Office of the Secretary to the Governor General
Bureau du secrétaire du gouverneur général

RETURN BIDS TO:
RETOURNER LES SOUMISSIONS À:

Office of the Secretary to the Governor General
Bureau du secrétaire du gouverneur général
1, promenade Sussex Drive
Ottawa Ontario K1A 0A1
Email: OSGGContracts@gg.ca

REQUEST FOR PROPOSAL
DEMANDE DE PROPOSITION

Proposal To: Office of the Secretary to the Governor General

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

Proposition aux : Bureau du secrétaire du gouverneur général

Nous offrons par la présente de vendre au 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-annexées, au(x) prix indiqué(s).

Instructions : See Herein
Instructions: Voir aux présentes

Issuing Office – Bureau de distribution

Office of the Secretary to the Governor General
Bureau du secrétaire du gouverneur général
Materiel Management | Gestion du matériel
1, promenande Sussex Drive
Ottawa, Ontario K1A 0A1

Title – Sujet **Web Design and Development**	
Solicitation No. – N° de l'invitation **OSGG-BSGG-16-1632**	**Date** **April 15, 2016**
Solicitation Closes – L'invitation prend fin **at – à** 2:00***PM*** **on – le May 25, 2016**	**Time Zone** **Fuseau horaire** **Eastern Daylight Time (EDT)**
F.O.B. - F.A.B. **Plant-Usine:** ☐ **Destination:** ☒ **Other-Autre:** ☐	
Address Inquiries to: - Adresser toutes questions à : OSGGContracts@gg.ca	
Telephone No. – N° de téléphone : **613-991-9351**	
Destination – of Goods, Services, and Construction: **Destination – des biens, services et construction :** See Herein	
Delivery required - Livraison exigée See Herein	
Vendor/firm Name and address **Raison sociale et adresse du fournisseur/de l'entrepreneur** **Facsimile No. – N° de télécopieur** **Telephone No. – N° de téléphone**	
Name and title of person authorized to sign on behalf of Vendor/firm **Nom et titre de la personne autorisée à signer au nom du fournisseur/de l'entrepreneur** ____________________ **(type or print)/ (taper ou écrire en caractères d'imprimerie)** ____________________ ________ **Signature** **Date**	

TABLE OF CONTENTS

List of Annexes

PART 1 - GENERAL INFORMATION

1.1 Security Requirements

1. At the date of bid closing, the following conditions must be met:

   (a) the Bidder must hold a valid organization security clearance as indicated in Part 6 - Resulting Contract Clauses;

   (b) the Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work site(s) must meet the security requirements as indicated in Part 6 - Resulting Contract Clauses;

   (c) the Bidder must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites;

2. For additional information on security requirements, bidders should refer to the Industrial Security Program (ISP) of Public Works and Government Services Canada (http://ssi-iss.tpsgc-pwgsc.gc.ca/index-eng.html) website.

1.2 Statement of Work

The Contractor must perform the Work in accordance with the Statement of Work at Annex "A".

1.3 Office of the Procurement Ombudsman (OPO)

The Office of the Procurement Ombudsman (OPO) was established by the Government of Canada to provide an independent avenue for suppliers to raise complaints regarding the award of contracts under $25,000 for goods and under $100,000 for services. You have the option of raising issues or concerns regarding the solicitation, or the award resulting from it, with the OPO by contacting them by telephone at 1-866-734-5169 or by email at opo-boa@opo-boa.gc.ca. You can also obtain more information on the OPO services available to you at their website at www.opo-boa.gc.ca

1.4 Debriefings

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

PART 2 - BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

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

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

The 2003 (2016-04-04) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

2.2 Submission of Bids

Bids must be submitted only to Office of the Secretary to the Governor General by the date, time and place indicated on page 1 of the bid solicitation.

2.2.1 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 reason 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 at least fifteen (15) days before the bid closing date. Canada will have the right to accept or reject any or all suggestions.

2.3 Former Public Servant

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. If the answer to the questions and, as applicable the information required have not been received by the time the evaluation of bids is completed, Canada will inform the Bidder of a time frame within which to provide the information. Failure to comply with Canada's request and meet the requirement within the prescribed time frame will render the bid non-responsive.

1. Definitions

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

a. an individual;

b. an individual who has incorporated;

c. a partnership made of former public servants; or

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

"lump sum payment period" means the period measured in weeks of salary, for which payment has been made to facilitate the transition to retirement or to other employment as a result of the implementation of various programs to reduce the 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.

2. 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 FPSs in receipt of a pension, as applicable:

a. name of former public servant;

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

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

3. Work Force Adjustment Directive

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

If so, the Bidder must provide the following information:

a. name of former public servant;

b. conditions of the lump sum payment incentive;

c. date of termination of employment;

d. amount of lump sum payment;

e. rate of pay on which lump sum payment is based;

f. period of lump sum payment including start date, end date and number of weeks;

g. 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.

2.4 Enquiries - Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than ten (10) calendar days before the bid closing date. Enquiries received after that time may not be answered.

Bidders should reference as accurately as possible the numbered item of the bid solicitation to which the enquiry relates. Care should be taken by bidders to explain each question in sufficient detail in order to enable Canada to provide an accurate answer. Technical enquiries that are of a proprietary nature must be clearly marked "proprietary" at each relevant item. Items identified as "proprietary" will be treated as such except where Canada determines that the enquiry is not of a proprietary nature. Canada may edit the question(s) or may request that the Bidder do so, so that the proprietary nature of the question(s) 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.

2.5 Applicable Laws

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

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

PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

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

i. Section I: Technical Bid (one (1) electronic copy)
ii. Section II: Financial Bid (one (1) electronic copy)
iii. Section III: Certifications (one (1) electronic copy)

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

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

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

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 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:

1) use 8.5 x 11 inch (216 mm x 279 mm) paper containing fibre certified as originating from a sustainably-managed forest and containing minimum 30% recycled content; and

2) use an environmentally-preferable format including black and white printing instead of colour printing, printing double sided/duplex, using staples or clips instead of cerlox, duotangs or binders.

Section I: Technical Bid
In their technical bid, bidders should explain and demonstrate how they propose to meet the requirements and how they will carry out the Work.

Section II: Financial Bid
Bidders must submit their financial bid in accordance with the Basis of Payment. The total amount of Applicable Taxes must be shown separately.

Section III: Certifications
Bidders must submit the certifications required under Part 5.

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.

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

4.1.1 Technical Evaluation

4.1.1.1 Mandatory Technical Criteria

Item	Requirements	Rating	Proposal Section
MT1	**Executive Summary** The Bidder must include an executive summary highlighting the following: i. a brief description of their company ii. a summary of their company's areas of specialization and the unique value they are offering	M	
MT2	**Web Development Experience** The bidder must demonstrate its experience producing websites in Drupal 7 by providing three (3) web projects of similar complexity to the proposed functionalities of the new GG.ca as detailed in Annex A – Statement of Work (SOW). To be considered valid the three (3) submitted sites must have been developed and implemented by the Bidder within the past five (5) years and a minimum of one (1) of these sites must be fully bilingual. For each web project presented the Bidder must provide: i. Operational links; and ii. A summary document highlighting the methodology used to for each of the following components. The components will be assessed across all three (3) proposed websites. The proposed websites do not have to contain all the components under one single website.	M	

	• The creation of the site designs, information architecture and graphic user interface. • The creation and/or customization of a Drupal 7 module • The creation of a custom Drupal 7 theme • The development of web forms For each project, the bidder must provide the following information: • the name of the client organization; • the start and end date of the work; • the value of the project		
MT3	**Web Content Writing** The Bidder must demonstrate its ability to produce bilingual content in both of Canada's official languages as defined in Annex A – Statement of Work, Task 3.4. To demonstrate this ability the Bidder must detail its proposed solution which includes an individual or a firm that holds a valid accreditation, in good standing, from the Canadian Translators Terminologists and Interpreters Council (or Member Associations).		
MT4	**Project Summary** The Bidder must provide an estimated project timeline with milestones demonstrating a clear understanding of the requirement as defined in Annex A – Statement of Work. To clarify the timeline, the Bidder must describe the proposed approach of the web design and development process and the acceptance testing procedures that will be used.	M	

4.1.1.2 Point Rated Technical Criteria

Item	Rated Technical Requirements (Technical)	Points	Allocation of points
RT1	**Experience – Accessibility** The Bidder should demonstrate its experience developing websites that meet WCAG 2.0 guidelines, level AA. The Bidder should provide a minimum of one (1) and up to three (3) operational website links that were developed by the bidder.	/24	Two (2) points will be allocated for each guideline that meets level AA success criteria for each of the twelve (12) WCAG 2.0 guidelines up to a maximum of twenty-four (24) points.

	The Bidder's website will be evaluated against the twelve (12) WCAG 2.0 guidelines, level AA. (https://www.w3.org/TR/WCAG20/) The guidelines will be evaluated against all of the proposed websites, up to a maximum of three (3) websites. The Bidder's proposed websites do not have to meet all twelve (12) guidelines under one single website. Points will be allocated only once per guideline. Guidelines that are not applicable to any of the proposed websites will not be allocated any points.		
RT2	**Experience – Web Development** The Bidder should demonstrate its experience in developing websites using Drupal 7, containing one or more of the following features: 1. Theme based on the web experience toolkit 2. Search features that use facets and an indexing server 3. Email distribution list management and mail-out system 4. A timeline view (displays links to content using a timeline) 5. A map view (displays links to content on a map) 6. Booking/Reservation system 7. Chat 8. Discussion forum The Bidder should provide an operational link, developed by the bidder, for each of the above features.	/80	Ten (10) points will be allocated for each of the features that are met up to a maximum of eighty (80) points.
RT3	**Experience – Advanced HTML Web Forms** The Bidder should demonstrate its experience in developing advance HTML Web Forms* by providing five (5) operational links. Each operational link must be accompanied by a brief project summary defining how the project meets a minimum of four (4) of the following requirements. Form requirements: • Integrated in a Drupal 7 website • Contain a client side and server side input validation • Contains dynamic input validation (i.e. fields are	/50	Ten (10) points will be allocated for each of the projects that are met up to a maximum of fifty (50) points

	validated and feedback is provided as the user fills out the form, without having to press on submit button) • Contains multiple steps presented across multiple pages • Contain dynamic elements, such as branching or form fields changing depending on other field values • Allows users to save their progress and resume at a later time. In order to be considered valid the proposed projects must contain a minimum of four (4) out of six (6) of the above requirements. *Drupal content edit forms cannot be included in these examples.		
RT4	**Experience – External User Account Management** The Bidder should demonstrate its experience implementing up to three (3) different solutions in Drupal 7 that allows for user account management from an external system. For each of the three (3) examples, the bidder must include a description of the technical approach used to meet the requirements and identify what mechanisms were used to ensure data security.	/30	Ten (10) points will be allocated for each of the solutions that are met up to a maximum of thirty (30) points
Total points for Rated Technical Criteria (Technical) Minimum pass mark for Rated Technical Criteria (Technical) = 74 out of 184		/184	

Rating Table for Web Portfolio (RT5 & RT6)

Each Technical Bid that meets all the Mandatory Requirements specified above will be evaluated and scored in accordance with the following point-rated evaluation criteria table for the Web Portfolio Evaluation. Each point rated technical criterion should be addressed separately.

