



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

**Bid Receiving - PWGSC / Réception des  
soumissions - TPSGC**  
**11 Laurier St., / 11, rue Laurier**  
**Place du Portage, Phase III**  
**Core 0B2 / Noyau 0B2**  
**Gatineau**  
**Québec**  
**K1A 0S5**  
**Bid Fax: (819) 997-9776**

**REQUEST FOR PROPOSAL  
DEMANDE DE PROPOSITION**

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

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

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

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

**Comments - Commentaires**

**Vendor/Firm Name and Address**

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

**Issuing Office - Bureau de distribution**

Informatics Professional Services - EL Division/Services  
professionnels en informatique - division EL  
4C2, Place du Portage  
Gatineau  
Québec  
K1A 0S5

<b>Title - Sujet</b> MDMS/SOAPS/ERASS		
<b>Solicitation No. - N° de l'invitation</b> 47060-152116/B		<b>Date</b> 2016-09-28
<b>Client Reference No. - N° de référence du client</b> 1000322116		
<b>GETS Reference No. - N° de référence de SEAG</b> PW-\$\$EL-632-30496		
<b>File No. - N° de dossier</b> 632el.47060-152116	<b>CCC No./N° CCC - FMS No./N° VME</b>	
<b>Solicitation Closes - L'invitation prend fin</b> <b>at - à 02:00 PM</b> <b>on - le 2016-10-26</b>		<b>Time Zone</b> <b>Fuseau horaire</b> Eastern Daylight Saving Time EDT
<b>F.O.B. - F.A.B.</b> <b>Plant-Usine:</b> <input type="checkbox"/> <b>Destination:</b> <input type="checkbox"/> <b>Other-Autre:</b> <input type="checkbox"/>		
<b>Address Enquiries to: - Adresser toutes questions à:</b> Lapalme, Francis		<b>Buyer Id - Id de l'acheteur</b> 632el
<b>Telephone No. - N° de téléphone</b> (873) 469-4985 ( )		<b>FAX No. - N° de FAX</b> (819) 956-5925
<b>Destination - of Goods, Services, and Construction:</b> <b>Destination - des biens, services et construction:</b>  Specified Herein Précisé dans les présentes		

**Instructions: See Herein**

**Instructions: Voir aux présentes**

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

Solicitation Number:  
[47060-152116/B](#)

Amendment Number:

Buyer ID:  
[632EL](#)

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**BID SOLICITATION**

**FOR**

**CONTRACTS AGAINST A SUPPLY ARRANGEMENT FOR TASK-  
BASED INFORMATICS PROFESSIONAL SERVICES (TBIPS)**

**FOR**

**VARIOUS RESOURCE CATEGORIES – LEVEL 3  
(SEE HEREIN)**

**ON BEHALF OF**

**THE CANADA BORDER SERVICES AGENCY**

**This document contains a security requirement**

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- Annex A - Statement of Work
  - Appendix A – Non-Functional Requirements
  - Appendix B – Acronyms
  - Appendix C – Glossary
  - Appendix D – Tasking Assessment Procedure
  - Appendix E – Task Authorization (TA) Form
  - Appendix F – Resources Assessment Criteria and Response Table
  - Appendix G – Certifications at the TA Stage
- Annex B - Basis of Payment
- Annex C - Security Requirements Check List

**List of Attachment to Part 3 (Bid Preparation Instructions):**

- Attachment 1: Bid Submission Form
- Attachment 2: Bid Evaluation Criteria (Workstream 1)
- Attachment 3: Bid Evaluation Criteria (Workstream 2)
- Attachment 4: Financial Bid

**List of Attachment to Part 5 (Certifications):**

- Attachment 5: Federal Contractors Program for Employment Equity - Certification

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## PART 1 - GENERAL INFORMATION

### 1.1 Introduction

This document states terms and conditions that apply to this bid solicitation. It is divided into seven parts plus attachments and annexes, as follows:

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

Part 2 Bidder Instructions: provides the instructions, clauses and conditions applicable to the bid solicitation;

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

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

Part 5 Certifications and Additional Information: includes the certifications and additional information to be provided;

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

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

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

### 1.2 Summary

- (a) This bid solicitation is being issued to satisfy the requirement of the Canada Border Services Agency (CBSA) (the "**Client**") for Task-Based Informatics Professional Services (TBIPS) under the TBIPS Supply Arrangement (SA) method of supply.
- (b) It is intended to result in the award of up to one contract in each of two Workstreams, with each contract purchasing Work from only one Workstream. Each contract will be for one year plus five one-year irrevocable options allowing Canada to extend the term of the contract.
- (c) There are security requirements associated with this requirement. For additional information, consult Part 6 - Security, Financial and Other Requirements, and Part 7 – Resulting Contract Clauses. For more information on personnel and organization security screening or security clauses, Bidders should refer to the, Industrial Security Program (ISP) of Public Works and Government Services Canada (<http://ssi-iss.tpsgc-pwgsc.gc.ca/index-eng.html>) website.
- (d) The requirement is subject to the provisions of the World Trade Organization Agreement on Government Procurement (WTO-AGP), the North American Free Trade Agreement (NAFTA), the Canada-Chile Free Trade Agreement (CCFTA), the Canada-Peru Free Trade Agreement (CPFTA), the Canada-Colombia Free Trade Agreement (CColFTA), and the Canada-Panama Free Trade Agreement (CPanFTA), and the Agreement on Internal Trade (AIT).
- (e) The Federal Contractor's Program (FCP) for employment equity applies to this procurement; see Part 5 – Certifications, Part 7 – Resulting Contract Clauses and the attachment titled "Federal Contractor's Program for Employment Equity – Certification."
- (f) Only TBIPS SA Holders currently holding a TBIPS SA for Tier 2, in all resource categories of a Workstream and in the National Capital Region under the EN578-055605 series of SAs are eligible to compete. The TBIPS SA EN578-055605 is incorporated by reference and forms part of this bid solicitation, as though expressly set out in it, subject to any express terms and conditions contained in this bid solicitation. The capitalized terms not defined in this bid solicitation have the meaning given to them in the TBIPS SA.

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- (g) SA Holders that are invited to compete as a joint venture must submit a bid as that joint venture SA Holder, forming no other joint venture to bid. Any joint venture must be already qualified under the SA #EN578-055605 as that joint venture at the time of bid closing in order to submit a bid.
- (h) For each Workstream, the Resource Categories described below are required on an as and when requested basis in accordance with the TBIPS SA Annex "A":

WORKSTREAM 1

RESOURCE CATEGORY	LEVEL OF EXPERTISE	ESTIMATED NUMBER OF RESOURCES REQUIRED PER YEAR
Application/Software Architect - Specialty in IBM Master Data Management (MDM) Server	LEVEL 3	1
Application/Software Architect - Specialty in IBM InfoSphere Information Server (IIS) DataStage and Quality Stage	LEVEL 3	1
Application/Software Architect - Specialty in IBM Infosphere Identity Insight (ISII)	LEVEL 3	1
Programmer/Software Developer - Specialty in IBM InfoSphere Information Server (IIS) DataStage and QualityStage	LEVEL 3	1
Programmer/Software Developer - Specialty in IBM Master Data Management (MDM) - Java development	LEVEL 3	1
Programmer/Software Developer - Specialty in pME (probabilistic Matching Engine) - Matching algorithm development	LEVEL 3	1
Programmer/Software Developer - Specialty in IBM Infosphere Identity Insight (ISII)	LEVEL 3	1
Programmer/Software Developer - Specialty in IBM Global Name Management (GNM)	LEVEL 3	1
Business System Analyst - Specialty in IBM Master Data Management (MDM) - Data Governance	LEVEL 3	1
Technology Architect - IBM Master Data Management (MDM) Configuration and Release Management	LEVEL 3	1

WORKSTREAM 2

RESOURCE CATEGORY	LEVEL OF EXPERTISE	ESTIMATED NUMBER OF RESOURCES REQUIRED PER YEAR
Application/Software Architect - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)	LEVEL 3	1
Application/Software Architect - Specialty in IBM Business Process Management (BPM) Advanced	LEVEL 3	1
Application/Software Architect - Specialty in IBM Operational Decision Manager (ODM) Standard and ODM Advanced (including the Event Management System (EMS))	LEVEL 3	1
Programmer/Software Developer - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)	LEVEL 3	1
Programmer/Software Developer - Specialty in IBM Business Process Management (BPM) Advanced	LEVEL 3	1
Programmer/Software Developer - Specialty in IBM Operational Decision Manager (ODM) Standard and ODM Advanced (including the Event Management System (EMS))	LEVEL 3	1
Test Coordinator - Specialty in Test coordination of one or many of the following Products: IBM MDM, IBM IIS DataStage and QualityStage, IBM ISII, IBM IIB-ESB, IBM GNM, IBM ODM Standard and Advanced	LEVEL 3	1
Technology Architect - IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) Configuration and Release Management	LEVEL 3	1

### 1.3 Debriefings

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



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## PART 2 - BIDDER INSTRUCTIONS

### 2.1 Standard Instructions, Clauses and Conditions

- (a) All instructions, clauses and conditions identified in the bid solicitation by number, date and title are set out in the *Standard Acquisition Clauses and Conditions Manual* (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.
- (b) Bidders who submit a bid agree to be bound by the instructions, clauses and conditions of the bid solicitation and accept the clauses and conditions of the resulting contract(s).
- (c) The 2003 (2016-04-04) Standard Instructions - Goods or Services - Competitive Requirements are incorporated by reference into and form part of the bid solicitation. If there is a conflict between the provisions of 2003 and this document, this document prevails.
- (d) Subsection 3.a) of Section 01, Integrity Provisions - Bid of Standard Instructions 2003 incorporated by reference above is deleted in its entirety and replaced with the following:
  - a. at the time of submitting an arrangement under the Request for Supply Arrangement (RFSA), the Bidder has already provided a list of names, as requested under the *Ineligibility and Suspension Policy*. During this procurement process, the Bidder must immediately inform Canada in writing of any changes affecting the list of names.
- (e) Subsection 5(4) of 2003, Standard Instructions – Goods and Services – Competitive Requirements is amended as follows:
  - (i) Delete: 60 days
  - (ii) Insert: 180 days

### 2.2 Submission of Bids

- (a) **Location and Time for Delivery of Bid:** Due to the nature of this solicitation, bids submitted by facsimile or electronic mail will not be accepted. Bids must not be sent directly to the Contracting Authority. Bids sent directly to the Contracting Authority will not be considered.

Bids must be delivered to the following location, by the time and date indicated below:

Department of Public Works and Government Services Canada  
Bid Receiving Unit  
Portage III, 0B2, 11 Laurier Street  
Gatineau, Quebec K1A 0S5

#### **Solicitation Closes:**

At 02:00 PM on 2016 10 26 Time Zone: Eastern Daylight Saving Time EDT

Bid Receiving Unit Address is Solely for Delivery of Bids: The above address is for the sole purpose of bid submission. No other communications are to be forwarded to this address.

- (b) Due to the nature of the bid solicitation, bids transmitted by facsimile or electronic mail to PWGSC will not be accepted.

### 2.3 Enquiries - Bid Solicitation

- (a) All enquiries must be submitted in writing to the Contracting Authority no later than five calendar days before the bid closing date. Enquiries received after that time may not be answered.
- (b) Bidders should reference as accurately as possible the numbered item of the bid solicitation to which the enquiry relates. Care should be taken by Bidders to explain each question in sufficient detail in order to enable Canada to provide an accurate answer. Technical enquiries that are of a

proprietary nature must be clearly marked "proprietary" at each relevant item. Items identified as "proprietary" will be treated as such except where Canada determines that the enquiry is not of a proprietary nature. Canada may edit the questions or may request that the Bidder do so, so that the proprietary nature of the question is eliminated, and the enquiry can be answered with copies to all Bidders. Enquiries not submitted in a form that can be distributed to all Bidders may not be answered by Canada.

## 2.4 Former Public Servant

- (a) 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.

### (b) Definitions

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

- (i). an individual;
- (ii). an individual who has incorporated;
- (iii). a partnership made of former public servants; or
- (iv). a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.

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

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

### (c) Former Public Servant in Receipt of a Pension

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

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

- (i). name of former public servant;

- (ii). 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](#).

**(d) Work Force Adjustment Directive**

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

If so, the Bidder must provide the following information:

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

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

**2.5 Applicable Laws**

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

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

**2.6 Improvement of Requirement During Solicitation Period**

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

## **2.7 Basis for Canada's Ownership of Intellectual Property**

CBSA has determined that any Material subject to copyright arising from the performance of the Work under the resulting contract will be owned by Canada. Examples of such Material (as such is defined in General Conditions 2035) include the deliverables identified in Section 7. Tasks and Activities of the Statement of Work.

## **2.8 Volumetric Data**

The estimated numbers of resources required per resource category per year have been provided to Bidders to assist them in preparing their bids. The inclusion of this data in this bid solicitation does not represent a commitment by Canada that Canada's future usage of the service identified in this bid solicitation will be consistent with this data. It is provided purely for information purposes.

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## PART 3 - BID PREPARATION INSTRUCTIONS

### 3.1 Bid Preparation Instructions

- (a) **Copies of Bid:** Canada requests that Bidders provide their bid in separately bound sections as follows:
- (i) Section I: Technical Bid (4 hard copies)
  - (ii) Section II: Financial Bid (1 hard copy)
  - (iii) Section III: Certifications not included in the Technical Bid (1 hard copy)
- Prices must appear in the financial bid only. No prices must be indicated in any other section of the bid.
- (b) **Format for Bid:** Canada requests that Bidders follow the format instructions described below in the preparation of their bid:
- (i) use 8.5 x 11 inch (216 mm x 279 mm) paper;
  - (ii) use a numbering system that corresponds to the bid solicitation;
  - (iii) include a title page at the front of each volume of the bid that includes the title, date, bid solicitation number, bidder's name and address and contact information of its representative; and
  - (iv) include a table of contents.
- (c) **Canada's Policy on Green Procurement:** In April 2006, Canada issued a policy directing federal departments and agencies to take the necessary steps to incorporate environmental considerations into the procurement process. See the Policy on Green Procurement (<http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html>). To assist Canada in reaching its objectives, Bidders should:
- (i) use paper containing fibre certified as originating from a sustainably-managed forest and/or containing a minimum of 30% recycled content; and
  - (ii) use an environmentally-preferable format including black and white printing instead of colour printing, printing double sided/duplex, and using staples or clips instead of cerlox, duotangs or binders.
- (d) **Submission of Only One Bid:**
- (i) A Bidder, including related entities, will be permitted to submit only one bid in response to this bid solicitation. If a Bidder or any related entities participate in more than one bid (participating means being part of the Bidder, not being a subcontractor), Canada will provide those Bidders with 2 working days to identify the single bid to be considered by Canada. Failure to meet this deadline will result in all the affected bids being disqualified. A single bid may contain bids to be awarded a contract in one or more Workstreams. However, a bid may not contain a bid from the Bidder, including related entities to be awarded more than one contract in any given Workstream.
  - (ii) For the purposes of this Article, regardless of the jurisdiction where any of the entities concerned is incorporated or otherwise formed as a matter of law (whether that entity is a natural person, corporation, partnership, etc), an entity will be considered to be "**related**" to a Bidder if:
    - (A) they are the same legal entity (i.e., the same natural person, corporation, partnership, limited liability partnership, etc.);
    - (B) they are "related persons" or "affiliated persons" according to the Canada Income Tax Act;

- 
- (C) the entities have now or in the two years before bid closing had a fiduciary relationship with one another (either as a result of an agency arrangement or any other form of fiduciary relationship); or
- (D) the entities otherwise do not deal with one another at arm's length, or each of them does not deal at arm's length with the same third party.
- (iii) Individual members of a joint venture cannot participate in another bid, either by submitting a bid alone or by participating in another joint venture.
- (e) Joint Venture Experience:
- (i) Where the Bidder is a joint venture with existing experience as that joint venture, it may submit the experience that it has obtained as that joint venture.
- Example: A bidder is a joint venture consisting of members L and O. A bid solicitation requires that the bidder demonstrate experience providing maintenance and help desk services for a period of 24 months to a customer with at least 10,000 users. As a joint venture (consisting of members L and O), the bidder has previously done the work. This bidder can use this experience to meet the requirement. If member L obtained this experience while in a joint venture with a third party N, however, that experience cannot be used because the third party N is not part of the joint venture that is bidding.
- (ii) A joint venture bidder may rely on the experience of one of its members to meet any given technical criterion of this bid solicitation.
- Example: A bidder is a joint venture consisting of members X, Y and Z. If a solicitation requires: (a) that the bidder have 3 years of experience providing maintenance service, and (b) that the bidder have 2 years of experience integrating hardware with complex networks, then each of these two requirements can be met by a different member of the joint venture. However, for a single criterion, such as the requirement for 3 years of experience providing maintenance services, the bidder cannot indicate that each of members X, Y and Z has one year of experience, totaling 3 years. Such a response would be declared non-responsive.
- (iii) Joint venture members cannot pool their abilities with other joint venture members to satisfy a single technical criterion of this bid solicitation. However, a joint venture member can pool its individual experience with the experience of the joint venture itself. Wherever substantiation of a criterion is required, the Bidder is requested to indicate which joint venture member satisfies the requirement. If the Bidder has not identified which joint venture member satisfies the requirement, the Contracting Authority will provide an opportunity to the Bidder to submit this information during the evaluation period. If the Bidder does not submit this information within the period set by the Contracting Authority, its bid will be declared non-responsive.
- Example: A bidder is a joint venture consisting of members A and B. If a bid solicitation requires that the bidder demonstrate experience providing resources for a minimum number of 100 billable days, the bidder may demonstrate that experience by submitting either:
- Contracts all signed by A;
  - Contracts all signed by B; or
  - Contracts all signed by A and B in joint venture, or
  - Contracts signed by A and contracts signed by A and B in joint venture, or
  - Contracts signed by B and contracts signed by A and B in joint venture.
- That show in total 100 billable days.

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

### 3.2 Section I: Technical Bid

- (a) The technical bid consists of the following:

- (i) **Bid Submission Form:** Bidders are requested to include the Bid Submission Form - Attachment "1" with their bids. It provides a common form in which bidders can provide information required for evaluation and contract award, such as a contact name and the Bidder's Procurement Business Number, etc. Using the form to provide this information is not mandatory, but it is recommended. If Canada determines that the information required by the Bid Submission Form is incomplete or requires correction, Canada will provide the Bidder with an opportunity to do so.
- (ii) **Security Clearance:** Bidders are requested to submit the following security information for each of the proposed resources with their bids on or before the bid closing date:

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

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

- (iii) **Substantiation of Technical Compliance:** The technical bid must substantiate the compliance with the specific articles of Attachments "2" and "3", which is the requested format for providing the substantiation. The substantiation must not simply be a repetition of the requirement(s), but must explain and demonstrate how the Bidder will meet the requirements and carry out the required Work. Simply stating that the Bidder or its proposed solution or resources comply is not sufficient. Where Canada determines that the substantiation is not complete, the Bidder will be considered non-responsive and disqualified. The substantiation may refer to additional documentation submitted with the bid - this information can be referenced in the "Bidder's Response" column of Attachments "2" and "3", where Bidders are requested to indicate where in the bid the reference material can be found, including the title of the document, and the page and paragraph numbers; where the reference is not sufficiently precise, Canada may request that the Bidder direct Canada to the appropriate location in the documentation.
- (iv) **Previous Similar Projects:** Where the bid must include a description of previous similar projects: (i) a project must have been completed by the Bidder itself (and cannot include the experience of any proposed subcontractor or any affiliate of the Bidder); (ii) a project must have been completed by the bid closing date; (iii) each project description must include, at minimum, the name and either the telephone number or e-mail address of a customer reference; and (iv) if more similar projects are provided than requested, Canada will decide in its discretion which projects will be evaluated.

- (v) **For Proposed Resources:** The technical bid must include one résumé, per Resource Category, as identified in Attachments "2" and "3". The same individual must not be proposed for more than one Resource Category or more than one Workstream. The Technical bid must demonstrate that each proposed individual meets the qualification requirements described (including any educational requirements, work experience requirements, and professional designation or membership requirements). With respect to the proposed resources:
- (A) Proposed resources may be employees of the Bidder or employees of a subcontractor, or these individuals may be independent contractors to whom the Bidder would subcontract a portion of the Work (refer to Part 5, Certifications).
  - (B) For educational requirements for a particular degree, designation or certificate, PWGSC will only consider educational programs that were successfully completed by the resource by the time of bid closing. If the degree, designation or certification was issued by an educational institution outside of Canada, the Bidder must provide a copy of the results of the academic credential assessment and qualification recognition service issued by an agency or organization recognized by the Canadian Information Centre for International Credentials (CICIC).
  - (C) For requirements relating to professional designation or membership, the resource must have the required designation or membership by the time of bid closing and must continue, where applicable, to be a member in good standing of the profession or membership throughout the evaluation period and Contract Period. Where the designation or membership must be demonstrated through a certification, diploma or degree, such document must be current, valid and issued by the entity specified in this solicitation. If the entity is not specified, the issuer must have been an accredited or otherwise recognized body, institution or entity at the time the document was issued. If the degree, diploma or certification was issued by an educational institution outside of Canada, the Bidder must provide a copy of the results of the academic credential assessment and qualification recognition service issued by an agency or organization recognized by the Canadian Information Centre for International Credentials (CICIC).
  - (D) For work experience, PWGSC will not consider experience gained as part of an educational program, except for experience gained through a formal co-operative program at a post-secondary institution.
  - (E) For any requirements that specify a particular time period (e.g., 2 years) of work experience, PWGSC will disregard any information about experience if the technical bid does not include the relevant dates (month and year) for the experience claimed (i.e., the start date and end date). Canada will evaluate only the duration that the resource actually worked on a project or projects (from his or her start date to end date), instead of the overall start and end date of a project or a combination of projects in which a resource has participated.
  - (F) For work experience to be considered by Canada, the technical bid must not simply indicate the title of the individual's position, but must demonstrate that the resource has the required work experience by explaining the responsibilities and work performed by the individual while in that position. In situations in which a proposed resource worked at the same time on more than one project, the duration of any overlapping time period will be counted only once toward any requirements that relate to the individual's length of experience.
- (vi) **Customer Reference Contact Information:**
- (A) In conducting its evaluation of the bids, Canada may, but will have no obligation to request that a bidder provide customer references. If Canada sends such a written request, the bidder will have 2 working days to provide the necessary



information to Canada. Failure to meet this deadline will result in the bid being declared non-responsive. These customer references must each confirm if requested by PWGSC, the facts identified in the Bidder's bid, as required by Attachments "2" and "3".

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

*Sample Question to Customer Reference: "Has [the Bidder] (1) provided your organization with the services described in criterion XX and within [the required time frame of criterion XX] or (2) performed for your organization the tasks described in criterion XX and within [the required time frame of criterion XX]?"*

*\_\_\_ Yes, the Bidder has (1) provided my organization with the services described above and within the time frame described above or (2) performed for my organization the tasks described above and within the time frame described above.*

*\_\_\_ No, the Bidder has not (1) provided my organization with the services described above and within the time frame described above or (2) performed for my organization the tasks described above and within the time frame described above.*

*\_\_\_ I am unwilling or unable to provide any information about the (1) services described above or (2) tasks described above.*

- (C) For each customer reference, the Bidder must, at a minimum, provide the name and either the telephone number or e-mail address for a contact person. If only the telephone number is provided, it will be used to call to request the e-mail address and the reference check will be done by e-mail.

Bidders are also requested to include the title of the contact person. It is the sole responsibility of the Bidder to ensure that it provides a contact who is knowledgeable about the services the Bidder has provided to its customer and who is willing to act as a customer reference. Crown references will be accepted.

### 3.3 Section II: Financial Bid

- (a) **Pricing:** Bidders must submit their financial bid in accordance with the Financial Bid provided in Attachment "4". The total amount of Applicable Taxes must be shown separately, if applicable. Unless otherwise indicated, bidders must include a single, firm, all-inclusive per diem rate quoted in Canadian dollars in each cell requiring an entry in the pricing tables.
- (b) **Variation in Resource Rates By Time Period:** For any given resource category, where the financial tables provided by Canada allow different firm rates to be charged for a resource category during different time periods, the rate bid for the same resource category during any subsequent time period must not be lower than the rate bid for the time period that includes the first month of the Initial Contract Period.
- (c) **All Costs to be Included:** The financial bid must include all costs for the requirement described in the bid solicitation for the entire Contract Period, including any option periods. The identification of all necessary equipment, software, peripherals, cabling and components required to meet the requirements of the bid solicitation and the associated costs of these items is the sole responsibility of the Bidder.
- (d) **Blank Prices:** Bidders are requested to insert "\$0.00" for any item for which it does not intend to charge or for items that are already included in other prices set out in the tables. If the Bidder leaves any price blank, Canada will treat the price as "\$0.00" for evaluation purposes and may request that the Bidder confirm that the price is, in fact, \$0.00. No bidder will be permitted to add or change a price as part of this confirmation. Any bidder who does not confirm that the price for a blank item is \$0.00 will be declared non-responsive.

