational requirements, work experience requirements, and professional designation or membership requirements). With respect to the proposed resources:
 - (i) Proposed resources may be employees of the Contractor or employees of a subcontractor, or these individuals may be independent contractors to whom the Contractor would subcontract a portion of the Work. (Refer to Appendix C to Annex B, Certifications).
 - (ii) For educational requirements for a particular degree, designation or certificate, Canada will only consider educational programmes that were successfully completed by the resource before the date the draft TA was first issued to the Contractor.
 - (iii) For requirements relating to professional designation or membership, the resource must have the required designation or membership by the time of draft TA issuance and must continue, where applicable, to be a member in good standing of the profession or membership throughout the assessment period and Contract Period. Where the designation or membership must be demonstrated through a certification, diploma or degree, such document must be current, valid and issued by the entity specified in this Contract or if the entity is not specified, the issuer must have been an accredited or otherwise recognized body, institution or entity at the time the document was issued.
 - (iv) For work experience, Canada will not consider experience gained as part of an educational programme, except for experience gained through a formal co-operative programme at a post-secondary institution.
 - (v) For any requirements that specify a particular time period (e.g., 2 years) of work experience, Canada will disregard any information about experience if the résumé does not include the relevant dates (month and year) for the experience claimed (i.e., the start date and end date). Canada will evaluate only the duration that the resource actually worked on a project or projects (from his or her start date to end date), instead of the overall start and end date of a project or a combination of projects in which a resource has participated.
 - (vi) A résumé must not simply indicate the title of the individual's position, but must demonstrate that the resource has the required work experience by explaining the responsibilities and work performed by the individual while in that position. Only listing experience without providing any supporting data to describe responsibilities, duties and relevance to the requirement, or reusing the same wording as the TA Form, will not be considered "demonstrated" for the purposes of the assessment. The Contractor should provide complete details as to where, when, month and year, and how, through which activities/responsibilities, the stated qualifications / experience were obtained. In situations in which a proposed resource worked at the same time on more than one

project, the duration of any overlapping time period will be counted only once toward any requirements that relate to the individual's length of experience.

3. The qualifications and experience of the proposed resources will be assessed against the requirements set out in Appendix B to Annex B to determine each proposed resource's compliance with the mandatory and rated criteria. Canada may request proof of successful completion of formal training, as well as reference information. Canada may conduct reference checks to verify the accuracy of the information provided. If reference checks are done, they will be conducted in writing by e-mail (unless the contact at the reference is only available by telephone). Canada will not assess any points or consider a mandatory criterion met unless the response is received within 5 working days. On the third working day after sending out the e-mails, if Canada has not received a response, Canada will notify the Contractor by e-mail, to allow the Contractor to contact its reference directly to ensure that it responds to Canada within 5 working days. Wherever information provided by a reference differs from the information supplied by the Contractor, the information supplied by the reference will be the information assessed. Points will not be allocated or a mandatory criteria considered as met if the reference customer is not a customer of the Contractor itself (for example, the customer cannot be the customer of an affiliate of the Contractor). Nor will points be allocated or a mandatory criteria considered as met if the customer is itself an affiliate or other entity that does not deal at arm's length with the Contractor. Crown references will be accepted.
4. During the assessment of the resources proposed, should the references for two or more resources required under that TA either be unavailable or fail to substantiate the required qualifications of the proposed resources to perform the required services, the Contracting Authority may find the quotation to be non-responsive.
5. Only quotations that meet all of the mandatory criteria will be considered for assessment of the point rated criteria. Each resource proposed must attain the required minimum score for the point rated criteria for the applicable Resource Category. If the minimum score for any proposed resource is less than what is required, the Contractor's quotation will be found to be non-responsive.
6. Once the quotation has been accepted by the Technical Authority, the TA Form will be signed by Canada and provided to the Contractor for signature. The TA Form must be appropriately signed by Canada prior to commencement of any work. The Contractor must not commence work until a validly issued TA Form (the Task Authorization) has been received, and any work performed in its absence is done at the Contractor's own risk.

**APPENDIX A TO ANNEX B
TASK AUTHORIZATION FORM
(SEE ATTACHED)**

**APPENDIX B TO ANNEX B
RESOURCES ASSESSMENT CRITERIA AND RESPONSE TABLE**

To facilitate resource assessment, Contractors must prepare and submit a response to a draft Task Authorization using the tables provided in this Annex. When completing the resource grids, the specific information which demonstrates the requested criteria and reference to the page number of the résumé should be incorporated so that Canada can verify this information. The tables should not contain all the project information from the resume. Only the specific answer should be provided.

- 1. PROJECT EXECUTIVE - LEVEL 3**
- 1.1 MANDATORY REQUIREMENTS – PROJECT EXECUTIVE – LEVEL 3**

PROJECT EXECUTIVE – LEVEL 3			
Name of proposed resource: _____			
The Contractor must demonstrate that the proposed resource has:			
Criteria	Mandatory Requirements	Demonstrated experience	
Insert page # of Resume			
M1	A minimum of ten years of experience, within the last fifteen years prior to the solicitation closing date, in liaising with stakeholders and management and providing risk management on IT enabled projects which were governed and managed through a staged review gating approach.		
M2	Experience managing one IT enabled project involving 2 or more stakeholders. The project must have a minimum duration of six months and a total project expenditure of \$100M or more.		

1.2 POINT RATED CRITERIA - PROJECT EXECUTIVE - LEVEL 3

PROJECT EXECUTIVE – LEVEL 3

Name of proposed resource: _____

The Contractor should demonstrate that the proposed resource has:

Criteria #	Rated Criteria	Score / Points MAX	Demonstrated experience	Insert Page # of Resume
R1	<p>Experience providing executive level briefings on the project status of IT enabled projects. Executive level includes Chief Information Officer, Chief Financial Officer, Vice President, Minister, and Assistant Deputy Minister</p> <p>0 to 5 years = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points</p>	10		
R2	<p>Experience implementing an IT enabled project that lasted for 6 months or more and incorporated the use of World Customs Organization standards such as the SAFE framework of standards.</p> <p>No demonstrated experience = 0 points Demonstrated experience = 10 points</p>	10		
R3	<p>Experience leading and managing IT enabled projects where the number of resources on the project team was in excess of 100 resources.</p> <p>0 to 5 years = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points</p>	10		

PROJECT EXECUTIVE – LEVEL 3

Name of proposed resource: _____

The Contractor should demonstrate that the proposed resource has:

Criteria #	Rated Criteria	Score / Points MAX	Demonstrated experience	Insert Page # of Resume
R4	<p>Experience leading and managing IT enabled projects that were implemented nationally and required high availability.</p> <p>High Availability: a system that is expected to operate reliably 24 hours per day, 365 days per year and an associated implementation that ensures a minimum of 99% operational continuity per year.</p> <p>The system must be rolled out across a minimum of 20 locations across the country and be implemented for 2,000 or more users.</p> <p>0 to 10 years = 0 point 10+ to 12 years = 10 points 12+ to 15 years = 15 points 15+ to 20 years = 20 points</p>	20		
R5	<p>Experience leading and managing IT project(s) that support the shared business needs of 2 or more Government of Canada departments or agencies, and project(s) involving 2 or more stakeholders who are responsible for the movement of goods or people across international boundaries.</p> <p>0 to 5 years = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points</p>	10		

PROJECT EXECUTIVE – LEVEL 3

Name of proposed resource: _____

The Contractor should demonstrate that the proposed resource has:

Criteria #	Rated Criteria	Score / Points MAX	Demonstrated experience	Insert Page # of Resume
R6	<p>10+ years = 10 points</p> <p>Experience performing assessments on project complexity and project in accordance with TBS Policy on the Management of Projects (PoMP) and consistent with the corresponding Project Complexity and Risk Assessments standard.</p> <p>0 to 5 years = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points</p>	10		
	MAX. AVAILABLE POINTS	70		
	MIN. POINTS REQUIRED	45		
	POINTS ACHIEVED			

2. PROJECT MANAGER, BUSINESS INTELLIGENCE (BI) – LEVEL 3

2.1 MANDATORY REQUIREMENTS – PROJECT MANAGER (BI) – LEVEL 3

PROJECT MANAGER (BI) – LEVEL 3

Name of proposed resource: _____

The Contractor must demonstrate that the proposed resource has:

Criteria	Mandatory Requirement	Demonstrated experience	Insert page # of Resume
M1	A minimum of ten years of experience managing a project during the development, implementation and operations using knowledge, skills, tools, and techniques to manage project activities to meet the project requirements.		
M2	Experience defining and documenting objectives, goals and deliverables for a minimum of one project which had 24 hours per day and 7 days per week operational mandate and a total project expenditure of \$100 Million or more.		
M3	A minimum of one year of experience establishing procedures and leading in the development of business requirements on data warehouse projects involving the use of Cognos reporting tools (Report Writer or Impromptu) and SPSS Clementine/Modeller.		