RATING SCHEME	
0%	Information provided does not address the criteria. Bidder receives 0% for the available points for this element.
10%	Information provided demonstrates a minimal understanding that is relevant to the stated criteria. Bidder receives 10% of the available points for this element.

30%	Information provided demonstrates some understanding that is relevant to the stated criteria but does not demonstrate a full range of understanding for all elements of the rated criteria. Bidder receives 30% of the available points for this
50%	Information provided demonstrates understanding for most but not all of the elements of the rated criteria. Bidder receives 50% of the available points for this element.
70%	Information provided demonstrates understanding that is relevant to all of the elements of the rated criteria meeting the established minimum. Bidder receives 70% of the available points for this element.
85%	Information provided clearly demonstrates a full understanding of all of the elements of the rated criteria. Bidder receives 85% of the available points for this element.
100%	Rated criteria is dealt with in depth, information provided demonstrates a full range of in-depth understanding of all of the elements of the rate criteria. Bidder receives 100% of the available points for this element.

Item	Rated Technical Requirements (Web Portfolio)	Points	Allocation of points
RT5	**User Centric Design** The Bidder should demonstrate its experience designing websites that are user centric by providing one sample website with a description of the methodology used to meet the needs of their target audience addressing each of the following: • User/Audience analysis • Site task analysis • Information architecture • Design approach • Assessment criteria for usability (user-friendliness)	/30	Points will be allocated based on rating scheme above
RT6	**Site Composition** The Bidder should demonstrate its experience in site composition by providing one sample website and with a description of the creative approach used to meet the needs of their target audience addressing each of the following: • **Design:** Does the design have visual interest to engage the targeted viewer? • **Structure:** Does the design present information in a structured hierarchy that is simple and easy to follow? • **Colour:** Do the colours used create an appropriate mood relative to the target audience • **Editorial Style:** Are the pages written with appropriate headlines that summarize the text	/70	Points will be allocated based on rating scheme above

	and are inviting? • **Multimedia Content:** is the use of multimedia content complementary to the editorial content.		
Total points for Rated Technical Criteria (Portfolio) Minimum pass mark for Rated Technical Criteria (Portfolio) = 60 out of 100		/100	
Overall Rated Technical Criteria Minimum pass mark for Overall Rated Technical Criteria = 134 out of 284		RTC Technical Score:_______ RTC Portfolio Score:+_______ Overall RTC Score:=_____/284	

4.1.2 Financial Evaluation

Only the proposals that are technically responsive will be considered for financial evaluation.

The price of the bid will be evaluated in Canadian dollars, applicable taxes are excluded.

For the purposes of bid evaluation, Annex B, Basis of Payment, will be used. The Bidder must provide all-inclusive fixed per diem rates for the Categories of Resources.

For bid evaluation and contractor selection purposes only, the evaluated price of a bid will be determined in accordance with Annex B, Basis of Payment.

The volumetric data included in the pricing schedule detailed in Annex B, Basis of Payment is provided for bid evaluated price determination purposes only. They are not to be considered as a contract guarantee.

4.2 Basis of Selection – Lowest Price Per Point

4.2.1 To be declared responsive, a bid must:

a. comply with all the requirements of the bid solicitation;
b. meet all mandatory technical evaluation criteria; and
c. obtain the required minimum points for the technical evaluation criteria which are subject to point rating.

4.2.2 Bids not meeting (a) or (b) or (c) will be declared non-responsive. Neither the responsive bid that receives the highest number of points nor the one that proposed the lowest price will necessarily be accepted. The responsive bid with the lowest evaluated price per point will be recommended for award of a contract.

PART 5 - CERTIFICATIONS

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

The certifications provided by bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default in carrying out any of its obligations under the Contract, 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 the Bidder's certifications. Failure to comply and to cooperate with any request or requirement imposed by the Contracting Authority may render the bid non-responsive or constitute a default under the Contract.

5.1 Certifications Precedent to Contract Award

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

5.1.1 Integrity Provisions - Associated Information

By submitting a bid, the Bidder certifies that the Bidder and its Affiliates are in compliance with the provisions as stated in Section 01 Integrity Provisions - Bid of Standard Instructions 2003. The associated information required within the Integrity Provisions will assist Canada in confirming that the certifications are true.

5.1.2 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" 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.

PART 6 - RESULTING CONTRACT CLAUSES

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

6.1 Security Requirements

6.1.1 The following security requirements apply and form part of the Contract.

PWGSC FILE # Common PS SRCL #6

1. The Contractor/Offeror must, at all times during the performance of the Contract/Standing Offer/Supply Arrangement, hold a valid Designated Organization Screening (DOS), issued by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC).
2. The Contractor/Offeror personnel requiring access to PROTECTED information, assets or sensitive work site(s) must EACH hold a valid **RELIABILITY STATUS**, granted or approved by CISD/PWGSC.
3. The Contractor/Offeror MUST NOT remove any PROTECTED information or assets from the identified work site(s), and the Contractor/Offeror must ensure that its personnel are made aware of and comply with this restriction.
4. Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of CISD/PWGSC.
5. The Contractor/Offeror must comply with the provisions of the:
    a. Security Requirements Check List and security guide (if applicable), attached at Annex C;
    b. *Industrial Security Manual* (Latest Edition).

6.2 Statement of Work

The Contractor must perform the Work in accordance with the Statement of Work at Annex "A".

6.3 Standard Clauses and Conditions

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

6.3.1 General Conditions

2035 (2016-04-04), General Conditions - Services (Higher Complexity), apply to and form part of the Contract.

6.3.2 Supplemental General Conditions

4002 (2010-08-16) Software Development or Modification Services, apply to and form part of the Contract.

4006 (2010-08-16) Contractor to Own Intellectual Property Rights in Foreground Information, apply to and form part of the Contract.

6.4 Term of Contract
6.4.1 Period of the Contract

The period of the Contract is from date of Contract to September 28th, 2018 inclusive.

6.4.2 Option to Extend the Contract

The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to one (1) additional one (1) year period(s) under the same conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions as set out in the Basis of Payment.

Canada may exercise this option at any time by sending a written notice to the Contractor at least thirty (30) calendar days 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.

6.5 Authorities
6.5.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: Melanie Vezina
Title: Manager, Material Management
Office of the Secretary to the Governor General
Address: 1 Sussex Drive, Ottawa, Ontario, K1A 0A1

Telephone: 613-991-9351
Facsimile: 613-990-8595
E-mail address: Melanie.Vezina@gg.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.

6.5.2 Project Authority

The Project Authority for the Contract is: (to be identified at contract award)

Name: _________
Title: _________
Organization: __________
Address: __________

Telephone: ___ ___ _______
Facsimile: ___ ___ _______
E-mail address: ___________

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

6.5.3 Contractor's Representative

The Contractor's Representative for the Contract is:

Name: _________
Title: _________
Organization: __________
Address: __________

Telephone: ___ ___ _______
Facsimile: ___ ___ _______
E-mail address: ___________

6.6 Proactive Disclosure of Contracts with Former Public Servants

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

6.7 Payment

6.7.1 Basis of Payment

For the Work described in Task 1 to 9 and 11 to 25 of the Statement of Work in Annex A:

The Contractor will be reimbursed for the costs reasonably and properly incurred in the performance of the Work as determined in accordance with the Basis of Payment in Annex B, to a limitation of expenditure of $________ (*insert the amount at contract award*). Customs duties are included and Applicable Taxes are extra.

For the Work described in Task 10 of the Statement of Work in Annex A:

The Contractor will be paid firm hourly rates as follows, for work performed in accordance with the Contract. Customs duties are included and Applicable Taxes are extra.

See Annex "B" Basis of Payment for Pricing Tables

6.7.2 Multiple Payments

Canada will pay the Contractor upon completion and delivery of units in accordance with the payment provisions of the Contract if:

a. an accurate and complete invoice and any other documents required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
b. all such documents have been verified by Canada; and
c. the Work delivered has been accepted by Canada.

6.8 Invoicing Instructions

The Contractor must submit invoices in accordance with the section entitled "Invoice Submission" of the general conditions. Invoices cannot be submitted until all work identified in the invoice is completed.

Invoices must be distributed as follows:

a) The original and one (1) copy must be forwarded to the address shown on page 1 of the Contract for certification and payment.

6.9 Certifications

6.9.1 Compliance

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

6.10 Applicable Laws

The Contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in _____________. (*Insert the name of the province or territory as specified by the Bidder in its bid, if applicable*)

6.11 Priority of Documents

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

a) the Articles of Agreement;
b) the supplemental general conditions 4002 (2010-08-16) Software Development or Modification Services;
c) the supplemental general conditions 4006 (2010-08-16) Contractor to Own Intellectual Property Rights in Foreground Information;
d) the general conditions 2035 (2016-04-04) Services (Higher Complexity);
e) Annex A, Statement of Work;
f) Annex B, Basis of Payment;
g) Annex C, Security Requirements Check List;
h) Annex D, National Honours Web Interface – Business Requirements Document; and

i) the Contractor's bid dated _______ (*insert date of bid*) (*If the bid was clarified or amended, insert at the time of contract award*: ", as clarified on _______" ***or*** ", as amended on_________" *and insert date(s) of clarification(s) or amendment(s)*)

6.12 Insurance Requirements

The Contractor is responsible for deciding if insurance coverage is necessary to fulfill its obligation under the Contract and to ensure compliance with any applicable law. Any insurance acquired or maintained by the Contractor is at its own expense and for its own benefit and protection. It does not release the Contractor from or reduce its liability under the Contract.