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**3.4 Section III: Certifications**

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

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**ATTACHMENT 1**  
**BID SUBMISSION FORM**

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

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

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**ATTACHMENT 2**  
**BID EVALUATION CRITERIA**  
**(WORKSTREAM 1)**

**(SEE ATTACHED HERETO)**

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**ATTACHMENT 3**  
**BID EVALUATION CRITERIA**  
**(WORKSTREAM 2)**

**(SEE ATTACHED HERETO)**

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## ATTACHMENT 4

### FINANCIAL BID

**Note to Bidders:** The following tables apply to Workstream 1 only.

#### WORKSTREAM 1

##### Initial Contract Period:

Initial Contract Period (1 year)		
Resource Category	Level of Expertise	Firm Per Diem Rate
Application/Software Architect - Specialty in IBM Master Data Management (MDM) Server	Level 3	\$
Application/Software Architect - Specialty in IBM InfoSphere Information Server (IIS) DataStage and Quality Stage	Level 3	\$
Application/Software Architect - Specialty in IBM Infosphere Identity Insight (ISII)	Level 3	\$
Programmer/Software Developer - Specialty in IBM InfoSphere Information Server (IIS) DataStage and QualityStage	Level 3	\$
Programmer/Software Developer - Specialty in IBM Master Data Management (MDM) - Java development	Level 3	\$
Programmer/Software Developer - Specialty in pME (probabilistic Matching Engine) - Matching algorithm development	Level 3	\$
Programmer/Software Developer - Specialty in IBM Infosphere Identity Insight (ISII)	Level 3	\$
Programmer/Software Developer - Specialty in IBM Global Name Management (GNM)	Level 3	\$
Business System Analyst - Specialty in IBM Master Data Management (MDM) - Data Governance	Level 3	\$
Technology Architect - IBM Master Data Management (MDM) Configuration and Release Management	Level 3	\$

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**Option Periods:**

Option Period 1 (1 year)		
Resource Category	Level of Expertise	Firm Per Diem Rate
Application/Software Architect - Specialty in IBM Master Data Management (MDM) Server	Level 3	\$
Application/Software Architect - Specialty in IBM InfoSphere Information Server (IIS) DataStage and Quality Stage	Level 3	\$
Application/Software Architect - Specialty in IBM Infosphere Identity Insight (ISII)	Level 3	\$
Programmer/Software Developer - Specialty in IBM InfoSphere Information Server (IIS) DataStage and QualityStage	Level 3	\$
Programmer/Software Developer - Specialty in IBM Master Data Management (MDM) - Java development	Level 3	\$
Programmer/Software Developer - Specialty in pME (probabilistic Matching Engine) - Matching algorithm development	Level 3	\$
Programmer/Software Developer - Specialty in IBM Infosphere Identity Insight (ISII)	Level 3	\$
Programmer/Software Developer - Specialty in IBM Global Name Management (GNM)	Level 3	\$
Business System Analyst - Specialty in IBM Master Data Management (MDM) - Data Governance	Level 3	\$
Technology Architect - IBM Master Data Management (MDM) Configuration and Release Management	Level 3	\$



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Option Period 2 (1 year)		
Resource Category	Level of Expertise	Firm Per Diem Rate
Application/Software Architect - Specialty in IBM Master Data Management (MDM) Server	Level 3	\$
Application/Software Architect - Specialty in IBM InfoSphere Information Server (IIS) DataStage and Quality Stage	Level 3	\$
Application/Software Architect - Specialty in IBM Infosphere Identity Insight (ISII)	Level 3	\$
Programmer/Software Developer - Specialty in IBM InfoSphere Information Server (IIS) DataStage and QualityStage	Level 3	\$
Programmer/Software Developer - Specialty in IBM Master Data Management (MDM) - Java development	Level 3	\$
Programmer/Software Developer - Specialty in pME (probabilistic Matching Engine) - Matching algorithm development	Level 3	\$
Programmer/Software Developer - Specialty in IBM Infosphere Identity Insight (ISII)	Level 3	\$
Programmer/Software Developer - Specialty in IBM Global Name Management (GNM)	Level 3	\$
Business System Analyst - Specialty in IBM Master Data Management (MDM) - Data Governance	Level 3	\$
Technology Architect - IBM Master Data Management (MDM) Configuration and Release Management	Level 3	\$

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Option Period 3 (1 year)		
Resource Category	Level of Expertise	Firm Per Diem Rate
Application/Software Architect - Specialty in IBM Master Data Management (MDM) Server	Level 3	\$
Application/Software Architect - Specialty in IBM InfoSphere Information Server (IIS) DataStage and Quality Stage	Level 3	\$
Application/Software Architect - Specialty in IBM Infosphere Identity Insight (ISII)	Level 3	\$
Programmer/Software Developer - Specialty in IBM InfoSphere Information Server (IIS) DataStage and QualityStage	Level 3	\$
Programmer/Software Developer - Specialty in IBM Master Data Management (MDM) - Java development	Level 3	\$
Programmer/Software Developer - Specialty in pME (probabilistic Matching Engine) - Matching algorithm development	Level 3	\$
Programmer/Software Developer - Specialty in IBM Infosphere Identity Insight (ISII)	Level 3	\$
Programmer/Software Developer - Specialty in IBM Global Name Management (GNM)	Level 3	\$
Business System Analyst - Specialty in IBM Master Data Management (MDM) - Data Governance	Level 3	\$
Technology Architect - IBM Master Data Management (MDM) Configuration and Release Management	Level 3	\$

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Option Period 4 (1 year)		
Resource Category	Level of Expertise	Firm Per Diem Rate
Application/Software Architect - Specialty in IBM Master Data Management (MDM) Server	Level 3	\$
Application/Software Architect - Specialty in IBM InfoSphere Information Server (IIS) DataStage and Quality Stage	Level 3	\$
Application/Software Architect - Specialty in IBM Infosphere Identity Insight (ISII)	Level 3	\$
Programmer/Software Developer - Specialty in IBM InfoSphere Information Server (IIS) DataStage and QualityStage	Level 3	\$
Programmer/Software Developer - Specialty in IBM Master Data Management (MDM) - Java development	Level 3	\$
Programmer/Software Developer - Specialty in pME (probabilistic Matching Engine) - Matching algorithm development	Level 3	\$
Programmer/Software Developer - Specialty in IBM Infosphere Identity Insight (ISII)	Level 3	\$
Programmer/Software Developer - Specialty in IBM Global Name Management (GNM)	Level 3	\$
Business System Analyst - Specialty in IBM Master Data Management (MDM) - Data Governance	Level 3	\$
Technology Architect - IBM Master Data Management (MDM) Configuration and Release Management	Level 3	\$

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Option Period 5 (1 year)		
Resource Category	Level of Expertise	Firm Per Diem Rate
Application/Software Architect - Specialty in IBM Master Data Management (MDM) Server	Level 3	\$
Application/Software Architect - Specialty in IBM InfoSphere Information Server (IIS) DataStage and Quality Stage	Level 3	\$
Application/Software Architect - Specialty in IBM Infosphere Identity Insight (ISII)	Level 3	\$
Programmer/Software Developer - Specialty in IBM InfoSphere Information Server (IIS) DataStage and QualityStage	Level 3	\$
Programmer/Software Developer - Specialty in IBM Master Data Management (MDM) - Java development	Level 3	\$
Programmer/Software Developer - Specialty in pME (probabilistic Matching Engine) - Matching algorithm development	Level 3	\$
Programmer/Software Developer - Specialty in IBM Infosphere Identity Insight (ISII)	Level 3	\$
Programmer/Software Developer - Specialty in IBM Global Name Management (GNM)	Level 3	\$
Business System Analyst - Specialty in IBM Master Data Management (MDM) - Data Governance	Level 3	\$
Technology Architect - IBM Master Data Management (MDM) Configuration and Release Management	Level 3	\$

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**Note to Bidders:** The following tables apply to Workstream 2 only.

## WORKSTREAM 2

### Initial Contract Period:

Initial Contract Period (1 year)		
Resource Category	Level of Expertise	Firm Per Diem Rate
Application/Software Architect - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)	LEVEL 3	\$
Application/Software Architect - Specialty in IBM Business Process Management (BPM) Advanced	LEVEL 3	\$
Application/Software Architect - Specialty in IBM Operational Decision Manager (ODM) Standard and ODM Advanced (including the Event Management System (EMS))	LEVEL 3	\$
Programmer/Software Developer - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)	LEVEL 3	\$
Programmer/Software Developer - Specialty in IBM Business Process Management (BPM) Advanced	LEVEL 3	\$
Programmer/Software Developer - Specialty in IBM Operational Decision Manager (ODM) Standard and ODM Advanced (including the Event Management System (EMS))	LEVEL 3	\$
Test Coordinator - Specialty in Test coordination of one or many of the following Products: IBM MDM, IBM IIS DataStage and QualityStage, IBM ISII, IBM IIB-ESB, IBM GNM, IBM ODM Standard and Advanced	LEVEL 3	\$
Technology Architect - IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) Configuration and Release Management	LEVEL 3	\$

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**Option Periods:**

Option Period 1 (1 year)		
Resource Category	Level of Expertise	Firm Per Diem Rate
Application/Software Architect - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)	LEVEL 3	\$
Application/Software Architect - Specialty in IBM Business Process Management (BPM) Advanced	LEVEL 3	\$
Application/Software Architect - Specialty in IBM Operational Decision Manager (ODM) Standard and ODM Advanced (including the Event Management System (EMS))	LEVEL 3	\$
Programmer/Software Developer - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)	LEVEL 3	\$
Programmer/Software Developer - Specialty in IBM Business Process Management (BPM) Advanced	LEVEL 3	\$
Programmer/Software Developer - Specialty in IBM Operational Decision Manager (ODM) Standard and ODM Advanced (including the Event Management System (EMS))	LEVEL 3	\$
Test Coordinator - Specialty in Test coordination of one or many of the following Products: IBM MDM, IBM IIS DataStage and QualityStage, IBM ISII, IBM IIB-ESB, IBM GNM, IBM ODM Standard and Advanced	LEVEL 3	\$
Technology Architect - IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) Configuration and Release Management	LEVEL 3	\$

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Option Period 2 (1 year)		
Resource Category	Level of Expertise	Firm Per Diem Rate
Application/Software Architect - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)	LEVEL 3	\$
Application/Software Architect - Specialty in IBM Business Process Management (BPM) Advanced	LEVEL 3	\$
Application/Software Architect - Specialty in IBM Operational Decision Manager (ODM) Standard and ODM Advanced (including the Event Management System (EMS))	LEVEL 3	\$
Programmer/Software Developer - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)	LEVEL 3	\$
Programmer/Software Developer - Specialty in IBM Business Process Management (BPM) Advanced	LEVEL 3	\$
Programmer/Software Developer - Specialty in IBM Operational Decision Manager (ODM) Standard and ODM Advanced (including the Event Management System (EMS))	LEVEL 3	\$
Test Coordinator - Specialty in Test coordination of one or many of the following Products: IBM MDM, IBM IIS DataStage and QualityStage, IBM ISII, IBM IIB-ESB, IBM GNM, IBM ODM Standard and Advanced	LEVEL 3	\$
Technology Architect - IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) Configuration and Release Management	LEVEL 3	\$

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Option Period 3 (1 year)		
Resource Category	Level of Expertise	Firm Per Diem Rate
Application/Software Architect - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)	LEVEL 3	\$
Application/Software Architect - Specialty in IBM Business Process Management (BPM) Advanced	LEVEL 3	\$
Application/Software Architect - Specialty in IBM Operational Decision Manager (ODM) Standard and ODM Advanced (including the Event Management System (EMS))	LEVEL 3	\$
Programmer/Software Developer - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)	LEVEL 3	\$
Programmer/Software Developer - Specialty in IBM Business Process Management (BPM) Advanced	LEVEL 3	\$
Programmer/Software Developer - Specialty in IBM Operational Decision Manager (ODM) Standard and ODM Advanced (including the Event Management System (EMS))	LEVEL 3	\$
Test Coordinator - Specialty in Test coordination of one or many of the following Products: IBM MDM, IBM IIS DataStage and QualityStage, IBM ISII, IBM IIB-ESB, IBM GNM, IBM ODM Standard and Advanced	LEVEL 3	\$
Technology Architect - IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) Configuration and Release Management	LEVEL 3	\$



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Option Period 4 (1 year)		
Resource Category	Level of Expertise	Firm Per Diem Rate
Application/Software Architect - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)	LEVEL 3	\$
Application/Software Architect - Specialty in IBM Business Process Management (BPM) Advanced	LEVEL 3	\$
Application/Software Architect - Specialty in IBM Operational Decision Manager (ODM) Standard and ODM Advanced (including the Event Management System (EMS))	LEVEL 3	\$
Programmer/Software Developer - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)	LEVEL 3	\$
Programmer/Software Developer - Specialty in IBM Business Process Management (BPM) Advanced	LEVEL 3	\$
Programmer/Software Developer - Specialty in IBM Operational Decision Manager (ODM) Standard and ODM Advanced (including the Event Management System (EMS))	LEVEL 3	\$
Test Coordinator - Specialty in Test coordination of one or many of the following Products: IBM MDM, IBM IIS DataStage and QualityStage, IBM ISII, IBM IIB-ESB, IBM GNM, IBM ODM Standard and Advanced	LEVEL 3	\$
Technology Architect - IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) Configuration and Release Management	LEVEL 3	\$

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Option Period 5 (1 year)		
Resource Category	Level of Expertise	Firm Per Diem Rate
Application/Software Architect - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)	LEVEL 3	\$
Application/Software Architect - Specialty in IBM Business Process Management (BPM) Advanced	LEVEL 3	\$
Application/Software Architect - Specialty in IBM Operational Decision Manager (ODM) Standard and ODM Advanced (including the Event Management System (EMS))	LEVEL 3	\$
Programmer/Software Developer - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)	LEVEL 3	\$
Programmer/Software Developer - Specialty in IBM Business Process Management (BPM) Advanced	LEVEL 3	\$
Programmer/Software Developer - Specialty in IBM Operational Decision Manager (ODM) Standard and ODM Advanced (including the Event Management System (EMS))	LEVEL 3	\$
Test Coordinator - Specialty in Test coordination of one or many of the following Products: IBM MDM, IBM IIS DataStage and QualityStage, IBM ISII, IBM IIB-ESB, IBM GNM, IBM ODM Standard and Advanced	LEVEL 3	\$
Technology Architect - IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) Configuration and Release Management	LEVEL 3	\$

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## PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

### 4.1 Evaluation Procedures

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

### 4.2 Technical Evaluation

A separate technical evaluation will be conducted for each Workstream.

- (a) **Mandatory Technical Criteria:**
  - (i) Each bid will be reviewed for compliance with the mandatory requirements of the bid solicitation. Any element of the bid solicitation that is identified specifically with the words "must" or "mandatory" is a mandatory requirement. Bids that do not comply with each and every mandatory requirement will be declared non-responsive and be disqualified.
  - (ii) The mandatory technical criteria are described at Section 1.0 Mandatory Requirements of Attachments "2" and "3".
- (b) **Point-Rated Technical Criteria:**
  - (i) Each bid will be rated by assigning a score to the rated requirements, which are identified in the bid solicitation by the word "rated" or by reference to a score. Bidders who fail to submit complete bids with all the information requested by this bid solicitation will be rated accordingly.
  - (ii) The rated requirements are described at Section 2.0 Point-Rated Requirements of Attachments "2" and "3".

(c) **Number of Resources Evaluated:**

Only one (1) resource per identified resource category will be evaluated as part of this bid solicitation as identified in Attachments "2" and "3". Additional Resources will only be assessed after contract award once specific tasks are requested of the Contractor. After contract award, the Task Authorization process will be in accordance with Part 7 – Resulting Contract Clauses, the Article titled "Task Authorization". When a Task Authorization Form (TA Form) is issued, the Contractor will be requested to propose a resource to satisfy the specific requirement based on the TA Form's Statement of Work. The proposed resource will then be assessed against the criteria identified in the Contract's Statement of Work in accordance with Appendix F of Annex A.

(d) **Reference Checks:**

- (i) Whether or not to conduct reference checks is discretionary. However, if PWGSC chooses to conduct reference checks for any given rated or mandatory requirement, it will check the references for that requirement for all bidders who have not, at that point, been found non-responsive.
- (ii) For reference checks, Canada will conduct the reference check in writing by email. Canada will send all email reference check requests to contacts supplied by all the Bidders on the same day using the email address provided in the bid. Canada will not award any points and/or a bidder will not meet the mandatory experience requirement (as applicable) unless the response is received within 5 working days of the date that Canada's email was sent.
- (iii) On the third working day after sending out the reference check request, if Canada has not received a response, Canada will notify the Bidder by email, to allow the Bidder to contact its reference directly to ensure that it responds to Canada within 5 working days. If the individual named by a Bidder is unavailable when required during the evaluation period, the Bidder may provide the name and email address of an alternate contact person from the same customer. Bidders will only be provided with this opportunity once for each customer, and only if the originally named individual is unavailable to respond (i.e., the Bidder will not be provided with an opportunity to submit the name of an alternate contact person if the original contact person indicates that he or she is unwilling or unable to respond). The Bidder will have 1 working day to submit the name of a new contact. That contact will again be given 5 working days to respond once Canada sends its reference check request.
- (iv) Wherever information provided by a reference differs from the information supplied by the Bidder, the information supplied by the reference will be the information evaluated.
- (v) Points will not be allocated and/or a bidder will not meet the mandatory experience requirement (as applicable) if (1) the reference customer states he or she is unable or unwilling to provide the information requested, or (2) the customer reference is not a customer of the Bidder itself (for example, the customer cannot be the customer of an affiliate of the Bidder instead of being a customer of the Bidder itself). Nor will points be allocated or a mandatory met if the customer is itself an affiliate or other entity that does not deal at arm's length with the Bidder.

**4.3 Financial Evaluation**

- (a) The financial evaluation will be conducted using the firm per diem rates provided by the responsive bid(s). A separate financial evaluation will be conducted for each Workstream.
- (b) There are two possible financial evaluation methods for this requirement. The first method will be used if three or more bids are determined responsive (see (c) Financial Evaluation - Method A below). The second method will be used if fewer than three bids are determined responsive (see (d) Financial Evaluation - Method B below).
- (c) **Financial Evaluation - Method A:** The following financial evaluation method will be used if three or more bids are determined responsive:

- (i) **STEP 1 - ESTABLISHING THE LOWER AND UPPER MEDIAN BAND LIMITS FOR EACH PERIOD AND EACH RESOURCE CATEGORY:** The Contracting Authority will establish, for each period and each Resource Category of each Workstream, the median band limits based on the firm per diem rates provided by the technically responsive bids. For each such Resource Category the median will be calculated using the median function in Microsoft Excel and will represent a range that encompasses any rate to a value of minus (-) 20% of the median, and an upper median rate to a value of plus (+) 30% of the median. When an even number of technically responsive bids have been determined, an average of the middle two rates will be used to calculate the median band limits and for an odd number of technically responsive bids, the middle rate will be used.
- (ii) **STEP 2 - POINTS ALLOCATION:** For each period and each Resource Category of each Workstream points will be allocated as follows:
- (A) A Bidder's proposed firm per diem rate that is either lower than the established lower median band limit or higher than the established upper median band limit for that period and Resource Category will be allocated 0 points.
- (B) A Bidder's proposed firm per diem rate falling within the upper and lower median band limits, for that period and Resource Category, will be allocated points using the following calculation, which will be rounded to two decimal places:
- $$\frac{\text{Lowest proposed firm per diem rate within the median band limits}}{\text{Bidder's proposed firm per diem rate within the median band limits}} \times \text{Maximum Points Assigned at Table 1 below}$$
- (C) A Bidder's proposed firm per diem rate falling within the established median band limits which is the lowest proposed firm per diem rate will be allocated the applicable maximum points assigned at Table 1 below.

TABLE 1 - MAXIMUM POINTS ASSIGNED							
RESOURCE CATEGORIES	INITIAL PERIOD (1 YEAR)	OPTION PERIOD 1 (1 YEAR)	OPTION PERIOD 2 (1 YEAR)	OPTION PERIOD 3 (1 YEAR)	OPTION PERIOD 4 (1 YEAR)	OPTION PERIOD 5 (1 YEAR)	TOTAL POINTS
<b>WORKSTREAM 1</b>							
Application/Software Architect - Specialty in IBM Master Data Management (MDM) Server – level 3	100	100	100	100	40	40	480
Application/Software Architect - Specialty in IBM InfoSphere Information Server (IIS) DataStage and Quality Stage – level 3	100	100	100	100	15	15	430
Application/Software Architect - Specialty in IBM InfoSphere Identity Insight (ISII) – level 3	15	100	100	100	15	15	345
Programmer/Software Developer - Specialty in IBM InfoSphere Information Server (IIS) DataStage and QualityStage – level 3	100	100	100	100	15	15	430
Programmer/Software Developer - Specialty in IBM Master Data Management (MDM) - Java development – level 3	100	100	100	100	40	40	480

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Programmer/Software Developer - Specialty in pME (probabilistic Matching Engine) - Matching algorithm development – level 3	50	50	50	50	15	15	230
Programmer/Software Developer - Specialty in IBM Infosphere Identity Insight (ISII) – level 3	15	100	100	100	15	15	345
Programmer/Software Developer - Specialty in IBM Global Name Management (GNM) – level 3	50	50	50	50	15	15	230
Business System Analyst - Specialty in IBM Master Data Management (MDM) - Data Governance – level 3	50	50	50	50	15	15	230
Technology Architect - IBM Master Data Management (MDM) Configuration and Release Management – level 3	50	50	50	50	40	40	280
<b>TOTAL</b>	<b>630</b>	<b>800</b>	<b>800</b>	<b>800</b>	<b>225</b>	<b>225</b>	<b>3480</b>
<b>WORKSTREAM 2</b>							
Application/Software Architect - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) – level 3	100	100	100	50	30	30	410
Application/Software Architect - Specialty in IBM Business Process Management (BPM) Advanced – level 3	15	50	100	100	15	15	295
Application/Software Architect - Specialty in IBM Operational Decision Manager (ODM) Standard and ODM Advanced (including the Event Management System (EMS)) – level 3	15	50	100	100	30	30	325
Programmer/Software Developer - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) – level 3	80	100	100	100	30	30	440
Programmer/Software Developer - Specialty in IBM Business Process Management (BPM) Advanced – level 3	15	30	100	100	15	15	275
Programmer/Software Developer - Specialty in IBM Operational Decision Manager (ODM) Standard and ODM Advanced (including the Event Management System (EMS)) – level 3	80	100	100	100	30	30	440
Test Coordinator - Specialty in Test coordination of one or many of the following Products: IBM MDM, IBM IIS DataStage and QualityStage, IBM ISII, IBM IIB-ESB, IBM GNM, IBM ODM Standard and Advanced – level 3	30	100	100	50	15	15	310
Technology Architect - IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) Configuration and Release Management – level 3	50	100	100	50	30	30	360
<b>TOTAL</b>	<b>385</b>	<b>630</b>	<b>800</b>	<b>650</b>	<b>195</b>	<b>195</b>	<b>2855</b>

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

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

TABLE 2 - EXAMPLE OF A FINANCIAL EVALUATION USING METHOD A:							
Resource Category	Max. Points	Bidder 1		Bidder 2		Bidder 3	
		Year 1	Year 2	Year 1	Year 2	Year 1	Year 2
Programmer	150 (75 pts. per year)	\$400.00	\$400.00	\$420.00	\$450.00	\$450.00	\$450.00
Business Analyst	100 (50 pts. per year)	\$600.00	\$600.00	\$600.00	\$620.00	\$650.00	\$820.00
Project Manager	50 (25 pts. per year)	\$555.00	\$900.00	\$750.00	\$800.00	\$700.00	\$800.00
TOTAL	300						
STEP 1 - Establishing the lower and upper median band limits for each year and each resource category							
(Median 1)	For the Programmer Resource Category, the year 1 median would be \$420.00. The lower median band limit would be \$336.00 and higher median band limit would be \$546.00.						
(Median 2)	For the Programmer Resource Category, the year 2 median would be \$450.00. The lower median band limit would be \$360.00 and higher median band limit would be \$585.00.						
(Median 3)	For the Business Analyst Resource Category, the year 1 median would be \$600.00. The lower median band limit would be \$480.00 and higher median band limit would be \$780.00.						
(Median 4)	For the Business Analyst Resource Category, the year 2 median would be \$620.00. The lower median band limit would be \$496.00 and higher median band limit would be \$806.00.						
(Median 5)	For the Project Manager Resource Category, the year 1 median would be \$700.00. The lower median band limit would be \$560.00 and higher median band limit would be \$910.00.						
(Median 6)	For the Project Manager Resource Category, the year 2 median would be \$800.00. The lower median band limit would be \$640.00 and higher median band limit would be \$1,040.00.						
STEP 2 - Points Allocation:							
Bidder 1:							
Programmer Year 1 = 75 points (lowest rate within the lower and upper median band limits)							
Programmer Year 2 = 75 points (lowest rate within the lower and upper median band limits)							
Business Analyst Year 1 = 50 points (lowest rate within the lower and upper median band limits)							
Business Analyst Year 2 = 50 points (lowest rate within the lower and upper median band limits)							
Project Manager Year 1 = 0 points (outside the lower and higher median band limits)							
Project Manager Year 2 = 22.22 points (based on the following calculation = (Lowest rate of \$800.00 / Bidder's proposed rate of \$900.00) Multiplied by 25 pts)							
Bidder 2:							
Programmer Year 1 = 71.43 points (based on the following calculation = (Lowest rate of \$400.00 / Bidder's proposed rate of \$420.00) Multiplied by 75 pts)							
Programmer Year 2 = 66.67 points (based on the following calculation = (Lowest rate of \$400.00 / Bidder's proposed rate of \$450.00) Multiplied by 75 pts)							
Business Analyst Year 1 = 50 points (lowest price within the lower and upper median band limits)							
Business Analyst Year 2 = 48.39 points (based on the following calculation = (Lowest rate of \$600.00 / Bidder's proposed rate of \$620.00) Multiplied by 50 pts)							

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

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

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

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

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

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

TABLE 3 - MAXIMUM POINTS ASSIGNED							
RESOURCE CATEGORIES	INITIAL PERIOD (1 YEAR)	OPTION PERIOD 1 (1 YEAR)	OPTION PERIOD 2 (1 YEAR)	OPTION PERIOD 3 (1 YEAR)	OPTION PERIOD 4 (1 YEAR)	OPTION PERIOD 5 (1 YEAR)	TOTAL POINTS
<b>WORKSTREAM 1</b>							
Application/Software Architect - Specialty in IBM Master Data Management (MDM) Server – level 3	100	100	100	100	40	40	480
Application/Software Architect - Specialty in IBM InfoSphere Information Server (IIS) DataStage and Quality Stage – level 3	100	100	100	100	15	15	430
Application/Software Architect - Specialty in IBM InfoSphere Identity Insight (ISII) – level 3	15	100	100	100	15	15	345



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Programmer/Software Developer - Specialty in IBM InfoSphere Information Server (IIS) DataStage and QualityStage – level 3	100	100	100	100	15	15	430
Programmer/Software Developer - Specialty in IBM Master Data Management (MDM) - Java development – level 3	100	100	100	100	40	40	480
Programmer/Software Developer - Specialty in pME (probabilistic Matching Engine) - Matching algorithm development – level 3	50	50	50	50	15	15	230
Programmer/Software Developer - Specialty in IBM InfoSphere Identity Insight (ISII) – level 3	15	100	100	100	15	15	345
Programmer/Software Developer - Specialty in IBM Global Name Management (GNM) – level 3	50	50	50	50	15	15	230
Business System Analyst - Specialty in IBM Master Data Management (MDM) - Data Governance – level 3	50	50	50	50	15	15	230
Technology Architect - IBM Master Data Management (MDM) Configuration and Release Management – level 3	50	50	50	50	40	40	280
<b>TOTAL</b>	<b>630</b>	<b>800</b>	<b>800</b>	<b>800</b>	<b>225</b>	<b>225</b>	<b>3480</b>
<b>WORKSTREAM 2</b>							
Application/Software Architect - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) – level 3	100	100	100	50	30	30	410
Application/Software Architect - Specialty in IBM Business Process Management (BPM) Advanced – level 3	15	50	100	100	15	15	295
Application/Software Architect - Specialty in IBM Operational Decision Manager (ODM) Standard and ODM Advanced (including the Event Management System (EMS)) – level 3	15	50	100	100	30	30	325
Programmer/Software Developer - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) – level 3	80	100	100	100	30	30	440
Programmer/Software Developer - Specialty in IBM Business Process Management (BPM) Advanced – level 3	15	30	100	100	15	15	275
Programmer/Software Developer - Specialty in IBM Operational Decision Manager (ODM) Standard and ODM Advanced (including the Event Management System (EMS)) – level 3	80	100	100	100	30	30	440
Test Coordinator - Specialty in Test coordination of one or many of the following Products: IBM MDM, IBM IIS DataStage and QualityStage, IBM ISII, IBM IIB-ESB, IBM GNM, IBM ODM Standard and Advanced – level 3	30	100	100	50	15	15	310

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Technology Architect - IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) Configuration and Release Management – level 3	50	100	100	50	30	30	360
<b>TOTAL</b>	<b>385</b>	<b>630</b>	<b>800</b>	<b>650</b>	<b>195</b>	<b>195</b>	<b>2855</b>

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

(e) **Substantiation of Professional Services Rates**

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

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

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

(f) **Formulae in Pricing Tables**

If the pricing tables provided to bidders include any formulae, Canada may re-input the prices provided by bidders into a fresh table, if Canada believes that the formulae may no longer be functioning properly in the version submitted by a bidder.