2.2 POINT RATED CRITERIA – PROJECT MANAGER (BI) – LEVEL 3

PROJECT MANAGER (BI) – LEVEL 3				
Name of proposed resource: _____				
The Contractor should demonstrate that the proposed resource has:				
#	Rated Criteria	Score / Points MAX	Demonstrated Experience	Insert Page # of Resume
R1	Experience over and above the minimum ten years of experience identified in mandatory requirement M1. 0 to 10 years = 0 point 10+ to 12 years = 2 points 12+ to 15 years = 5 points 15+ years = 10 points	10		
R2	A minimum of 1 year experience applying project Management Financial methodologies to the management of IM/IT projects. No demonstrate experience = 0 points Demonstrate experience = 5 points	5		
R3	Experience managing the implementation of Business Intelligence reporting systems used for assessing risks associated with the movement of goods in support of the Canadian economy. 0 to less than 6 months = 0 point 6 months to 1 year = 5 points 1+ year = 10 points	10		
R4	Experience working with Microsoft Project for the purpose of reporting against project milestones.	10		

PROJECT MANAGER (BI) – LEVEL 3

Name of proposed resource: _____

The Contractor should demonstrate that the proposed resource has:

#	Rated Criteria	Score / Points MAX	Demonstrated Experience	Insert Page # of Resume
	0 to 5 years = 0 points 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points			
R5	A valid Information Technology Information Library (ITIL) Certification. To obtain points a copy of the certification is to be included with the Contractor's proposal. No valid certification = 0 point Valid ITIL certification = 5 points	5		
R6	Experience in developing project plans, including defining the project scope, budget and schedule, for a project with 2 or more stakeholders who are responsible for the movement of goods or people. 0 to 5 years = 0 point 5+ years = 5 points	5		
R7	A valid Project Management Professional (PMP) certification from the Project Management Institute (PMI). To obtain points a valid copy of the certification is to be included with the Contractor's proposal. No valid certification = 0 point Valid PMP certification = 10 points	10		

PROJECT MANAGER (BI) – LEVEL 3

Name of proposed resource: _____

The Contractor should demonstrate that the proposed resource has:

#	Rated Criteria	Score / Points MAX	Demonstrated Experience	Insert Page # of Resume
	MAX. AVAILABLE POINTS	55		
	MIN. POINTS REQUIRED	36		
	POINTS ACHIEVED			

3. PROJECT MANAGER, PROJECT MANAGEMENT OFFICE (PMO/FINANCIAL) – LEVEL 3

3.1 MANDATORY REQUIREMENTS- PROJECT MANAGER (PMO/FINANCIAL) - LEVEL 3

PROJECT MANAGER (PMO/FINANCIAL) - LEVEL 3

Name of proposed resource: _____

The Contractor must demonstrate that the proposed resource has:

Criteria	Mandatory Requirement	Demonstrated experience	Insert page # of Resume
M1	A minimum of ten years of experience leading a team and stakeholders from an Information Technology and Business perspective while maintaining project work plans, deliverables, project status reporting and managing the assigned project schedule, risks, issues, scope, and budget.		
M2	Experience defining and documenting objectives, goals and deliverables for a minimum of one project which had 24 hours per day and 7 days per week operational mandate and a total project expenditure of		

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3.2 POINT RATED CRITERIA – PROJECT MANAGER (PMO/FINANCIAL) - LEVEL 3

PROJECT MANAGER (PMO/FINANCIAL) - LEVEL 3

Name of proposed Resource: _____

The Contractor **SHOULD** demonstrate that the proposed resource has:

#	Rated Criteria	Score/ Points MAX	Demonstrated Experience	Insert Page # of Resume
R1	<p>Experience defining and documenting objectives, goals and deliverables on an IM/IT project(s) in a 24 hour per day, 7 days per week environment involving 2 or more stakeholders who are responsible for the movement of goods or people with an a total project expenditure of \$100 Million or more.</p> <p>0 to 1 year = 0 point 1+ year = 5 points</p>	5		
R2	<p>Experience evaluating the measurement of project performance and progress in accordance with the concepts of the Earned Value Management project management technique.</p> <p>0 to 1 year = 0 point 1+ year to 2 years = 2 points 2+ years to 3 years = 5 points 3+ years = 10 points</p>	10		
R3	<p>Experience performing project financial management, including:</p>	5		

	<ul style="list-style-type: none"> Overseeing the project's budget management; Briefing senior management on project financials; and Conducting financial planning and reporting 			
R4	<p>Experience in developing and managing detailed project schedules and financial plans for IM/IT projects.</p> <p>0 to 5 years = 0 point 5+ years = 5 points</p>	5		
R5	<p>Experience conducting financial reporting risk assessments.</p> <p>0 to 2 years = 0 point 2+ years = 5 points</p>	5		
R6	<p>One or more professional certification(s), designations or accreditations as follows:</p> <ol style="list-style-type: none"> A valid Project Management Professional (PMP) certification from the Project Management Institute (PMI). A valid and recognized professional accounting designation (Chartered Accountant (CA), Certified General Accountant (CGA) or Certified Management Accountant (CMA) or Certified Professional Accountant (CPA)). A valid Certified Information Systems Auditor (CISA) from the Information Systems Audit and Control Association (ISACA). A valid Prince 2 certification <p>To obtain points a valid copy of the certification is to be included with the Contractor's proposal.</p>	10		

	<p>To obtain points a valid copy of the certification is to be included with the Contractor's proposal.</p> <p>No valid certification = 0 point</p> <p>5 points per certification, designation or accreditation to a maximum of 10 points.</p>		
MAX. AVAILABLE POINTS		40	
MIN. POINTS REQUIRED		26	
POINTS ACHIEVED			

4. BUSINESS PROCESS RE-ENGINEERING CONSULTANT – LEVEL 3
4.1 MANDATORY REQUIREMENTS - BUSINESS PROCESS RE-ENGINEERING CONSULTANT - LEVEL 3

<p>BUSINESS PROCESS RE-ENGINEERING CONSULTANT - LEVEL 3</p> <p>Name of proposed resource: _____</p> <p>The Contractor must demonstrate that the proposed resource has:</p>			
Criteria	Mandatory Requirement	Demonstrated experience	Insert page # of Resume
M1	A minimum of ten years of experience analyzing business functional requirements to identify information, procedures and decision flows on IM/IT business transformation initiatives.		
M2	Experience analyzing business functional requirements to identify information, procedures and decision flows on a minimum of one IM/IT project involving a 24 hours per day, 7 days per week operational mandate and a total project expenditure of \$100 million or more that involved 2 or more stakeholders.		

BUSINESS PROCESS RE-ENGINEERING CONSULTANT - LEVEL 3

Name of proposed resource: _____

The Contractor must demonstrate that the proposed resource has:

Criteria	Mandatory Requirement	Demonstrated experience	Insert page # of Resume
M3	A minimum of one year experience designing business rules for risk assessment using the IBM application Operational Decision Manager (ODM).		
M4	A minimum of two years of experience documenting business processes of an organization involved in the international movement of goods and people.		
M5	A minimum of five years of experience in conducting interviews and workshops with business and technical communities.		

4.2 POINT RATED CRITERIA – BUSINESS PROCESS RE-ENGINEERING CONSULTANT - LEVEL 3

BUSINESS PROCESS RE-ENGINEERING CONSULTANT - LEVEL 3

Name of proposed resource: _____

The Contractor should demonstrate that the proposed resource has:

#	Rated Criteria	Score / Points MAX	Demonstrated Experience	Insert Page # of Resume
R1	Experience over and above the minimum ten years of experience identified in mandatory requirement M1. 0 to 10 years = 0 point	10		

BUSINESS PROCESS RE-ENGINEERING CONSULTANT - LEVEL 3

Name of proposed resource: _____

The Contractor should demonstrate that the proposed resource has:

#	Rated Criteria	Score / Points MAX	Demonstrated Experience	Insert Page # of Resume
	10+ years to 12 years = 2 points 12+ years to 15 years = 5 points 15+ years = 10 points			
R2	Experience over and above the minimum five years of experience in conducting interviews and workshops with business and technical communities identified in mandatory requirement M5. 0 to 5 years = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points	10		
R3	A valid Lean Certification (Six Sigma or Lean FOCUS for Transactional or Services Environment) To obtain points a valid copy of the certification is to be included with the Contractor's proposal. No valid certification = 0 point Valid Six Sigma or Lean FOCUS for Transactional or Services Environment = 10 points If a certification needs to be approved by a specific institution, this needs to be made clear directly in the criterion.	10		
R4	Experience over and above the minimum two	5		

BUSINESS PROCESS RE-ENGINEERING CONSULTANT - LEVEL 3

Name of proposed resource: _____

The Contractor should demonstrate that the proposed resource has:

#	Rated Criteria	Score / Points MAX	Demonstrated Experience	Insert Page # of Resume
	<p>years of experience identified in mandatory requirement M4.</p> <p>0 to 2 years = 0 point 2+ year to 3 years = 2 points 3+ years = 5 points</p>			
R5	<p>Experience employing Treasury Board's Business Transformation Enablement Program (BTEP) tools and practices to provide an integrated approach for strategic management and alignment, and business transformation.</p> <p>0 to 1 year = 0 point 1+ year to 2 years = 2 points 2+ years to 3 years = 5 points 3+ years = 10 points</p>	10		
R6	<p>Experience developing and integrating processes and information models for nomenclature, enforcement and compliance, and procedures and facilitation relative to the World Customs Organization frameworks or agreements.</p> <p>1+ year of experience = 10 points</p>	10		
R7	<p>Experience analyzing business functional requirements to identify information, procedures and decision flows on a project(s) involving a 24 hours per day, 7 days per week operational mandate and a total project expenditure of \$100 million or more that involved 2 or more</p>	5		

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BUSINESS PROCESS RE-ENGINEERING CONSULTANT - LEVEL 3

Name of proposed resource: _____

The Contractor should demonstrate that the proposed resource has:

#	Rated Criteria	Score / Points MAX	Demonstrated Experience	Insert Page # of Resume
	stakeholders who are responsible for the movement of goods or people. 0 to 1 year = 0 point 1+ year = 5 points			
R8	Experience working on new business processes for risk management using IBM Operational Decision Manager (ODM) or Master Data Management (MDM) 0 to 1 year = 0 point 1+ years to 3 years = 5 points 3+ years = 10 points	10		
MAX. AVAILABLE POINTS		70		
MIN. POINTS REQUIRED		45		
POINTS ACHIEVED				

5. IM ARCHITECT, DATA WAREHOUSE – LEVEL 3

5.1 MANDATORY REQUIREMENTS - IM ARCHITECT - DATA WAREHOUSE - LEVEL 3

IM ARCHITECT - DATA WAREHOUSE - LEVEL 3

Name of proposed resource: _____

The Contractor must demonstrate that the proposed resource has:

Criteria		Mandatory Requirement	Demonstrated experience	Insert page # of Resume
M1		A minimum of ten years of experience developing, analysing and evaluating IM/IT initiatives, requirements or processes.		
M2		A minimum of one project developing, analysing and evaluating requirements and processes on an IM/IT project involving a 24 hours per day, 7 days per week operational mandate, with a dollar value in excess of a \$100 million budget, that involved 2 or more stakeholders.		
M3		A minimum of five years of experience working on data warehousing projects with an overall budget of \$15M Canadian funds (or equivalent) or more which relies on DB2/UDB as a primary source or store.		
M4		A minimum of five years of experience with Large-Scale* data management and data modeling concepts, with both relational and dimensional data models with an overall budget of \$10M Canadian funds (or equivalent) or more. *Large-Scale is defined as an organization with over 10,000 employees.		

IM ARCHITECT - DATA WAREHOUSE - LEVEL 3

Name of proposed resource: _____

The Contractor must demonstrate that the proposed resource has:

Criteria	Mandatory Requirement
M5	A minimum of five years of experience designing and implementing ETL processes, using IBM Data stage.
M6	A minimum of two years of experience with the IBM SPSS Modeller application to support the development and implementation of data warehouse initiatives.
M7	A minimum of five years of experience working on data warehouse systems that runs on an IBM OS390 operating system environment.

5.2 POINT RATED CRITERIA – IM ARCHITECT - DATA WAREHOUSE - LEVEL 3

IM ARCHITECT - DATA WAREHOUSE - LEVEL 3

Name of proposed resource: _____

The Contractor should demonstrate that the proposed resource has:

#	Rated Criteria	Score / Points MAX	Demonstrated Experience	Insert Page # of Resume
R1	Experience over and above the minimum ten years of experience identified in mandatory requirement M1. 0 to 10 years = 0 point 10+ years to 12 years = 2 points	10		

IM ARCHITECT - DATA WAREHOUSE - LEVEL 3

Name of proposed resource: _____

The Contractor should demonstrate that the proposed resource has:

#	Rated Criteria	Score / Points MAX	Demonstrated Experience	Insert Page # of Resume
	12+ years to 15 years = 5 points 15+ years = 10 points			
R2	Experience over and above the minimum five years of experience identified in mandatory requirement M3. 0 to 5 years = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points	10		
R3	Experience with the development of business driven data governance methodologies for Business Intelligence initiatives. 0 to 5 years = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points	10		
R4	Experience over and above the minimum of two years of experience identified in mandatory requirement M6. 0 to 2 years = 0 point 2+ years to 3 years = 5 points 3+ years = 10 points	10		
R5	Experience working with the application DBFit to automate ETL test scripts and test cases.	5		

IM ARCHITECT - DATA WAREHOUSE - LEVEL 3

Name of proposed resource: _____

The Contractor should demonstrate that the proposed resource has:

#	Rated Criteria	Score / Points MAX	Demonstrated Experience	Insert Page # of Resume
	0 to 1 year = 0 point 1+ year = 5 points			
R6	Experience developing, analysing and evaluating data warehouse initiatives that rely on DB2 as a primary data source or store. 0 to 5 year = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points	10		
R7	Previous working experience on CBSA Commercial Systems or initiatives such as: <ul style="list-style-type: none"> • ACROSS • TITAN • CMRS • DAN • RAUS (previously RAUD) • RAPM • SWI 1 to 2 systems = 1 points 3 to 5 systems = 2.5 points 5+ systems = 5 points	5		
MAX. AVAILABLE POINTS		60		
MIN. POINTS REQUIRED		39		
POINTS ACHIEVED				

6. IM ARCHITECT - ANALYTICS – LEVEL 3

6.1 MANDATORY REQUIREMENTS - IM ARCHITECT - ANALYTICS - LEVEL 3

IM ARCHITECT - ANALYTICS - LEVEL 3

Name of proposed Resource: _____

The Contractor **MUST** demonstrate that the proposed resource has:

Criteria	Mandatory Requirement	Demonstrated experience	Insert page # of Resume
M1	A minimum of ten years of experience analysing existing capabilities and developing and documenting detailed statements of requirements that are focused specifically on IM/IT systems that provide data analytics and/or quantitative analysis capabilities.		
M2	A minimum of one project analysing existing capabilities and developing and documenting detailed statements of requirements on an IM/IT project involving a 24 hours per day, 7 days per week operational mandate, with a dollar value in excess of a \$100 million budget that involved 2 or more stakeholders.		
M3	A minimum of three years of experience researching, designing and implementing analytical formulas to conduct quantitative risk assessments.		
M4	A minimum of two years of hands-on experience working with the IBM SPSS Modeller application to support the development of predictive analytics for organizations involved in the international movement of goods.		

6.2 POINT RATED CRITERIA – IM ARCHITECT - ANALYTICS - LEVEL 3

IM ARCHITECT - ANALYTICS - LEVEL 3

Name of proposed Resource: _____

The Contractor SHOULD demonstrate that the proposed resource has:

#	Rated Criteria	Score / Points MAX	Demonstrated Experience	Insert Page # of Resume
R1	Experience applying predictive analytics to the development of IM/IT systems. 0 to 10 years = 0 point 10+ years to 12 years = 2 points 12+ years to 15 years = 5 points 15+ years = 10 points	10		
R2	Experience researching, designing and implementing analytical formulas to conduct quantitative risk assessment of trade goods. 0 to 3 years = 0 point 3+ years to 5 years = 5 points 5+ years = 10 points	10		
R3	Hands-on experience over and above the minimum two years of experience identified in mandatory requirement M4. 0 to 2 years of experience = 0 point 2+ years to 3 years = 5 points 3+ years = 10 points	10		
R4	Experience analysing existing capabilities and developing and documenting detailed statements of requirements in a project that incorporates the	10		

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IM ARCHITECT - ANALYTICS - LEVEL 3

Name of proposed Resource: _____

The Contractor SHOULD demonstrate that the proposed resource has:

#	Rated Criteria	Score / Points MAX	Demonstrated Experience	Insert Page # of Resume
R5	<p>use of World Customs Organization standards.</p> <p>0 to 6 months = 0 point 6+ months to 1 year = 5 points 1+ years = 10 points</p> <p>Experience analysing existing capabilities and developing and documenting detailed statements of requirements on an IM/IT project involving a 24 hours per day, 7 days per week operational mandate, with a dollar value in excess of a \$100 million budget that involved 2 or more stakeholders who are responsible for the movement of goods or people across international borders.</p> <p>0 to 1 year = 0 point 1+ year = 5 points</p>	5		
MAX. AVAILABLE POINTS		45		
MIN. POINTS REQUIRED		29		
POINTS ACHIEVED				