6.13 Dispute Resolution

The parties understand that the Procurement Ombudsman appointed pursuant to Subsection 22.1(1) of the *Department of Public Works and Government Services Act* will, on request, and consent of the parties, to participate in an alternative dispute resolution process to resolve any dispute between the parties respecting the interpretation or application of a term and condition of this contract and their consent to bear the cost of such process, provide to the parties a proposal for an alternative dispute resolution process to resolve their dispute. The Office of the Procurement Ombudsman may be contacted by telephone at 1-866-734-5169 or by e-mail at opo-boa@opa-boa.gc.ca.

6.14 Contract administration

The parties understand that the Procurement Ombudsman appointed pursuant to Subsection 22.1(1) of the *Department of Public Works and Government Services Act* will review a complaint filed by *[the supplier or the contractor or the name of the entity awarded this contract]* respecting administration of this contract if the requirements of Subsection 22.2(1) of the *Department of Public Works and Government Services Act* and Sections 15 and 16 of the *Procurement Ombudsman Regulations* have been met, and the interpretation and application of the terms and conditions and the scope of the work of this contract are **not** in dispute. The Office of the Procurement Ombudsman may be contacted by telephone at 1-866-734-5169 or by e-mail at opo-boa@opa-boa.gc.ca.

6.15 Government of Canada Web Standards

The Work must comply with the Government of Canada standards established by the Treasury Board, that include the Standard of Web Accessibility, the Standard on Web Usability, the Standard on Web Interoperability, and the Standard on Optimizing Websites and Applications for Mobile Devices.

In addition, the Work must comply with the standards and guidelines developed by the department or agency for whom the Work is being performed. Such standards and guidelines are available from the department or agency's Web Standards Centre of Expertise.

ANNEX "A"
STATEMENT OF WORK

FOR THE PROVISION OF WEB DESIGN AND DEVELOPMENT SERVICES IN SUPPORT TO THE OFFICE OF THE SECRETARY TO THE GOVERNOR GENERAL (OSGG)

1.0 GENERAL

1.1 The purpose of this Statement of Work (SOW) is to define the scope, the deliverables that apply to the work and responsibilities for design and development services to completely redevelop its website, www.gg.ca.

2.0 SCOPE

2.1 Purpose

2.1.1 The Office of the Secretary to the Governor General (OSGG) is seeking web design and development services to completely redevelop its website, www.gg.ca, using Drupal 7. OSGG is looking for a firm to provide project management, creative design, technical development and deployment of the new website.

2.1.2 The purpose of the web redevelopment project is to create a new site that enables OSGG to connect, honour and inspire Canadians through the Governor General's programs, the public visitor experience and the Canadian Honours system.

2.1.3 The OSGG is not part of the Government of Canada's standardized Web Renewal Initiative and so the new site design must have it's own unique look and feel that sets the OSGG apart from other government sites. The site must enable OSGG to connect with Canadians and create a positive and memorable web experience. The new design must improve the overall user experience through ease of navigation, by creating rich content, developing new features, and creating a responsive design that is mobile-friendly.

2.1.4 The new website's initial launch is planned for December 2016 in time for the 150th anniversary of Confederation to promote 2017 celebratory initiatives and to showcase past and future Governors General with two subsequent phases launched in March 2017 and June 2017.

2.2 Objectives

2.2.1 The GG.ca Web Renewal Project must create a new site driven by user experience to meet the following objectives:

i. Create a website that offers rich content and that follows the latest trends regarding user experience best practices;

ii. Create a new web concept based around storytelling and driven by the user experience;
iii. Create an original web design with an attractive and engaging look and feel;
iv. Create a responsive design that can present the ensemble of the Governor General's programs and OSGG services.
v. Create a user-friendly information architecture that showcases the Governor General's programs and themes, Vice-regal visits at home and abroad, Canadian Honours and Heraldry, the Public Visitor Program and OSGG corporate information.
vi. Create new web content for the sites first tier of information (40 landing pages) using a storytelling approach that engages users with compelling descriptive text, photo selection and multimedia content;
vii. Create a features that facilitates 2-way communications between the public and the Office;
viii. Develop the site using Drupal 7 for the content management system (CMS), to provide OSGG employees managing content and the OSGG technical team more advanced features;
ix. Build a site that meets or exceeds web accessibility standards set by Treasury Board of Canada Secretariat to enable full public access to site;
x. Consolidate all of OSGG web data, past and present, in one site, including data on the former Governors General messages, photos and speeches currently available at archive.gg.ca;
xi. Improve the site search features to include the honours recipient search engine with the ability to link related content to search results and use facets to filter search results;
xii. Support the nomination process for five (5) public honours programs by developing a National Honours Web Interface (NHWI) to transfer public information into a new nomination system which is currently in production and must be deployed concurrently with this site.
xiii. Host a new updated version of the Public Register of Arms Flags and Badges which has recently been developed using Drupal 7.
xiv. Propose a new server infrastructure that is performant, scalable and flexible to support the new site.
xv. Develop a content migration plan and deploy the new site;
xvi. Offer maintenance and support for a year following project completion.

2.3 Background Information

2.3.1 Current Website

2.3.1.1 The current GG.ca website was designed and launched in 2009 and consists of approximately 7 000 document pages and 17 000 photos providing a range of information to the public. It uses a custom built CMS that relies on ASP.Net 3.5 and SQL Server 2008.

2.3.1.2 The main goal of the site is to enable Canadians to follow the activities surrounding the Governor General's role and responsibilities in real time. The site contains links to historic documents about former Governors General and their activities. The website is updated daily with news releases, speeches, photo albums and often includes videos. The site also serves as the public source of information for the Chancellery of Honours and the Canadian Heraldic Authority. It is also serves a promotional function for tourists to find out about the Public Visitor program and special events. Finally, it serves as a corporate reporting site for the activities of the Office of the Secretary to the Governor General.

2.3.1.3 The website is primarily events driven. For each official activity completed by the Governor General, an event page is created with photos which then becomes the front page feature of the moment. Each event is documented and the webpages need to be updated daily. Content updates are performed by the Press office which has admin control of the content. Design updates or program changes are performed by the Web team. The content is cumulative and follows a known display path. It begins as a news release for an event, then all event related media content is aggregated on the home page. Once the event is over the content is displayed for the duration of the mandate (an average of five years) on the site's main thematic pages. Finally, when a new Governor General is installed the content moves to the online archives for Former Governors General where it remains visible to the public and indexed.

2.3.1.4 Content Web Site Inventory

Here is the current content inventory of gg.ca:

Pages	Total
Media related documents (news releases, speeches, messages)	3 688
Main Menu Document (documents available through the main menu)	172
Top Menu Documents (documents available through the top menu)	34
Events	1143
Photo Galleries	1772
Total	6809

Note that the current gg.ca website contains all the speeches and messages from the mandate of Mme Jean (September 2009-september 2010). Speeches from Former

Governors General from Roméo Leblanc in 1999 up to Michaëlle Jean, in September 2010 are available in archive.gg.ca. These pages must be migrated to the new gg.ca website, for a total of 875 documents.

2.3.2 Content Types and functionalities

The following is a list of the various content types currently used:

2.3.2.1 **Home Page:** the home page is event driven. The Press office creates events in the CMS and the latest 10 events are automatically displayed on the home page. It also contains an RSS feed of the latest news releases and three (3) promotional buttons that are updated manually on a weekly basis.

2.3.2.2 **Basic Documents:** These are standard document pages. Editors can enter html or use a WYSIWYG editor to create the content. They can choose to display a left navigation bar that is generated automatically based on the parent document. This represents most of the content of the site.

2.3.2.3 **News Releases:** News releases are created by the Press office. They use the same template as basic document, but the content text entered is standardized.

2.3.2.4 **Events:** Events have a specific template: they have cover image, can be promoted to the front page and can contain links to basic documents, photo galleries and new releases.

2.3.2.5 **Photo Galleries:** photo galleries have specific template. Photos are uploaded by media officers and official photographers. Each photo contains the credit and copy right information. Each photo displays the following information:

i. Description
ii. Date taken
iii. Photographer Name
iv. Reference Number

2.3.3 Widgets and features

The following widgets are used on the current website:

i. Image sliders
ii. Video player
iii. Video feed from the OSGG YouTube Channel
iv. News releases RSS feed
v. Specific search pages for Messages, News Releases, Events and Photo galleries.

2.3.4 Web usage stats

Here are relevant data regarding usage statics of the website from January 2015 to January 2016:

Web Site Statistics 2015-2016	Total
Sessions	890 455
Users	655 166
Page views	2 570 000

Usage Peaks:

Date	Page views
16/02/2015	12 000
01/07/2015	22 000
23/09/2015	14 000
04/11/2015	99 000
11/11/2015	18 000
30/12/2015	25 000

2.3.5 GG.ca and National Honours Web Interface (NHWI)

2.3.5.1 The current Nomination Process for National Honours

2.3.5.1.1 The OSGG through the Chancellery of Honours is responsible for managing the nominations process for certain honours that are presented each year by the Governor General to hundreds of Canadians. The nomination lifecycle begins when a nominator, inspired by the deeds of another, uses a web browser and visits the GG.ca website, navigates to the "Nominate Someone" page (www.gg.ca/nominate), selects one of five public honours programs, fills in the relevant nomination form, and provides it to the Chancellery of Honours.

2.3.5.1.2. Presently, there are three systems in place to facilitate nominations; a downloadable PDF-based "Nomination Form" that needs to be opened in Adobe Reader and mailed by post or email; an Adobe LiveCycle pdf form with a submit features that pushes information to a database and finally a multi-step web form that is opened within the web browser for the nominator to fill in with data validation which is then encoded and transferred to the Chancellery of Honours. In all cases, data from the nomination forms are manually entered into the back end systems for the National Honours Platform.