#### 4.4 Basis of Selection

##### (a) Evaluation of Bid

**Selection Process:** The following selection process will be conducted for each Workstream:

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

(ii) The responsive bid that obtains the highest Total Bidder Score will be recommended for award of a contract. For any given Bidder, the greatest possible Total Technical Score is 60 while the greatest possible Total Financial Score is 40.

(A) Calculation of Total Technical Score: For each Workstream the Total Technical Score will be computed for each responsive bid by converting the Technical Score obtained for the point-rated technical criteria using the following formula, rounded to two decimal places:

$$\frac{\text{Technical Score}}{\text{Maximum Technical Points (Bidders, please refer to the maximum technical points for each Workstream at Attachments "2" and "3")}} \times 60 = \text{Total Technical Score}$$

(B) Calculation of Total Financial Score: For each Workstream the Total Financial Score will be computed for each responsive bid by converting the Financial Score obtained for the financial evaluation using the following formula rounded to two decimal places:

$$\frac{\text{Financial Score}}{\text{Total Maximum Points Assigned (Bidders, please refer to the total maximum points assigned for each Workstream)}} \times 40 = \text{Total Financial Score}$$

(C) Calculation of the Total Bidder Score: For each Workstream the Total Bidder Score will be computed for each responsive bid in accordance with the following formula:

$$\text{Total Technical Score} + \text{Total Financial Score} = \text{Total Bidder Score}$$

(iii) In the event of identical Total Bidder Scores occurring within a given Workstream, then the bid with the highest Total Technical Score will become the top-ranked bidder.

(b) A maximum of one contract per Workstream may be awarded in total as a result of this solicitation.

(c) Bidders should note that all contract awards are subject to Canada's internal approvals process, which includes a requirement to approve funding in the amount of any proposed contract. Despite the fact that the Bidder may have been recommended for contract award, a contract will only be awarded if internal approval is granted according to Canada's internal policies. If approval is not granted, no contract will be awarded.

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## PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

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

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

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

### 5.1 Certifications Precedent to Contract Award and Additional Information

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

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

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "[FCP Limited Eligibility to Bid](http://www.labour.gc.ca/eng/standards_equity/eq/emp/fcp/list/inelig.shtml)" list ([http://www.labour.gc.ca/eng/standards\\_equity/eq/emp/fcp/list/inelig.shtml](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](http://www.labour.gc.ca/eng/standards_equity/eq/emp/fcp/list/inelig.shtml)" list at the time of contract award.

Canada will also have the right to terminate the Contract for default if a Contractor, or any member of the Contractor if the Contractor is a Joint Venture, appears on the "[FCP Limited Eligibility to Bid](http://www.labour.gc.ca/eng/standards_equity/eq/emp/fcp/list/inelig.shtml)" list during the period of the Contract.

The Bidder must provide the Contracting Authority with a completed Attachment "5", Federal Contractors Program for Employment Equity - Certification, before contract award. If the Bidder is a Joint Venture, the Bidder must provide the Contracting Authority with a completed Attachment Federal Contractors Program for Employment Equity - Certification, for each member of the Joint Venture.

### 5.2 Additional Certifications Precedent to Contract Award

#### (a) Professional Services Resources

- (i) By submitting a bid, the Bidder certifies that, if it is awarded a contract as a result of the bid solicitation, every individual proposed in its bid will be available to perform the Work as required by Canada's representatives and at the time specified in the bid solicitation or agreed to with Canada's representatives.
- (ii) By submitting a bid, the Bidder certifies that all the information provided in the résumés and supporting material submitted with its bid, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Bidder to be true and accurate. Furthermore, the Bidder warrants that every individual proposed by the Bidder for the requirement is capable of performing the Work described in the resulting contract.

- (iii) If the Bidder is unable to provide the services of an individual named in its bid due to the death, sickness, extended leave (including parental leave or disability leave), retirement, resignation or dismissal for cause of that individual, within five business days of Canada's knowledge of the unavailability of the individual the Bidder may propose a substitute to the Contracting Authority, providing:
- (A) the reason for the substitution with substantiating documentation acceptable to the Contracting Authority;
  - (B) the name, qualifications and experience of a proposed replacement immediately available for work; and
  - (C) proof that the proposed replacement has the required security clearance granted by Canada, if applicable.

No more than one substitute will be considered for any given individual proposed in the bid. In response to the Bidder's proposed substitution, the Contracting Authority may elect in its sole discretion either to:

- (A) set aside the bid and give it no further consideration; or
- (B) evaluate the replacement in accordance with the requirements of the bid solicitation in the place of the original resource as if that replacement had originally been proposed in the bid, with any necessary adjustments being made to the evaluation results, including the rank of the bid vis-à-vis other bids.

If no substitute is proposed the Contracting Authority will set aside the bid and give it no further consideration.

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

**(b) Certification of Language – English Essential**

By submitting a bid, the Bidder certifies that, should it be awarded a contract as result of the bid solicitation, every individual proposed in its bid will be fluent in English. The individual(s) proposed must be able to communicate orally and in writing in English without any assistance and with minimal errors.

**(c) Submission of Only One Bid**

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

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**ATTACHMENT 5**

**FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY -  
CERTIFICATION**

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

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

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

Complete both A and B.

A. Check only one of the following:

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

OR

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

B. Check only one of the following:

- ( ) B1. The Bidder is not a Joint Venture.

OR

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

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## PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS

### 6.1 Security Requirement

- (a) Before award of a contract, the following conditions must be met:
  - (i) the Bidder must hold a valid organization security clearance as indicated in Part 7 - Resulting Contract Clauses;
  - (ii) 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 7 - Resulting Contract Clauses; and
  - (iii) the Bidder must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites.
- (b) Bidders are reminded to obtain the required security clearance promptly. Any delay in the award of a contract to allow the successful Bidder to obtain the required clearance will be at the entire discretion of the Contracting Authority.
- (c) For additional information on security requirements, Bidders should refer to the Industrial Security Program (ISP) of Public Works and Government Services Canada (<http://ssi-iss.tpsgc-pwgsc.gc.ca/index-eng.html>) website.
- (d) In the case of a joint venture bidder, each member of the joint venture must meet the security requirements.
- (e) Additional Security Requirements:
  - (i) The CBSA, will conduct its own personnel Reliability Status assessment on the recommended Bidder and its personnel as per the Treasury Board Secretariat of Canada's (TBS) "Security and Contracting Management Standard" and the Policy on Government Security – Personnel Security Standard, irrespective of whether such assessment has already been conducted under any such policies. Reliability Status assessment conducted by the CBSA will include a credit check performed by an authorized secure official with CBSA's "Personnel Security Screening Section"(PSSS), which is independent of the Public Works and Government Services Canada's (PWGSC), "Canadian Industrial Security Directorate" (CISD) and the "International Industrial Security Directorate" (IISD).
  - (ii) For each proposed resources, the recommended Contractor must submit a complete signed original TBS 330-23 Form – Personnel Screening Consent and Authorization (<http://www.tbs-sct.gc.ca/tbsf-fsct/330-23-eng.pdf>) upon request of the Contracting Authority prior to contract award.
  - (iii) Until the credit check, fingerprinting (if required) and all other security screening processes required by this Request for Proposal have been completed and the recommended Bidder (specifically the recommended Bidder personnel) is deemed suitable by the CBSA, no contract will be awarded and the recommended Bidder (specifically the recommended Bidder personnel) will **not** be permitted access to Protected / Classified information or assets, and further, will **not** be permitted to enter sites where such information or assets are kept.
  - (iv) In the event the recommended Bidder is not deemed suitable following the security screening process required by the CBSA, the said recommended Bidder's bid will be deemed non-compliant and the next ranked Bidder will be contacted. If only one bid was obtained and the recommended Bidder does not meet the security requirement, then, the Contracting Authority will determine the next steps in order to ensure all requirements are met.

**6.2 Financial Capability**

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



## PART 7 - RESULTING CONTRACT CLAUSES

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

### 7.1 Requirement

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

### 7.2 Task Authorization

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

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- (F) the start and completion dates;
  - (G) milestone dates for deliverables and payments (if applicable);
  - (H) the number of person-days of effort required;
  - (I) whether the work requires on-site activities and the location;
  - (J) the language profile of the resources required;
  - (K) the level of security clearance required of resources;
  - (L) the price payable to the Contractor for performing the task under a maximum TA price (the TA must indicate how the final amount payable will be determined; where the TA does not indicate how the final amount payable will be determined, the amount payable is the amount, up to the maximum, that the Contractor demonstrates was actually worked on the project, by submitting time sheets filled in at the time of the work by the individual resources to support the charges); and
  - (M) any other constraints that might affect the completion of the task.
- (d) **Contractor's Response to Draft Task Authorization:** The Contractor must provide to the Technical Authority, within 3 working days of receiving the draft Task Authorization (or within any longer time period specified in the draft TA), the proposed total price for performing the task and a breakdown of that cost, established in accordance with the Basis of Payment specified in the Contract. The Contractor's quotation must be based on the rates set out in the Contract. The Contractor will not be paid for preparing or providing its response or for providing other information required to prepare and validly issue the TA.
- (e) **Task Authorization Limit and Authorities for Validly Issuing Task Authorizations:**
- To be validly issued, a TA must include the following signatures:
- (i) for any TA, inclusive of revisions, with a value less than or equal to \$200,000.00 (excluding Applicable Taxes), the TA must be signed by a representative from the Strategic Procurement and Material Management Division within CBSA; and
  - (ii) for any TA with a value greater than this amount, a TA must be signed by a representative from the Strategic Procurement and Material Management Division within CBSA and the Contracting Authority.
- Any TA that does not bear the appropriate signature(s) is not validly issued by Canada. Any work performed by the Contractor without receiving a validly issued TA is done at the Contractor's own risk. If the Contractor receives a TA that is not appropriately signed, the Contractor must notify the Contracting Authority. By providing written notice to the Contractor, the Contracting Authority may suspend the Client's ability to issue TA's at any time, or reduce the dollar value threshold described in sub-article (i) above; any suspension or reduction notice is effective upon receipt.
- (f) **Periodic Usage Reports:**
- (i) The Contractor must compile and maintain records on its provision of services to the federal government under Task Authorizations validly issued under the Contract. The Contractor must provide this data to Canada in accordance with the reporting requirements detailed below. If some data is not available, the reason must be indicated. If services are not provided during a given period, the Contractor must still provide a "NIL" report. The data must be submitted on a quarterly basis to the Contracting Authority. From time to time, the Contracting Authority may also require an interim report during a reporting period.
  - (ii) The quarterly periods are defined as follows:
    - (A) 1<sup>st</sup> quarter: April 1 to June 30;

- (B) 2<sup>nd</sup> quarter: July 1 to September 30;
- (C) 3<sup>rd</sup> quarter: October 1 to December 31; and
- (D) 4<sup>th</sup> quarter: January 1 to March 31.

The data must be submitted to the Contracting Authority no later than 15 calendar days after the end of the reporting period.

- (iii) Each report must contain the following information for each validly issued TA (as amended):
  - (A) the Task Authorization number and the Task Authorization Revision number(s), if applicable;
  - (B) a title or a brief description of each authorized task;
  - (C) the name, Resource category and level of each resource involved in performing the TA, as applicable;
  - (D) the total estimated cost specified in the validly issued TA of each task, exclusive of Applicable Taxes;
  - (E) the total amount, exclusive of Applicable Taxes, expended to date against each authorized task;
  - (F) the start and completion date for each authorized task; and
  - (G) the active status of each authorized task, as applicable (e.g., indicate whether work is in progress or if Canada has cancelled or suspended the TA, etc.).
- (g) **Refusal of Task Authorizations or Submission of a Response which is not Valid:** The Contractor is not required to submit a response to every draft TA sent to it by Canada. However, in addition to Canada's other rights to terminate the Contract, Canada may immediately, and without further notice, terminate the Contract for default in accordance with the General Conditions if the Contractor in at least three instances has either not responded or has not submitted a valid response when sent a draft TA. For greater clarity, each draft TA, which is identifiable by its task number, will only count as one instance. A valid response is one that is submitted within the required time period and meets all requirements of the draft TA issued, including proposing the required number of resources who each meet the minimum experience and other requirements of the categories identified in the draft TA at pricing not exceeding the rates set out in Annex B.
- (h) **Consolidation of TA's for Administrative Purposes:** The Contract may be amended from time to time to reflect all validly issued Task Authorizations to date, to document the Work performed under those TA's for administrative purposes.

### 7.3 Minimum Work Guarantee

- (a) In this clause,
  - (i) **"Maximum Contract Value"** means the amount specified in the **"Limitation of Expenditure"** clause set out in the Contract (excluding Applicable Taxes); and
  - (ii) **"Minimum Contract Value"** means \$20,000.00.
- (b) Canada's obligation under the Contract is to request Work in the amount of the Minimum Contract Value or, at Canada's option, to pay the Contractor at the end of the Contract in accordance with sub-article (c), subject to sub-article (d). In consideration of such obligation, the Contractor agrees to stand in readiness throughout the Contract Period to perform the Work described in the Contract. Canada's maximum liability for work performed under the Contract must not exceed the Maximum Contract Value, unless an increase is authorized in writing by the Contracting Authority.

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

#### 7.4 Standard Clauses and Conditions

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

(a) **General Conditions:**

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

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

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

(b) **Supplemental General Conditions:**

The following Supplemental General Conditions:

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

apply to and form part of the Contract.

#### 7.5 Security Requirement

- (a) The following security requirements apply to and form part of the Contract:

- (i) The Contractor must, at all times during the performance of the Contract, hold a valid Facility Security Clearance at the level of SECRET, issued by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC).
- (ii) The Contractor personnel requiring access to PROTECTED/CLASSIFIED information, assets or sensitive work site(s) must EACH hold a valid personnel security screening at the level of **SECRET**, granted or approved by CISD/PWGSC.
- (iii) The Contractor MUST NOT remove any PROTECTED/CLASSIFIED information from the identified work site(s), and the Contractor must ensure that its personnel are made aware of and comply with this restriction.
- (iv) Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of CISD/PWGSC.
- (v) The Contractor 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).
- (b) Additional Security Requirement
  - (i) The CBSA, will conduct its own personnel Reliability Status assessment the Contractor (specifically the Contractor personnel), which is allowed under the Treasury Board Secretariat of Canada's (TBS) "Security and Contracting Management Standard" and the Policy on Government Security – Personnel Security Standard. Reliability Status assessment conducted by the CBSA will include a credit check.
  - (ii) If the Contractor (specifically the Contractor personnel), has already been screened under the TBS Policy on Government Security - Personnel Security Standard, the Contractor (specifically the Contractor personnel), will still undergo a security screening process to be conducted by the CBSA.
  - (iii) The credit check and fingerprinting, if required, will be performed by an authorized security official with the CBSA's "Personnel Security Screening Section" (PSSS), which is independent of the Public Works and Government Services Canada's (PWGSC), "Canadian and International Industrial Security Directorate" (CIISD).
  - (iv) Until the credit check, fingerprinting (if required) and all other security screening processes required have been completed and the Contractor (specifically the Contractor personnel) is deemed suitable by the CBSA, the Contractor (specifically the Contractor personnel) will not be permitted access to Protected / Classified information or assets, and further, will not be permitted to enter sites where such information or assets are kept.
- (c) The Company Security Officer (CSO) must ensure through the Industrial Security Program (ISP) that the Contractor and individual(s) hold a valid security clearance at the required level.

#### 7.6 Contract Period

- (a) **Contract Period:** The "**Contract Period**" is the entire period of time during which the Contractor is obliged to perform the Work, which includes:
  - (i) The "**Initial Contract Period**", which begins on the date the Contract is awarded and ends one year later; and
  - (ii) The period during which the Contract is extended, if Canada chooses to exercise any options set out in the Contract.
- (b) **Option to Extend the Contract:**

- (i) The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to five additional one-year periods under the same terms and conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions set out in the Basis of Payment.
- (ii) Canada may exercise this option at any time by sending a written notice to the Contractor before the expiry date of the Contract. The option may only be exercised by the Contracting Authority, and will be evidenced, for administrative purposes only, through a contract amendment.

## 7.7 Authorities

### (a) Contracting Authority

The Contracting Authority for the Contract is:

Name: Francis Lapalme  
Title: Supply Specialist  
Public Works and Government Services Canada  
Acquisitions Branch  
Directorate: Informatics and Telecommunications Systems Procurement Directorate  
Address: 11 Laurier St., Gatineau, Québec  
Telephone: 873-469-4985  
E-mail address: francis.lapalme@tpsgc-pwgsc.gc.ca

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

### (b) Technical Authority

The Technical Authority for the Contract is: **[To be completed at contract award]**

Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Organization: \_\_\_\_\_  
Address: \_\_\_\_\_  
Telephone: \_\_\_\_\_  
Facsimile: \_\_\_\_\_  
E-mail address: \_\_\_\_\_

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

### (c) Contractor's Representative

**[To be completed at contract award]**

## 7.8 Proactive Disclosure of Contracts with Former Public Servants

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

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## 7.9 Payment

### (a) Basis of Payment

- (i) **Professional Services provided under a Task Authorization with a Maximum Price:** For professional services requested by Canada, in accordance with a validly issued Task Authorization, Canada will pay the Contractor, in arrears, up to the Maximum Price for the TA, for actual time worked and any resulting deliverables in accordance with the firm all-inclusive per diem rates set out in Annex B, Basis of Payment, Applicable Taxes extra. Partial days will be prorated based on actual hours worked based on a 7.5-hour workday.
- (ii) **Travel and Living Expenses – National Joint Council Travel Directive** The Contractor will be reimbursed its authorized travel and living expenses reasonably and properly incurred in the performance of the Work, at cost, without any allowance for profit and/or administrative overhead, in accordance with the meal, private vehicle and incidental expenses provided in Appendices B, C and D of the National Joint Council Travel Directive and with the other provisions of the directive referring to “travellers”, rather than those referring to “employees”. All travel must have the prior authorization of the Contracting Authority. Travel requests will only be considered for a work location which is located more than 100 kilometers from the National Capital Region. The Contractor will be paid for actual time spent travelling at half the hourly rate. The hourly rate will be determined by dividing the firm per diem rate set out in Annex B by 7.5 hours. All payments are subject to government audit.
- (iii) **Competitive Award:** The Contractor acknowledges that the Contract has been awarded as a result of a competitive process. No additional charges will be allowed to compensate for errors, oversights, misconceptions or underestimates made by the Contractor when bidding for the Contract.
- (iv) **Professional Services Rates:** In Canada's experience, bidders from time to time propose rates at the time of bidding for one or more Resource Categories that they later refuse to honour, on the basis that these rates do not allow them to recover their own costs and/or make a profit. This denies Canada of the benefit of the awarded contract. If the Contractor does not respond or refuses to provide an individual with the qualifications described in the Contract within the time described in the Contract (or proposes instead to provide someone from an alternate category at a different rate), whether or not Canada terminates the Contract as a whole or in part or chooses to exercise any of the rights provided to it under the general conditions, Canada may impose sanctions or take other measures in accordance with the PWGSC Vendor Performance Corrective Measure Policy (or equivalent) then in effect, which measures may include an assessment that results in conditions applied against the Contractor to be fulfilled before doing further business with Canada, or full debarment of the Contractor from bidding on future requirements.

### (b) Limitation of Expenditure – Cumulative Total of all Task Authorizations

- (i) Canada's total liability to the Contractor under the Contract for all validly issued Task Authorizations (TAs), inclusive of any revisions, must not exceed the amount set out on page 1 of the Contract, less any Applicable taxes. With respect to the amount set out on page 1 of the Contract, Customs duties are excluded and Applicable Taxes are included
- (ii) No increase in the total liability of Canada will be authorized or paid to the Contractor unless an increase has been approved, in writing, by the Contracting Authority.
- (iii) The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:
  - (A) when it is 75 percent committed, or
  - (B) 4 months before the contract expiry date, or



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- (C) As soon as the Contractor considers that the sum is inadequate for the completion of the Work required in all authorized TAs, inclusive of any revisions, whichever comes first.
- (iv) If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority a written estimate for the additional funds required. Providing this information does not increase Canada's liability.
- (c) **Method of Payment for Task Authorizations with a Maximum Price:** For each Task Authorization validly issued under the Contract that contains a maximum price:
- (i) Canada will pay the Contractor no more frequently than once a month in accordance with the Basis of Payment. The Contractor must submit time sheets for each resource showing the days and hours worked to support the charges claimed in the invoice.
- (ii) Once Canada has paid the maximum TA price, Canada will not be required to make any further payment, but the Contractor must complete all the work described in the TA, all of which is required to be performed for the maximum TA price. If the work described in the TA is completed in less time than anticipated, and the actual time worked (as supported by the time sheets) at the rates set out in the Contract is less than the maximum TA price, Canada is only required to pay for the time spent performing the work related to that TA.
- (d) **Time Verification**
- Time charged and the accuracy of the Contractor's time recording system are subject to verification by Canada, before or after payment is made to the Contractor. If verification is done after payment, the Contract must repay any overpayment, at Canada's request.
- (e) **Payment Credits**
- (i) **Failure to Provide Resource:**
- (A) If the Contractor does not provide a required professional services resource that has all the required qualifications within the time prescribed by the Contract, the Contractor must credit to Canada an amount equal to the per diem rate (based on a 7.5-hour workday) of the required resource for each day (or partial day) of delay in providing the resource, up to a maximum of 10 days.
- (B) **Corrective Measures:** If credits are payable under this Article for two consecutive months or for three months in any 12-month period, the Contractor must submit a written action plan describing measures it will implement or actions it will undertake to eliminate the recurrence of the problem. The Contractor will have five working days to deliver the action plan to the Client and the Contracting Authority and 20 working days to rectify the underlying problem.
- (C) **Termination for Failure to Meet Availability Level:** In addition to any other rights it has under the Contract, Canada may terminate the Contract for default in accordance with the General Conditions by giving the Contractor three months' written notice of its intent, if any of the following apply:
- (1) the total amount of credits for a given monthly billing cycle reach a level of 10% of the total billing for that month; or
- (2) the corrective measures required of the Contractor described above are not met.
- This termination will be effective when the three month notice period expires, unless Canada determines that the Contractor has implemented the corrective measures to Canada's satisfaction during those three months.
- (ii) **Credits Apply during Entire Contract Period:** The Parties agree that the credits apply throughout the Contract Period.
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- (iii) **Credits represent Liquidated Damages:** The Parties agree that the credits are liquidated damages and represent their best pre-estimate of the loss to Canada in the event of the applicable failure. No credit is intended to be, nor will it be construed as, a penalty.
  - (iv) **Canada's Right to Obtain Payment:** The Parties agree that these credits are a liquidated debt. To collect the credits, Canada has the right to hold back, draw back, deduct or set off from and against any money Canada owes to the Contractor from time to time.
  - (v) **Canada's Rights & Remedies not Limited:** The Parties agree that nothing in this Article limits any other rights or remedies to which Canada is entitled under the Contract (including the right to terminate the Contract for default) or under the law generally.
  - (vi) **Audit Rights:** The Contractor's calculation of credits under the Contract is subject to verification by government audit, at the Contracting Authority's discretion, before or after payment is made to the Contractor. The Contractor must cooperate fully with Canada during the conduct of any audit by providing Canada with access to any records and systems that Canada considers necessary to ensure that all credits have been accurately credited to Canada in the Contractor's invoices. If an audit demonstrates that past invoices contained errors in the calculation of the credits, the Contractor must pay to Canada the amount the audit reveals was required to be credited to Canada, plus interest, from the date Canada remitted the excess payment until the date of the refund (the interest rate is the Bank of Canada's discount annual rate of interest in effect on the date the credit was first owed to Canada, plus 1.25% per year). If, as a result of conducting an audit, Canada determines that the Contractor's records or systems for identifying, calculating or recording the credits are inadequate, the Contractor must implement any additional measures required by the Contracting Authority.
- (f) **No Responsibility to Pay for Work not performed due to Closure of Government Offices**
- (i) Where the Contractor, its employees, subcontractors, or agents are providing services on government premises under the Contract and those premises are inaccessible because of the evacuation or closure of government offices, and as a result no work is performed, Canada is not responsible for paying the Contractor for work that otherwise would have been performed if there had been no evacuation or closure.
  - (ii) If, as a result of any strike or lock-out, the Contractor or its employees, subcontractors or agents cannot obtain access to government premises and, as a result, no work is performed, Canada is not responsible for paying the Contractor for work that otherwise would have been performed if the Contractor had been able to gain access to the premises

#### 7.10 Invoicing Instructions

- (a) The Contractor must submit invoices in accordance with the information required in the General Conditions.
- (b) The Contractor's invoice must include a separate line item for each subparagraph in the Basis of Payment provision, and must show all applicable Task Authorization numbers.
- (c) By submitting invoices, the Contractor is certifying that the goods and services have been delivered and that all charges are in accordance with the Basis of Payment provision of the Contract, including any charges for work performed by subcontractors.
- (d) The Contractor must provide the original to CBSA National Invoice Receiving Unit ([Vendors-Fournisseurs@cbsa-asfc.gc.ca](mailto:Vendors-Fournisseurs@cbsa-asfc.gc.ca)) for processing, and a copy to the Contracting Authority.