7. APPLICATION/SOFTWARE ARCHITECT – LEVEL 3

7.1 MANDATORY REQUIREMENTS – APPLICATION/SOFTWARE ARCHITECT – LEVEL 3

APPLICATION/SOFTWARE ARCHITECT – LEVEL 3

Name of proposed Resource: _____

The Contractor **MUST** demonstrate that the proposed resource has:

Criteria	Mandatory Requirements	Demonstrated experience	Insert page # of Resume
M1	A minimum of ten years of experience developing technical architectures, frameworks and strategies, to meet business and application requirements.		
M2	A minimum of one project developing technical architectures, frameworks and strategies on an IM/IT project involving a 24 hours per day, 7 days per week operational mandate, with a dollar value in excess of a \$100 million budget that involved 2 or more stakeholders.		
M3	A minimum of five years of experience designing and applying risk assessment concepts as it relates to analyzing risk profiles for organizations involved in the international movement of goods or people.		
M4	A minimum of one year experience designing systems that incorporate a minimum of 2 of the 4 following systems: <ul style="list-style-type: none"> • IBM Master Data Management (MDM) • IBM Quality Stage Address Verification 		

APPLICATION/SOFTWARE ARCHITECT – LEVEL 3

Name of proposed Resource: _____

The Contractor **MUST** demonstrate that the proposed resource has:

Criteria	Mandatory Requirements	Demonstrated experience	Insert page # of Resume
	Interface (AVI) <ul style="list-style-type: none"> IBM LanguageWare IBM Operational Decision Management (ODM). 		
M5	A minimum of three years of experience designing systems that use IBM Websphere MQ (MQSeries) to integrate and transport data from disparate systems.		

7.2 POINT RATED CRITERIA – APPLICATION/SOFTWARE ARCHITECT – LEVEL 3

APPLICATION/SOFTWARE ARCHITECT – LEVEL 3

Name of proposed Resource: _____

The Contractor **SHOULD** demonstrate that the proposed resource has:

#	Rated Criteria	Score/ Points MAX	Demonstrated Experience	Insert Page # of Resume
R1	Experience designing systems that provide secure access to a minimum of 100 external or independent businesses. 0 to 1 year = 0 point 1+ year to 3 years = 2 points 3+ years to 5 years = 5 points 5+ years = 10 points	10		
R2	Experience designing and supporting applications	9		

APPLICATION/SOFTWARE ARCHITECT – LEVEL 3

Name of proposed Resource: _____

The Contractor **SHOULD** demonstrate that the proposed resource has:

#	Rated Criteria	Score/ Points MAX	Demonstrated Experience	Insert Page # of Resume
	for any of the following CBSA systems or initiatives: <ul style="list-style-type: none"> • TITAN • ACROSS • Single Window 3 points per system or initiative to a maximum of 9 points			
R3	Experience designing systems that support a minimum of 500,000 transactions per day. 0 to 1 year = 0 point 1+ year to 3 years = 2 points 3+ years to 5 years = 5 points 5+ years = 10 points	10		
R4	Experience in the last 10 years designing systems that are based on Java front-ends accessing OS/390 operating environments. 0 to 1 year = 0 points 1+ year to 3 years = 2 points 3+ years to 5 years = 5 points 5+ years = 10 points	10		
R5	Experience analyzing and implementing risk scoring or assessment algorithms as it relates to the movement of commercial goods across international borders.	10		

APPLICATION/SOFTWARE ARCHITECT – LEVEL 3

Name of proposed Resource: _____

The Contractor **SHOULD** demonstrate that the proposed resource has:

#	Rated Criteria	Score/ Points MAX	Demonstrated Experience	Insert Page # of Resume
	0 to 1 year = 0 point 1+ year to 3 years = 2 points 3+ years to 5 years = 5 points 5+ years = 10 points			
	MAX. AVAILABLE POINTS	49		
	MIN. POINTS REQUIRED	32		
	POINTS ACHIEVED			

8. BUSINESS ARCHITECT – LEVEL 3

8.1 MANDATORY REQUIREMENTS – BUSINESS ARCHITECT – LEVEL 3

BUSINESS ARCHITECT – LEVEL 3

Name of proposed Resource: _____

The Contractor **MUST** demonstrate that the proposed resource has:

Criteria	Mandatory Requirements	Demonstrated experience	Insert page # of Resume
M1	A minimum of ten years of experience developing policies and rules to support an organization's mandate and functional responsibilities.		
M2	A minimum of one project developing specifications, presentations and use cases on an IM/IT project involving a 24 hours per		

BUSINESS ARCHITECT – LEVEL 3

Name of proposed Resource: _____

The Contractor **MUST** demonstrate that the proposed resource has:

Criteria	Mandatory Requirements	Demonstrated experience	Insert page # of Resume
	day, 7 days per week operational mandate, with a dollar value in excess of a \$100 million budget that involved 2 or more stakeholders.		
M3	A minimum of five years of experience developing and coordinating policies, processes and systems related to the assessment of risk and operational surveillance for organizations involved in the international movement of goods or people.		
M4	A minimum of two years of experience in the development of data acquisition strategies and statement of requirements.		

8.2 POINT RATED CRITERIA – BUSINESS ARCHITECT – LEVEL 3

BUSINESS ARCHITECT – LEVEL 3

Name of proposed Resource: _____

The Contractor **SHOULD** demonstrate that the proposed resource has:

#	Rated Criteria	Score / Points Max	Demonstrated Experience	Insert Page # of Resume
R1	Experience developing specifications, presentations and use cases involving a 24 hours	10		

BUSINESS ARCHITECT – LEVEL 3

Name of proposed Resource: _____

The Contractor SHOULD demonstrate that the proposed resource has:

#	Rated Criteria	Score / Points Max	Demonstrated Experience	Insert Page # of Resume
	<p>per day, 7 days per week operational mandate, with a dollar value in excess of a \$100 million budget that involved 2 or more stakeholders who are responsible for the movement of goods or people across international borders.</p> <p>1 project = 5 points 2 or more projects = 10 points</p>			
R2	<p>Experience assessing business needs and translating requirements into system functional specifications.</p> <p>0 to 10 years = 0 point 10+ years to 12 years = 2 points 12+ years to 15 years = 5 points 15+ years = 10 points</p>	10		
R3	<p>Experience documenting business processes using IBM WebSphere Business Process Model Notation (BPMN).</p> <p>0 to 1 year = 0 point 1+ years to 3 years = 2 points 3+ years to 5 years = 5 points 5+ years = 10 points</p>	10		
R4	<p>Experience over and above the minimum five years of experience identified in mandatory requirement M3.</p>	10		

BUSINESS ARCHITECT – LEVEL 3

Name of proposed Resource: _____

The Contractor **SHOULD** demonstrate that the proposed resource has:

#	Rated Criteria	Score / Points Max	Demonstrated Experience	Insert Page # of Resume
	0 to 5 years = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points			
	MAX. AVAILABLE POINTS	40		
	MIN. POINTS REQUIRED	26		
	POINTS ACHIEVED			

9. BUSINESS TRANSFORMATION ARCHITECT – LEVEL 3

9.1 MANDATORY REQUIREMENTS – BUSINESS TRANSFORMATION ARCHITECT – LEVEL 3

BUSINESS TRANSFORMATION ARCHITECT – LEVEL 3

Name of proposed Resource: _____

The Contractor **MUST** demonstrate that the proposed resource has:

Criteria	Mandatory Requirements	Demonstrated experience	Insert page # of Resume
M1	A minimum of ten years of experience analysing and developing architecture requirements design, process development, and process mapping.		
M2	A minimum of one project analysing and developing architecture requirements design, process development, and process mapping		

BUSINESS TRANSFORMATION ARCHITECT – LEVEL 3

Name of proposed Resource: _____

The Contractor **MUST** demonstrate that the proposed resource has:

Criteria	Mandatory Requirements	Demonstrated experience	Insert page # of Resume
	on an IM/IT project involving a 24 hours per day, 7 days per week operational mandate, with a dollar value in excess of a \$100 million budget, that involved 2 or more stakeholders.		
M3	A minimum of two years of experience in the development of data acquisition strategies or statement of requirements.		
M4	A minimum of four years of experience defining and negotiating business and program requirements with personnel in headquarters, and personnel in one of: (a) regional offices in Canada; or (b) International offices.		