2.3.5.2 The new National Honours Web Interface (NHWI)

2.3.5.2.1 The current forms and processes to nominate someone for an honour do not provide a convenient, efficient, or scalable means of nominating and recognizing all the worthy Canadians. There are hurdles that may discourage people and organizations from nominating someone. There is a desire to improve the process for nominators and to increase the number of nominations processed and honours awarded each year. The gg.ca website must offer a National Honours Web Interface (NHWI) for the five (5) public honours programs managed by the Chancellery of honours (Order of Canada, Decoration for Bravery, Meritorious Service Decoration – Civil Division, the Sovereign's Medal for Volunteers and the Polar Medal).

2.3.5.2.2 A full business analysis has already been produced and documented for the NHWI. A separate project is underway, *the National Honours Platform (NHP) Modernization project*, which will replace many isolated IT systems that currently are used to manage the data associated with nominations. This project is on track for completion by December 2016 and the new website GG.ca must include a National Honours Web Interface that will ingest nominations for the five honours programs that will be managed by the new nomination system currently being built. Annex D summarizes the requirements for the NHWI.

2.3.6 Other sites supported by GG.ca

2.3.6.1 The OSGG also has other websites, hosted on the same server. The Public Register of Arms, Flags and Badges (reg.gg.ca) contains all of the content created by the Canadian Heraldic Authority, which is a part of OSGG. This website has recently been redeveloped using Drupal 7. The Contractor must migrate all of the relevant content into the new gg.ca website.

2.3.6.2 Archive.gg.ca contains former governor general speeches and HR proactive disclosures. The Contractor must migrate all of the relevant content into the new gg.ca website.

2.3.7 Current Infrastructure

2.3.7.1 The current website is hosted on an external server by a web hosting service provider, and is managed by the OSGG web team. It is a single physical server with 16GB of RAM, 1 TB of disk space, running on windows 2008. The database is stored on the same server as the website.

2.3.8 Challenges with the current GG.ca site

i. **Development time** – Development using the CMS is time consuming. The learning curve for this CMS tool is high and this limits the number of resources who can use the tool for posting content.
ii. **Hard to Maintain -** The backend code is hard to maintain and update.
iii. **Limited Functionality -** The CMS is not very robust or flexible. It was developed when CMS's were in their early stages and it does not have current features of robustness.
iv. **No Support –** Because the CMS was custom built, there is no external technical support available for the application.

v. **Limited features** - CMS technology has matured significantly over the past few years. Current COTS and Open Source CMS applications provide significantly more functionality, features, integration, ease of use, and a lower learning curve. These additional characteristics can add significant value to OSGG.

vi. **No multisite/subtheme support**: since the design is hard to adapt, microsites are created for special events, making it harder to manage over the long run..

vii. **Week server Infrastructure:**

a. Using a single physical dedicated server does not offer redundancy or possible scalability. It offers no quick fall-over plan and makes updating the server's various software a challenge.

b. Hardware and bandwidth limitations cause problems when special events occur as the high spikes in web traffic can cause the server to stop responding, affecting all the sites that are hosted on that server

3.0 REQUIREMENT

3.1 The requirement is separated in three (3) phases:

i. Phase 1 requirements must be implemented in the website at launch date of December 19, 2016; and

ii. Phase 2 requirements are features that must be implemented after completion of Phase 1, by March 31st 2017; and

iii. Phase 3 requirements are features that must be implemented after completion of Phase 2, by June 30th 2017.

3.2 Tasks

3.2.1 The tasks to be performed by the Contractor to reach the objectives stated above include but are not limited to the following:

PHASE 1

Task 1: Project Management

i. The Contractor must assign a project manager to develop a detailed plan and timeline following client consultation that meets the defined site requirements and respects the key milestones identified in section 4.

ii. The project plan must clearly identify the work process, milestones and deliverables that must be reviewed and approved by the Project Authority.

iii. The project manager will be responsible for:

a. Activity planning and sequencing deliverables with client and stakeholders

b. Ensuring benefits realisation in production

c. Resource allocation and budget monitoring

d. Maintaining an up-to-date schedule for the project identifying level of effort, assignments, delays, status of deliverables and milestones which must be reported weekly
e. Monitoring risks by informing the project authority of potential issues and proposing solutions
f. Responsible for testing and quality control and ensuring that features and functionality are delivered in an acceptable state.
g. Producing all project documentation

Task 2: Exploration and Discovery – Client Consultation

The Contractor must:

i. Conduct bilingual interviews with focus groups identified by the Project Authority;
ii. Conduct planning meetings to discuss details for the project;
iii. Produce a functional and technical requirement document of all the features of the website for review and approval by the Project Authority; and develop in consultation with OSGG a phased launch that includes mandatory site features for the December launch deadline followed by staged roll-out of additional features and new content over the next 6 months.

Task 3: Develop a web concept and look and feel

i. The OSGG has developed a communication and branding strategy that uses storytelling to connect with Canadians. The redesigned website must be aligned with this approach. The Contractor must work with the OSGG to develop a web design concept that revolves around news and storytelling to engage the audience. Once approved, the concept must be followed to define the information architecture, to create the web design and produce the web content that will be required in the project.

ii. This task will involve, but not limited to the following sub-tasks:

Task 3.1: Creative Development

i. In order to create a website that meets the communications objectives of the OSGG the Contractor must develop a creative design and editorial strategy that supports the themes and key messages of the OSGG. The Contractor's creative team must:
   a. Research and analyse user needs;
   b. Develop an editorial strategy that defines the voice and style of the website;
   c. Develop a concept that supports the key themes and messages of OSGG;

d. Develop a plan for the creation of new content in consultation with the project authority;
e. Integrate a social media strategy into content management system;
f. Develop a strategy for tagging content and establishing key meta data for SEO optimization;
g. Assign resources and plan production for the creation of new content (text, images and multimedia);
h. Map content migration for existing content and the integration of new material; and
i. Content encoding for accessibility, testing and quality control.

Task 3.2: Information Architecture

i. The current site information architecture is not optimal for end users. The site is mainly based on the OSGG's organizational structure and is not as user-friendly as it should be. It can be difficult for users to find the information that they are looking for. The Contractor must propose three (3) options for the new site's Information Architecture that focuses on facilitating user navigation. The Contractor must work with the OSGG Project Authority on the options and the navigation must be tested before the Information Architecture is approved.

Task 3.3: Web Design

i. The Contractor must propose three (3) separate and unique design concepts for the website to be reviewed by the Project Authority, including:

   a. Responsive HTML/CSS mock-ups (comps)
   b. Screenshots of additional concepts/pages not included in html/css mock-ups
   c. Mobile-friendly view

ii. Each web design concepts must show a different look and feel and be reviewed by the Project Authority. Once the Project Authority approves a mock-up, the Contractor must create the final version of the design that will be used to create the theme of the website and style guide.

Task 3.4: Web Content Development

i. The landing pages of each section of the website and key content must be rewritten to persuasively communicate OSGG messages to the site audience in a clear and concise manner that is consistent with the site concept. The Contractor will help the Project Authority identify the content that needs to be rewritten.
ii. The Contractor must then develop the web content for these pages which includes copywriting and translation in the other official language of the newly

created content as well as the production of any supporting media content (video, images, etc.), as required. Following is an estimation of the volume of documents that need to be re-written based on current site content.

iii. Top-level content currently located on www.gg.ca contains 11 menu pages est. total of 2,500 words in 1 language

iv. Main content currently located on www.gg.ca contains 40 landing pages est. total of 15,000 words in 1 language

Task 4: Analyze and recommend option(s) for hosting the gg.ca Website

i. The OSGG will be hosting the new website on an infrastructure outside of the OSGG Network and will not be using Software as a Service (SaaS) solution. The Contractor must propose and document a new infrastructure plan to host the new website and legacy websites. The key requirements for this infrastructure must include, but are not limited to the following:
   a. Optimal OS and server software combination
   b. Scalability and flexibility
   c. Possibility to implement load balancing
   d. Virtualized Environment
   e. Caching Capacity
   f. Indexing Capacity
   g. Capacity of hosting Protected B information
   h. VPN access for management
   i. Support of legacy systems (running on the current windows server 2008, IIS 7.5, .Net 4.0 and MS SQL Server 2008)
   j. Possibility to increase available bandwidth on demand
   k. Offer a fast response time when spike periods occur
   l. SMTP server, which can be provided by another service provider other than the rest of the infrastructure

Task 5: Website Development

i. The Contractor must build the website, based on the approved concept, using Drupal 7 as the content management system. This includes the development of the NHWI, which is described in Task 6.

Task 5.1: Bilingual Content

i. The website must be bilingual with all content available in both French and English. The Contractor must configure the CMS to allow:
   a. Entity translation
   b. URL aliases translation
   c. If possible, content edit form interface should provide side by side translation (both French and English can be edited on the same page).

Task 5.2: URLs

i. The Contractor must implement a solution that allows URLS that are:
   a. Friendly
   b. optimized for search engines
   c. French content must have French URLs and English content must have English URLs.

Task 5.3: Theme creation

i. The Contractor must build a theme that implements the web design. This theme must:
   a. Provide a rich user experience;
   b. Meet or exceed accessibility standards using both WCAG 2 (AA) guidelines and the WAI-ARIA W3C recommendation;
   c. Be responsive: the design must adapt to the wide range of devices that can be used to access the site on mobile, tablets, PC, etc.
   d. Compatible with the popular browsers on all major platforms (Windows, Mac and Android):
      - Internet Explorer 10 and up
      - Microsoft Edge
      - Firefox
      - Chrome
      - Safari
   e. Must be created using the latest version of the Web Experience Toolkit (WET). Other web frameworks can be used in conjunction with WET. Note that the existing Wetkit Drupal distribution shall not be used for this project.