#### 7.11 Certifications

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

#### 7.12 Federal Contractors Program for Employment Equity - Default by Contractor

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

#### 7.13 Copyright In Material

- (a) In this section, "Material" means anything that is created by the Contractor as part of the Work under the Contract that is required by the Contract to be delivered to Canada and in which copyright subsists, excluding any computer software code and all documentation manuals or guides intended to assist end users or technicians in respect of that code. "Material" does not include anything created by the Contractor before the award date of the Contract.
- (b) Copyright in the Material belongs to Canada and the Contractor must include the copyright symbol and either of the following notice on the Material: © Her Majesty the Queen in right of Canada (year) or © Sa Majesté la Reine du chef du Canada (année).
- (c) The Contractor must not use, copy, divulge or publish any Material except as is necessary to perform the Contract. The Contractor must execute any conveyance and other documents relating to copyright in the Material as Canada may require.
- (d) The Contractor must provide at the request of Canada a written permanent waiver of moral rights, in a form acceptable to Canada, from every author that contributed to the Material. If the Contractor is the author of the Material, the Contractor permanently waives its moral rights in the Material.

#### 7.14 Applicable Laws

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

#### 7.15 Priority of Documents

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

- (a) these Articles of Agreement, including any individual SACC clauses incorporated by reference in these Articles of Agreement;
- (b) Supplemental General Conditions, in the following order:
  - (i) 4002 (2010-08-16), Supplemental General Conditions - Software Development or Modification Services;
  - (ii) 4006 (2010-08-16), Supplemental General Conditions - Contractor to Own Intellectual Property Rights in Foreground Information;
- (c) General Conditions 2035 (2016-04-04), Higher Complexity - Services;

- (d) Annex A, Statement of Work - Annex A including its Appendices as follows;
  - (i) Appendix D to Annex A - Tasking Assessment Procedure;
  - (ii) Appendix E to Annex A - Task Authorization (TA) Form;
  - (iii) Appendix F to Annex A - Resource Assessment Criteria and Response Table;
  - (iv) Appendix G to Annex A - Certifications at the TA stage;
- (e) Annex B, Basis of Payment;
- (f) Annex C, Security Requirements Check List);
- (g) the validly issued Task Authorizations and any required certifications (including all of their annexes, if any); and
- (h) the Contractor's bid dated \_\_\_\_\_.

**7.16 Foreign Nationals (Canadian Contractor)**

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

**Note to Bidders:** Either this clause or the one that follows, whichever applies (based on whether the successful Bidder is a Canadian Contractor or Foreign Contractor), will be included in any resulting contract.

**7.17 Foreign Nationals (Foreign Contractor)**

- (a) SACC Manual clause A2001C (2006-06-16) Foreign Nationals (Foreign Contractor)

**7.18 Insurance Requirements**

**(a) Compliance with Insurance Requirements**

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

**(b) Commercial General Liability Insurance**

- (i) The Contractor must obtain Commercial General Liability Insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature, but for not less than \$2,000,000 per accident or occurrence and in the annual aggregate.

- 
- (ii) The Commercial General Liability policy must include the following:
- (A) Additional Insured: Canada is added as an additional insured, but only with respect to liability arising out of the Contractor's performance of the Contract. The interest of Canada should read as follows: Canada, as represented by Public Works and Government Services Canada.
  - (B) Bodily Injury and Property Damage to third parties arising out of the operations of the Contractor.
  - (C) Products and Completed Operations: Coverage for bodily injury or property damage arising out of goods or products manufactured, sold, handled, or distributed by the Contractor and/or arising out of operations that have been completed by the Contractor.
  - (D) Personal Injury: While not limited to, the coverage must include Violation of Privacy, Libel and Slander, False Arrest, Detention or Imprisonment and Defamation of Character.
  - (E) Cross Liability/Separation of Insureds: Without increasing the limit of liability, the policy must protect all insured parties to the full extent of coverage provided. Further, the policy must apply to each Insured in the same manner and to the same extent as if a separate policy had been issued to each.
  - (F) Blanket Contractual Liability: The policy must, on a blanket basis or by specific reference to the Contract, extend to assumed liabilities with respect to contractual provisions.
  - (G) Employees and, if applicable, Volunteers must be included as Additional Insured.
  - (H) Employers' Liability (or confirmation that all employees are covered by Worker's compensation (WSIB) or similar program)
  - (I) Broad Form Property Damage including Completed Operations: Expands the Property Damage coverage to include certain losses that would otherwise be excluded by the standard care, custody or control exclusion found in a standard policy.
  - (J) Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of policy cancellation.
  - (K) If the policy is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.
  - (L) Owners' or Contractors' Protective Liability: Covers the damages that the Contractor becomes legally obligated to pay arising out of the operations of a subcontractor.
  - (M) Advertising Injury: While not limited to, the endorsement must include coverage for piracy or misappropriation of ideas, or infringement of copyright, trademark, title or slogan.
- (c) **Errors and Omissions Liability Insurance**
- (i) The Contractor must obtain Errors and Omissions Liability (a.k.a. Professional Liability) insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature but for not less than \$1,000,000 per loss and in the annual aggregate, inclusive of defence costs.
  - (ii) If the Professional Liability insurance is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.
  - (iii) The following endorsement must be included:
-

Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of cancellation.

**7.19 Limitation of Liability - Information Management/Information Technology**

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

- (vi) If Canada's records or data are harmed as a result of the Contractor's negligence or willful act, the Contractor's only liability is, at the Contractor's own expense, to restore Canada's records and data using the most recent back-up kept by Canada. Canada is responsible for maintaining an adequate back-up of its records and data.

(c) **Third Party Claims:**

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

**7.20 Joint Venture Contractor**

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

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

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

#### 7.21 Professional Services - General

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

##### Replacement of Specific Individuals

- (i) If the Contractor is unable to provide the services of any specific individual identified in the Contract to perform the services, the Contractor must within five working days of having this knowledge, the individual's departure or failure to commence Work (or, if Canada has requested the replacement, within ten working days of Canada's notice of the requirement for a replacement) provide to the Contracting Authority:
- (A) the name, qualifications and experience of a proposed replacement immediately available for Work; and
  - (B) security information on the proposed replacement as specified by Canada, if applicable.
- The replacement must have qualifications and experience that meet or exceed those obtained for the original resource.
- (ii) Subject to an Excusable Delay, where Canada becomes aware that a specific individual identified under the Contract to provide services has not been provided or is not performing, the Contracting Authority may elect to:
- (A) exercise Canada's rights or remedies under the Contract or at law, including terminating the Contract in whole or in part for default under the Article titled "Default of the Contractor", or
  - (B) assess the information provided under (c) (i) above or, if it has not yet been provided, require the Contractor to propose a replacement to be rated by the Technical Authority. The replacement must have qualifications and experience that are similar or exceed those obtained for the original resource and be acceptable to Canada. Upon assessment of the replacement, Canada may accept the replacement, exercise the rights in (ii) (A) above, or require another replacement in accordance with this sub-article (c).

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



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

#### **7.22 Safeguarding Electronic Media**

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

#### **7.23 Representations and Warranties**

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

#### **7.24 Access to Canada's Property and Facilities**

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

#### **7.25 Government Property**

Canada agrees to supply the Contractor with the items listed in Sections 9. Client Support and 12. Technical Environment of Annex A, Statement of Work (the "**Government Property**"). The section of the General Conditions entitled "Government Property" also applies to the use of the Government Property by the Contractor.

#### **7.26 Identification Protocol Responsibilities**

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

- (a) Contractor Representatives who attend a Government of Canada meeting (whether internal or external to Canada's offices) must identify themselves as Contractor Representatives prior to the commencement of the meeting, to ensure that each meeting participant is aware of the fact that the individual is not an employee of the Government of Canada;



- (b) During the performance of any Work at a Government of Canada site, each Contractor Representative must be clearly identified at all times as being a Contractor Representative; and
- (c) If a Contractor Representative requires the use of the Government of Canada's e-mail system in the performance of the Work, then the individual must clearly identify him or herself as an agent or subcontractor of the Contractor in all electronic mail in the signature block as well as under "Properties." This identification protocol must also be used in all other correspondence, communication, and documentation.
- (d) If Canada determines that the Contractor is in breach of any obligation stated in this Article, upon written notice from Canada the Contractor must submit a written action plan describing corrective measures it will implement to eliminate the recurrence of the problem. The Contractor will have five working days to deliver the action plan to the Client and the Contracting Authority, and twenty working days to rectify the underlying problem.
- (e) In addition to any other rights it has under the Contract, Canada may terminate the Contract for default if the corrective measures required of the Contractor described above are not met.

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Buyer ID:  
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**ANNEX A**  
**STATEMENT OF WORK**

**(SEE ATTACHED HERETO)**

## ANNEX B

### BASIS OF PAYMENT

#### 1. Professional Services

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

**Note to Bidders:** The following tables apply to Workstream 1 only.

#### WORKSTREAM 1

##### Initial Contract Period:

Initial Contract Period (1 year)		
Resource Category	Level of Expertise	Firm Per Diem Rate
Application/Software Architect - Specialty in IBM Master Data Management (MDM) Server	Level 3	\$ TBD
Application/Software Architect - Specialty in IBM InfoSphere Information Server (IIS) DataStage and Quality Stage	Level 3	\$ TBD
Application/Software Architect - Specialty in IBM Infosphere Identity Insight (ISII)	Level 3	\$ TBD
Programmer/Software Developer - Specialty in IBM InfoSphere Information Server (IIS) DataStage and QualityStage	Level 3	\$ TBD
Programmer/Software Developer - Specialty in IBM Master Data Management (MDM) - Java development	Level 3	\$ TBD
Programmer/Software Developer - Specialty in pME (probabilistic Matching Engine) - Matching algorithm development	Level 3	\$ TBD
Programmer/Software Developer - Specialty in IBM Infosphere Identity Insight (ISII)	Level 3	\$ TBD
Programmer/Software Developer - Specialty in IBM Global Name Management (GNM)	Level 3	\$ TBD
Business System Analyst - Specialty in IBM Master Data Management (MDM) - Data Governance	Level 3	\$ TBD
Technology Architect - IBM Master Data Management (MDM) Configuration and Release Management	Level 3	\$ TBD

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**Option Periods:**

Option Period 1 (1 year)		
Resource Category	Level of Expertise	Firm Per Diem Rate
Application/Software Architect - Specialty in IBM Master Data Management (MDM) Server	Level 3	\$ TBD
Application/Software Architect - Specialty in IBM InfoSphere Information Server (IIS) DataStage and Quality Stage	Level 3	\$ TBD
Application/Software Architect - Specialty in IBM Infosphere Identity Insight (ISII)	Level 3	\$ TBD
Programmer/Software Developer - Specialty in IBM InfoSphere Information Server (IIS) DataStage and QualityStage	Level 3	\$ TBD
Programmer/Software Developer - Specialty in IBM Master Data Management (MDM) - Java development	Level 3	\$ TBD
Programmer/Software Developer - Specialty in pME (probabilistic Matching Engine) - Matching algorithm development	Level 3	\$ TBD
Programmer/Software Developer - Specialty in IBM Infosphere Identity Insight (ISII)	Level 3	\$ TBD
Programmer/Software Developer - Specialty in IBM Global Name Management (GNM)	Level 3	\$ TBD
Business System Analyst - Specialty in IBM Master Data Management (MDM) - Data Governance	Level 3	\$ TBD
Technology Architect - IBM Master Data Management (MDM) Configuration and Release Management	Level 3	\$ TBD

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Option Period 2 (1 year)		
Resource Category	Level of Expertise	Firm Per Diem Rate
Application/Software Architect - Specialty in IBM Master Data Management (MDM) Server	Level 3	\$ TBD
Application/Software Architect - Specialty in IBM InfoSphere Information Server (IIS) DataStage and Quality Stage	Level 3	\$ TBD
Application/Software Architect - Specialty in IBM Infosphere Identity Insight (ISII)	Level 3	\$ TBD
Programmer/Software Developer - Specialty in IBM InfoSphere Information Server (IIS) DataStage and QualityStage	Level 3	\$ TBD
Programmer/Software Developer - Specialty in IBM Master Data Management (MDM) - Java development	Level 3	\$ TBD
Programmer/Software Developer - Specialty in pME (probabilistic Matching Engine) - Matching algorithm development	Level 3	\$ TBD
Programmer/Software Developer - Specialty in IBM Infosphere Identity Insight (ISII)	Level 3	\$ TBD
Programmer/Software Developer - Specialty in IBM Global Name Management (GNM)	Level 3	\$ TBD
Business System Analyst - Specialty in IBM Master Data Management (MDM) - Data Governance	Level 3	\$ TBD
Technology Architect - IBM Master Data Management (MDM) Configuration and Release Management	Level 3	\$ TBD

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Option Period 3 (1 year)		
Resource Category	Level of Expertise	Firm Per Diem Rate
Application/Software Architect - Specialty in IBM Master Data Management (MDM) Server	Level 3	\$ TBD
Application/Software Architect - Specialty in IBM InfoSphere Information Server (IIS) DataStage and Quality Stage	Level 3	\$ TBD
Application/Software Architect - Specialty in IBM Infosphere Identity Insight (ISII)	Level 3	\$ TBD
Programmer/Software Developer - Specialty in IBM InfoSphere Information Server (IIS) DataStage and QualityStage	Level 3	\$ TBD
Programmer/Software Developer - Specialty in IBM Master Data Management (MDM) - Java development	Level 3	\$ TBD
Programmer/Software Developer - Specialty in pME (probabilistic Matching Engine) - Matching algorithm development	Level 3	\$ TBD
Programmer/Software Developer - Specialty in IBM Infosphere Identity Insight (ISII)	Level 3	\$ TBD
Programmer/Software Developer - Specialty in IBM Global Name Management (GNM)	Level 3	\$ TBD
Business System Analyst - Specialty in IBM Master Data Management (MDM) - Data Governance	Level 3	\$ TBD
Technology Architect - IBM Master Data Management (MDM) Configuration and Release Management	Level 3	\$ TBD

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Option Period 4 (1 year)		
Resource Category	Level of Expertise	Firm Per Diem Rate
Application/Software Architect - Specialty in IBM Master Data Management (MDM) Server	Level 3	\$ TBD
Application/Software Architect - Specialty in IBM InfoSphere Information Server (IIS) DataStage and Quality Stage	Level 3	\$ TBD
Application/Software Architect - Specialty in IBM Infosphere Identity Insight (ISII)	Level 3	\$ TBD
Programmer/Software Developer - Specialty in IBM InfoSphere Information Server (IIS) DataStage and QualityStage	Level 3	\$ TBD
Programmer/Software Developer - Specialty in IBM Master Data Management (MDM) - Java development	Level 3	\$ TBD
Programmer/Software Developer - Specialty in pME (probabilistic Matching Engine) - Matching algorithm development	Level 3	\$ TBD
Programmer/Software Developer - Specialty in IBM Infosphere Identity Insight (ISII)	Level 3	\$ TBD
Programmer/Software Developer - Specialty in IBM Global Name Management (GNM)	Level 3	\$ TBD
Business System Analyst - Specialty in IBM Master Data Management (MDM) - Data Governance	Level 3	\$ TBD
Technology Architect - IBM Master Data Management (MDM) Configuration and Release Management	Level 3	\$ TBD

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Option Period 5 (1 year)		
Resource Category	Level of Expertise	Firm Per Diem Rate
Application/Software Architect - Specialty in IBM Master Data Management (MDM) Server	Level 3	\$ TBD
Application/Software Architect - Specialty in IBM InfoSphere Information Server (IIS) DataStage and Quality Stage	Level 3	\$ TBD
Application/Software Architect - Specialty in IBM Infosphere Identity Insight (ISII)	Level 3	\$ TBD
Programmer/Software Developer - Specialty in IBM InfoSphere Information Server (IIS) DataStage and QualityStage	Level 3	\$ TBD
Programmer/Software Developer - Specialty in IBM Master Data Management (MDM) - Java development	Level 3	\$ TBD
Programmer/Software Developer - Specialty in pME (probabilistic Matching Engine) - Matching algorithm development	Level 3	\$ TBD
Programmer/Software Developer - Specialty in IBM Infosphere Identity Insight (ISII)	Level 3	\$ TBD
Programmer/Software Developer - Specialty in IBM Global Name Management (GNM)	Level 3	\$ TBD
Business System Analyst - Specialty in IBM Master Data Management (MDM) - Data Governance	Level 3	\$ TBD
Technology Architect - IBM Master Data Management (MDM) Configuration and Release Management	Level 3	\$ TBD



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**Note to Bidders:** The following tables apply to Workstream 2 only.

## WORKSTREAM 2

### Initial Contract Period:

Initial Contract Period (1 year)		
Resource Category	Level of Expertise	Firm Per Diem Rate
Application/Software Architect - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)	LEVEL 3	\$ TBD
Application/Software Architect - Specialty in IBM Business Process Management (BPM) Advanced	LEVEL 3	\$ TBD
Application/Software Architect - Specialty in IBM Operational Decision Manager (ODM) Standard and ODM Advanced (including the Event Management System (EMS))	LEVEL 3	\$ TBD
Programmer/Software Developer - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)	LEVEL 3	\$ TBD
Programmer/Software Developer - Specialty in IBM Business Process Management (BPM) Advanced	LEVEL 3	\$ TBD
Programmer/Software Developer - Specialty in IBM Operational Decision Manager (ODM) Standard and ODM Advanced (including the Event Management System (EMS))	LEVEL 3	\$ TBD
Test Coordinator - Specialty in Test coordination of one or many of the following Products: IBM MDM, IBM IIS DataStage and QualityStage, IBM ISII, IBM IIB-ESB, IBM GNM, IBM ODM Standard and Advanced	LEVEL 3	\$ TBD
Technology Architect - IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) Configuration and Release Management	LEVEL 3	\$ TBD

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**Option Periods:**

Option Period 1 (1 year)		
Resource Category	Level of Expertise	Firm Per Diem Rate
Application/Software Architect - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)	LEVEL 3	\$ TBD
Application/Software Architect - Specialty in IBM Business Process Management (BPM) Advanced	LEVEL 3	\$ TBD
Application/Software Architect - Specialty in IBM Operational Decision Manager (ODM) Standard and ODM Advanced (including the Event Management System (EMS))	LEVEL 3	\$ TBD
Programmer/Software Developer - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)	LEVEL 3	\$ TBD
Programmer/Software Developer - Specialty in IBM Business Process Management (BPM) Advanced	LEVEL 3	\$ TBD
Programmer/Software Developer - Specialty in IBM Operational Decision Manager (ODM) Standard and ODM Advanced (including the Event Management System (EMS))	LEVEL 3	\$ TBD
Test Coordinator - Specialty in Test coordination of one or many of the following Products: IBM MDM, IBM IIS DataStage and QualityStage, IBM ISII, IBM IIB-ESB, IBM GNM, IBM ODM Standard and Advanced	LEVEL 3	\$ TBD
Technology Architect - IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) Configuration and Release Management	LEVEL 3	\$ TBD

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Option Period 2 (1 year)		
Resource Category	Level of Expertise	Firm Per Diem Rate
Application/Software Architect - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)	LEVEL 3	\$ TBD
Application/Software Architect - Specialty in IBM Business Process Management (BPM) Advanced	LEVEL 3	\$ TBD
Application/Software Architect - Specialty in IBM Operational Decision Manager (ODM) Standard and ODM Advanced (including the Event Management System (EMS))	LEVEL 3	\$ TBD
Programmer/Software Developer - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)	LEVEL 3	\$ TBD
Programmer/Software Developer - Specialty in IBM Business Process Management (BPM) Advanced	LEVEL 3	\$ TBD
Programmer/Software Developer - Specialty in IBM Operational Decision Manager (ODM) Standard and ODM Advanced (including the Event Management System (EMS))	LEVEL 3	\$ TBD
Test Coordinator - Specialty in Test coordination of one or many of the following Products: IBM MDM, IBM IIS DataStage and QualityStage, IBM ISII, IBM IIB-ESB, IBM GNM, IBM ODM Standard and Advanced	LEVEL 3	\$ TBD
Technology Architect - IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) Configuration and Release Management	LEVEL 3	\$ TBD

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47060-152116/B

Amendment Number:

Buyer ID:  
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Option Period 3 (1 year)		
Resource Category	Level of Expertise	Firm Per Diem Rate
Application/Software Architect - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)	LEVEL 3	\$ TBD
Application/Software Architect - Specialty in IBM Business Process Management (BPM) Advanced	LEVEL 3	\$ TBD
Application/Software Architect - Specialty in IBM Operational Decision Manager (ODM) Standard and ODM Advanced (including the Event Management System (EMS))	LEVEL 3	\$ TBD
Programmer/Software Developer - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)	LEVEL 3	\$ TBD
Programmer/Software Developer - Specialty in IBM Business Process Management (BPM) Advanced	LEVEL 3	\$ TBD
Programmer/Software Developer - Specialty in IBM Operational Decision Manager (ODM) Standard and ODM Advanced (including the Event Management System (EMS))	LEVEL 3	\$ TBD
Test Coordinator - Specialty in Test coordination of one or many of the following Products: IBM MDM, IBM IIS DataStage and QualityStage, IBM ISII, IBM IIB-ESB, IBM GNM, IBM ODM Standard and Advanced	LEVEL 3	\$ TBD
Technology Architect - IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) Configuration and Release Management	LEVEL 3	\$ TBD

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Option Period 4 (1 year)		
Resource Category	Level of Expertise	Firm Per Diem Rate
Application/Software Architect - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)	LEVEL 3	\$ TBD
Application/Software Architect - Specialty in IBM Business Process Management (BPM) Advanced	LEVEL 3	\$ TBD
Application/Software Architect - Specialty in IBM Operational Decision Manager (ODM) Standard and ODM Advanced (including the Event Management System (EMS))	LEVEL 3	\$ TBD
Programmer/Software Developer - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)	LEVEL 3	\$ TBD
Programmer/Software Developer - Specialty in IBM Business Process Management (BPM) Advanced	LEVEL 3	\$ TBD
Programmer/Software Developer - Specialty in IBM Operational Decision Manager (ODM) Standard and ODM Advanced (including the Event Management System (EMS))	LEVEL 3	\$ TBD
Test Coordinator - Specialty in Test coordination of one or many of the following Products: IBM MDM, IBM IIS DataStage and QualityStage, IBM ISII, IBM IIB-ESB, IBM GNM, IBM ODM Standard and Advanced	LEVEL 3	\$ TBD
Technology Architect - IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) Configuration and Release Management	LEVEL 3	\$ TBD

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Option Period 5 (1 year)		
Resource Category	Level of Expertise	Firm Per Diem Rate
Application/Software Architect - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)	LEVEL 3	\$ TBD
Application/Software Architect - Specialty in IBM Business Process Management (BPM) Advanced	LEVEL 3	\$ TBD
Application/Software Architect - Specialty in IBM Operational Decision Manager (ODM) Standard and ODM Advanced (including the Event Management System (EMS))	LEVEL 3	\$ TBD
Programmer/Software Developer - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)	LEVEL 3	\$ TBD
Programmer/Software Developer - Specialty in IBM Business Process Management (BPM) Advanced	LEVEL 3	\$ TBD
Programmer/Software Developer - Specialty in IBM Operational Decision Manager (ODM) Standard and ODM Advanced (including the Event Management System (EMS))	LEVEL 3	\$ TBD
Test Coordinator - Specialty in Test coordination of one or many of the following Products: IBM MDM, IBM IIS DataStage and QualityStage, IBM ISII, IBM IIB-ESB, IBM GNM, IBM ODM Standard and Advanced	LEVEL 3	\$ TBD
Technology Architect - IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) Configuration and Release Management	LEVEL 3	\$ TBD

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Amendment Number:

Buyer ID:  
[632EL](#)

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**ANNEX C**  
**SECURITY REQUIREMENTS CHECK LIST**

**(SEE ATTACHED HERETO)**

## ATTACHMENT 2 – BID EVALUATION CRITERIA (WORKSTREAM 1)

Technical proposals will be evaluated and scored in accordance with the following evaluation criteria (Mandatory and Rated Requirements). Substantiation of mandatory and point-rated requirements must not simply be a repetition of the criteria, but must explain and demonstrate how the Bidder meets the requirement. Where Canada determines that the substantiation of a mandatory requirement is not complete, the Bidder will be considered non-responsive. In the case of point-rated requirements, unless the Bidder demonstrates that the requirement is met points will not be awarded.

### 1.0 MANDATORY REQUIREMENTS

#### 1.1 Mandatory Corporate Requirements

Experience and Expertise of the Bidder		
Criteria	Mandatory Requirement	Demonstrated Experience (Bidder to insert response)
M1	<p>The bidder must have experience in providing informatics professional services, to architect, design, implement, deliver either components or services or both, and configure, integrate existing solutions or products to support the development of enterprise back-end capabilities with a Master Data Management (MDM) implementation integrated with back end systems based on a Service Oriented Architecture (SOA).</p> <p>The experience in the completion of the services described above must be demonstrated through a maximum of five contracts, each contract must have had an effective date within the last three years of the initial solicitation closing date* and the value** of the contract(s) must totalize \$5M minimum.</p> <p>A summary of the scope and key responsibilities under each contract must be provided.</p> <p>The above requirement must be demonstrated in a signed letter by the client. The name of the client and the name of a contact person at the client must be provided in the letter. It is requested that an email and phone number also be provided. It is also requested that the description of the informatics professional services be limited to one paragraph and the contract title or serial number be included.</p> <p>*initial solicitation closing date is 2016-10-26.</p> <p>**value is defined as either the amount specified in the limitation of expenditure article of a contract, plus Applicable Taxes or the total price in the contract, whichever is the highest.</p>	



Experience and Expertise of the Bidder		
Criteria	Mandatory Requirement	Demonstrated Experience (Bidder to insert response)
M2	<p>The Bidder must have demonstrated contract experience in supplying all of the following resource categories or similar resource categories, for the required minimum billable days per resource category, within the past seven years prior to the Initial Solicitation Closing Date*. The Bidder must demonstrate the required minimum billable days over up to five contracts.</p> <p>Bidder must provide the completed Appendices A and B of Attachment 2.</p>	
<p>*Initial Solicitation Closing Date is 2016-10-26.</p>		

## **1.2 Mandatory Resource Requirements**

The Bidder should provide complete details regarding the qualifications, relevant experience and expertise, and linguistic capabilities, if applicable, of the proposed personnel such as “ The experience of the proposed resources must be clearly identified by providing a summary description of the previous projects worked on, and indicating when the work was carried out and the client”.