9.2 **POINT RATED CRITERIA – BUSINESS TRANSFORMATION ARCHITECT**

BUSINESS TRANSFORMATION ARCHITECT – LEVEL 3

Name of proposed Resource: _____

The Contractor **SHOULD** demonstrate that the proposed resource has:

#	Rated Criteria	Score/ Points MAX	Demonstrated Experience	Insert Page # of Resume
R1	Experience analysing and developing architecture requirements design, process development, and	10		

BUSINESS TRANSFORMATION ARCHITECT – LEVEL 3

Name of proposed Resource: _____

The Contractor **SHOULD** demonstrate that the proposed resource has:

#	Rated Criteria	Score/ Points MAX	Demonstrated Experience	Insert Page # of Resume
	<p>process mapping involving a 24 hours per day, 7 days per week operational mandate, with a dollar value in excess of a \$100 million budget that involved 2 or more stakeholders who are responsible for the movement of goods or people.</p> <p>1 project = 5 points 2 or more projects = 10 points</p>			
R2	<p>Experience on initiatives involving collaboration or liaison with federal government departments or agencies or liaison with foreign government representatives.</p> <p>0 to 1 year = 0 point 1+ year to 3 years = 2 points 3+ years to 5 years = 5 points</p>	5		
R3	<p>Experience working with World Customs Organization frameworks or agreements (including but not limited to nomenclature, enforcement and compliance, and procedures and facilitation).</p> <p>0 to 1 year = 0 point 1+ year = 10 points</p>	10		
MAX. AVAILABLE POINTS		25		
MIN. POINTS REQUIRED		15		
POINTS ACHIEVED				

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10. BUSINESS SYSTEMS ANALYST - WEB PORTALS – LEVEL 3

10.1 MANDATORY REQUIREMENTS – BUSINESS SYSTEM ANALYST - WEB PORTAL – LEVEL 3

BUSINESS SYSTEM ANALYST - WEB PORTAL – LEVEL 3

Name of proposed Resource: _____

The Contractor **MUST** demonstrate that the proposed resource has:

Criteria		Mandatory Requirements	Demonstrated experience	Insert page # of Resume
M1	A minimum of ten years of experience developing and documenting detailed statement of requirements and performing business analyses of functional requirements.			
M2	A minimum of one project developing and documenting detailed statement of requirements and performing business analyses of functional requirements on an IM/IT involving a 24 hours per day, 7 days per week operational mandate, with a dollar value in excess of a \$100 million budget that involved 2 or more stakeholders.			
M3	A minimum of five years of experience in analyzing, evaluating and developing business processes for eServices web portals servicing businesses in Large-Scale* environments for organizations involved in the international movement of goods or people. *Large-Scale is defined as an organization with over 10,000 employees.			

10.2 POINT RATED CRITERIA – BUSINESS SYSTEM ANALYST - WEB PORTAL – LEVEL 3

BUSINESS SYSTEM ANALYST - WEB PORTAL – LEVEL 3

Name of proposed Resource: _____

The Contractor SHOULD demonstrate that the proposed resource has:

#	Rated Criteria	Score / Points MAX (MIN.)	Demonstrated Experience	Insert Page # of Resume
R1	<p>Experience over and above the minimum ten years of experience identified in mandatory requirement M1.</p> <p>0 to 10 year = 0 point 10+ years to 12 years = 2 points 12+ years to 15 years = 5 points 15+ years = 10 points</p>	10		
R2	<p>Experience over and above the minimum five years of experience identified in mandatory requirement M3.</p> <p>0 to 5 years = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points</p>	10		
R3	<p>Experience designing and documenting business requirements and detailed specifications associated with risk assessment as it relates to movement of commercial goods across international borders.</p> <p>Reference projects must be a minimum of 12 months in duration to be awarded points.</p> <p>1 project = 3 points 2 projects = 5 points 3 or more projects = 7 points</p>	7		
R4	Experience developing business number	10		

BUSINESS SYSTEM ANALYST - WEB PORTAL – LEVEL 3

Name of proposed Resource: _____

The Contractor SHOULD demonstrate that the proposed resource has:

#	Rated Criteria	Score / Points MAX (MIN.)	Demonstrated Experience	Insert Page # of Resume
	registrations or identification systems. 0 to 5 years = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points			
R5	Experience liaising with stakeholders from other government agencies or private sector organizations. 0 to 5 years = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points	10		
R6	Experience designing and documenting business requirements and detailed specifications in a project that incorporates the use of World Customs Organization standards. 0 to 6 months = 0 point 6+ months = 10 points	10		
R7	Experience providing expert advice regarding both supply chain logistics business processes and the technical details of electronically transmitted commercial trade data. 0 to 1 year = 0 point 1+ year to 2 years = 2 points	10		

BUSINESS SYSTEM ANALYST - WEB PORTAL – LEVEL 3

Name of proposed Resource: _____

The Contractor **SHOULD** demonstrate that the proposed resource has:

#	Rated Criteria	Score / Points MAX (MIN.)	Demonstrated Experience	Insert Page # of Resume
	2+ year to 3 years = 5 points 3+ years = 10 points			
	MAX. AVAILABLE POINTS	67		
	MIN. POINTS REQUIRED	44		
	POINTS ACHIEVED			

11. BUSINESS SYSTEMS ANALYST, ELECTRONIC DATA INTERCHANGE (EDI) – LEVEL 3

11.1 MANDATORY REQUIREMENTS – BUSINESS SYSTEM ANALYST (EDI) – LEVEL 3

BUSINESS SYSTEM ANALYST (EDI) – LEVEL 3

Name of proposed Resource: _____

The Contractor **MUST** demonstrate that the proposed resource has:

Criteria	Mandatory Requirements	Demonstrated experience	Insert page # of Resume
M1	A minimum of ten years of experience developing and documenting statement of requirements and performing business analyses of functional requirements for IM/IT initiatives.		
M2	A minimum of one project developing and documenting statement of requirements and performing business analyses of functional		

BUSINESS SYSTEM ANALYST (EDI) – LEVEL 3		
Name of proposed Resource: _____		
The Contractor MUST demonstrate that the proposed resource has:		
Criteria	Mandatory Requirements	Demonstrated experience
Criteria	Mandatory Requirements	Insert page # of Resume
	requirements on an IM/IT project involving a 24 hours per day, 7 days per week operational mandate, with a dollar value in excess of a \$100 million budget, that involved 2 or more stakeholders.	
M3	A minimum of five years of experience in analyzing, evaluating and developing business processes for web applications in Large-Scale* environments for organizations involved in the international movement of goods or people. *Large-Scale is defined as an organization with over 10,000 employees	
M4	A minimum one year experience in developing automated risk assessment systems.	
M5	A minimum of one year of experience mapping ANSI-X12 and EDIFACT/GOVCBR inbound and outbound standards to the World Customs Organization V 3.3 data model.	

11.2 POINT RATED REQUIREMENTS – BUSINESS SYSTEM ANALYST (EDI) – LEVEL 3

BUSINESS SYSTEM ANALYST (EDI) – LEVEL 3				
Name of proposed Resource: _____				
The Contractor SHOULD demonstrate that the proposed resource has:				
#	Rated Criteria	Score / Points MAX (MIN.)	Demonstrated Experience	Insert Page # of Resume
R1	Experience modeling electronic transactions for cross-border trade. 0 to 1 year = 0 point 1+ year to 2 years = 2 points 2+ year to 3 years = 5 points 3+ years = 10 points	10		
R2	Experience providing expert advice regarding both supply chain logistics business processes and the technical details of electronically transmitted commercial trade data. 0 to 1 year = 0 point 1+ year to 2 years = 2 points 2+ year to 3 years = 5 points 3+ years = 10 points	10		
R3	Experience working on systems development projects, modeling business processes and documenting business requirements in business application IT projects. 0 to 5 years = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points	10		

BUSINESS SYSTEM ANALYST (EDI) – LEVEL 3				
Name of proposed Resource: _____				
The Contractor SHOULD demonstrate that the proposed resource has:				
#	Rated Criteria	Score / Points MAX (MIN.)	Demonstrated Experience	Insert Page # of Resume
R4	Experience developing automated risk assessment methodologies and implementing them within case and workflow systems. 0 to 5 years = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points	10		
R5	Experience documenting reporting requirements to support operational needs senior management reporting and performance measurement criteria. 0 to 5 years = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points	10		
R6	Experience over and above the minimum one year of experience identified in mandatory requirement M5. 0 to 1 year = 0 point 1+ year to 2 years = 5 points 2+ years = 10 points	10		
R7	Experience developing and documenting statement of requirements and performing business analyses	5		

BUSINESS SYSTEM ANALYST (EDI) – LEVEL 3			
Name of proposed Resource: _____			
The Contractor SHOULD demonstrate that the proposed resource has:			
#	Rated Criteria	Score / Points MAX (MIN.)	Demonstrated Experience
	of functional requirements on an IM/IT project involving a 24 hours per day, 7 days per week operational mandate, with a dollar value in excess of a \$100 million budget that involved 2 or more stakeholders who are responsible for the movement of goods or people. 1 project = 3 points 2 or more projects = 5 points		
	MAX. AVAILABLE POINTS	65	
	MIN. POINTS REQUIRED	43	
	POINTS ACHIEVED		

12. BUSINESS CONSULTANT – LEVEL 3

12.1 MANDATORY REQUIREMENTS – BUSINESS CONSULTANT – LEVEL 3

BUSINESS CONSULTANT – LEVEL 3		
Name of proposed Resource: _____		
The Contractor MUST demonstrate that the proposed resource has:		
Criteria	Mandatory Requirements	Demonstrated experience
M1	A minimum of one project managing business requirements by translating	

BUSINESS CONSULTANT – LEVEL 3

Name of proposed Resource: _____

The Contractor **MUST** demonstrate that the proposed resource has:

Criteria	Mandatory Requirements	Demonstrated experience	Insert page # of Resume
	business objectives into systems requirements on an IM/IT project involving a 24 hours per day, 7 days per week operational mandate, with a dollar value in excess of a \$100 million budget, that involved 2 or more stakeholders.		
M2	A minimum of ten years of experience providing business consulting services to support business improvements and information technology initiatives.		
M3	A minimum of two years of experience defining requirements and business processes and managing issues and risks related to the implementation of software applications for organizations involved in the international movement of goods or people.		