Task 5.4 National Honours Web Interface

i. The Contractor must develop the National Honours Web Interface (NHWI) that will be used by the public and select partners to submit nominations for five (5) public honours programs managed by the Chancellery of honours.
ii. The NHWI is intended to replace and enhance the various nomination forms currently located on the GG.ca website, moving away from paper-based to electronic submissions, thus enabling the automation and scaling up of the nomination lifecycle. A secondary goal of NHWI is to provide a foundation for facilitating the interactions with the people and organizations with which the governor general has long-term relationships.
iii. Refer to Annex D: NHWI Business Requirements Document for all the details regarding this subtask.
iv. This feature must be ready for beta testing by September 5, 2016.

Task 5.5: Roles and permissions

i. The Contractor must, in consultation with the OSGG, define the role and permissions required based on the requirements gathered in Task 1.

Task 5.6: Security

i. The administration portion of the website, as well as any other form data submitted by end users must be done via HTTPS.

Task 5.7: Content

i. The Contractor must work with the Project Authority to define and develop the various content types required for the website based on the web concept defined in Task 3 and must implement them. The Contractor will also be responsible for creating the content of the home page and the various pages that were written in Task 3.

Task 5.8 Site Search

i. The Contractor must develop and implement a search solution on the website that offers advanced features, such as faceted search to narrow down search results. Search results must be provided quickly and must be relevant.

Task 5.9 Find a Recipient

i. The Contractor must develop and implement a search solution using an indexing server for the Find a Recipient feature (see http://www.gg.ca/honours.aspx?lan=eng). Search results must be index able by search engines such as Google.

Task 5.10 News releases, e-mails and Subscribers list management

i. The Contractor must develop and deploy a new solution or implement an existing solution that that can send out mass mail-outs to various subscribers' distribution lists. The solution must have the option to either automatically generate emails based on existing content on the site (e.g.: news releases, messages) or give the Press office the ability to generate their own HTML mail based on manageable templates (e.g.: Order of Canada newsletter). Users must have the ability to subscribe and unsubscribe via the website and must also be able to do so directly from the emails that they receive. The solution must also include distribution list management.

Task 5.11 Social Media Integration

i. The Contractor must develop and implement a solution that enables uses to share each piece of content on social networks. The list of social networks will be defined in collaboration with the Project Authority. Relevant metadata fields (i.e. twitter cards, Facebook's Open Graph protocol, etc.) must be present on the content edit form to ensure that the content shared displays relevant information.

Task 5.12 Search Engine Optimisation and Metadata

i. The Contractor must implement the mandatory Dublin Core metadata fields as stated in the Appendix D of Treasury Board's Standard of Metadata and proper metadata for social media sharing, when relevant. The Contractor must also follow SEO best practices, to ensure high ranking of the website's content by search engines.

Task 5.13 Forms

i. The Contractor must develop various forms for the public to interact with OSGG which includes, but is not limited to the following:
   a. Contact Us form for public queries;
   b. Anniversary Message requests; and
   c. Invitations sent to the Governor General to attend an event.

Task 5.14 Web Analytics

i. The Contractor must implement a solution that will enable web analytics using Google Analytics to provide accurate web usage statistics to the OSGG.

Task 6: Initial Content Migration

i. The Contractor must migrate the following content for the initial launch:
   a. Email Distribution lists,
   b. Events, news releases and photo galleries from gg.ca and archives.gg.ca
   c. Various content pages from gg.ca that will be identified by the Project Authority.

ii. The Contractor must develop and implement strategies to deal with broken links contained in archived news releases and events. For example, links contained within archived news releases may be broken and a strategy to mitigate these types of issues must be developed and implemented.

Task 7: Testing

i. The Contractor must prepare a test plan for review and approval by the Project Authority. The testing must include, but is not limited to:

   a. User Acceptance Testing in various phases of the project, as agreed with the Project Authority team. This testing must be conducted by various key stakeholders within the OSGG and will be defined by the Project Authority.
   b. Web Accessibility testing: the Contractor must ensure that the website is conformant to WCAG 2.0 AA guidelines.
   c. Load testing: various testing scenarios must be developed in consultation with the Project Authority. The testing must be performed on a single instance installation, based on the recommended infrastructure developed in Task 4. The Contractor must provide the maximum number of concurrent users for each testing scenario. The accepted number of concurrent users for each case must be defined in consultation with the Project Authority based on historical visitor spikes on the current websites.

Task 8: Training and documentation

i. The Contractor must:

   a. Prepare maintenance and technical documentation relevant to Phase 1 deliverables, including server configuration;
   b. CMS Administrator's guide highlighting relevant configurations and features*;
   c. Provide training documentation that clearly explains how to add and manage content*;
   d. Provide a styling guide; and
   e. Deliver training to the OSGG team*.

*Note that these items must be provided in both official languages.

Task 9: Deployment on production

i. The Contractor must perform the deployment on the production environment and must perform the proper server configuration.

Task 10: Maintenance and support

i. For phase 1 deliverables, the Contractor must offer a support service for a period of twelve (12) months commencing from the website launch date.
ii. For phase 2 deliverables, the Contractor must offer a support service for a period of twelve (12) months starting from the launch date of phase 2 deliverables.

iii. For phase 3 deliverables, the Contractor must offer a support service for a period of twelve (12) months starting from the launch date of phase 3 deliverables.
iv. Following the initial twelve month support service, the Contractor must remain available to respond and support the website for a period of one (1) year on an as and when required basis.
v. In its proposal, the Contractor must describe the details of its maintenance and support offering, including but not limited to:

a. Days and hours of coverage, including days not covered (e.g. stat holidays)
b. Response times and priority definitions (e.g. One hour for issues classified as urgent, two hours for issues classified as high priority-critical, four hours for issues classified normal priority-minor, eight hours for issues classified as low priority-trivial)
c. Services provided (e.g. “Bug fixes to existing solution”; “System fine tuning and optimization”; “Development: site enhancements, new features and functions”, etc.)

PHASE 2: DEVELOPMENT OF ADVANCED FEATURES AND ADDITIONAL CONTENT MIGRATION

The second phase of the project begins after the successful launch of the phase 1 features, on December 19th, 2016.

Task 11: Content workflow

i. The Contractor must develop and implement, if required, a content publishing workflow, based on information gathered in Task 1.

Task 12: Timeline

i. When relevant, content types must have the option to be viewed on a timeline display with rich content (i.e.: text, photos, videos). The Contractor must work with the Project Authority to define which content type should have a timeline display option and implement the timeline functionality and display accordingly

Task 13: Maps

i. When relevant, content types must have the option to be viewed on a map. The Contractor must work with the Project Authority to define which content type should have map display option and implement the map functionality and display accordingly. These content types must be tagged and linked to pre-established OSGG subjects.

Task 14: Content migration

i. The contractor must migrate the new public register of Flags, Arms and Badges, which is a part of gg.ca into the new website.
ii. The contractor must migrate any additional existing content from gg.ca into the new website. Content will be identified by the Project Authority.

Task 15: Testing of Phase 2 features

i. The contractor must test the phase 2 features and produce a testing report as defined in
Task 7.

Task 16: Deployment on Production

i. The contractor must deploy task 2 tasks on the live website by March 31st, 2017.

Task 17: Training and Documentation

i. The contractor must produce and provide training and technical documentation relevant to Phase 2 tasks.

PHASE 3: DEVELOPMENT OF ADDITIONAL FEATURES

The third phase of the project begins after the successful launch of the phase 2 features, on March 31st, 2017.

Task 18: Reservation System module

i. The Contractor must propose and implement a reservation solution to allow users to book tours via the website at Rideau Hall and The Citadelle. The backend of the reservation system could rely on external sources such as Planyo, but user interactions should all be managed via the website.

Task 19: Photo Copyright management module

i. The Contractor must develop and implement a module that allows public users to request any official photo available on the website in its original format for their personal or public use. OSGG employees responsible for photo copyright management must have a dashboard that provides them with all the photo requests and offer them the ability to accept, refuse each request and contact the requester for follow-ups.

Task 20: Chat module

i. The Contractor must propose and implement a Drupal module that will allow users to engage in various chat sessions. The chat tool must be highly customizable and allow for the creation of chatrooms and user management.

Task 21: Blog module

i. The Contractor must propose and implement a Drupal module that must allow for the creation of blog posts.

Task 22: Discussion boards module

i. The Contractor must propose and implement a module that allows public users to post messages on discussion boards.

Task 23: Testing of Phase 3 features

i. The contractor must test the phase 3 features and produce a testing report as defined in Task 7.

Task 24: Deployment on Production

i. The contractor must deploy task 3 tasks on the live website by June 30th, 2017.

Task 25: Training and Documentation

i. The contractor must produce and provide training and technical documentation relevant to Phase 3 tasks.

4.0 DELIVERABLES

The deliverables must include, but are not limited to:

4.1 Phase 1 deliverables

i. Project Plan (Task 1)
ii. Functional and technical requirements document (Task 2)
iii. Propose three (3) different Web concepts each including the following: (Task 3)
   a) Concept presentation documentation
   b) Proposed site infrastructure
   c) Site mock-up (look and feel)
iv. Suggested infrastructure recommendation (Task 4)
v. Web development progress reports and prototypes of the website each time a subtask is completed.
vi. Test Plan (Task 7)
vii. Prototype site for initial testing (Task 7)
viii. Testing report (Task 7)

ix. Training Documentation (Task 8)
x. Technical Documentation (Task 8)
xi. Final site ready for deployment on production
xii. All source files used to develop Phase 1 of the website, must include, but is not limited to the following:
   a) Source code
   b) Un-compressed images (Photoshop document, Illustrator documents, etc.)
   c) Fonts used
   d) Stock images
   e) Stock videos

4.2 Phase 2 deliverables

i. Phase 2 features, ready for launch on production (Tasks 11,12 and 13)
ii. Migrated content ready for launch on production (Task 14)
iii. Testing report (Task 15)
iv. Training and technical documentation (Task 16)
v. All source files used to develop Phase 2 of the website, must include, but is not limited to the following:
   a) Source code
   b) Un-compressed images (Photoshop document, Illustrator documents, etc.)
   c) Fonts used
   d) Stock images
   e) Stock videos

4.3 Phase 3 deliverables

i. Reservation system module (Task 18)
ii. Photo Copyright Management module (Task 19)
iii. Chat module (Task 20)
iv. Blog module (Task 21)
v. Discussion boards module (Task 22)
vi. Testing Report (Task 23)
vii. Training and technical documentation (Task 25)
viii. All of Phase 3 modules, ready for deployment on live on production
ix. All source files used to develop Phase 2 of the website, must include, but is not limited to the following:
   a) Source code
   b) Un-compressed images (Photoshop document, Illustrator documents, etc.)
   c) Fonts used
   d) Stock images
   e) Stock videos

5.0 CONSTRAINTS

The following constraints apply:

5.1 Content Management System

5.1.1 The website must be built using Drupal 7. When possible modules selected and code developed must be on a safe upgrade path to Drupal 8.