The experience required for a Mandatory Resource Requirement must be demonstrated through one or multiple referenced projects of a minimum duration of three months in order to be accepted.

The Bidder must propose a different resource to fulfill each of the following four anticipated Core Team resource requirements.

### 1.2.1 Programmer/Software Developer – Specialty in IBM Master Data Management (MDM) – Java Development

Experience and Expertise of the Proposed Programmer/Software Developer – Specialty in IBM Master Data Management (MDM) – Java Development				
Name of proposed Resource: _____				
The Bidder MUST demonstrate that the Proposed Programmer/Software Developer – Specialty in IBM Master Data Management (MDM) – Java Development has:				
Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
<b>M.1</b>	<p>at least ten (10) years of experience, within the last twenty (20) years, performing the following tasks as a programmer/software developer:</p> <ul style="list-style-type: none"> <li>• Design detailed programs, flow charts, and diagrams indicating mathematical computation and sequence of machine operations necessary to copy and process data and print the results.</li> <li>• Translate detailed flow charts into coded machine instructions and confer with technical personnel in planning programs.</li> <li>• Verify accuracy and completeness of programs by preparing sample data, and testing them by means of system acceptance test runs made by operating personnel.</li> <li>• Correct program errors by revising instructions or altering the sequence of operations.</li> <li>• Perform unit testing, and assemble specifications, flow charts, diagrams, layouts, programming and operating instructions to document applications for later modification or reference.</li> </ul>			
<b>M.2</b>	<p>A minimum of three (3) years of experience, within the last ten (10) years, working as a Java programmer/software developer developing IBM Master Data Management (MDM)* solutions, aligned with a Service Oriented Architecture (SOA), in large scale projects (project value of \$6 million or greater) at an enterprise level with multiple stakeholders (greater than 2).</p> <p>*Or previous versions or instances.</p>			

### 1.2.2 Application/Software Architect – Specialty in IBM Master Data Management (MDM) Server

Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM Master Data Management (MDM) Server				
Name of proposed Resource: _____				
The Bidder <b>MUST</b> demonstrate that the Proposed Application/Software Architect – Specialty in IBM Master Data Management (MDM) Server has:				
Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
<b>M.1</b>	<p>A minimum of ten (10) years of experience, within the last twenty (20) years, performing the following tasks as an application/software architect:</p> <ul style="list-style-type: none"> <li>• Develop technical architectures, frameworks and strategies, either for an organization or for a major application area, to meet the business and application requirements.</li> <li>• Identify the policies and requirements that drive out a particular solution.</li> <li>• Analyse and evaluate alternative technology solutions to meet business problems.</li> <li>• Ensures the integration of all or key aspects of technology solutions.</li> <li>• Monitor industry trends to ensure that solutions fit with government and industry directions for technology.</li> <li>• Analyse functional requirements to identify information, procedures and decision flows.</li> <li>• Evaluate existing procedures and methods, identify and document database content, structure, and application sub-systems, and develop data dictionary.</li> <li>• Define and document interfaces of manual to automated operations within application sub-systems, to external systems and between new and existing systems.</li> <li>• Define input and output sources, including detailed plan for technical design phase.</li> </ul>			

<b>Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM Master Data Management (MDM) Server</b>				
<b>Name of proposed Resource:</b> _____				
<b>The Bidder MUST demonstrate that the Proposed Application/Software Architect – Specialty in IBM Master Data Management (MDM) Server has:</b>				
<b>Criteria</b>	<b>Mandatory Requirement</b>	<b>Bidder's response</b>		
		<b>INSERT PAGE # OF RESUME</b>	<b>Met</b>	<b>Not Met</b>
<b>M.2</b>	a minimum of three (3) years of experience, within the last ten (10) years, working as an application/software architect on the design, prototyping, components integration and oversight, as part of an IBM Master Data Management (MDM)* large scale (project value of \$6 million or greater) solution implementation, aligned with a Service Oriented Architecture (SOA), at an enterprise level with multiple stakeholders (greater than 2) with 20 million records or more.  *Or previous versions or instances.			

### 1.2.3 Business System Analyst – Specialty in IBM Master Data Management (MDM) - Data Governance

#### Experience and Expertise of the Proposed Business Systems Analyst – Specialty in IBM Master Data Management (MDM) - Data Governance

Name of proposed Resource: \_\_\_\_\_

The Bidder **MUST** demonstrate that the Proposed Business Systems Analyst – Specialty in IBM Master Data Management (MDM) - Data Governance has:

Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
<b>M.1</b>	<p>A minimum of ten (10) years of experience, within the last twenty (20) years, performing the following tasks as a business system analyst:</p> <ul style="list-style-type: none"> <li>• Establish Master Data policies and procedures to ensure data meets defined quality targets;</li> <li>• Establish the policies for setting up, maintaining, validating and cleansing party data;</li> <li>• Maintain changes to data process maps, document new processes and support ongoing audit requirement;</li> <li>• Act as subject matter expert and support projects to ensure that processes meet data policies and procedures best practices;</li> <li>• Assist teams in the creation of business rules, entities, party attributes;</li> <li>• Evaluate existing procedures and methods, identify and document items such as database content, structure, application subsystems, and develop data dictionary;</li> <li>• Review and analyse application data model and MDM data model;</li> <li>• Identify and resolve data quality issues</li> </ul>			
<b>M.2</b>	<p>A minimum of three (3) years of experience, within the last eight (8) years, working as a business system analyst responsible for the Data Governance of a large scale MDM solution implementation (project value of \$6 million or greater) at an enterprise level with multiple stakeholders (greater than 2).</p>			

#### 1.2.4 Technology Architect - Specialty in IBM Master Data Management (MDM) Configuration and Release Management

Experience and Expertise of the Proposed Technology Architect – Specialty in IBM Master Data Management (MDM) Configuration and Release Management				
Name of proposed Resource: _____				
The Bidder <b>MUST</b> demonstrate that the Proposed Technology Architect – Specialty in IBM Master Data Management (MDM) Configuration and Release Management has:				
Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
<b>M.1</b>	<p>A minimum of ten (10) years of experience, within the last twenty (20) years, performing the following tasks as a technology architect:</p> <ul style="list-style-type: none"> <li>• Prepare implementation plans and strategy in preparation of solutions' deployments</li> <li>• Develop, implement and maintain automated build and load deployment scripts</li> <li>• Maintain and support project source repository</li> <li>• Configure and optimize technical installations including the integration of technical components.</li> <li>• Ensure alignment of releases in both development and testing environments.</li> </ul>			
<b>M.2</b>	<p>A minimum of three (3) years of experience, within the last ten (10) years, working as a technology architect working on the configuration, optimization and deployment of an IBM MDM* integrated project solution implementation, aligned with a Service Oriented Architecture (SOA), in large scale projects (project value of \$6 million or greater) at an enterprise level with multiple stakeholders (greater than 2).</p> <p>*Or previous MDM versions or instances.</p>			

## 2.0 POINT-RATED REQUIREMENTS

### 2.1 Point-Rated Corporate Criteria

	Point Rated Criteria	Max Points	Bidder's Response	
			Evaluation Guideline	Cross Reference to Contract Reference(s)
R1	<p>The bidder should demonstrate experience in providing informatics professional services, to architect, design, implement, deliver either components or services or both, and configure, integrate existing solutions or products to support the development of enterprise back-end capabilities with a Master Data Management (MDM) implementation integrated with back end systems based on a Service Oriented Architecture (SOA), in the context of border or security or law enforcement or immigration management or customs management.</p> <p>The experience in the completion of the services described above should be demonstrated through a maximum of one contract, having an effective date within the last three years of the initial solicitation closing date* and the value** of the contract should be \$1M minimum.</p> <p>A summary of the scope and key responsibilities under the contract should be provided.</p> <p>The above requirement should be demonstrated in a signed letter by the client. The name of the client and the name of a contact person at the client should be provided in the letter. It is requested that an email and phone number also be provided. It is also requested that the description of the informatics professional services be limited to one paragraph and the contract title or serial number be included.</p> <p>*initial solicitation closing date is 2016-10-26.</p> <p>**value is defined as either the amount specified in the limitation of expenditure article of a contract, plus Applicable Taxes or the total price in the contract, whichever is the highest.</p>	10	1+ contract: 10 points	



Point Rated Criteria					Max Points	Bidder's Response			
					Evaluation Guideline	Cross Reference to Contract Reference(s)			
R2	The Bidder should demonstrate its billable days experience in excess to the minimum billable days per resource category under M2.					50	The bidders demonstrated "Total Billable Days" provided in response to M2 will be used to evaluate this criterion.  The bidder will be awarded points as demonstrated in the example evaluation scenario on the left side.  In this example, the bidder would score 31.71 points out of a possible 50 points.		
	EXAMPLE EVALUATION SCENARIO								
	BILLABLE DAYS								
	RESOURCE CATEGORY	(A)	(B)	(C)	(D)				
		BIDDER'S TOTAL	MINIMUM BILLABLE DAYS IDENTIFIED UNDER M2	BILLABLE DAYS IN EXCESS OF M2	BIDDER % INCREASE TO A MAXIMUM OF 100 (Rounded to two decimal places)				
		App A to Att B		(C)=(A)-(B)	(D)=(C)/(B)*100				
		Programmer/Software Developer	3300	2200	1100				50
		Application/Software Architect	1800	1100	700				63.64
	Business System Analyst	1400	1000	400	40				
	Technology Architect	2200	1000	1200	100				
	BIDDER SCORE = (SUM OF (D) FOR ALL 4 CATEGORIES / 4) * 50%		31.71						
MAXIMUM AVAILABLE POINTS					60				
MINIMUM POINTS REQUIRED					36				
POINTS ACHIEVED									
TO BE RESPONSIVE, THE BIDDER MUST OBTAIN A MINIMUM OF 36 POINTS									

## **2.2 Point-Rated Resource Criteria**

The Bidder should provide complete details regarding the qualifications, relevant experience and expertise, and linguistic capabilities, if applicable, of the proposed personnel such as " The experience of the proposed resources must be clearly identified by providing a summary description of the previous projects worked on, and indicating when the work was carried out and the client".

The experience required for a Point-Rated Resource Criteria should be demonstrated through one or multiple referenced projects of a minimum duration of three months in order to be accepted.

The Bidder must propose a different resource to fulfill each of the following four anticipated Core Team resource requirements.

## 2.2.1 Programmer/Software Developer - Specialty in IBM Master Data Management (MDM) – Java Development

### Experience and Expertise of the Proposed Programmer/Software Developer - Specialty in IBM Master Data Management (MDM) – Java Development

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Programmer/Software Developer - Specialty in IBM Master Data Management (MDM) – Java Development has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
<b>R.1</b>	<p>In addition to M2, experience, within the last ten (10) years, working as a Java programmer/software developer developing IBM Master Data Management (MDM)* solutions, aligned with a Service Oriented Architecture (SOA), in large scale projects (project value of \$6 million or greater) at an enterprise level with multiple stakeholders (greater than 2).</p> <p>*Or previous versions or instances</p>	15	<ul style="list-style-type: none"> <li>3+ to 4 years = 5 points</li> <li>4+ to 5 years = 10 points</li> <li>5+ years = 15 points</li> </ul>	
<b>R.2</b>	<p>Experience, within the last ten (10) years, working as a programmer/software developer on large scale projects (project value of \$6 million or greater) with a Master Data Management (MDM)* component with integration of one or more of the following products:</p> <ul style="list-style-type: none"> <li>IBM Enterprise Service Bus (ESB)*</li> <li>IBM DataStage or QualityStage</li> </ul> <p>*Or previous versions or instances</p>	15	<ul style="list-style-type: none"> <li>1 to 2 years = 5 points</li> <li>2+ to 3 years = 10 points</li> <li>3+ years = 15 points</li> </ul>	

**Experience and Expertise of the Proposed Programmer/Software Developer - Specialty in IBM Master Data Management (MDM) – Java Development**

**Name of proposed Resource:** \_\_\_\_\_

**The Bidder SHOULD demonstrate that the Proposed Programmer/Software Developer - Specialty in IBM Master Data Management (MDM) – Java Development has:**

			<b>BIDDER'S RESPONSE</b>	
<b>#</b>	<b>RATED CRITERIA</b>	<b>POINTS MAX</b>	<b>DEMONSTRATED EXPERIENCE</b>	<b>INSERT PAGE # OF RESUME</b>
<b>R.3</b>	<p>Experience, within the last ten (10) years, working as a programmer/software developer on projects with an MDM component for a government client.</p> <p>*Government may include the Federal, Provincial or Municipal Government. The Government of Canada includes any department, agency, board of the Government of Canada or a Crown corporation.</p>	5	<ul style="list-style-type: none"> <li>• 1 to 2 years = 1 points</li> <li>• 2+ to 3 years = 3 points</li> <li>• 3+ years = 5 points</li> </ul>	
<b>Maximum available points</b>		<b>35</b>		
<b>Minimum points required</b>		<b>21</b>		

## 2.2.2 Application/Software Architect – Specialty in IBM Master Data Management (MDM) Server

### Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM Master Data Management (MDM) Server

Name of proposed Resource: \_\_\_\_\_

The Bidder SHOULD demonstrate that the Proposed Application/Software Architect – Specialty in IBM Master Data Management (MDM) Server has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
R.1	<p>In addition to M2, experience, within the last ten (10) years, working as an application/software architect on the design, prototyping, components integration and oversight, as part of an IBM Master Data Management (MDM)* large scale (project value of \$6 million or greater) solution implementation, aligned with a Service Oriented Architecture (SOA), at an enterprise level with multiple stakeholders (greater than 2) with 20 million records or more.</p> <p>*Or previous versions or instances.</p>	15	<ul style="list-style-type: none"> <li>• 3+ to 4 years = 5 points</li> <li>• 4+ to 5 years = 10 points</li> <li>• 5+ years = 15 points</li> </ul>	
R.2	<p>Experience, as an application/software architect, within the last ten (10) years, performing the integration of IBM MDM* with one or more of the following IBM products:</p> <ul style="list-style-type: none"> <li>• IBM Business Process Management (BPM)* Advanced</li> <li>• IBM IIS* – DataStage or Quality Stage</li> <li>• IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)*</li> </ul> <p>*Or previous versions or instances.</p>	15	<ul style="list-style-type: none"> <li>• 1 to 2 years = 5 points</li> <li>• 2+ to 3 years = 10 points</li> <li>• 3+ years = 15 points</li> </ul>	

Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM Master Data Management (MDM) Server				
Name of proposed Resource: _____				
The Bidder SHOULD demonstrate that the Proposed Application/Software Architect – Specialty in IBM Master Data Management (MDM) Server has:				
			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
R.3	<p>Experience, as an application/software architect, within the last ten (10) years, in the development of security requirements* of an IBM MDM** implementation that required integration with one or more of the following COTS:</p> <ul style="list-style-type: none"> <li>• IBM Operational Decision Manager (ODM) Standard or Advanced**</li> <li>• IBM InfoSphere Identity Insight (ISI)**</li> <li>• IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)***</li> <li>• IBM Global Name Manager (GNM)</li> <li>• IBM InfoSphere Information Server DataStage or QualityStage</li> <li>• IBM Business Process Management (BPM)** Advanced</li> </ul> <p>*Security requirements include the integration of MDM with other products part of a solution and alignment with security frameworks, security policies, and guidelines.</p> <p>**Or previous versions or instances.</p>	15	<ul style="list-style-type: none"> <li>• 1 to 2 years = 5 points</li> <li>• 2+ to 3 years = 10 points</li> <li>• 3+ years = 15 points</li> </ul>	

**Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM Master Data Management (MDM) Server**

**Name of proposed Resource:** \_\_\_\_\_

**The Bidder SHOULD demonstrate that the Proposed Application/Software Architect – Specialty in IBM Master Data Management (MDM) Server has:**

			<b>BIDDER'S RESPONSE</b>	
<b>#</b>	<b>RATED CRITERIA</b>	<b>POINTS MAX</b>	<b>DEMONSTRATED EXPERIENCE</b>	<b>INSERT PAGE # OF RESUME</b>
<b>R.4</b>	<p>Experience, within the last ten (10) years, working as an application/software architect on projects with an MDM component for a government* client.</p> <p>*Government may include the Federal, Provincial or Municipal Government. The Government of Canada includes any department, agency, board of the Government of Canada or a Crown corporation.</p>	5	<ul style="list-style-type: none"> <li>• 1 to 2 years = 1 points</li> <li>• 2+ to 3 years = 3 points</li> <li>• 3+ years = 5 points</li> </ul>	
<b>Maximum available points</b>		<b>50</b>		
<b>Minimum points required</b>		<b>30</b>		

### 2.2.3 Business System Analyst – Specialty in IBM Master Data Management (MDM) - Data Governance

#### Experience and Expertise of the Proposed Business System Analyst – Specialty in IBM Master Data Management (MDM) - Data Governance

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Business System Analyst – Specialty in IBM Master Data Management (MDM) - Data Governance has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
<b>R.1</b>	In addition to M2, experience, within the last eight (8) years, working as a business system analyst responsible for the Data Governance of a large scale MDM solution implementation (project value of \$6 million or greater) at an enterprise level with multiple stakeholders (greater than 2).	15	<ul style="list-style-type: none"> <li>3+ to 4 years = 5 points</li> <li>4+ to 5 years = 10 points</li> <li>5+ years = 15 points</li> </ul>	
<b>R.2</b>	<p>Experience, within the last eight (8) years, working as a business system analyst responsible for the Data Stewardship and working with an IBM MDM* Data Stewardship interface of a large scale (project value of \$6 million or greater) IBM MDM solution implementation at an enterprise level with multiple stakeholders (greater than 2).</p> <p>*Or previous versions or instances</p>	15	<ul style="list-style-type: none"> <li>2 to 3 years = 5 points</li> <li>3+ to 4 years = 10 points</li> <li>4+ years = 15 points</li> </ul>	
<b>R.3</b>	<p>Experience, within the last ten (10) years, working as a business system analyst on projects that required the integration of an MDM component for a government* client.</p> <p>*Government may include the Federal, Provincial or Municipal Government. The Government of Canada includes any department, agency, board of the Government of Canada or a Crown corporation.</p>	5	<ul style="list-style-type: none"> <li>1 to 2 years = 1 points</li> <li>2+ to 3 years = 3 points</li> <li>3+ years = 5 points</li> </ul>	
<b>Maximum available points</b>		<b>35</b>		
<b>Minimum points required</b>		<b>21</b>		



## 2.2.4 Technology Architect – Specialty in IBM Master Data Management (MDM) Configuration and Release Management

### Experience and Expertise of the Proposed Technology Architect - Specialty in IBM Master Data Management (MDM) Configuration and Release Management

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Technology Architect - Specialty in IBM Master Data Management (MDM) Configuration and Release Management has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
<b>R.1</b>	Experience, working as a technology architect, within the last ten (10) years, developing, implementing and maintaining automated build and load deployment scripts for an IBM MDM* project.  *Or previous MDM versions or instances.	15	<ul style="list-style-type: none"> <li>1+ to 2 years = 5 points</li> <li>2+ to 3 years = 10 points</li> <li>3+ years = 15 points</li> </ul>	
<b>R.2</b>	Experience, within the last ten (10) years, performing the maintenance of an MDM project application source code repository.	15	<ul style="list-style-type: none"> <li>1 to 2 years = 5 points</li> <li>2+ to 3 years = 10 points</li> <li>3+ years = 15 points</li> </ul>	
<b>R.3</b>	Experience, within the last ten (10) years, working as a technology architect on projects that required the integration, deployment, and configuration of an MDM component for a government* client.  *Government may include the Federal, Provincial or Municipal Government. The Government of Canada includes any department, agency, board of the Government of Canada or a Crown corporation.	5	<ul style="list-style-type: none"> <li>1 to 2 years = 1 points</li> <li>2+ to 3 years = 3 points</li> <li>3+ years = 5 points</li> </ul>	
<b>Maximum available points</b>		<b>35</b>		
<b>Minimum points required</b>		<b>21</b>		

### 3.0 TOTAL POINT-RATED CRITERIA

Criterion	Maximum Available Points	Minimum Points Required	Points Achieved
2.1	60	36	
2.2.1	35	21	
2.2.2	50	30	
2.2.3	35	21	
2.2.4	35	21	
Total	215	129	
<b>TO BE RESPONSIVE, THE BIDDER MUST OBTAIN A TOTAL OF MINIMUM 129 POINTS</b>			

**APPENDIX A OF ATTACHMENT 2**  
**RFP BILLABLE DAYS RESPONSE TABLE**

Bidder Name: \_\_\_\_\_

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

RESOURCE CATEGORY	NUMBER OF BILLABLE DAYS			
	Cross Reference to Contract Reference #  Billing Period: ____/____/____ (dd/mm/yy) To ____/____/____ (dd/mm/yy)	Cross Reference to Contract Reference #  Billing Period: ____/____/____ (dd/mm/yy) To ____/____/____ (dd/mm/yy)	Cross Reference to Contract Reference #  Billing Period: ____/____/____ (dd/mm/yy) To ____/____/____ (dd/mm/yy)	Cross Reference to Contract Reference #  Billing Period: ____/____/____ (dd/mm/yy) To ____/____/____ (dd/mm/yy)
Programmer/Software Developer				
Application/Software Architect				
Business System Analyst				
Technology Architect				

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**APPENDIX B OF ATTACHMENT 2**

**RFP CONTRACT REFERENCE RESPONSE FORM**

To meet 1.0 M2 of attachment 2, the Bidder must have demonstrated contract experience in supplying all of the resource categories or similar resource categories, for the required Minimum Billable Days per resource category, within the past seven years prior to the Initial Solicitation Closing Date. For each individual resource category, the services provided must have been provided using a maximum of five contracts. All resources provided must have completed at least 50% of the tasks detailed in appendix C of attachment 2, for the resource category for which they were provided.

Bidder Name: \_\_\_\_\_ Bidder Contract Reference #: \_\_\_\_\_

**SECTION 1: CLIENT INFORMATION**

Government client (Yes/No)

Client Organization Name

Client Contact Name

Address

Telephone

Fax

E-mail

**SECTION 2: CONTRACT INFORMATION**

Contract Value

Award Date

Expiry Date

Description of requirement:

---

SECTION 3: RESOURCE DETAILS	
Category of Personnel and Level	Tasks performed under the contract with a cross reference to each specific SOW associated task

## **APPENDIX C OF ATTACHMENT 2**

### **LIST OF TASKS**

#### **1) Programmer/Software Developer**

- Develop and prepare diagrammatic plans for solution of business, scientific and technical problems by means of computer systems of significant size and complexity.
- Analyze the problems outlined by system analysts and designers in terms of such factors as style and extent of information to be transferred to and from storage units, variety of items to be processed, extent of sorting, and format of final printed results.
- Select and incorporate available software programs.
- Design detailed programs, flow charts, and diagrams indicating mathematical computation and sequence of machine operations necessary to copy and process data and print the results.
- Translate detailed flow charts into coded machine instructions and confer with technical personnel in planning programs.
- Verify accuracy and completeness of programs by preparing sample data, and testing them by means of system acceptance test runs made by operating personnel.
- Correct program errors by revising instructions or altering the sequence of operations.
- Test instructions, and assemble specifications, flow charts, diagrams, layouts, programming and operating instructions to document applications for later modification or reference.

#### **2) Application/Software Architect**

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

3) **Business System Analyst**

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

4) **Technology Architect**

- Develop technical architectures, frameworks and strategies, either for an organization or for a major application area, to meet the business and application requirements.
- Identify the policies and requirements that drive out a particular solution.
- Analyze and evaluate alternative technology solutions to meet business problems.
- Ensures the integration of all aspects of technology solutions.
- Monitor industry trends to ensure that solutions fit with government and industry directions for technology.
- Provide information, direction and support for emerging technologies.
- Perform impact analysis of technology changes.
- Provide support to applications and technical support teams in the proper application of existing infrastructure.
- Review application and program design or technical infrastructure design to ensure adherence to standards and to recommend performance improvements.

## ATTACHMENT 3 – BID EVALUATION CRITERIA (WORKSTREAM 2)

Technical proposals will be evaluated and scored in accordance with the following evaluation criteria (Mandatory and Rated Requirements). Substantiation of mandatory and point-rated requirements must not simply be a repetition of the criteria, but must explain and demonstrate how the Bidder meets the requirement. Where Canada determines that the substantiation of a mandatory requirement is not complete, the Bidder will be considered non-responsive. In the case of point-rated requirements, unless the Bidder demonstrates that the requirement is met points will not be awarded.

### 1.0 MANDATORY REQUIREMENTS

#### 1.1 Mandatory Corporate Requirements

Experience and Expertise of the Bidder		Demonstrated Experience (Bidder to insert response)
Criteria	Mandatory Requirement	
M1	<p>The bidder must have experience in providing informatics professional services, to architect, design, implement, deliver either components or services or both, and configure, integrate existing solutions or products to support the development of a Service Oriented Architecture Platform including both Automated Business Processing (Business Process Management and Enterprise Service Bus) and Automated Decision Making (Business Rules Management and Event Management Services).</p> <p>The experience in the completion of the services described above must be demonstrated through a maximum of three contracts, each contract must have had an effective date within the last five years of the initial solicitation closing date* and the value* of the contract(s) must totalize \$6M minimum**.</p> <p>A summary of the scope and key responsibilities under each contract must be provided.</p> <p>The above requirement must be demonstrated in a signed letter by the client. The name of the client and the name of a contact person at the client must be provided in the letter. It is requested that an email and phone number also be provided. It is also requested that the description of the informatics professional services be limited to one paragraph and the contract title or serial number be included.</p> <p>*initial solicitation closing date is 2016-10-26.</p> <p>**value is defined as either the amount specified in the limitation of expenditure article of a contract, plus Applicable Taxes or the total price in the contract, whichever is the highest.</p>	





## **1.2 Mandatory Resource Requirements**

The Bidder should provide complete details regarding the qualifications, relevant experience and expertise, and linguistic capabilities, if applicable, of the proposed personnel such as “ The experience of the proposed resources must be clearly identified by providing a summary description of the previous projects worked on, and indicating when the work was carried out and the client”.