12.2 POINT RATED CRITERIA – BUSINESS CONSULTANT – LEVEL 3

BUSINESS CONSULTANT – LEVEL 3

Name of proposed Resource: _____

The Contractor **SHOULD** demonstrate that the proposed resource has:

#	Rated Criteria	Score / Points MAX	Demonstrated Experience	Insert Page # of Resume
R1	<p>Experience conceiving, gathering requirements, documenting and leading the implementation of web portals.</p> <p>0 to 2 years = 0 point 2+ years to 3 years = 2 points 3+ years to 5 years = 5 points 5+ years = 10 points</p>	10		
R2	<p>Experience defining requirements and business processes and managing issues and risks related to the implementation of software applications in support of commercial risk assessment for projects involving the movement of goods across borders.</p> <p>0 to 2 years = 0 point 2+ years to 3 years = 2 points 3+ years to 5 years = 5 points 5+ years = 10 points</p>	10		
R3	<p>Experience coordinating IT security functions, including threat and risk assessments and statements of sensitivity.</p> <p>0 to 2 years = 0 point 2+ years to 3 years = 2 points 3+ years to 5 years = 5 points 5+ years = 10 points</p>	10		
R4	Experience on projects requiring the development	10		

	and review of testing strategies and approaches for portals and web-based information systems supporting both internal and external users. 0 to 2 year = 0 point 2+ years to 3 years = 2 points 3+ years to 5 years = 5 points 5+ years = 10 points			
R5	Experience in the identification and design of service level objectives (SLO) for operations in a 24 hours per day, 7 days per week work environment. 0 to 1 year = 0 point 1+ year to 2 years = 5 points 2+ years = 10 points	10		
R6	Experience working with World Customs Organization frameworks or agreements (including, but not limited to nomenclature, enforcement and compliance, and procedures and facilitation). 0 to 1 year = 0 point 1+ year of experience = 10 points	10		
R7	A valid Business Analyst Professional (CBAP) designation. To obtain points a valid copy of the designation is to be included with the Contractor's proposal. No valid designation = 0 point Valid Business Analyst Professional Designation = 5 points.	5		
MAX. AVAILABLE POINTS		65		
MIN. POINTS REQUIRED		43		
POINTS ACHIEVED				

13. TEST COORDINATOR – LEVEL 3

13.1 MANDATORY REQUIREMENTS – TEST COORDINATOR - LEVEL 3

TEST COORDINATOR - LEVEL 3

Name of proposed Resource: _____

The Contractor **MUST** demonstrate that the proposed resource has:

TEST COORDINATOR - LEVEL 3		
Name of proposed Resource: _____		
The Contractor MUST demonstrate that the proposed resource has:		
Criteria	Mandatory Requirements	Demonstrated experience
		Insert page # of Resume
M1	A minimum of ten years of experience overseeing and managing the testing and deployment of a nationally distributed system.	
M2	A minimum of one project developing and executing systems integration tests, specialized tests, and user acceptance testing on an IM/IT project involving a 24 hours per day, 7 days per week operational mandate, with a dollar value in excess of a \$100 million budget, that involved 2 or more stakeholders.	
M3	A minimum of five years of experience overseeing the scoping and implementation of testing and integration planning for a nationally distributed system.	

13.2 POINT RATED CRITERIA – TEST COORDINATOR - LEVEL 3

TEST COORDINATOR - LEVEL 3

Name of proposed Resource: _____

The Contractor **SHOULD** demonstrate that the propose resource has:

#	Rated Criteria	Score/ Points MAX	Demonstrated Experience	Insert Page # of Resume
R1	<p>Experience with managing and overseeing the testing, integration and deployment of systems used nationally.</p> <p>0 to 1 year = 0 point 1+ year to 3 years = 2 points 3+ years to 5 years = 5 points 5+ years = 10 points</p>	10		
R2	<p>Experience defining and developing test cases and test strategies for application architectures for high availability IM/ IT environments (operating 24 hours per day, 7 days per week).</p> <p>0 to 1 year = 0 point 1+ year to 3 years = 2 points 3+ years to 5 years = 5 points 5+ years = 10 points</p>	10		
R3	<p>Experience with automated testing tools and test processes for IM/IT environments (operating 24 hours per day, 7 days per week).</p> <p>0 to 1 year = 0 point 1+ year to 3 years = 2 points 3+ years to 5 years = 5 points 5+ years = 10 points</p>	10		

TEST COORDINATOR - LEVEL 3

Name of proposed Resource: _____

The Contractor **SHOULD** demonstrate that the propose resource has:

#	Rated Criteria	Score/ Points MAX	Demonstrated Experience	Insert Page # of Resume
R4	Experience overseeing the testing and implementation of systems that comply with the standards of the World Customs Organization. 0 to 2 year = 0 point 2+ years to 3 years = 2 points 3+ years to 4 years = 3 points 4+ years = 5 points	5		
	MAX. AVAILABLE POINTS	35		
	MIN. POINTS REQUIRED	23		
	POINTS ACHIEVED			

14. PROJECT MANAGER, GENERIC – LEVEL 3

14.1 MANDATORY REQUIREMENTS – PROJECT MANAGER, GENERIC – LEVEL 3

PROJECT MANAGER, GENERIC – LEVEL 3

Name of proposed Resource: _____

The Contractor **MUST** demonstrate that the proposed resource has:

Criteria	Mandatory Requirement	Demonstrated experience	Insert page # of Resume
M1	A minimum of five years of experience managing a project during the development, implementation and operations using knowledge, skills, tools, and techniques to		

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PROJECT MANAGER, GENERIC – LEVEL 3

Name of proposed Resource: _____

The Contractor **MUST** demonstrate that the proposed resource has:

Criteria	Mandatory Requirement	Demonstrated experience	Insert page # of Resume
	project activities to meet the project requirements on a project involving a 24 hours per day, 7 days per week operational mandate, with a dollar value in excess of a \$100 million budget, that involved 2 or more stakeholders.		
M2	A minimum of five years of experience working with Microsoft Project for the purpose of reporting against project milestones.		

14.2 POINT RATED CRITERIA – PROJECT MANAGER, GENERIC – LEVEL 3

PROJECT MANAGER, GENERIC – LEVEL 3

Name of proposed Resource: _____

The Contractor SHOULD demonstrate that the proposed resource has:

#	Rated Criteria	Score / Points MAX	Demonstrated Experience	Insert Page # of Resume
R1	<p>Experience managing a project during the development, implementation and operations using knowledge, skills, tools, and techniques to project activities to meet the project requirements on a project involving a 24 hours per day, 7 days per week operational mandate, with a dollar value in excess of a \$100 million budget, that involved 2 or more stakeholders who are responsible for the movement of goods or people.</p> <p>1 project – 3 points 2 or more projects – 5 points</p>	5		
R2	<p>A valid Project Management Professional (PMP) certification from the Project Management Institute (PMI).</p> <p>To obtain points a valid copy of the certification is to be included with the Contractor’s proposal.</p> <p>No valid designation = 0 point Valid Business Analyst Professional Designation = 5 points.</p>	5		
R3	<p>Experience developing project plans, including the definition of the project scope, budget and schedule.</p> <p>0 to 5 years = 0 point</p>	10		

PROJECT MANAGER, GENERIC – LEVEL 3

Name of proposed Resource: _____

The Contractor SHOULD demonstrate that the proposed resource has:

#	Rated Criteria	Score / Points MAX	Demonstrated Experience	Insert Page # of Resume
	5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points			
R4	Experience over and above the minimum five years of experience identified in mandatory requirement M2. 0 to 5 years = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points	10		

PROJECT MANAGER, GENERIC – LEVEL 3

Name of proposed Resource: _____

The Contractor **SHOULD** demonstrate that the proposed resource has:

#	Rated Criteria	Score / Points MAX	Demonstrated Experience	Insert Page # of Resume
5	<p>Experience managing project risk, issues and changes using industry recognized best practices.</p> <p>0 to 5 years = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points</p>	10		
R6	<p>Experience interacting and communicating project status, risks and issue to senior management.</p> <p>0 to 5 years = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points</p>	10		
R7	<p>Experience managing a project during the development, implementation and operations using knowledge, skills, tools, and techniques to project activities to meet the project requirements on a project involving a 24 hours per day, 7 days per week operational mandate, with a dollar value in excess of a \$100 million budget, that involved 2 or more stakeholders, who are responsible for the movement of goods or people across international borders.</p> <p>1 project – 3 points 2 or more projects – 5 points</p>	5		
MAX. AVAILABLE POINTS		55		

PROJECT MANAGER, GENERIC – LEVEL 3

Name of proposed Resource: _____

The Contractor **SHOULD** demonstrate that the proposed resource has:

#	Rated Criteria	Score / Points MAX	Demonstrated Experience	Insert Page # of Resume
MIN. POINTS REQUIRED		36		
POINTS ACHIEVED				

15. BUSINESS SYSTEMS ANALYST, GENERIC – LEVEL 3

15.1 MANDATORY REQUIREMENTS – BUSINESS SYSTEM ANALYST, GENERIC - LEVEL 3

BUSINESS SYSTEM ANALYST, GENERIC - LEVEL 3

Name of proposed Resource: _____

The Contractor **MUST** demonstrate that the proposed resource has:

Criteria	Mandatory Requirements	Demonstrated experience	Insert page # of Resume
M1	A minimum of ten years of experience working on IM/IT initiatives developing and documenting statement of requirements and performing business analyses of functional requirements.		
M2	A minimum of five years of experience developing and documenting detailed statement of requirements for IM/IT projects.		
M3	A minimum of five years of experience performing business analyses of functional requirements to identify information, procedures, and decision flows.		

15.2 POINT RATED CRITERIA – BUSINESS SYSTEM ANALYST, GENERIC - LEVEL 3

BUSINESS SYSTEM ANALYST, GENERIC - LEVEL 3

Name of proposed Resource: _____

The Contractor SHOULD demonstrate that the proposed resource has:

#	Rated Criteria	Score / Points MAX (MIN.)	Demonstrated Experience	Insert Page # of Resume
R1	<p>Experience over and above the minimum ten years identified in mandatory requirement M1.</p> <p>0 to 10 years = 0 point 10+ years to 12 years = 2 points 12+ years to 15 years = 5 points 15+ years = 10 points</p>	10		
R2	<p>Experience over and above the minimum five (5) years of experience identified in mandatory requirement M2.</p> <p>0 to 5 years = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points</p>	10		
R3	<p>Experience facilitating JAD sessions and conducting interviews.</p> <p>0 to 5 years = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points</p>	10		
R4	<p>Experience in application systems testing and quality assurance. This includes the development of testing strategies, and plans.</p>	10		

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BUSINESS SYSTEM ANALYST, GENERIC - LEVEL 3

Name of proposed Resource: _____

The Contractor SHOULD demonstrate that the proposed resource has:

#	Rated Criteria	Score / Points MAX (MIN.)	Demonstrated Experience	Insert Page # of Resume
	0 to 5 years = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points			
R5	Experience developing technical documentation to support the system analysis and development process 0 to 5 years = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points	10		
MAX. AVAILABLE POINTS		50		
MIN. POINTS REQUIRED		32		
POINTS ACHIEVED				

16. BUSINESS ANALYST – LEVEL 3

16.1 MANDATORY REQUIREMENTS – BUSINESS ANALYST - LEVEL 3

BUSINESS ANALYST - LEVEL 3

Name of proposed Resource: _____

The Contractor **MUST** demonstrate that the proposed resource has:

Criteria	Mandatory Requirement	Demonstrated experience	Insert page # of Resume
M1	A minimum of ten years of experience developing project charters, plans and schedules and performing business analyses of functional requirements.		
M2	A minimum of five years of experience conducting requirements gathering sessions and documenting the current state, the As-Is business processes and the supporting information systems.		
M3	A minimum of five years of experience developing process analysis and functional specifications to support the development of automated business processes.		
M4	A minimum five years of experience in conducting interviews and workshops with business and technical communities.		
M5	A minimum of two years of experience developing project charters, plans and schedules and performing business analyses of functional requirements on a project involving a 24 hours per day, 7 days per week operational mandate, with a dollar value in excess of a \$100 million budget that involved 2 or more stakeholders.		

16.2 POINT RATED CRITERIA – BUSINESS ANALYST - LEVEL 3

BUSINESS ANALYST - LEVEL 3

Name of proposed Resource: _____

The Contractor SHOULD demonstrate that the proposed resource has:

#	Rated Criteria	Score / Points MAX	Demonstrated Experience	Insert Page # of Resume
R1	Experience over and above the minimum ten years' experience identified in mandatory requirement M1. 0 to 10 years = 0 point 10+ years to 12 years = 2 points 12+ years to 13 years = 5 points 13+ years = 10 points	10		
R2	Experience over and above the minimum five years of experience identified in mandatory requirement M2. 0 to 5 years = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points	10		
R3	Experience over and above the minimum five years of experience identified in mandatory requirement M3. 0 to 5 years = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points	10		

BUSINESS ANALYST - LEVEL 3

Name of proposed Resource: _____

The Contractor SHOULD demonstrate that the proposed resource has:

#	Rated Criteria	Score / Points MAX	Demonstrated Experience	Insert Page # of Resume
R4	Experience over and above the minimum five years of experience identified in mandatory requirement M4. 0 to 5 years = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points	10		
R5	Experience developing project charters, plans and schedules and performing business analyses of functional requirements on a project involving a 24 hours per day, 7 days per week operational mandate, with a dollar value in excess of a \$100 million budget that involved 2 or more stakeholders, who are responsible for the movement of goods or people. 1 project – 3 points 2 or more projects – 5 points	5		
MAX. AVAILABLE POINTS		45		
MIN. POINTS REQUIRED		29		
POINTS ACHIEVED				

17. CHANGE MANAGEMENT CONSULTANT – LEVEL 3

17.1 MANDATORY REQUIREMENTS – CHANGE MANAGEMENT CONSULTANT - LEVEL 3

CHANGE MANAGEMENT CONSULTANT - LEVEL 3			
Name of proposed Resource:			
The Contractor MUST demonstrate that the proposed resource has:			
Criteria	Mandatory Requirement	Demonstrated experience	Insert page # of Resume
M1	A minimum of ten years of experience working on IM/IT initiatives in analysing and developing architecture requirements design, process development and process mapping.		
M2	A minimum of five years of experience in evaluating the impact of business transformation and changes in Large-Scale* work environment. *Large-Scale is defined as an organization with over 10,000 employees.		
M3	A minimum of five years of experience in developing new business policies and procedures to support business changes and transformation.		
M4	A minimum of five years of experience in developing communication material to support business changes and transformation.		

17.2 POINT RATED CRITERIA – CHANGE MANAGEMENT CONSULTANT - LEVEL 3

Name of proposed Resource:				
The Contractor SHOULD demonstrate that the proposed resource has:				
#	Rated Criteria	Score / Points MAX	Demonstrated Experience	Insert Page # of Resume
R1	Experience with the development of change management plans and strategies 0 to 5 years = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points	10		
R2	Experience over and above the minimum five years identified in mandatory requirement M2. 0 to 5 years = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points	10		
R3	Experience over and above the minimum five years identified in mandatory requirement M3. 0 to 5 years = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points	10		
R4	Experience over and above the minimum five years identified in mandatory requirement M4. 0 to 5 years = 0 point 5+ years to 7 years = 2 points	10		

Name of proposed Resource:			
The Contractor SHOULD demonstrate that the proposed resource has:			
#	Rated Criteria	Score / Points MAX	Demonstrated Experience
	7+ years to 10 years = 5 points 10+ years = 10 points		
R5	Experience in conducting information gathering interviews and workshops with business and technical communities. 0 to 5 years = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points	10	
MAX. AVAILABLE POINTS		50	
MIN. POINTS REQUIRED		32	
Points Achieved			

18. PROJECT SCHEDULER – LEVEL 3

18.1 MANDATORY REQUIREMENTS – PROJECT SCHEDULER - LEVEL 3

PROJECT SCHEDULER - LEVEL 3		
Name of proposed Resource: _____		
The Contractor MUST demonstrate that the proposed resource has:		
Criteria	Mandatory Requirements	Demonstrated experience
M1	A minimum of ten years of experience working on IM/IT initiatives developing and	

PROJECT SCHEDULER - LEVEL 3

Name of proposed Resource: _____

The Contractor **MUST** demonstrate that the proposed resource has:

Criteria	Mandatory Requirements	Demonstrated experience	Insert page # of Resume
	supporting project schedules on a project involving a 24 hours per day, 7 days per week operational mandate, with a dollar value in excess of a \$10 million budget.		
M2	A minimum of five years of experience in the development of Work Breakdown Structures (WBS), including WBS Dictionaries and Work Package descriptions.		
M3	A minimum of five years of experience developing, maintaining and monitoring Large Project schedules using MS Project. *Large Project is defined as over 1,000 lines or activities.		
M4	Experience developing and supporting project schedules on a minimum of one project that includes all of the following: A. with an overall budget of \$10M Canadian dollars or more; B. that spans 2 or more years; C. that includes 2 or more resource allocation; D. that involves other organizations; E. that consists of phased implementation; and F. A minimum duration of 6 months		

PROJECT SCHEDULER - LEVEL 3

Name of proposed Resource: _____

The Contractor **MUST** demonstrate that the proposed resource has:

Criteria	Mandatory Requirements	Demonstrated experience	Insert page # of Resume

18.2 POINT RATED CRITERIA – PROJECT SCHEDULER - LEVEL 3

PROJECT SCHEDULER - LEVEL 3

Name of proposed Resource: _____

The Contractor **SHOULD** demonstrate that the proposed resource has:

#	Rated Criteria	Score / Points MAX	Demonstrated Experience	Insert Page # of Resume
R1	Experience over and above the minimum ten years identified in mandatory requirement M1. 0 to 10 years = 0 point 10+ years to 12 years = 2 points 12+ years to 15 years = 5 points 15+ years = 10 points	10		
R2	Experience over and above the minimum five years identified in mandatory requirement M2. 0 to 5 years = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points	10		
R3	Experience over and above the minimum five	10		

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Name of proposed Resource: _____

The Contractor SHOULD demonstrate that the proposed resource has:

#	Rated Criteria	Score / Points MAX	Demonstrated Experience	Insert Page # of Resume
	years identified in mandatory requirement M3. 0 to 5 years = 0 point 5+ years to 7 years = 2 points 7+ years to 10 years = 5 points 10+ years = 10 points			
R4	Experience over and above the minimum one project identified in mandatory requirement M4. 2 points for each additional project experience, above and beyond M4, to a maximum of 10 points.	10		
MAX. AVAILABLE POINTS		40		
MIN. POINTS REQUIRED		26		
POINTS ACHIEVED				

Glossary of Terms

- **IM/IT Project** - A project is a defined undertaking with a beginning and an end to be executed to create a unique product or result.
 - **Business Projects - IT-Enabled are either:**
 - New solution projects which develop new solutions to achieve efficient and effective business processes and service delivery that are facilitated by Information Technology; some of these projects may transform business practices.
 - Maintenance projects which implement changes to existing products, results, services, applications or systems.
 - Business Process - A business process is a collection of linked tasks which find their end in the delivery of a service or product to a client. A business process has also been defined as a set of activities and tasks that, once completed, will accomplish an organizational goal
 - **Gated Process** - A phase-gate model, also referred to as a phase-gate process, is a project management technique in which an initiative or project (e.g., new product development, process improvement, business change) is divided into stages or phases, separated by gates for a decision making stage
 - **Risk Assessment** - Risk assessment includes both the identification of potential risk and the evaluation of the potential impact of the risk managing risks on projects is a process that includes risk assessment and a mitigation strategy for those risks.
 - **Large-Scale Work Environment** - defined as an organization with over 10,000 employees
 - **Systems**
 - ACROSS - Accelerated Commercial Release Operations Support System
 - TITAN - An automated risk assessment tool used to screen marine commercial shipments
 - CMRS - Consolidated Management Reporting System
 - RAUS – Risk Assessment User Services
 - RAPM – Risk Assessment Program Maintenance
 - SWI – Single Window Initiative
 - **eManifest** - eManifest is modernizing and improving cross-border commercial processes and, when fully implemented, will require all carriers, freight forwarders and importers to send advance commercial information electronically to the CBSA.
- The eManifest Project is managed by the Commercial Projects Directorate of the Information, Science and Technology Branch, in close collaboration with the Programs and Operations Branches.
- **World Customs Organization** - Independent intergovernmental body whose mission is to improve the administration of customs
-

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- **Safe Framework** - Framework set out by the World Customs Organization, http://www.wcoomd.org/en/topics/facilitation/instrument-and-tools/tools/safe_package.aspx
- **Data Model** - Data modeling is often the first step in database design and object-oriented programming as the designers first create a conceptual model of how data items relate to each other. Data modeling involves a progression from conceptual model to logical model to physical schema.
- **Relational data model** - the primary data model, which is used for data storage and processing.
- **Dimensional data model** – is a design technique for databases intended to support end-user queries in a data warehouse.
- **Business Intelligence** - the applications, infrastructure and tools, and best practices that enable access to and analysis of information to improve and optimize decisions and performance.
- **Hands-on experience** – active participation in the operation, as distinguished from mere observation or study.

**APPENDIX C TO ANNEX B
CERTIFICATIONS AT THE TA STAGE**

The following Certifications are to be used, as applicable. If they apply, they must be signed and attached to the Contractor's quotation when it is submitted to Canada.

1. CERTIFICATION OF EDUCATION AND EXPERIENCE

The Contractor certifies that all the information provided in the résumés and supporting material proposed for completing the subject work, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Contractor to be true and accurate. Furthermore, the Contractor warrants that every individual proposed by the Contractor for the requirement is capable of performing the Work described in the Task Authorization.

Print name of authorized individual & sign above

Date

2. CERTIFICATION OF AVAILABILITY OF PERSONNEL

The Contractor certifies that, should it be authorized to provide services under this Task Authorization, the persons proposed in the quotation will be available to commence performance of the work within a reasonable time from the date of issuance of the valid Task Authorization, or within the time specified in the TA Form, and will remain available to perform the work in relation to the fulfillment of the requirement.

Print name of authorized individual & sign above

Date

3. CERTIFICATION OF STATUS OF PERSONNEL

If the Contractor has proposed any individual who is not an employee of the Contractor, the Contractor certifies that it has permission from that individual to propose his/her services in relation to the Work to be performed under this TA and to submit his/her résumé to Canada. At any time during the Contract Period the Contractor must, upon request from the Contracting Authority, provide the written confirmation, signed by the individual, of the permission that was given to the Contractor of his/her availability. Failure to comply with the request may result in a default under the Contract in accordance with the General Conditions.

Print name of authorized individual & sign above

Date

4. CERTIFICATION OF LANGUAGE - ENGLISH

The Contractor certifies that the proposed resource(s) in response to this draft Task Authorization is/are fluent in English. The individual(s) proposed must be able to communicate orally and in writing in English without any assistance and with minimal errors.

Print name of authorized individual & sign above

Date

OR

5. CERTIFICATION OF LANGUAGE - BILINGUAL

The Contractor certifies that the proposed resource(s) in response to this draft Task Authorization is/are fluent in both official languages of Canada (French and English). The individual(s) proposed must be able to communicate orally and in writing in French and English without any assistance and with minimal errors.

Print name of authorized individual & sign above

Date

ANNEX C
BASIS OF PAYMENT

Professional Services

In accordance with the contract, the Contractor will be paid the following firm all-inclusive per diem rates for work performed pursuant to this Contract, GST/HST extra.

FOR THE INITIAL CONTRACT PERIOD (2 YEARS)		
Category of Personnel	Level	Firm Per Diem Rate
Project Executive	3	
Project Manager – Business Intelligence (BI)	3	
Project Manager – Project Management Office (PMO) and Financial	3	
Project Manager - Generic	3	
Business Process Re-Engineering Consultant	3	
IM Architect – Data Warehouse	3	
IM Architect – Analytics	3	
Application/Software Architect	3	
Business Architect	3	
Business Transformation Architect	3	
Business System Analyst – Web Portals	3	
Business System Analyst – Electronic Data Interchange	3	
Business System Analyst - Generic	3	
Test Coordinator	3	
Change Management Consultant	3	

Business Consultant	3	
Project Scheduler	3	
Business Analyst	3	

FOR THE OPTION YEAR 1 (1 YEAR)		
Category of Personnel	Level	Firm Per Diem Rate
Project Executive	3	
Project Manager – Business Intelligence (BI)	3	
Project Manager – Project Management Office (PMO) and Financial	3	
Project Manager - Generic	3	
Business Process Re-Engineering Consultant	3	
IM Architect – Data Warehouse	3	
IM Architect – Analytics	3	
Application/Software Architect	3	
Business Architect	3	
Business Transformation Architect	3	
Business System Analyst – Web Portals	3	
Business System Analyst – Electronic Data Interchange	3	
Business System Analyst - Generic	3	
Test Coordinator	3	
Change Management Consultant	3	
Business Consultant	3	
Project Scheduler	3	

Business Analyst	3	
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ANNEX D

SECURITY REQUIREMENTS CHECK LIST

(see attached hereto)