5.2 Technology

5.2.1 The OSGG is currently hosting its website on a Microsoft Windows environment, using IIS 7.5 and MS SQL Server 2008. However, the office is looking for the optimal solution for hosting Drupal Content. Consequently, the Contractor shall not limit its infrastructure recommendations based on the current OSGG infrastructure and software.

5.3 Methodology

5.3.1 The project must be developed using an iterative approach with weekly meetings and updates on the development of the project. OSGG staff must have access to the technical lead when needed for discussions and consultations at any time during the project.

5.4 Web Standards

5.4.1 GG.ca is not part of the Canada web renewal initiative. Therefore, the website does not have to follow the Canada.ca look and feel. However, the website must be developed using the Web Standards for the Government of Canada, specifically:

i. Standard on Optimizing Websites and Applications for Mobile Devices
ii. Standard on Web Interoperability
iii. Standard on Web Usability
iv. Standard on Web Accessibility

5.4.2 To ensure that the website respects these standards, the Contractor must create the website's Drupal theme using the latest version of the web experience toolkit as a base framework. Note that the existing wetkit Drupal distribution must not be used for this project.

5.5 Website Performances

5.5.1 The website must be built using best practices regarding Drupal performance utilisation. The website must have a caching and an indexing component.

5.6 Scalability

5.6.1 The website must be built with scalability in mind. At initial launch, the website will most likely be running on a single instance, but it must have the capacity to run on multiple server instances. During special events or announcements, over 10 000 users can access the site in a single day. The website must be built to support high traffic volume if hosted on the infrastructure proposed by the Contractor in Task 4.

5.7 Reusable code

5.7.1 When possible, the Contractor must develop modules that can be re-used in other OSGG projects in the future. The code shall be clearly commented.

5.8 Multisite support

5.8.1 The Content Management System must be configured to allow multiple websites on the same instance allowing the OSGG to create subsites with different themes for various events in the future.

6.0 Language of work

6.1 The Contractor must provide services in both English and French, for project meetings, stakeholder interviews, training and as required during the support period.

7.0 Location of Work

7.1 The Contractor will perform the work off-site at its own location.

7.2 The Contractor's project team must be present for on-site meetings at Rideau Hall (1 Sussex Drive, Ottawa, Ontario, K1A 0A1) as required by the Project Authority.

8.0 Schedule

8.1 All deliverables must be submitted as per the agreed project timeline and:

i. Deliverables for Phase 1 must be completed and delivered no later than December 19th, 2016
ii. Deliverables for Phase 2 must be completed and delivered no later than March 31st, 2017.
iii. Deliverables for Phase 3 must be completed and delivered no later than June 30th, 2017.

ANNEX "B"
BASIS OF PAYMENT

The Contractor will be paid in accordance with the following Basis of Payment for Work performed pursuant to the Contract and each Task Authorization, if applicable.

All deliverables are F.O.B. Destination, and Canadian Customs Duty included, and GST/HST extra, where applicable.

Definition of a Day/Proration: A day is defined as 7.5 hours exclusive of meal breaks. Payment will be for days actually worked with no provision for annual leave, statutory holidays and sick leave. Time worked ("Days_worked", in the formula below) which is less than a day will be prorated to reflect actual time worked in accordance with the following formula:

$$Days\_worked = \frac{Hours\_Worked}{7.5\_hours\_per\_day}$$

OVERTIME WORK
All proposed personnel must be available to work outside normal office hours during the duration of the Contract. No overtime charges will be authorized under this Contract.

A - Contract Period (From date of contract to September 28, 2018)

During the period of the Contract, for Work performed in accordance with the Contract, the Contractor will be paid as specified below.

1.0 Professional Fees

The Contractor will be paid as follows:

All-inclusive prices for task completion (payment is made upon completion and acceptance in accordance with the terms of the contract):

Task	Cost to Complete the Task	Task	Cost to Complete the Task
Task 1	$	Task 14	$
Task 2	$	Task 15	$
Task 3	$	Task 16	$
Task 4	$	Task 17	$
Task 5	$	Task 18	$
Task 6	$	Task 19	$
Task 7	$	Task 20	$
Task 8	$	Task 21	$
Task 9	$	Task 22	$
Task 11	$	Task 23	$
Task 12	$	Task 24	$
Task 13	$	Task 25	$
		Total cost of Tasks (taxes excluded):	

All-inclusive hourly rates for Maintenance and Support (Task 10)

Task	Description	**All-inclusive hourly rate** (Date of Contract to Dec. 31, 2016)	Estimated Hours	**All-inclusive hourly rate** (Jan.1 2017 to Dec. 31, 2017)	Estimated Hours	**All-inclusive hourly rate** (Jan 1, 2018 to Sep. 28, 2018)	Estimated Hours
Task 10	Maintenance and Support	$	10	$	100	$	100
Total cost for Maintenance and Support (taxes excluded):							$

B – Option to Extend the Term of the Contract

This section is only applicable if the option to extend the Contract is exercised by Canada.

During the extended period of the Contract specified below, the Contractor will be paid as specified below to perform all the Work in relation to the Contract extension.

Option Period (From September 29, 2018 to September 28, 2019)

All-inclusive hourly rates for Maintenance and Support (Task 10)

Task	Description	**All-inclusive hourly rate** (Sep. 29, 2018 to Sep. 28, 2019)	Estimated Hours
Task 10	Maintenance and Support	$	100
Total cost for Maintenance and Support (taxes excluded):			$

ANNEX "C"
SECURITY REQUIREMENTS CHECK LIST

Government of Canada / Gouvernement du Canada

Contract Number / Numéro du contrat
Common PS SRCL#6
Security Classification / Classification de sécurité: UNCLASSIFIED

SECURITY REQUIREMENTS CHECK LIST (SRCL)
LISTE DE VÉRIFICATION DES EXIGENCES RELATIVES À LA SÉCURITÉ (LVERS)

PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE

1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine: Public Works and Government Services Canada	2. Branch or Directorate / Direction générale ou Direction: Acquisitions Branch
3. a) Subcontract Number / Numéro du contrat de sous-traitance	3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant

4. Brief Description of Work / Brève description du travail
Professional Services - Standing Offers and Supply Arrangements

	No / Non	Yes / Oui
5. a) Will the supplier require access to Controlled Goods? Le fournisseur aura-t-il accès à des marchandises contrôlées?	✓	
5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques?	✓	

6. Indicate the type of access required / Indiquer le type d'accès requis

	No / Non	Yes / Oui
6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? (Specify the level of access using the chart in Question 7. c) (Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c)		✓
6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé.	✓	
6. c) Is this a commercial courier or delivery requirement with no overnight storage? S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit?	✓	

7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès

Canada	NATO / OTAN	Foreign / Étranger
✓	☐	☐

7. b) Release restrictions / Restrictions relatives à la diffusion

Canada	NATO / OTAN	Foreign / Étranger
No release restrictions / Aucune restriction relative à la diffusion ✓	All NATO countries / Tous les pays de l'OTAN ☐	No release restrictions / Aucune restriction relative à la diffusion ☐
Not releasable / À ne pas diffuser ☐		
Restricted to: / Limité à : ☐	Restricted to: / Limité à : ☐	Restricted to: / Limité à : ☐
Specify country(ies): / Préciser le(s) pays :	Specify country(ies): / Préciser le(s) pays :	Specify country(ies): / Préciser le(s) pays :

7. c) Level of information / Niveau d'information

Canada		NATO / OTAN		Foreign / Étranger	
PROTECTED A / PROTÉGÉ A	✓	NATO UNCLASSIFIED / NATO NON CLASSIFIÉ	☐	PROTECTED A / PROTÉGÉ A	☐
PROTECTED B / PROTÉGÉ B	✓	NATO RESTRICTED / NATO DIFFUSION RESTREINTE	☐	PROTECTED B / PROTÉGÉ B	☐
PROTECTED C / PROTÉGÉ C	☐	NATO CONFIDENTIAL / NATO CONFIDENTIEL	☐	PROTECTED C / PROTÉGÉ C	☐
CONFIDENTIAL / CONFIDENTIEL	☐	NATO SECRET / NATO SECRET	☐	CONFIDENTIAL / CONFIDENTIEL	☐
SECRET / SECRET	☐	COSMIC TOP SECRET / COSMIC TRÈS SECRET	☐	SECRET / SECRET	☐
TOP SECRET / TRÈS SECRET	☐			TOP SECRET / TRÈS SECRET	☐
TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT)	☐			TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT)	☐

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité: UNCLASSIFIED

Canada

Government of Canada / Gouvernement du Canada

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PART A (continued) / PARTIE A (suite)

8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS?
If Yes, indicate the level of sensitivity:
Dans l'affirmative, indiquer le niveau de sensibilité :
☑ No / Non ☐ Yes / Oui

9. Will the supplier require access to extremely sensitive INFOSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate?
☑ No / Non ☐ Yes / Oui

Short Title(s) of material / Titre(s) abrégé(s) du matériel :
Document Number / Numéro du document :

PART B - PERSONNEL (SUPPLIER) / PARTIE B - PERSONNEL (FOURNISSEUR)

10. a) Personnel security screening level required / Niveau de contrôle de la sécurité du personnel requis

☑ RELIABILITY STATUS / COTE DE FIABILITÉ	☐ CONFIDENTIAL / CONFIDENTIEL	☐ SECRET / SECRET	☐ TOP SECRET / TRÈS SECRET
☐ TOP SECRET– SIGINT / TRÈS SECRET – SIGINT	☐ NATO CONFIDENTIAL / NATO CONFIDENTIEL	☐ NATO SECRET / NATO SECRET	☐ COSMIC TOP SECRET / COSMIC TRÈS SECRET
☐ SITE ACCESS / ACCÈS AUX EMPLACEMENTS			

Special comments:
Commentaires spéciaux : ____________________

NOTE: If multiple levels of screening are identified, a Security Classification Guide must be provided.
REMARQUE : Si plusieurs niveaux de contrôle de sécurité sont requis, un guide de classification de la sécurité doit être fourni.