The experience required for a Mandatory Resource Requirement must be demonstrated through one or multiple referenced projects of a minimum duration of three months in order to be accepted.

The Bidder must propose a different resource to fulfill each of the following five anticipated Core Team resource requirements.

### 1.2.1 Programmer/Software Developer – Specialty in IBM Integration BUS (IIB) – Enterprise Service Bus (ESB)

Experience and Expertise of the Proposed Programmer/Software Developer – Specialty in IBM Integration BUS (IIB) – Enterprise Service Bus (ESB)				
Name of proposed Resource: _____				
The Bidder <b>MUST</b> demonstrate that the Proposed Programmer/Software Developer – Specialty in IBM Integration BUS (IIB) – Enterprise Service Bus (ESB) has:				
Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
<b>M.1</b>	<p>A minimum of ten (10) years of experience, within the last twenty (20) years, performing the following tasks as a programmer/software developer:</p> <ul style="list-style-type: none"> <li>• Design detailed programs, flow charts, and diagrams indicating mathematical computation and sequence of machine operations necessary to copy and process data and print the results.</li> <li>• Translate detailed flow charts into coded machine instructions and confer with technical personnel in planning programs.</li> <li>• Verify accuracy and completeness of programs by preparing sample data, and testing them by means of system acceptance test runs made by operating personnel.</li> <li>• Correct program errors by revising instructions or altering the sequence of operations.</li> <li>• Perform unit testing, and assemble specifications, flow charts, diagrams, layouts, programming and operating instructions to document applications for later modification or reference.</li> </ul>			

<b>Experience and Expertise of the Proposed Programmer/Software Developer – Specialty in IBM Integration BUS (IIB) – Enterprise Service Bus (ESB)</b>				
<b>Name of proposed Resource:</b> _____				
<b>The Bidder MUST demonstrate that the Proposed Programmer/Software Developer – Specialty in IBM Integration BUS (IIB) – Enterprise Service Bus (ESB) has:</b>				
Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
<b>M.2</b>	A minimum of three (3) years of experience, within the last ten (10) years, working as a programmer/software developer developing IBM Integration Bus (IIB) - Enterprise Service Bus (ESB)* solutions, aligned with a Service Oriented Architecture (SOA), in large scale projects (project value of \$6 million or greater) at an enterprise level with multiple stakeholders (greater than 2).  *Or previous versions or instances.			

### 1.2.2 Programmer/Software Developer – Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced

<b>Experience and Expertise of the Proposed Programmer/Software Developer – Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced</b>				
Name of proposed Resource: _____				
<b>The Bidder MUST demonstrate that the Proposed Programmer/Software Developer – Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced has:</b>				
Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
<b>M.1</b>	<p>A minimum of ten (10) years of experience, within the last twenty (20) years, performing the following tasks as a programmer/software developer:</p> <ul style="list-style-type: none"> <li>• Design detailed programs, flow charts, and diagrams indicating mathematical computation and sequence of machine operations necessary to copy and process data and print the results.</li> <li>• Translate detailed flow charts into coded machine instructions and confer with technical personnel in planning programs.</li> <li>• Verify accuracy and completeness of programs by preparing sample data, and testing them by means of system acceptance test runs made by operating personnel.</li> <li>• Correct program errors by revising instructions or altering the sequence of operations.</li> <li>• Perform unit testing, and assemble specifications, flow charts, diagrams, layouts, programming and operating instructions to document applications for later modification or reference.</li> </ul>			

Experience and Expertise of the Proposed Programmer/Software Developer – Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced				
Name of proposed Resource: _____				
The Bidder MUST demonstrate that the Proposed Programmer/Software Developer – Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced has:				
Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
<b>M.2</b>	<p>A minimum of three (3) years of experience, within the last ten (10) years, working as a programmer/software developer developing IBM Operational Decision Management (ODM)* solutions including the creation of executable object models (XOM), business object models (BOM), and the authoring of rules for a rules engine**, aligned with a Service Oriented Architecture (SOA), in large scale projects (project value of \$6 million or greater) at an enterprise level with multiple stakeholders (greater than 2).</p> <p>*Or previous versions or instances.</p> <p>**includes separate Business rules and Business events components prior to creation of IBM Operational Decision Management (ODM) (Advanced).</p>			

### 1.2.3 Application/Software Architect – Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)

Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)				
Name of proposed Resource: _____				
The Bidder <b>MUST</b> demonstrate that the Proposed Application/Software Architect – Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) has:				
Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
<b>M.1</b>	<p>A minimum of ten (10) years of experience, within the last twenty (20) years, performing the following tasks as an application/software architect:</p> <ul style="list-style-type: none"> <li>• Develop technical architectures, frameworks and strategies, either for an organization or for a major application area, to meet the business and application requirements.</li> <li>• Identify the policies and requirements that drive out a particular solution.</li> <li>• Analyse and evaluate alternative technology solutions to meet business problems.</li> <li>• Ensures the integration of all aspects of technology solutions.</li> <li>• Monitor industry trends to ensure that solutions fit with government and industry directions for technology.</li> <li>• Analyse functional requirements to identify information, procedures and decision flows.</li> <li>• Evaluate existing procedures and methods, identify and document database content, structure, and application sub-systems, and develop data dictionary.</li> <li>• Define and document interfaces of manual to automated operations within application sub-systems, to external systems and between new and existing systems.</li> <li>• Define input and output sources, including detailed plan for technical design phase, and obtain approval of the system proposal.</li> <li>• Identify and document system specific standards relating to programming, documentation and testing, covering program libraries, data dictionaries, naming conventions, etc.</li> </ul>			

Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)				
Name of proposed Resource: _____				
The Bidder MUST demonstrate that the Proposed Application/Software Architect – Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) has:				
Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
M.2	<p>A minimum of three (3) years of experience, within the last ten (10) years, working as an application/software architect on the design, prototyping, components integration and oversight, as part of an IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)* large scale (project value of \$6 million or greater) solution implementation, aligned with a Service Oriented Architecture (SOA), at an enterprise level with multiple stakeholders (greater than 2).</p> <p>*Or previous versions or instances.</p>			



#### 1.2.4 Application/Software Architect – Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced

Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced				
Name of proposed Resource: _____				
The Bidder <b>MUST</b> demonstrate that the Proposed Application/Software Architect – Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced has:				
Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
<b>M.1</b>	<p>A minimum of ten (10) years of experience, within the last twenty (20) years, performing the following tasks as an application/software architect:</p> <ul style="list-style-type: none"> <li>• Develop technical architectures, frameworks and strategies, either for an organization or for a major application area, to meet the business and application requirements.</li> <li>• Identify the policies and requirements that drive out a particular solution.</li> <li>• Analyse and evaluate alternative technology solutions to meet business problems.</li> <li>• Ensures the integration of all aspects of technology solutions.</li> <li>• Monitor industry trends to ensure that solutions fit with government and industry directions for technology.</li> <li>• Analyse functional requirements to identify information, procedures and decision flows.</li> <li>• Evaluate existing procedures and methods, identify and document database content, structure, and application sub-systems, and develop data dictionary.</li> <li>• Define and document interfaces of manual to automated operations within application sub-systems, to external systems and between new and existing systems.</li> <li>• Define input and output sources, including detailed plan for technical design phase, and obtain approval of the system proposal.</li> <li>• Identify and document system specific standards relating to programming, documentation and testing, covering program libraries, data dictionaries, naming conventions, etc.</li> </ul>			

<b>Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced</b>				
<b>Name of proposed Resource:</b> _____				
<b>The Bidder MUST demonstrate that the Proposed Application/Software Architect – Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced has:</b>				
<b>Criteria</b>	<b>Mandatory Requirement</b>	<b>Bidder's response</b>		
		<b>INSERT PAGE # OF RESUME</b>	<b>Met</b>	<b>Not Met</b>
<b>M.2</b>	A minimum of three (3) years of experience, within the last ten (10) years, working as an application/software architect on the design, prototyping, components integration and oversight, as part of an IBM Operational Decision Manager (ODM)*, large scale (project value of \$6 million or greater) solution implementation, aligned with a Service Oriented Architecture (SOA), at an enterprise level with multiple stakeholders (greater than 2).  *Or previous versions or instances.			

### 1.2.5 Technology Architect - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) Configuration and Release Management

<b>Experience and Expertise of the Proposed Technology Architect – Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) Configuration and Release Management</b>				
<b>Name of proposed Resource:</b> _____				
<b>The Bidder MUST demonstrate that the Proposed Technology Architect – Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) Configuration and Release Management has:</b>				
Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
<b>M.1</b>	A minimum of ten (10) years of experience, within the last twenty (20) years, performing the following tasks as a technology architect: <ul style="list-style-type: none"> <li>• Prepare implementation plans and strategy in preparation of solutions' deployments</li> <li>• Develop, implement and maintain automated build and load deployment scripts</li> <li>• Maintain and support project source repository</li> <li>• Configure and optimize technical installations including the integration of technical components.</li> <li>• Ensure alignment of releases in both development and testing environments.</li> </ul>			
<b>M.2</b>	A minimum of three (3) years of experience, within the last ten (10) years, working as a technology architect on the configuration, optimization and deployment of an IBM Integration Bus (IIB) - Enterprise Service Bus (ESB)* project solution implementation, aligned with a Service Oriented Architecture (SOA), in large scale projects (project value of \$6 million or greater) at an enterprise level with multiple stakeholders (greater than 2).  *Or previous versions or instances.			

## 2.0 POINT-RATED REQUIREMENTS

### 2.1 Point-Rated Corporate Criteria

	Point Rated Criteria	Max Points	Bidder's Response	
			Evaluation Guideline	Cross Reference to Contract Reference(s)
<b>R1</b>	<p>The bidder should have experience in providing informatics professional services, to architect, design, implement, deliver either components or services or both, and configure, integrate existing solutions or products to support the development of a Service Oriented Architecture Platform including both Automated Business Processing (Business Process Management and Enterprise Service Bus) and Automated Decision Making (Business Rules Management and Event Management Services), in the context of border or security or law enforcement or immigration management or customs management.</p> <p>The experience in the completion of the services described above should be demonstrated through a maximum of one contract, having an effective date within the last five years of the initial solicitation closing date* and the value* of the contracts should totalize \$2M minimum**.</p> <p>A summary of the scope and key responsibilities under the contract should be provided.</p> <p>The above requirement should be demonstrated in a signed letter by the client. The name of the client and the name of a contact person at the client should be provided in the letter. It is requested that an email and phone number also be provided. It is also requested that the description of the informatics professional services be limited to one paragraph and the contract title or serial number be included.</p> <p>*initial solicitation closing date is 2016-10-26.</p> <p>**value is defined as either the amount specified in the limitation of expenditure article of a contract, plus Applicable Taxes or the total price in the contract, whichever is the highest.</p>	10	1+ contract: 10 points	

Point Rated Criteria					Max Points	Bidder's Response			
						Evaluation Guideline	Cross Reference to Contract Reference(s)		
R2	The Bidder should demonstrate its billable days experience in excess to the minimum billable days per resource category under M2.					50	The bidders demonstrated "Total Billable Days" provided in response to M2 will be used to evaluate this criterion.  The bidder will be awarded points as demonstrated in the example evaluation scenario on the left side.  In this example, the bidder would score 39.21 points out of a possible 50 points.		
	EXAMPLE EVALUATION SCENARIO								
	BILLABLE DAYS								
	RESOURCE CATEGORY	(A)	(B)	(C)	(D)				
		BIDDER'S TOTAL	MINIMUM BILLABLE DAYS IDENTIFIED UNDER M2	BILLABLE DAYS IN EXCESS OF M2	BIDDER % INCREASE TO A MAXIMUM OF 100 (Rounded to two decimal places)				
		App A to Att B		(C)=(A)-(B)	(D)=(C)/(B)*100				
		Programmer/Software Developer	3300	2200	1100				50
		Application/Software Architect	1800	1100	400				63.64
	Test Coordinator	1000	300	700	100				
	Technology Architect	2200	1000	1200	100				
	BIDDER SCORE = (SUM OF (D) FOR ALL 4 CATEGORIES / 4) * 50%		39.21						
MAXIMUM AVAILABLE POINTS					60				
MINIMUM POINTS REQUIRED					36				
POINTS ACHIEVED									
TO BE RESPONSIVE, THE BIDDER MUST OBTAIN A MINIMUM OF 36 POINTS									

## 2.2 Point-Rated Resource Criteria

The Bidder should provide complete details regarding the qualifications, relevant experience and expertise, and linguistic capabilities, if applicable, of the proposed personnel such as "The experience of the proposed resources must be clearly identified by providing a summary description of the previous projects worked on, and indicating when the work was carried out and the client".

The experience required for a Point-Rated Resource Criteria must be demonstrated through one or multiple referenced projects of a minimum duration of three months in order to be accepted.

The Bidder must propose a different resource to fulfill each of the following five (5) anticipated Core Team resource requirements.

### 2.2.1 Programmer/Software Developer - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)

Experience and Expertise of the Proposed Programmer/Software Developer - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)				
Name of proposed Resource: _____				
The Bidder SHOULD demonstrate that the Proposed Programmer/Software Developer - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) has:				
			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
R.1	In addition to M2, experience, within the last ten (10) years, working as a programmer/software developer developing IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)* solutions, aligned with a Service Oriented Architecture (SOA), in large scale projects (project value of \$6 million or greater) at an enterprise level with multiple stakeholders (greater than 2).  *Or previous versions or instances.	15	<ul style="list-style-type: none"><li>• 3+ to 4 years = 5 points</li><li>• 4+ to 5 years = 10 points</li><li>• 5+ years = 15 points</li></ul>	

Experience and Expertise of the Proposed Programmer/Software Developer - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)				
Name of proposed Resource: _____				
The Bidder SHOULD demonstrate that the Proposed Programmer/Software Developer - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) has:				
			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
R.2	<p>Experience, within the last ten (10) years, working as a programmer/software developer on large scale projects (project value of \$6 million or greater) with an IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)* component that required an integration with one or more of the following products:</p> <ul style="list-style-type: none"> <li>• IBM Operational Decision Manager (ODM)* Standard or Advanced</li> <li>• IBM InfoSphere Identity Insight (ISII)*</li> <li>• IBM Master Data Management (MDM)*</li> <li>• IBM Global Name Manager (GNM)</li> <li>• IBM InfoSphere Information Server DataStage or QualityStage</li> <li>• IBM Business Process Management (BPM)* Advanced</li> </ul> <p>*Or previous versions or instances.</p>	15	<ul style="list-style-type: none"> <li>• 1 to 2 years = 5 points</li> <li>• 2+ to 3 years = 10 points</li> <li>• 3+ years = 15 points</li> </ul>	

Experience and Expertise of the Proposed Programmer/Software Developer - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)				
Name of proposed Resource: _____				
The Bidder SHOULD demonstrate that the Proposed Programmer/Software Developer - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) has:				
			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
R.3	<p>Experience, within the last ten (10) years, working as a programmer/software developer on projects with an ESB component for a government* client.</p> <p>*Government may include the Federal, Provincial or Municipal Government. The Government of Canada includes any department, agency, board of the Government of Canada or a Crown corporation.</p>	5	<ul style="list-style-type: none"> <li>1 to 2 years = 1 points</li> <li>2+ to 3 years = 3 points</li> <li>3+ years = 5 points</li> </ul>	
<b>Maximum available points</b>		<b>35</b>		
<b>Minimum points required</b>		<b>21</b>		



## 2.2.2 Programmer/Software Developer - Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced

Experience and Expertise of the Proposed Programmer/Software Developer - Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced				
Name of proposed Resource: _____				
The Bidder SHOULD demonstrate that the Proposed Programmer/Software Developer - Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced has:				
			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
R.1	<p>In addition to M2, experience, within the last ten (10) years, working as a programmer/software developer developing IBM Operational Decision Management (ODM)* solutions including the creation of executable object models (XOM), business object models (BOM), and the authoring of rules for a rules engine**, aligned with a Service Oriented Architecture (SOA), in large scale projects (project value of \$6 million or greater) at an enterprise level with multiple stakeholders (greater than 2).</p> <p>*Or previous versions or instances.</p> <p>**Includes separate Business rules and Business events components prior to creation of IBM Operational Decision Management (ODM) (Advanced).</p>	15	<ul style="list-style-type: none"> <li>• 3+ to 4 years = 5 points</li> <li>• 4+ to 5 years = 10 points</li> <li>• 5+ years = 15 points</li> </ul>	
R.2	<p>Experience, within the last ten (10) years, working as a programmer/software developer on large scale projects with an IBM Operational Decision Management (ODM)* component with integration of one or more of the following products:</p> <ul style="list-style-type: none"> <li>• IBM Business Process Management (BPM)*</li> <li>• IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)*</li> <li>• IBM Master Data Management (MDM)*</li> </ul> <p>*Or previous versions or instances.</p>	15	<ul style="list-style-type: none"> <li>• 1 to 2 years = 5 points</li> <li>• 2+ to 3 years = 10 points</li> <li>• 3+ years = 15 points</li> </ul>	

Experience and Expertise of the Proposed Programmer/Software Developer - Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced				
Name of proposed Resource: _____				
The Bidder SHOULD demonstrate that the Proposed Programmer/Software Developer - Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced has:				
			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
R.3	<p>Experience, within the last five (5) years, working as a programmer/software developer on projects with an IBM Operational Decision Management (ODM)* component with volumes equal to or exceeding 10 million transactions per year.</p> <p>*Or previous versions or instances.</p>	5	<ul style="list-style-type: none"> <li>10 million to 12 million transactions = 1 point</li> <li>12+ million to 14 million transactions = 3 points</li> <li>14+ million transactions per year = 5 points</li> </ul>	
R.4	<p>Experience, within the last ten (10) years, working as a programmer/software developer on projects with a rule engine component for a government* client.</p> <p>*Government may include the Federal, Provincial or Municipal Government. The Government of Canada includes any department, agency, board of the Government of Canada or a Crown corporation.</p>	5	<ul style="list-style-type: none"> <li>1 to 2 years = 1 points</li> <li>2+ to 3 years = 3 points</li> <li>3+ years = 5 points</li> </ul>	
<b>Maximum available points</b>		<b>40</b>		
<b>Minimum points required</b>		<b>24</b>		

### 2.2.3 Application/Software Architect – Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)

#### Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)

Name of proposed Resource: \_\_\_\_\_

The Bidder SHOULD demonstrate that the Proposed Application/Software Architect – Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
R.1	<p>Experience, as an application/software architect, within the last ten (10) years, on the design, prototyping, components integration and oversight, as part of an IBM Integration Bus (IIB)* – Enterprise Service Bus (ESB) large scale (project value of \$6 million or greater) solution implementation, aligned with a Service Oriented Architecture (SOA), at an enterprise level with multiple stakeholders (greater than 2).</p> <p>*Or previous versions or instances.</p>	15	<ul style="list-style-type: none"> <li>• 3+ to 4 years = 5 points</li> <li>• 4+ to 5 years = 10 points</li> <li>• 5+ years = 15 points</li> </ul>	
R.2	<p>Experience, as an application/software architect, within the last ten (10) years, performing the integration of IBM IIB-ESB* with one or more of the following products:</p> <ul style="list-style-type: none"> <li>• IBM Operational Decision Manager (ODM)* Standard or Advanced</li> <li>• IBM InfoSphere Identity Insight (ISII)*</li> <li>• IBM Master Data Management (MDM)*</li> <li>• IBM Business Process Management (BPM)* Advanced</li> </ul> <p>*Or previous versions or instances.</p>	15	<ul style="list-style-type: none"> <li>• 1 to 2 years = 5 points</li> <li>• 2+ to 3 years = 10 points</li> <li>• 3+ years = 15 points</li> </ul>	

Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)				
Name of proposed Resource: _____				
The Bidder SHOULD demonstrate that the Proposed Application/Software Architect – Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) has:				
			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
R.3	<p>Experience, as an application/software architect, within the last ten (10) years, in the development of security requirements* of an IBM IIB-ESB* implementation that required integration with one or more of the following COTS:</p> <ul style="list-style-type: none"> <li>• Master Data Management (MDM)**</li> <li>• IBM Business Process Management (BPM)** Advanced</li> <li>• IBM Operational Decision Manager (ODM)** Standard or Advanced</li> <li>• IBM InfoSphere Identity Insight (ISII)**</li> <li>• IBM Global Name Manager (GNM)</li> <li>• IBM InfoSphere Information Server DataStage or QualityStage</li> </ul> <p>*Security requirements include the integration of MDM with other products part of a solution and alignment with security frameworks, security policies, and guidelines.</p> <p>**Or previous versions or instances.</p>	15	<ul style="list-style-type: none"> <li>• 1 to 2 years = 5 points</li> <li>• 2+ to 3 years = 10 points</li> <li>• 3+ years = 15 points</li> </ul>	

**Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)**

**Name of proposed Resource:** \_\_\_\_\_

**The Bidder SHOULD demonstrate that the Proposed Application/Software Architect – Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) has:**

			<b>BIDDER'S RESPONSE</b>	
<b>#</b>	<b>RATED CRITERIA</b>	<b>POINTS MAX</b>	<b>DEMONSTRATED EXPERIENCE</b>	<b>INSERT PAGE # OF RESUME</b>
<b>R.4</b>	<p>Experience, within the last ten (10) years, working as an application/software architect on projects with an ESB component for a government* client.</p> <p>*Government may include the Federal, Provincial or Municipal Government. The Government of Canada includes any department, agency, board of the Government of Canada or a Crown corporation.</p>	5	<ul style="list-style-type: none"> <li>• 1 to 2 years = 1 points</li> <li>• 2+ to 3 years = 3 points</li> <li>• 3+ years = 5 points</li> </ul>	
<b>Maximum available points</b>		<b>50</b>		
<b>Minimum points required</b>		<b>30</b>		

## 2.2.4 Application/Software Architect – Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced

### Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced

Name of proposed Resource: \_\_\_\_\_

The Bidder SHOULD demonstrate that the Proposed Application/Software Architect – Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
R.1	<p>In addition to M2, experience, within the last ten (10) years, working as an application/software architect on the design, prototyping, components integration and oversight, as part of an IBM Operational Decision Manager (ODM)*, large scale (project value of \$6 million or greater) solution implementation, aligned with a Service Oriented Architecture (SOA), at an enterprise level with multiple stakeholders (greater than 2).</p> <p>*Or previous versions or instances.</p>	15	<ul style="list-style-type: none"> <li>• 3+ to 4 years = 5 points</li> <li>• 4+ to 5 years = 10 points</li> <li>• 5+ years = 15 points</li> </ul>	
R.2	<p>Experience, within the last ten (10) years, working as an application/software architect on the integration of IBM Operational Decision Manager (ODM)* with one or more of the following IBM products listed below on a large scale project (project value of \$6 million or greater) solution implementation at an enterprise level with multiple stakeholders (greater than 2).</p> <ul style="list-style-type: none"> <li>• IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)*</li> <li>• IBM Business Process Management (BPM)* Advanced</li> <li>• IBM InfoSphere Information Server (IIS) DataStage or QualityStage</li> </ul> <p>*Or previous versions or instances,</p>	15	<ul style="list-style-type: none"> <li>• 1 to 2 years = 5 points</li> <li>• 2+ to 3 years = 10 points</li> <li>• 3+ years = 15 points</li> </ul>	

Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced				
Name of proposed Resource: _____				
The Bidder SHOULD demonstrate that the Proposed Application/Software Architect – Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced has:				
			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
R.3	<p>Experience, within the last ten (10) years, as an application/software architect in the development of security requirements* of a solution implementation that required integration with one or more of the following COTS:</p> <ul style="list-style-type: none"> <li>• IBM Operational Decision Manager (ODM)** Standard or Advanced</li> <li>• IBM InfoSphere Identity Insight (ISI)**</li> <li>• IBM Master Data Management(MDM)**</li> <li>• IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)**</li> <li>• IBM Global Name Manager (GNM)</li> <li>• IBM InfoSphere Information Server DataStage or QualityStage</li> <li>• IBM Business Process Management (BPM)** Advanced</li> </ul> <p>*Security requirements include the integration of IBM Operational Decision Manager (ODM) Standard or Advanced with other products part of a solution and alignment with security frameworks, security policies, and guidelines.</p> <p>**Or previous versions or instances.</p>	15	<ul style="list-style-type: none"> <li>• 1 to 2 years = 5 points</li> <li>• 2+ to 3 years = 10 points</li> <li>• 3+ years = 15 points</li> </ul>	

Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced				
Name of proposed Resource: _____				
The Bidder SHOULD demonstrate that the Proposed Application/Software Architect – Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced has:				
			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
R.4	<p>Experience, within the last ten (10) years, working as an application/software architect on projects with a rule engine for a government* client.</p> <p>*Government may include the Federal, Provincial or Municipal Government. The Government of Canada includes any department, agency, board of the Government of Canada or a Crown corporation.</p>	5	<ul style="list-style-type: none"> <li>• 1 to 2 years = 1 points</li> <li>• 2+ to 3 years = 3 points</li> <li>• 3+ years = 5 points</li> </ul>	
Maximum available points		50		
Minimum points required		30		



## 2.2.5 Technology Architect – Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) Configuration and Release Management

### Experience and Expertise of the Proposed Technology Architect - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) Configuration and Release Management

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Technology Architect - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) Configuration and Release Management has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
<b>R.1</b>	<p>Experience within the last ten (10) years working as a technology architect working on the configuration, optimization and deployment of an IBM Integration Bus (IIB) - Enterprise Service Bus (ESB)* project solution implementation, aligned with a Service Oriented Architecture (SOA), in large scale projects (project value of \$6 million or greater) at an enterprise level with multiple stakeholders (greater than 2).</p> <p>*Or previous versions or instances.</p>	15	<ul style="list-style-type: none"> <li>• 3 to 4 years = 5 points</li> <li>• 4+ to 5 years = 10 points</li> <li>• 5+ years = 15 points</li> </ul>	
<b>R.2</b>	<p>Experience, within the last ten (10) years, as a technology architect performing the integration of IBM Integration Bus (IIB) - IBM Enterprise Service Bus (ESB)* with the IBM Business Process Management (BPM)* Advanced IBM product and one or more of the following IBM products:</p> <ul style="list-style-type: none"> <li>• IBM Operational Decision Manager (ODM)* Standard or Advanced</li> <li>• IBM InfoSphere Identity Insight (ISII)*</li> <li>• IBM Master Data Management(MDM)*</li> <li>• IBM Global Name Manager (GNM)</li> <li>• IBM InfoSphere Information Server DataStage or QualityStage</li> </ul> <p>*Or previous versions or instances.</p>	15	<ul style="list-style-type: none"> <li>• 1 to 2 years = 5 points</li> <li>• 2+ to 3 years = 10 points</li> <li>• 3+ years = 15 points</li> </ul>	

Experience and Expertise of the Proposed Technology Architect - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) Configuration and Release Management				
Name of proposed Resource: _____				
The Bidder SHOULD demonstrate that the Proposed Technology Architect - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) Configuration and Release Management has:				
			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
R.3	<p>Experience, within the last ten (10) years, working as a technology architect on projects with an MDM component for a government* client.</p> <p>*Government may include the Federal, Provincial or Municipal Government. The Government of Canada includes any department, agency, board of the Government of Canada or a Crown corporation.</p>	5	<ul style="list-style-type: none"> <li>1 to 2 years = 1 points</li> <li>2+ to 3 years = 3 points</li> <li>3+ years = 5 points</li> </ul>	
Maximum available points		35		
Minimum points required		21		

### 3.0 TOTAL POINT-RATED CRITERIA

Criterion	Maximum Available Points	Minimum Points Required	Points Achieved
2.1	60	36	
2.2.1	35	21	
2.2.2	40	24	
2.2.3	50	30	
2.2.4	50	30	
2.2.5	35	21	
Total	270	162	
<b>TO BE RESPONSIVE, THE BIDDER MUST OBTAIN A TOTAL OF MINIMUM 162 POINTS</b>			

**APPENDIX A OF ATTACHMENT 3**  
**RFP BILLABLE DAYS RESPONSE TABLE**

Bidder Name: \_\_\_\_\_

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

RESOURCE CATEGORY	NUMBER OF BILLABLE DAYS			
	Cross Reference to Contract Reference #  Billing Period: ____/____/____ (dd/mm/yy) To ____/____/____ (dd/mm/yy)	Cross Reference to Contract Reference #  Billing Period: ____/____/____ (dd/mm/yy) To ____/____/____ (dd/mm/yy)	Cross Reference to Contract Reference #  Billing Period: ____/____/____ (dd/mm/yy) To ____/____/____ (dd/mm/yy)	Cross Reference to Contract Reference #  Billing Period: ____/____/____ (dd/mm/yy) To ____/____/____ (dd/mm/yy)
Programmer/Software Developer				
Application/Software Architect				
Test Coordinator				
Technology Architect				

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**APPENDIX B OF ATTACHMENT 3**

**RFP CONTRACT REFERENCE RESPONSE FORM**

To meet 1.0 M2 of attachment 3, the Bidder must have demonstrated contract experience in supplying all of the resource categories or similar resource categories, for the required Minimum Billable Days per resource category, within the past seven years prior to the Initial Solicitation Closing Date. For each individual resource category, the services provided must have been provided using a maximum of five contracts. All resources provided must have completed at least 50% of the tasks detailed in appendix C of attachment 3, for the resource category for which they were provided.

Bidder Name: \_\_\_\_\_ Bidder Contract Reference #: \_\_\_\_\_

**SECTION 1: CLIENT INFORMATION**

Government client (Yes/No)	
Client Organization Name	
Client Contact Name	
Address	
Telephone	
Fax	
E-mail	

**SECTION 2: CONTRACT INFORMATION**

Contract Value	
Award Date	
Expiry Date	
Description of requirement:	

---

SECTION 3: RESOURCE DETAILS	
Category of Personnel and Level	Tasks performed under the contract with a cross reference to each specific SOW associated task

## **APPENDIX C OF ATTACHMENT 3**

### **LIST OF TASKS**

#### **1) Programmer/Software Developer**

- Develop and prepare diagrammatic plans for solution of business, scientific and technical problems by means of computer systems of significant size and complexity.
- Analyze the problems outlined by system analysts and designers in terms of such factors as style and extent of information to be transferred to and from storage units, variety of items to be processed, extent of sorting, and format of final printed results.
- Select and incorporate available software programs.
- Design detailed programs, flow charts, and diagrams indicating mathematical computation and sequence of machine operations necessary to copy and process data and print the results.
- Translate detailed flow charts into coded machine instructions and confer with technical personnel in planning programs.
- Verify accuracy and completeness of programs by preparing sample data, and testing them by means of system acceptance test runs made by operating personnel.
- Correct program errors by revising instructions or altering the sequence of operations.
- Test instructions, and assemble specifications, flow charts, diagrams, layouts, programming and operating instructions to document applications for later modification or reference.

#### **2) Application/Software Architect**

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

### 3) Test Coordinator

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

### 4) Technology Architect

- Develop technical architectures, frameworks and strategies, either for an organization or for a major application area, to meet the business and application requirements.
- Identify the policies and requirements that drive out a particular solution.
- Analyze and evaluate alternative technology solutions to meet business problems.
- Ensures the integration of all aspects of technology solutions.
- Monitor industry trends to ensure that solutions fit with government and industry directions for technology.
- Provide information, direction and support for emerging technologies.
- Perform impact analysis of technology changes.
- Provide support to applications and technical support teams in the proper application of existing infrastructure.
- Review application and program design or technical infrastructure design to ensure adherence to standards and to recommend performance improvements.



## **Annex A - Statement of Work (SOW)**

Acquisition of Professional Services for SOAPS-MDMS-ERASS

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## 1. Introduction

The Canada Border Services Agency (CBSA) is undertaking an ambitious agenda of change in support of various key initiatives (e.g. Beyond the Border, Entry-Exit, Biometrics, Generic Passage Flow), and Border modernization efforts. The Information, Science and Technology Branch (ISTB) support these efforts with oversight and alignment of major capital projects and the associated information technology solutions. Traditional IT functions have been augmented with program directorates that drive business transformation efforts and alignment of business solutions in portfolios for Travelers, Commercial, Common and Corporate projects.

In order to advance the planning, development and implementation of the CBSA's transformation agenda, ISTB has implemented an enterprise approach to the management of its portfolio of systems, projects and services. The following key steps have been taken to implement this enterprise approach to portfolio management:

- The creation of ISTB Service Portfolio Directorates – Corporate, Commercial, Traveler and Common Services;
- The implementation of a Service Life Cycle Management Framework (SLMF) to help align the provision of ISTB services with the needs of CBSA. The SLMF is used to integrate the methods, processes, roles and responsibilities within ISTB with CBSA's business strategy to deliver value. The SLMF establishes a baseline from which ISTB can plan, build, operate, manage and evolve services; and
- The alignment and implementation of the following frameworks: Project Management, Project Portfolio and Service Life Cycle Management.

As part of this transformation the Common Services Portfolio has been created with the mandate of leading key projects to deliver various new enterprise building block capabilities and services for CBSA. These projects include Service Oriented Architecture Platform Services (SOAPS), Master Data Management Services (MDMS), and Enterprise Risk Assessment Support Services (ERASS). Together, they will provide enterprise back-end capabilities for Entry-Exit and other key CBSA initiatives.

## 2. Background

The Common Services Portfolio has a mandate to plan, lead and stand up, in multiple releases, key mission-critical, large-scale, high-volume foundational services to deliver increased horizontal capabilities and services for CBSA. The services to be implemented are Service Oriented Architecture Platform Services (SOAPS), Master Data Management Services (MDMS), and Enterprise Risk Assessment Support Services (ERASS).

The delivery of these foundational services will allow CBSA to increase its ability to meet its security obligations and provide both efficient and effective management of its resources in support of risk management and assessment activities.

## 2.1 SOAPS

SOA will enable reusable, horizontal enterprise services providing modern, robust, and agile IT services. The CBSA SOA services will be realized by integrating a number of Commercial Off-the-Shelf (COTS) products, augmented by custom development for capabilities not readily available in the market.

The SOA platform services will be a cornerstone of CBSA's information technology systems to promote the development of horizontal services within the enterprise, they will enable re-use of common business function.

These platform services will be used by CBSA Lines of business (LOB) initiatives to develop and deploy IT-enabled business services. COTS products, ESB IBM Integrated Bus (IIB), IBM Business Process Manager (BPM), IBM Operational Decision Manager (ODM) Standard, and IBM Operational Decision Manager (ODM) Advanced will be used to enable and support the SOA platform services.

## 2.2 MDMS

MDM will become the authoritative system of record for CBSA's people and business tombstone data and will be critical in enabling a 360 degree view of people and businesses. After the MDM system is put in place, all systems at CBSA will have the ability to integrate with the MDM solution when requiring access to people and business tombstone data.

Stewards responsible for maintaining the MDM data quality will be put in place as part of the initiative and will align to the overall direction for data governance to be provided by the Enterprise Data Governance initiative.

An ingestion service based on IBM InfoSphere DataStage and QualityStage COTS, under the IBM InfoSphere Information server (IIS) product suite, will be used to feed required data (initial loads and ongoing feeds) from various CBSA data sources into relevant COTS for search purposes.

The MDMS requires the use of the following architecture components:

- The Master Data Management (MDM) component will provide services to maintain and search party information (businesses and people) as well as a user interface to govern the mastered data (data stewardship interface).
- The Data Preparation and Loading Service (DPLS) component will provide services to extract, cleanse, standardize, transform and ingest data during initial load as well as ongoing operational processes.

## 2.3 ERASS

Enterprise Risk Assessment Support Service (ERASS) will build upon the SOA platform to deliver the Entity Resolution and Search Service providing enterprise services in support of the CBSA risk assessment landscape.

Its primary services relate to identity resolution, fuzzy search, and federated search of information related to a specified person across multiple LOB systems. ERASS is dependent on MDMS and SOAPS as a result of service provisioning and utilization amongst them.

ERASS will leverage MDMS for entity resolution, data preparation, and data loading services. ERASS will also require the ESB component within SOAPS to host the public interface and processes that comprise the services offered by ERASS.

Additionally, ERASS could make use of Informatica SSA Name 3 as a component of the Fuzzy Search Service. Relationship resolution is an additional service offered by ERASS which will provide obvious and non-obvious relationship discovery capabilities for ingested entities. The Relationship Resolution Service (RRS) will require IBM's InfoSphere Identity Insight (ISII) COTS software product as an architecture component.

## 2.4 Travellers – Entry-Exit

Entry-Exit will be the initial on-boarder to the components included in the SOA platform services. Entry-Exit is responsible for the development of a key Government of Canada commitment under the Canada US Border Action plan, to create a Canadian entry and exit information system which will, ultimately, provide a valuable new source of information with potential benefits for security, law enforcement and program integrity. The key deliverables of the Entry-Exit Project rely on the ability to identify individuals and recognize if they are known or unknown to CBSA.

The delivery of the Entry-Exit project is dependent on the components found in the SOA platform services. Entry-Exit will leverage the SOA and MDM components to deliver the following:

- Calculating duration of complete Entry to Exit Events.
- Calculating duration of complete Exit to Entry Events
- Calculating duration of open Exit Events.
- Calculating duration of open Entry Events.
- Calculating complete events over specified periods of time.
- Reconciliation of data from multiple sources to create an Entry or Exit Event.
- Determination of mode of transportation.
- Enhanced people name searching and matching support;
- Identity resolution for entities that exist in multiple databases;
- Relationship resolution for entities across multiple databases, and;
- Alerting.

An ingestion service based on IBM InfoSphere DataStage and QualityStage COTS, under the IIS product suite, will be used to feed required data (initial loads and ongoing feeds) from various CBSA data sources into relevant COTS for search purposes.

### 3. Objective

The specific objective of this procurement is to acquire the professional services on an as required basis to support the work of CBSA in the establishment and integration of the above mentioned key mission-critical foundational services, i.e. SOAPS, MDMS, and ERASS.

It is expected that the Contractor's resources will be used across CBSA. The resources will be involved in the architecture and design, development, configuration, testing, optimization, integration with other related components and systems, deployment, and support and maintenance of the above mentioned foundational services in a complex technical environment using the Crown-owned suite of commercial off-the-shelf (COTS) products.

### 4. Scope

The scope of work consists of the acquisition of professional services to provide guidance, expertise, deliverables, and assistance to perform the development, deployment, configuration, integration, and post-implementation maintenance support of the architecture components required for SOAPS, MDMS, and ERASS.

On an as and when requested basis, through the issuance of Task Authorizations (TAs), the Contractor must perform the tasks as described in section 7 below.

To realize this delivery within the time constraints, CBSA foresees a requirement for the assistance of professional services, starting from October 2016 until the end of March 2020, in the following domains: (1) architecture, (2) software development and configuration, (3) system analysis, (4) testing services, (5) business analysis, (6) IT Security, and (7) systems-solutions integration.

CBSA plans to iterate the delivery of the above-mentioned services through phases identified in section 5 below: (1) Planning, (2) Building, (3) Verification, (4) Production, (5) On-Boarding, (6) Maintenance. Each phase will include embedded controls and checkpoints and will require the work of professional services for which categories and tasks are identified below in sections 6 and 7. The resources may be required to perform tasks in any or all of the phases. These services need to be delivered in accordance with CBSA approved methodologies and frameworks.

#### 4.1 Out of Scope – End-User Support

The Contractor will not be required to provide End-User Support following post-implementation of the architecture components required for SOAPS, MDMS, and ERASS.

## 5. Phases

The work delivery of the above-mentioned services will need to be performed iteratively through phases. Each phase has a set of expected deliverables. Note that there may be some overlap in the timing of the phases such that a later phase may begin before the prior phase has completed.

Deliverables may include but are not limited to the following:

1. Planning Phase – System Requirements Specifications (SRS), Architecture and Design Specification (ADS), System Use Cases (SUC), System Requirements Traceability Matrix (S-RTM), high level architecture, preliminary User Interface (UI) screens, and master test plan;
2. Building Phase – System components and integration, unit, integration and component test plan, development release notes, ADS, S-RTM, Test to System Requirements Traceability Matrix (TS-RTM), implementation schedule;
3. Verification Phase – Master test plan (fully defined), functional acceptance plan, verification test plan, verification test report, release notes, defects, build book, component and integration documentation, screen captures and hierarchy, ADS, TS-RTM, production implementation schedule;
4. Production Phase – SRS, comprehensive traceability matrix, master test plan, test reports, ADS, operations release guide, release notes, Service Level Agreements (SLAs), build book;
5. On-boarding Phase – client engagement plan, technical qualification and assessment, client readiness and development, integration endorsement and testing, production readiness assessment, implementation schedule, SRS, ADS, SUC;
6. Maintenance Phase – Maintenance system documentation, maintenance component and integration documentation, maintenance performance verification testing, operations services documentation, monitoring and reporting requirements.

## 6. Resource Categories

The table below identifies the categories of expert resources that CBSA anticipates requiring on an as and when requested basis.

**Note to Bidders:** The following table applies to Workstream 1 only.

### WORKSTREAM 1

TBIPS Category	Level of Expertise	Area of expertise
Programmer/Software Developer	3	Specialty in IBM InfoSphere Information Server (IIS) DataStage and QualityStage
	3	Specialty in IBM Master Data Management (MDM) - Java development
	3	Specialty in pME (probabilistic Matching Engine) - Matching algorithm development
	3	Specialty in IBM Infosphere Identity Insight (ISII)
	3	Specialty in IBM Global Name Management (GNM)
Application/Software Architect	3	Specialty in IBM Master Data Management (MDM) Server
	3	Specialty in IBM InfoSphere Information Server (IIS) DataStage and Quality Stage
	3	Specialty in IBM Infosphere Identity Insight (ISII)
Business System Analyst	3	Specialty in IBM Master Data Management (MDM) - Data Governance.
Technology Architect	3	IBM Master Data Management (MDM) Configuration and Release Management

**Note to Bidders:** The following table applies to Workstream 2 only.

### WORKSTREAM 2

TBIPS Category	Level of Expertise	Area of expertise
Programmer/Software Developer	3	Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)
	3	Specialty in IBM Business Process Management (BPM) Advanced
	3	Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced (including the Event Management System (EMS))
Application/Software Architect	3	Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)
	3	Specialty in IBM Business Process Management (BPM) Advanced
	3	Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced (including the Event Management System (EMS))
Test Coordinator	3	Specialty in Test coordination of one or many of the following Products: IBM MDM, IBM IIS DataStage and QualityStage, IBM ISII, IBM IIB-ESB, IBM GNM, IBM Operational Decision Manager (ODM) Standard and Advanced
Technology Architect	3	IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) Configuration and Release Management



## 7. Tasks and Activities

This section describes the categories of expert resources and the basic responsibilities for each that CBSA anticipates will be required to build, integrate, test, and deploy a large-scale integrated SOA, MDM, and ERASS foundation. The Contractor may be required to perform the tasks and produce the deliverables identified, but not limited to, the lists provided below. Each individual Task Authorization (TA) will detail the specific tasks and deliverables to be completed.

**Note to Bidders:** *Either Workstream 1 or 2, whichever applies (based on whether the successful bidder is for Workstream 1 or 2), will be included in any resulting contract.*

### WORKSTREAM 1

#### 7.1 Programmer/Software Developer

The resources identified may be required to participate in any or all phases identified in the Scope section above.

##### 7.1.1 Specialty in IBM InfoSphere Information Server (IIS) DataStage and QualityStage

Tasks (may include but not limited to the following) -

- Develop DataStage extract, transform, and load (ETL) jobs using the DataStage ETL scripting language to extract source data, transfer data and generate MDM xml requests;
- Develop jobs to extract data from Master Data Management (MDM), and load into CBSA data source;
- Design, develop and test QualityStage name standardization jobs using the QualityStage scripting language based on CBSA name standardization rules provided; and
- Perform integration with the following: IBM Enterprise Service Bus, IBM Integration Bus (ESB-IIB), and MDM.

Deliverables (may include but not limited to the following) –

- Detailed design documents for all customized code and configuration solution components for Extract, Transform, and Load (ETL) jobs using IBM IIS DataStage;
- Detailed design documents for all customized code and configuration solution components for ETL jobs using IBM IIS QualityStage;
- ETL jobs for:
  - CBSA MDM data ingestion from source databases; and
  - Loading MDM CBSA entity identification to source system.
- QualityStage jobs for CBSA name standardization; and
- Loading MDM data into MDM downstream systems such as Enterprise Data Warehouse (EDW) or Business Intelligence (BI).

### **7.1.2 Specialty in IBM Master Data Management (MDM) - Java development**

Tasks (may include but not limited to the following) -

- Review of MDM detail design document in order to confirm or identify implementation approach;
- Design and develop IBM MDM server solution components including web service customizations and user interface customizations using Java technologies;
- Design and implement system integration components to integrate the IBM InfoSphere MDM server solution with CBSA business systems and third party reference data sources;
- Document the processes and steps needed to build, administer and support all tests, development and production environments;
- Perform MDM knowledge transfer to CBSA application support team;
- Perform the activities required for solution implementation, integration, and operation in production;
- Perform defect analysis and create new requirements as required;
- Modify service or solution design, as necessary;
- Confirm continued operation of integrated service or solution;
- Integration with IBM Integration Bus (IIB) - Enterprise Service Bus (ESB);
- Integration IBM InfoSphere Information Server (IIS) QualityStage and DataStage; and
- Package fixed or enhanced solution for redeployment.

Deliverables (may include but not limited to the following) –

- System requirements, System Use Cases;
- Application code, including customizations;
- Updated detailed design documents;
- Developed, integrated and tested MDM component working with an approved interchange data format; and
- MDM server solution component packaging and promotion strategy document.

### **7.1.3 Specialty in pME (probabilistic Matching Engine) - Matching algorithm development**

Tasks (may include but not limited to the following) –

- Lead business requirement gathering on party matching scenarios;
- Design and implement IBM MDM server business rule configurations including pME matching rules, duplicate suspect processing rules, data survivorship rules, business validation rules;
- Customize and fine tune MDM pME matching algorithm based on business requirements;
- Review matching result with business team;
- Support MDM initial load and incremental process; and

- MDM pME matching algorithm developer will be provided with CBSA data source to MDM data mapping document, and subset of CBSA production source data.

Deliverables (may include but not limited to the following) –

- System Use Cases, system requirements;
- Detailed design documents for all customized code and configurations for IBM InfoSphere MDM server related solution components;
- High Level Design document for pME rules, duplicate suspect processing and data survivorship rules;
- Application code, including customizations;
- pME configuration;
- Unit, integration and system test plan documents and customized code, and configuration solution components for IBM InfoSphere MDM Server related solution components;
- IBM InfoSphere MDM server solution component packaging and promotion strategy document;
- Fully configured and tested probability Matching Engine (pME) working with an approved interchange data format and matching business requirements; and
- Other analysis, advice, and guidance as required.

#### **7.1.4 Specialty in IBM Infosphere Identity Insight (ISII)**

Tasks (may include but not limited to the following) -

- Package Service solution for deployment;
- Perform initial and ongoing data ingestion;
- Design and develop integration points with new data sources;
- Configure deliverables to integrate into CBSA testing environment;
- Tune performance of solution (including data review and validation);
- Tune solution to meet non-functional requirements;
- Conduct functional and non-functional testing in CBSA environment; and
- Conduct integration testing with CBSA applications and other components include ESB-IIB, MDM, IIS DataStage and QualityStage.

Deliverables (may include but not limited to the following) –

- Application code, including customizations;
- Detailed design documents for all customized code and configuration; and
- System requirements and system use cases.

#### **7.1.5 Specialty in IBM Global Name Management (GNM)**

Tasks (may include but not limited to the following) -

- Work collaboratively in a multi-disciplinary project environment contributing significant IBM Global Name Management (GNM) solution expertise;
- Contribute to name standardization rules;
- Document and analyze complex business requirements, business rules, System Use Cases and system requirements;
- Design and develop IBM GNM solution components including web service customizations and user interface customizations using Java technologies;
- Design and develop system integration components to integrate the IBM GNM solution with CBSA business systems and third party reference data sources; and
- Contribute to planning and execution of performance testing of IBM GNM solution.

Deliverables (may include but not limited to the following) –

- System Use Cases, system requirements;
- Detailed design documents for all customized code and configurations for IBM GNM related solution components;
- High level design document for name standardization rules;
- Application code, including customizations;
- Unit, integration and system test plan documents and customized code and configuration solution components for IBM GNM related solution components;
- Developed, integrated and tested GNM component working with an approved interchange data format; and
- IBM GNM component packaging and promotion strategy document.

## **7.2 Application/Software Architect**

### **7.2.1 Specialty in IBM Master Data Management (MDM) Server**

Tasks (may include but not limited to the following) -

- Provide assistance and guidance to install, configure, and test MDM products to all CBSA environments and document;
- Assist in MDM infrastructure design;
- Review MDM Server components hardware sizing;
- Provide guidance and assistance in performance tuning, load balancing and optimization strategies for IBM InfoSphere MDM Server environment;
- Perform knowledge transfer to CBSA application support team;
- Provide best practices on IBM MDM implementation;
- Assist on MDM and other CBSA Data sources data mapping;
- Review MDM data mapping and MDM business functional requirement;
- Review CBSA non-functional requirement;
- Provide MDM high level design and detail design;
- Provide assistance and guidance to the MDM development team;
- Assist the test coordinator(s) with preparing test cases and providing input to test plans to validate final designs;
- Assist the project manager for resource planning;
- MDM security frameworks and integration with CBSA security policy and identity stores;
- Provide guidance for MDM performance tuning; and
- Integration with ESB-IIB, IIS and ISII.

Deliverables (may include but not limited to the following) –

- Design of MDM environment integrated with IIS server in CBSA data center;
- Installation scripts to install MDM Server on different environments;
- Availability, fail-over and recoverability strategies;
- Step by step installation documentation with screenshots;
- MDM solution high level design document; and
- MDM components detailed design document.

### **7.2.2 Specialty in IBM InfoSphere Information Server (IIS) – DataStage and Quality Stage**

Tasks (may include but not limited to the following) -

- Review CBSA IIS server installation topology;
- Provide assistance and guidance to install and configure information server products for CBSA including WebSphere Information Services Director of Information Server;
- Ensure proper DataStage and QualityStage project version control is in place;
- Provide technical expertise to install and configure InfoSphere for the integration of IIS components;
- IIS security frameworks and integration with CBSA security policy and identity stores; and
- Provide assistance and guidance to performance tuning, load balancing and optimization strategies for IBM InfoSphere in the context of the MDM Server environment.

Deliverables (may include but not limited to the following) –

- Design documentation for IIS server HA environment in CBSA data center, integrated with MDM server; and
- IIS server step by step installation documentation with screenshots.

### **7.2.3 Specialty in IBM Infosphere Identity Insight (ISII)**

Tasks (may include but not limited to the following) -

- As an IBM ISII subject matter expert (SME), provide technical expertise to install and configure of ISII COTS product;
- Prepare and load ISII repository data and setup ongoing data ingestion;
- Support business and technical teams by providing expertise and advice regarding the ISII product usage to meet the business functional requirements;
- Provide assistance on integration with CBSA applications and other components including ESB-IIB, IIS DataStage and QualityStage;
- Provide expertise in the integration of ISII with IBM MDM system;
- ISII security frameworks and integration with CBSA security policy and identity stores;
- Transfer knowledge through documentation and solution design artifacts; and
- Configure matching rules based on various business requirements.

Deliverables (may include but not limited to the following) –

- Technical work breakdown and execution sequence;
- Design options and recommendations;
- Input to MDM standards, procedures, and data governance;
- Development and implementation strategy; and
- Written analysis, strategic advice, and guidance as required.

### **7.3 Business System Analyst**

The resources identified may be required to participate, on demand, in any or all phases identified in the Scope section above.