10. b) May unscreened personnel be used for portions of the work?
Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail?
☑ No / Non ☐ Yes / Oui

If Yes, will unscreened personnel be escorted?
Dans l'affirmative, le personnel en question sera-t-il escorté?
☑ No / Non ☐ Yes / Oui

PART C - SAFEGUARDS (SUPPLIER) / PARTIE C - MESURES DE PROTECTION (FOURNISSEUR)

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

11. a) Will the supplier be required to receive and store PROTECTED and/or CLASSIFIED information or assets on its site or premises?
Le fournisseur sera-t-il tenu de recevoir et d'entreposer sur place des renseignements ou des biens PROTÉGÉS et/ou CLASSIFIÉS?
☑ No / Non ☐ Yes / Oui

11. b) Will the supplier be required to safeguard COMSEC information or assets?
Le fournisseur sera-t-il tenu de protéger des renseignements ou des biens COMSEC?
☑ No / Non ☐ Yes / Oui

PRODUCTION

11. c) Will the production (manufacture, and/or repair and/or modification) of PROTECTED and/or CLASSIFIED material or equipment occur at the supplier's site or premises?
Les installations du fournisseur serviront-elles à la production (fabrication et/ou réparation et/ou modification) de matériel PROTÉGÉ et/ou CLASSIFIÉ?
☑ No / Non ☐ Yes / Oui

INFORMATION TECHNOLOGY (IT) MEDIA / SUPPORT RELATIF À LA TECHNOLOGIE DE L'INFORMATION (TI)

11. d) Will the supplier be required to use its IT systems to electronically process, produce or store PROTECTED and/or CLASSIFIED information or data?
Le fournisseur sera-t-il tenu d'utiliser ses propres systèmes informatiques pour traiter, produire ou stocker électroniquement des renseignements ou des données PROTÉGÉS et/ou CLASSIFIÉS?
☑ No / Non ☐ Yes / Oui

11. e) Will there be an electronic link between the supplier's IT systems and the government department or agency?
Disposera-t-on d'un lien électronique entre le système informatique du fournisseur et celui du ministère ou de l'agence gouvernementale?
☑ No / Non ☐ Yes / Oui

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité
UNCLASSIFIED

Canadä

Government of Canada Gouvernement du Canada

Contract Number / Numéro du contrat

Common PS SRCL#6

Security Classification / Classification de sécurité
UNCLASSIFIED

PART C - (continued) / PARTIE C - (suite)

For users completing the form **manually** use the summary chart below to indicate the category(ies) and level(s) of safeguarding required at the supplier's site(s) or premises.
Les utilisateurs qui remplissent le formulaire **manuellement** doivent utiliser le tableau récapitulatif ci-dessous pour indiquer, pour chaque catégorie, les niveaux de sauvegarde requis aux installations du fournisseur.

For users completing the form **online** (via the Internet), the summary chart is automatically populated by your responses to previous questions.
Dans le cas des utilisateurs qui remplissent le formulaire **en ligne** (par Internet), les réponses aux questions précédentes sont automatiquement saisies dans le tableau récapitulatif.

SUMMARY CHART / TABLEAU RÉCAPITULATIF

Category / Catégorie	PROTECTED / PROTÉGÉ			CLASSIFIED / CLASSIFIÉ			NATO				COMSEC					
	A	B	C	CONFIDENTIAL / CONFIDENTIEL	SECRET	TOP SECRET / TRÈS SECRET	NATO RESTRICTED / NATO DIFFUSION RESTREINTE	NATO CONFIDENTIAL / NATO CONFIDENTIEL	NATO SECRET	COSMIC TOP SECRET / COSMIC TRÈS SECRET	PROTECTED / PROTÉGÉ A	B	C	CONFIDENTIAL / CONFIDENTIEL	SECRET	TOP SECRET / TRÈS SECRET
Information / Assets / Renseignements / Biens																
Production																
IT Media / Support TI																
IT Link / Lien électronique																

12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED?
La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE?

☑ No / Non ☐ Yes / Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification".
Dans l'affirmative, classifier le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire.

12. b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED?
La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE?

☑ No / Non ☐ Yes / Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification" and indicate with attachments (e.g. SECRET with Attachments).
Dans l'affirmative, classifier le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire et indiquer qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).

ANNEX "D"
NHWI – Business Requirements Document

1.0 BUSINESS REQUIREMENTS
1.1 Purpose

To identify the primary business requirements for the public-facing National Honours Platform. The requirement is two-fold:

I. Electronic ingest of nominations for the public-facing National Honours programs administered by the Chancellery. Specifically, the *Order of Canada (ORC)*, the *Decoration for Bravery,* the *Meritorious Service Decoration* (MSD) – *Civilian*, the *Sovereign's Medal for Volunteers* (SMV) *(*formerly *Caring Canadian Award (CCA))*, and the *Polar Medal.*

II. Nominations submitted by members of the general public (including frequent nominators), and trusted partner organizations.

1.2 Project Objectives

1.2.1 Increase efficiency of the nomination lifecycle, to support the goal of increased capacity to receive and process nominations.

1.2.2 Improve consistency of "customer service", specifically, the interactions with nominees, recipients, and other individuals, across all OSGG functions and departments.

1.2.3 Expand multi-media capabilities, so that nominators can include multi-media evidence with to a nomination.

1.2.4 Improve the usability, convenience, and consistency of nomination forms, to encourage more nominations from the general public and trusted partners and be able to measure it.

1.2.5 Ensure nominations are captured electronically as early in the process as possible.

1.3 Actors and System Interactions

This section describes the significant Actors and their interactions with the NHWI system in the first phase. Actors include the users of NHWI and other collaborative systems.

1.3.1 General Public

1.3.1.1 Members of the general public are encouraged to submit nominations for the people that inspire them to one of the five public-facing honour programs. To reduce the perceived barriers to nominating someone, there is no need to be registered or signed-in to the system to submit a nomination. However, for those people that are looking to submit multiple nominations, there are benefits of convenience and perhaps status to register and sign-in to the system. Thus there are two related user roles, Unregistered Public User and Registered Public User.

Interactions between Unregistered Public User and the System include:

i. Receive guidance for selecting the appropriate honour – including email to Chancellery
ii. Nominate someone – opens a web form so user can fill in its fields
iii. Save nomination – saves state of an in-progress nomination so it can be continued later, and sends a link to the form to the user's email address
iv. Edit nomination – opens the nomination form using the link, and restores its last saved state
v. Cancel nomination – discards the nomination
vi. Submit nomination – saves, validates, and sends to NHP system. A copy of the completed nomination (in PDF) is also sent to the user.
vii. Receive acknowledgement of submitted nomination by email - sent by NHP system
viii. Create an account – to become a Registered Public User. Specify a user name, password, full name and contact info.

Interactions of a Registered Public User include:

i. Sign-in – with user name and password
ii. View / Edit account – includes full name and contact info. This information is conveniently pre-filled in a new nomination, which avoids entering it many times.
iii. Change password
iv. View list of saved or submitted nominations – information for each nomination includes:
    a. Candidate name
    b. Honours program
    c. Status: saved, submitted
    d. Date nomination was created
    e. Date nomination was last saved or submitted
    f. Actions for saved nominations: Edit, Cancel
v. Sign out
vi. Delete account

1.3.1.2 Note that Registered Public User accounts are known only on the NHWI system. If that person is also known to the NHP as a nominator, there is no linkage between the two. In particular, if a Registered Public User updates their contact information on NHWI, there is no automatic attempt to update whatever contact information may also be stored in the NHP for that person. Also, sign-in authentication and password management is performed within the NHWI without the involvement of a separate authentication service.

1.3.1.3 Once a nomination is submitted and successfully transferred to the NHP system, it is removed from NHWI, leaving behind only minimal information to display in the list of saved or submitted nominations. Since a completed nomination form may contain protected B information, removing the nomination reduces the security concerns related to NHWI.

1.3.2 Trusted Partners

1.3.2.1 Trusted Partners are organizations that have a special relationship with the OSGG for the purpose of submitting nominations. NHWI provides interfaces to make it easier for

Trusted Partners to submit many nominations, thus helping to scale up the number of nominations and resulting recipients for a program.

1.3.2.2 Although these relationships can take a different form depending on the specific honours program, in the first phase, only trusted partners for the Sovereign Medal for Volunteers (SMV) program (formerly Caring Canadian Award (CCA)) are supported.

1.3.2.3 In the case of the SMV program, Trusted Partners are usually non-profit organizations, such as the Canadian Cancer Society or the Alzheimer's Society of Canada, trusted by the Chancellery to provide high-quality nominations. As such, the nominations need less supporting evidence, and require a lighter vetting process in the advisory council, but still need formal approval by the Governor General.

1.3.2.4 Note that a Trusted Partner may be part of an umbrella organization, consisting of a number of related but independent organizations. For example, Alzheimer's Society has organizations at many levels, including national, provincial, regional, and municipal. Nominations can be submitted independently by each organization in the umbrella. However, NHWI has no knowledge of these organizational relationships; from its perspective, each organization is entirely independent.

1.3.2.5 There is one sign-in account on NHWI for each Trusted Partner organization of the SMV program. If there are multiple people submitting nominations in the same organization, they must share the same account credentials (i.e. account name and password).

1.3.2.6 All administration and configuration of Trusted Partners and their contact information is performed on the NHP system, the details of which are beyond the scope of this document. Creation of an NHWI sign-in account for a Trusted Partner is initiated by an NHP user, which causes the account information (account name, organization name, and initial password) to be exported to NHWI, where the account is created. A link to that account on NHWI can be sent to the Trusted Partner by email.

1.3.2.7 A Trusted Partner may use the same sign-in page on NHWI as a member of the general public, or alternatively a separate sign-in page; it depends on design details to be decided later. Once signed-in, a trusted partner can interact with the system in similar ways as a Registered Public User to fill-in and submit individual nominations. This is suitable for smaller organizations that submit a small number of nominations at a time. Larger organizations may submit many nominations at a time, and benefit from a bulk interface that takes lists of nominations.

1.3.2.8 Interactions between a signed-in Trusted Partner and the System include:

i. View list of saved or submitted nominations – information for each nomination includes:
   a. Candidate name for an individual nomination, or file name for a bulk nomination
   b. Status: saved, submitted
   c. Date nomination was created
   d. Date nomination was last saved or submitted
   e. Actions for saved nominations: Edit, Cancel

ii. Nominate someone – opens a web form for an individual candidate. This form is similar to that for a public user, but has the organization name pre-filled. The contact information for the person doing this operation must be filled-in the first time, but is remembered the next time as a convenience.
iii. Save nomination – saves state of an in-progress nomination so it can be continued later
iv. Edit nomination – opens the nomination form and restores its last saved state
v. Cancel nomination – discards the nomination
vi. Submit nomination – saves and validates the nomination, and sends it to NHP system
vii. Submit multiple nominations – upload, validate, and submit a list of nominations.
viii. Receive acknowledgement of submitted nomination by email - sent by NHP system
ix. Change password
x. Sign out

1.3.2.9 Since the creation of a Trusted Partner account is initiated on the NHP system, so is the deletion of an account.

1.3.2.10 Once an individual or bulk nomination is submitted and successfully transferred to the NHP system, it is removed from NHWI, leaving behind only minimal information to display in the list of saved or submitted nominations. Since a completed nomination form may contain protected B information, removing the nomination reduces the security concerns related to NHWI.

1.3.3 System Administrator

A System Administrator is responsible for general operations and administration of the system.

System interactions include:

i. Manage system users and roles
ii. Review and purge inactive accounts
iii. Update the structure and page organization of the website
iv. Update existing nomination forms
v. Add new nomination forms
vi. Start and stop the system
vii. Administer and configure the CMS and its modules
viii. Receive notification of errors or other events of interest
ix. View system logs
x. Perform system maintenance, such as database backups
xi. View analytics reports for nomination forms

1.3.4 Content Editor

1.3.4.1 A Content Editor has the ability to edit the content of pages on the website, but not to change the structure of the website or the fields of a nomination form. Approval of content edits must be accepted by business owners in order to publish revised content. The interactions of the Content Editor are largely defined by the underlying Content Management System (CMS).

1.4 National Hounours Platform (NHP) System

1.4.1 The modernized National Honours Platform is being designed and implemented in the same time frame as the NHWI. The two systems collaborate, but are independent systems. There are several areas of collaboration.

i. Submitted nominations. The NHWI is the primary system to enable individuals to submit nominations for the five public-facing honours programs, and trusted partners to submit nominations to the SMV program. The NHWI must encode and transfer submitted nominations (both individual and bulk) to the NHP in a manner that permits the nomination to be automatically ingested without need for manual data entry or intervention. Once successfully transferred, submitted nominations are removed from NHWI.

ii. Saved nominations. The NHP accepts and processes only submitted nominations from NHWI. However when requested by NHP, the NHWI must return a list of saved nominations. The information for each saved nomination includes: nominator name and contact info; candidate name; date when the nomination was first created; and date when the nomination was last saved. This information is included in an NHP report, and allows an NHP user to take action if the nomination looks stale. For example, send a reminder email or offer for assistance to the nominator, determine if there is a problem, or delete an old and abandoned nomination.

iii. Letters of support. The CCA/SMV program has a high volume of nominations and requires automation for getting a letter of support from a reference. Given a submitted nomination, NHP is responsible for requesting a letter of support by email, and managing the workflow of what to do when a support letter has or has not been received. NHWI must host a web form which enables the reference to submit a letter for a specific nomination. NHWI must then transfer that letter to NHP.

iv. Recipients. Although NHWI has no knowledge of the progress of nominees through the nomination lifecycle, it would like to know about the successful recipients, so it can validate that candidates in nomination forms are not already recipients. More importantly, GG.ca also needs to know about successful recipients for its Find Recipient page; and it needs recipients for all honours and awards programs, not just the five honours programs managed by NHP in the first phase. It may be that NHWI gets its knowledge of recipients from GG.ca and not NHP.

v. Trusted Partners. The NHWI provides sign-in accounts for Trusted Partners. Creation of a sign-in account is initiated on the NHP system, and the account information is exported to NHWI where the account is created locally. NHWI is responsible for subsequent password management and authentication of sign in credentials .The exported information includes:
   a. Trusted partner ID
   b. Organization name
   c. User name (email address is suggested)
   d. Initial password

vi. Correspondence. The NHP includes a Correspondence service to manage and log correspondence with contacts. This service will be made available to other OSSG systems as they are modernized. The NHWI may use this service to send emails to its users.

1.5 Mail Service

1.5.1 The NHWI system may interact with a Mail service to send email in the following cases:

i. Return link to saved nomination form to unregistered user;

ii. Alternatively, NHWI may use the NHP Correspondence service as described above.

1.6 Account Profile Requirements

1.6.1 Registered Public Users and Trusted Partners have accounts on NHWI to which they can sign in using their credentials. There is an associated account profile which saves personal and contact information about that user. This profile information is used to pre-fill corresponding fields in a nomination form.

1.7 Nomination Form Requirements

1.7.1 The five honours program require similar information about the nominator, nominee, and references; where the programs differ are in the reasons for the nomination. However, the current nomination forms (www.gg.ca/nominate) , developed independently over time, have a number of inconsistencies in the presence, naming, grouping, and ordering of fields. Furthermore, the evolution from paper-based to web-based forms, and from snail mail to email for communication, motivate other changes in the forms.

1.7.2 The fields are displayed using similar steps, groups, and fields as the present CCA web form (www.caring.gg.ca), as this is the most modern and only web-based form of all the programs. Some fields have been added to satisfy the needs of other programs, or removed to simply the form and reduce the perceived burden on the nominator. The steps, groups, and field names and types shown in the CCA web form are a reasonable starting point, but should not be considered a hard requirement for the actual design and implementation of the form. However what is a requirement is the existence of a field, its intent and possible values, and whether it is required or optional.

i. The nomination form must be supported in English and French.

ii. The form is presented in the user's preferred language, but it must be possible to switch to the other supported language at any time without losing the current context.

iii. There will be different navigation paths to the form from GG.ca, and depending on the path, there may or may not be a specific honours program in context. The form URL must support parameters which indicate which program, if any, is in context. These parameters in effect answer the prompt questions in the "Reasons for nomination" step, so that the prompt questions are suppressed and the program specific fields and help guidance is displayed.

1.8 Submission by Registered Public User

1.8.1 The nomination form presented to a signed-in registered public user is identical, except that the fields in "Your Information" step are pre-filled with values from the account profile. The pre-filled fields are still editable.

1.9 Submission by Trusted Partner

1.9.1 The individual nomination form presented to a signed-in trusted partner is similar to the normal form, except:

i. Fields in "Your information" step are pre-filled from the account profile.

ii. The name and contact fields can be edited, since the organization account can be shared by many people, and it's good to know the individual doing the submission.

iii. The organization field cannot be edited, as this identifies the Trusted Partner responsible for this nomination.

iv. In the first phase, trusted partners are supported only for the CCA/SMV program, so the prompt questions are not necessary.

v. The certification field is not required nor visible. This partner is already trusted.

1.10 Bulk submission by Trusted Partner

1.10.1 The style, organization and overall flow of an individual nomination form is optimized for a user to submit a single nomination. However, Trusted Partner organizations may submit many nominations (10's not 100's) at a time, and it can be tedious to enter them one at a time. For this reason, the NHWI must support an interface for the efficient entry and submission of many nominations at once. There is no such method at present, so there are no specific requirements on how to implement such a method.

1.10.2 One possible method is to provide an excel template. Many trusted partners gather information about nominees in spreadsheets already, so it would be convenient for them to use the template for such purposes. When ready, they just upload the filled-in spreadsheet to NHWI. Another possible method is to provide a table-oriented web form, similar in nature to a spreadsheet, into which the user could directly enter the data.

1.10.3 The option for bulk submission is visible and available only to signed-in Trusted Partners.

1.10.4 If an excel template is used, the information about the nominator, i.e. the fields in the "Your information" step, don't need to be present in the template. This information can be taken from the account profile. However, if nominator information is present, it should occur only once. Values for name and contact fields would override those in the account profile form. The organization field, if present, must match the value from the account profile.

1.10.5 The certification field is not required. This partner is already trusted.

1.10.6 Bulk submission should accommodate up to 100 nominees.

1.11 Letter of Support Requirements

1.11.1 Some nomination references are requested by email to provide a letter of support. The email contains a web link to NHWI that when clicked, opens a web form that allows the reference to submit the letter. This section provides requirements for the web form.

1.12 Security and Access Control

1.12.1 Security and Access Control are required to protect NHP data and to facilitate authorized users to access functionality they need. This section specifies the functional security requirements, which affect end user behaviour.

Description	Requirement
User management	The NHWI must include user records that: • Have a defined NHWI role and status • Can be used to express user capabilities • Selected roles can be created by the user (i.e. Registered Public User) • Selected roles can be created by other systems (i.e. Trusted Partner) • Whose sign-in credentials can be locally authenticated
Unregistered Users	The NHWI must enable use of selected capabilities by users that are not registered or otherwise known to the system.
Authenticated Users	The NHWI must require that selected capabilities are only available to users that have been authenticated through sign-in.
Inactive Users	The NHWI must support transitioning user records to an Inactive status such that the associated users cannot access the NHP but the data integrity of other records that may reference their user id will not be affected.
RBAC (Role Based Access Control)	The NHWI must support the creation of roles that can be utilized to grant or restrict access to application functionality and data to users who are associated with that role.

Description	Requirement
State-based Access Control	The NHP must support the ability to grant or restrict access to application functionality and data fields based on a combination of role and record state / status for certain record types.
Access Control based on Ownership	The NHP must support the ability to grant or restrict access to application functionality and data fields to only the assigned user / owner for certain record types.