#### **7.3.1 Specialty in IBM Master Data Management (MDM) – Data Governance**

Tasks (may include but not limited to the following) –

- Responsible for the establishment, maintenance and execution of master data policies and workflow management, proactively maintain the integrity and accuracy of CBSA master data;
- Establish master data policies and procedures to ensure data meets defined quality targets;
- Understand CBSA enterprise data model and processes to successfully define party attributes within master data databases;
- Establish the policies for setting up, maintaining, validating and cleansing CBSA party data;
- Maintain changes to data process maps, document new processes and support ongoing audit requirement;
- Act as subject matter expert and support CBSA projects to ensure that processes meet data policies and procedures best practices;
- Assist senior manager in defining guidelines and KPI for all master data parameters, and build and maintain a data governance framework;
- Assist MDM teams in the creation of business rules, entities, party attributes;
- Understand CBSA application data model and MDM data model;
- Perform CBSA master data maintenance;
- Resolve duplicate suspect parties in MDM database; and
- Identify and resolve data quality issues.

Deliverables (may include but not limited to the following) –

- CBSA master data governance business requirement documents;
- CBSA master data governance business process and rules documents;
- MDM data maintenance report;
- MDM suspect duplication resolution report; and
- MDM data quality issue and solution report.

## **7.4 Technology Architect**

The resources identified may be required to participate in any or all phases identified in the Scope section above.

### **7.4.1 IBM Master Data Management (MDM) Configuration and Release Management**

Tasks (may include but not limited to the following) –

- Prepare implementation plans in preparation of solution deployments;
- Develop, implement and maintain automated build and load deployment scripts in order to automatically build and deploy MDM code to different environments;
- Maintain and support MDM source code repository;
- Configure and optimize technical installations including the integration of technical components;
- Administer MDM applications in both development and testing environment; and
- Support the integration of ESB, and IIS.

Deliverables (may include but not limited to the following) –

- MDM repository to maintain application source code; and
- Build script to auto build MDM application, and deployment script to deploy application package to each CBSA server environment.



## **WORKSTREAM 2**

### **7.5 Programmer/Software Developer**

The resources identified may be required to participate in any or all phases identified in the Scope section above.

#### **7.5.1 Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)**

Tasks (may include but not limited to the following) -

- Provide CBSA with expert technical expertise and guidance on developing rules for the IBM SOA Suite Integration Bus platform:
  - Integration of IBM IIB with other IBM SOA suite components (BPM, ODM Standard and Advanced) as well as current and future CBSA information systems;
  - Implementation of Integration solutions using IBM IIB including design, development, testing and deployment of Integration Applications, integration libraries and message flows; and
  - All aspects of testing of solutions developed for the IBM Integration Bus including functional, integration and performance testing.
- Develop best practices and development guidelines;
- Perform performance optimization of Message Flow solutions for IBM Integration Bus;
- Provide best practices and guidelines for component, integration, and performance testing of integration solutions implemented using the IBM IIB;
- Test planning for unit and component testing; and
- Development of developer training material.

Deliverables (may include but not limited to the following) –

- Deployable Integration Applications and libraries developed to CBSA Standards and using CBSA development infrastructure;
- Detailed Design documents for all customized code and configurations for IBM IIB – ESB related solution components;
- Best practices and guidelines documentation;
- Test Plans;
- IIB-related system use cases and system requirements documents; and
- Developer training material documentation.

#### **7.5.2 Specialty in IBM Business Process Management (BPM) Advanced**

Tasks (may include but not limited to the following) -

- Provide CBSA with expert technical expertise and guidance on the following topics:

- Integration of IBM BPM with other IBM SOA Suite components (IIB, ODM Standard and Advanced) as well as current and future CBSA information systems;
  - BPM performance optimization
  - Automated business process execution using IBM BPM including process analysis, process authoring, process application development, testing and deployment;
  - Performance optimization and troubleshooting;
- Provide best practices and development guidelines;
- Design and development of business process orchestrations targeted at the IBM SOA suite toolsets using the IBM SOA development toolsets; and
- Development of developer training material.

Deliverables (may include but not limited to the following) –

- Deployable business process applications developed to CBSA standards and using CBSA development infrastructure;
- Detailed design documents conforming to CBSA SLMF template requirements; more specifically the required ADS section for business process applications;
- Planning for and analysis of results from unit, component and other related test plans for business process applications;
- Documented guidelines and best practices related to business process development;
- BPM-related system use cases and system requirements; and
- Developer training material documentation.

### **7.5.3 Specialty in IBM Operational Decision Manager (ODM) standard and ODM Advanced (including the Event Management System (EMS))**

Tasks (may include but not limited to the following) -

- Provide CBSA with expert technical expertise and guidance on the following topics:
  - Integration of ODM and ODM Advanced with other IBM SOA suite components (IIB and BPM) as well as current and future CBSA information systems;
  - Automated decision making using ODM Standard including rule development, rule flow development, rule application testing and deployment;
  - Automated triggering of business processes and notifications based on event pattern matching using ODM Advanced including event pattern design and development, event application testing and deployment;
  - Performance optimization and troubleshooting; and
  - Provide best practices and development guidelines.
- Planning for and analysis of results from unit, component and other related test plans for business rule applications;
- Assist CBSA with the design and development of:
  - Business Object Models (BOM); and

- eXecution Object Models (XOM).
- Development of developer training material.

Deliverables (may include but not limited to the following) –

- Develop deployable business rule applications (including BOMs and XOMs as required) developed to CBSA standards using CBSA development infrastructure and processes.
- Detailed design documents conforming to CBSA SLMF template requirements (specifically the ADS Part 4) for business rule applications;
- Test plans;
- Developer training material documentation;
- Documented guidelines and best practices related to Business and Event Rule Development; and
- BRMS-related System Use Cases and system requirements.

## **7.6 Application/Software Architect**

### **7.6.1 Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)**

Tasks (may include but not limited to the following) –

- Provide CBSA with expert technical expertise and guidance on the following topics:
  - Architecture that includes integration of IBM IIB with other IBM SOA suite components (BPM, ODM Standard and Advanced) as well as with current and future CBSA information systems;
  - Infrastructure and application architecture supporting high availability and disaster recovery;
  - Architecture best practices and guidelines;
  - IIB-ESB security frameworks and integration with CBSA security policy and identity stores; and
  - Guidelines, standards and best practices for when to implement business processes on the IBM Integration Bus versus the IBM Business Process Management System.

Deliverables (may include but not limited to the following) –

- Best practices, guidelines, standards and procedure documentation for items listed in the task list using CBSA approved templates; and
- Architecture & Design documentation using CBSA approved templates.

### **7.6.2 Specialty in IBM Business Process Management (BPM) Advanced**

Tasks (may include but not limited to the following) –

- Provide CBSA with expert technical expertise and guidance on the following topics:
  - Architecture that includes integration of IBM BPM with other IBM SOA Suite components (IIB, ODM Standard and Advanced) as well as current and future CBSA information systems;
  - Infrastructure and application architecture supporting high availability and disaster recovery;
  - Architecture best practices and guidelines;
  - BPM security frameworks and integration with CBSA security policy and identity stores; and
  - Guidelines, standards and best practices for when to implement business processes on the IBM Integration Bus versus the IBM Business Process Management (BPM) system.

Deliverables (may include but not limited to the following) –

- Best Practices, Guidelines, standards and procedure documentation for items listed in the task list using CBSA Approved templates; and
- Architecture & Design Documentation using CBSA approved templates.

### **7.6.3 Specialty in IBM Operational Decision Manager (ODM) standard and ODM Advanced (including the Event Management System (EMS))**

Tasks (may include but not limited to the following) –

- Provide CBSA with expert technical expertise and guidance on the following topics:
  - Architecture that includes integration of IBM ODM and ODM Advanced with other IBM SOA Suite components (IIB, BPM) as well as current and future CBSA information systems;
  - Infrastructure and application architecture supporting high availability and disaster recovery;
  - Architecture best practices and guidelines; and
  - ODM security frameworks and integration with CBSA security policy and identity stores

Deliverables (may include but not limited to the following) –

- Best Practices, Guidelines, standards and procedure documentation for items listed in the task list using CBSA Approved templates; and
- Architecture & Design Documentation using CBSA approved templates.

## 7.7 Test Coordinator

The test coordinator must plan, manage, schedule, coordinate, and control testing activities for multiple integrated systems and products specifically the ones part of the IBM SOA stack. Product specific knowledge is also required as identified below. The resources identified may be required to participate in any or all phases identified in the Scope section above.

### 7.7.1 Specialty in Test coordination of one or many of the following Products: IBM MDM, IBM BPM, IBM IIS DataStage and QualityStage, IBM IIB-ESB, IBM ODM Standard and Advanced

Tasks (may include but not limited to the following) –

- Provide expertise in all aspects of testing applications developed on IBM SOA stack, including testing of one or many of the following IBM products: ESB flows in IIB, business process automation on IBM BPM, MDM, ISII, IIS, rules and event management in ODM Standard and Advanced;
- Provide advice, guidance for the development of a test strategy, test plans, test scenarios, test cases, unit tests including recommendations for the selection of automated testing tools, and identification of test environment and resources required for testing;
- Develop, prepare and deliver the following documentation: test strategy, test plans, test scenarios, test cases, and test reports templates
- Plan, organize, schedule, and coordinate testing efforts for large enterprise systems, including:
  - Integration testing with CBSA applications and other components including for example: ESB-IIB, ODM Standard, ODM Advanced, MDM, IIS, BPM Advanced, MQ, and HTTP and HTTPS;
  - User acceptance testing (e.g. stress tests);
  - Verification testing of the test environment and tools
  - Ensure alignment of test plan with System Requirements Traceability Matrix (S-RTM)
  - Detailed time and resource estimates required for testing
- Report on test execution and cycles by ensuring completion of test Reports and reporting of bugs found during testing in the bug management system; and
- Complete the test traceability matrix;

Deliverables (may include but not limited to the following) –

- Test Strategy, test plans, test scenarios, test cases;
- Test schedules, test reports, test logs, test traceability matrix;
- Test checklists;
- Test scripts; and
- Verification implementation plan and schedule.

## 7.8 Technology Architect

The resources identified may be required to participate in any or all phases identified in the Scope section above.

### 7.8.1 IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) Configuration and Release Management

Tasks (may include but not limited to the following) –

- Work with Software Configuration Management (SCM) team to provide technical solutions to support SCM processes;
- Conduct consultations with stakeholders aimed at firming up and documenting the required infrastructure design integrating IBM IIB and IBM ESB with cross-platform underpinning technologies;
- Implement and maintain SCM tools pertaining to IBM SOA products (IIB, BPM Advanced, ODM, ODM Advanced);
- Perform defect troubleshooting and root-cause analysis;
- Develop, implement and maintain automated build and deployment scripts;
- Install and configure applications in development and QA environments;
- Provide technical solutions for general SCM tasks such as change control, status accounting and auditing;
- Integration with ESB-IIB, MDM, ODM, ODM Advanced, BPM, ISII, MQ, HTTP, and HTTPS; and
- Provide training and support to end users of SCM tools.

Deliverables (may include but not limited to the following) –

- Installation and Configuration recommendations for the deployment of the IBM IIB – ESB and the customized code and configuration solution components for CBSA related infrastructure;
- Installation and configuration recommendations for the integration of ESB-IIB, MDM, ODM, ODM Advanced, and BPM;
- Capacity management plan and strategy;
- Availability, fail-over and recoverability strategies;
- Test cases, test plans and scripts as required;
- Operations guide(s) as required; and
- Other written deployment and implementation strategies as required.

## 8. Constraints

Professional resources procured through this vehicle will be expected to adhere to the CBSA operating model, following CBSA standards and processes to accomplish their project work. The Contractor's resources will be required to abide by architectural design documents which have been developed and approved prior to the commencement of their services such as Release Proposal, Architecture Design Specification, and System Use Cases. CBSA will provide copies of all templates and policies applicable after contract award.

The professional services resources will be integrated into and collaborating with various CBSA responsibility centers working alongside CBSA employees and other professional contracted resources of varying disciplinary backgrounds.

Knowledge transfer, application code developed for CBSA, and documentation as necessary is expected from all professional resources hired through this vehicle and is required to ensure that CBSA personnel have the knowledge and mechanisms to independently support and sustain the infrastructure deployed through this contract.

Both software and hardware specifications identified in Section 12.2 and 12.3 respectively are provided for information purposes only and may be subject to change. Additional hardware and software components will be included in the applicable Task Authorizations.

Each Task Authorization will identify any additional constraints if applicable.

## 9. Client Support

CBSA will ensure that the Contractor's resource is provided with:

- Security access to the building; and
- Access to relevant project documentation; and
- Workspace and CBSA equipment.

## 10. Work Location

The specific work location will be identified in each Task Authorization. Unless specified otherwise, the work location will be a CBSA office in the National Capital Region (NCR).

## 11. Language Requirement

The resources must be able to perform the work and provide any deliverables in English. Each Task Authorization will identify the specific language requirements.

## 12. Technical Environment

The Canada Revenue Agency (CRA) and Shared Services Canada (SSC) currently provide infrastructure services to CBSA.

### 12.1 CBSA High-Availability (HA) Environment

Critical CBSA business applications require 24-7 availability and dual data center failover. As such, the computing environment including both infrastructure and software applications must be well integrated in ensuring critical CBSA systems are available at all time. This requires an application ability to mask both scheduled and un-scheduled outages. If required, CBSA standard Relational Database Management Systems (RDBMS) are available to store, report and retrieve enterprise authorized data on the CBSA enterprise platforms as defined by the CBSA technical platform document.

The integration of software applications in a highly available environment, paramount to support the model for the SOAPS, may include, but is not limited to, the following technologies:

- Clustered or redundant Web technologies: WebSphere, and Apache.
- Clustered or redundant DBRMS: DB2 with PureScale.
- Redundant LDAP, SiteMinder, and Identity Manager.
- Load balancer technologies using Apache servers and network appliances.
- Cognos SPSS
- SSA-Name3

### 12.2 Software Components

CBSA owns all licenses to use the IBM products found in the table below:

Architecture Component	COTS	Version and Platform	DB and Platform	Description
Master Data Management (MDM)	IBM Master Data Management (MDM)	11.5 on Linux	DB2 on Linux	MDM provides maintenance and search capabilities for mastered businesses and people
Global Name Management (GNM)	IBM Global Name Management (GNM)	5.0 or above	N.A.	Name structure recognition with cultural backgrounds.
Data Preparation and Loading Service (DPLS)	IBM DataStage (DS) and QualityStage (QS)	IIS 11.5	DB2 on Linux	DS and QS extract data from data sources, cleanses, standardizes and loads it into the target database
Business Process Management (BPM)	IBM Business Process Management (BPM) Advanced	8.5.6 or above on Linux	DB2 on Linux	BPM provides business process automation.



Enterprise Service Bus (ESB)	IBM IIB	10 or above	DB2 on Linux	IBM Integration Bus connects applications together. It routes, transforms, and enriches messages from one location to any other location.
Business Rules Management Service (BRMS) and Event Management Service (EMS)	IBM ODM Advanced	8.7 or above	DB2 on Linux	ODM manages the business decision logic that is used by operational systems
	IBM ODM Standard			
Relationship Resolution Service (RRS)	IBM InfoSphere Identity Insight (ISII)	8.1.0 or above	DB2 on Linux	IBM InfoSphere Identity Insight resolves inconsistent, ambiguous identity records into comprehensive entities across multiple data sets
IBM SOA Integrated Development tools	IBM integration Designer, IBM Integration Explorer, IBM Business Process Designer, IBM ODM Rule Designer, IBM ODM Decision Server Event Designer	Various	DB2 on Linux	Set of tool to support the development and implementation of an integrated SOA, MDM, and ERASS foundation.

### 12.3 Hardware specification

The following table provides the hardware specifications in anticipation of the integrated SOA, MDM, and ERASS foundation implementation and delivery:

Component	Hardware	Specifications	Units
MDM	Server specification	Xeon ES-2650 2x8 with 70 PVU score	
	Servers	Blade (Without VM)	36
		Blade (With VM)	30
	Chassis		6
	SAN Storage	Primary Disk capacity (Gb)	15862.50 (gb)
		Mirrored capacity (Gb)	15862.50 (gb)
		SAN ports	
SOA	Servers	Blade 32 cores	8.5625
	Chassis		4

## Appendix A – Non-Functional Requirements

### Volumetric – expected peak number of transactions per second

The following table illustrates the expected volumes (peak number of transactions per second) that are associated with the functioning services:

Component	Service	Year				
		2016	2017	2018	2019	2020
SOA	ESB	36.54	76.37	77.89	79.45	81.04
	BPM	19.21	19.60	19.99	20.39	20.80
	BRMS	27.35	66.99	68.33	69.70	71.09
	EMS	0.42	0.81	0.83	0.85	0.86
ERASS	ERSS	35.76	36.52	37.30	38.10	38.92

### Volumetric – Volumes

Component	COTS	Demand Unit	Release 1	Release 2
MDM	IBM MDM	Created businesses during initial load	6,000,000	N.A.
		Peak transactions per second	27	49
DPLS	IBM DataStage	Peak transactions per second	27	49
	IBM QualityStage or AVI	Transactions per second	27	49

### Volumetric – ID resolution and reconciliation RP

Reconciliation and identity resolution is tightly aligned with Master Data Management (MDM) services for initial load, and coupled with query functionality for ongoing operations.

- Created people during initial load 63,000,000
- Created new people in 5 years after release 50,000,000

### Availability

- The SOA enablement solution system must be highly available for 24-7 service with planned outages of 2 hours per month or 99.9+% operational ability.
- ERASS must be highly available for 24-7 service with 99.5% operational ability.
- MDM must be available 24 hours per day, 7 days per week, and 365 days per year.

## Appendix B – Acronyms

Acronym	Description
ADS	Architecture and Design Specification
BI	Business Intelligence
BPMN	Business Process Modeling Notation
BUC	Business Use Cases
CBSA	Canada Border Services Agency
COTS	Custom Off The Shelf
CRA	Canada Revenue Agency
DPLS	Data Preparation and Loading Service
EDW	Enterprise Data Warehouse
EFSS	Entity Fuzzy Search Service
ERASS	Enterprise Risk Assessment Support Services
ERSS	Entity Resolution and Search Service
ESB	Enterprise Service Bus
ETL	Extract, Transform, and Load
GNM	Global Name Management
GoC	Government of Canada
GC SOA	Government of Canada Service Oriented Architecture
HA	High Availability
IIB	IBM Integration Bus
IIS	InfoSphere Information Server
ISII	InfoSphere Identity Insight
ISTB	Information, Science and Technology Branch
KPI	Key Performance Indicator
LDAP	Lightweight Directory Access Protocol
LOB	Line of Business
MDM	Master Data Management
MDMS	Master Data Management Services
NCR	National Capital Region
ODM	Operational Decision Management
pME	probabilistic Matching Engine
RDBMS	Relational Database Management System
REST	Representational State Transfer
ROI	Return on Investment
RP	Release Proposal
RRS	Relationship Resolution Service
SAN	Storage Area Network
SCM	Software Configuration Management
SLA	Service Level Agreement
SME	Subject Matter Expert
SOA	Service Oriented Architecture
SOAP	Simple Object Access Protocol
SOAPS	Service Oriented Architecture Platform Services

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SRS	System requirements specification
S-RTM	System Requirements Traceability Matrix
SUC	System Use Cases
SSC	Shared Services Canada
TA	Task Authorization
TS-RTM	Test to System Requirements Traceability Matrix
UML	Unified Modeling Language

## Appendix C – Glossary

Acronym or Term	Description
ADS	An Architecture and Design Specification (ADS) document contains architecture and design information. The Architecture definition is contained in Parts 1 and 2; and the Design is captured in Parts 3 and 4.
BPM	Business process management (BPM) is a discipline that uses various methods to discover, model, analyze, measure, improve, and optimize business processes. A business process coordinates the behavior of people, systems, information, and things to produce business outcomes in support of a business strategy.
Deployment	Deployment services support the implementation and rollout of new applications or infrastructure. Activities may include hardware or software procurement, configuration, tuning, staging, installation and interoperability testing.
ETL	ETL is short for extract, transform, and load, three database functions that are combined into one tool to pull data out of one database and place it into another database. <ul style="list-style-type: none"><li>• Extract is the process of reading data from a database.</li><li>• Transform is the process of converting the extracted data from its previous form into the form it needs to be in so that it can be placed into another database. Transformation occurs by using rules or lookup tables or by combining the data with other data.</li><li>• Load is the process of writing the data into the target database.</li></ul>
Implementation	A term used to designate the phases of the system lifecycle that are responsible for the delivery of an information system. It includes the initiation, development and acquisition, and integration and installation phases of the system lifecycle, but excludes the operations and maintenance phase and the disposal phase.
Master Data Management	Master data management (MDM) of product data solutions are software products that: <ul style="list-style-type: none"><li>• Support the global identification, linking and synchronization of product information across</li><li>• heterogeneous data sources through semantic reconciliation of master data</li><li>• Create and manage a central, persisted system of record or index of record for master data</li><li>• Enable delivery of a single product view to all stakeholders, in support of various business benefits</li><li>• Support ongoing master data stewardship and governance requirements through workflow-based</li><li>• monitoring and corrective action techniques</li></ul>
Project implementation	Project implementation or execution is directing, managing, performing and accomplishing the project work, providing the deliverables, and providing work performance information.
Relationship analytical tool	A system that provides services to analyze identities and their relationship for the purpose of fraud detection and risk assessment.
SOA	SOA is an approach for developing enterprise information systems solutions based on services. SOA is an industry best practice, which promotes open architecture. SOA aims to align information system services with business processes and data to enable re-use of business level functions. SOA is a foundation architecture that will influence systems development across the Agency's line of business portfolios.

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GC SOA	The GC Service Oriented Architecture (GC SOA) is a comprehensive reference model that guides the use and adoption of Service Oriented Architectures (SOA) across the Government of Canada.
System integration	It ensures that the various segments and elements of the total system can interface with each other and with the external environment. [Thayer & Thayer European Perspective 1993]

## Appendix D – Tasking Assessment Procedure

1. Where a requirement for a specific task is identified, a draft Task Authorization Form (TA Form) as attached at Appendix E to Annex A will be provided to the Contractor in accordance with the allocation methodology stated in the Contract Article titled "Allocation of Task Authorizations". Once a draft TA Form is received, the Contractor must submit to the Technical Authority a quotation of rates to supply the requested Resource Categories based on the information identified in the TA Form. The quotation must be signed and submitted to Canada within the time for response identified in the TA Form. The Contractor will be given a minimum of 3 working days turnaround time to submit a quotation.
2. For each proposed resource the Contractor must supply a résumé, the requested security clearance information and must complete the Response Tables at Appendix F of Annex A applicable to the Resource Categories identified in the draft TA. The same individual must not be proposed for more than one Resource Category. The résumés must demonstrate that each proposed individual meets the qualification requirements described (including any educational requirements, work experience requirements, and professional designation or membership requirements). With respect to the proposed resources:
  - (i) Proposed resources may be employees of the Contractor or employees of a subcontractor, or these individuals may be independent contractors to whom the Contractor would subcontract a portion of the Work. (Refer to Appendix G to Annex A, Certifications).
  - (ii) For educational requirements for a particular degree, designation or certificate, Canada will only consider educational programmes that were successfully completed by the resource before the date the draft TA was first issued to the Contractor.
  - (iii) For requirements relating to professional designation or membership, the resource must have the required designation or membership by the time of draft TA issuance and must continue, where applicable, to be a member in good standing of the profession or membership throughout the assessment period and Contract Period. Where the designation or membership must be demonstrated through a certification, diploma or degree, such document must be current, valid and issued by the entity specified in this Contract or if the entity is not specified, the issuer must have been an accredited or otherwise recognized body, institution or entity at the time the document was issued.
  - (iv) For work experience, Canada will not consider experience gained as part of an educational programme, except for experience gained through a formal co-operative programme at a post-secondary institution.
  - (v) For any requirements that specify a particular time period (e.g., 2 years) of work experience, Canada will disregard any information about experience if the résumé does not include the relevant dates (month and year) for the experience claimed (i.e., the start date and end date). Canada will evaluate only the duration that the resource actually worked on a project or projects (from his or her start date to end date), instead of the overall start and end date of a project or a combination of projects in which a resource has participated.
  - (vi) A résumé must not simply indicate the title of the individual's position, but must demonstrate that the resource has the required work experience by explaining the responsibilities and work performed by the individual while in that position. Only listing experience without providing any supporting data to describe responsibilities, duties and relevance to the requirement, or reusing the same wording as the TA Form, will not be considered "demonstrated" for the purposes of the assessment. The Contractor should provide complete details as to where, when, month and year, and how, through which activities or responsibilities, the stated qualifications and experience were obtained. In situations in which a proposed resource worked at the same time on more than one

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

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



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## **Appendix E – Task Authorization Form**

**(SEE ATTACHED HERETO)**

## **Appendix F – Resources Assessment Criteria and Response Table**

**(SEE ATTACHED HERETO)**

## Appendix G – Certifications at the TA Stage

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

### 1. CERTIFICATION OF EDUCATION AND EXPERIENCE

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

\_\_\_\_\_  
Print name of authorized individual & sign above

\_\_\_\_\_  
Date

### 2. CERTIFICATION OF AVAILABILITY OF PERSONNEL

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

\_\_\_\_\_  
Print name of authorized individual & sign above

\_\_\_\_\_  
Date

### 3. CERTIFICATION OF STATUS OF PERSONNEL

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

\_\_\_\_\_  
Print name of authorized individual & sign above

\_\_\_\_\_  
Date

### 4. CERTIFICATION OF LANGUAGE - ENGLISH

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

\_\_\_\_\_  
Print name of authorized individual & sign above

\_\_\_\_\_  
Date



## TASK AUTHORIZATION FORM FORMULAIRE D'AUTORISATION DE TÂCHES

**PART 1** (completed by the Technical/Project Authority) / **PARTIE 1** (complété par le Responsable technique / Chargé du projet)

### A. General Information / Informations générales

Contract Number / Numéro du contrat :

Contractor Name / Nom du Contracteur :

Task Authorization (TA) No.  
N° de l'autorisation de tâches (AT) :

Commitment No.  
N° de l'engagement :

Financial Coding  
Code financier :

Date of Issuance  
Date d'émission :

Response required by  
Réponse requise  
d'ici le :

### B. For Amendments Only / Aux fins de modification seulement

Amendment No. / N° de la modification :

Reason for the Amendment / Raison pour la modification :

### C. TA Requirements / Exigences relatives à l'AT

Required Resource(s) / Ressource(s) requise(s)

Category and Level Catégorie et Niveau	Estimated Level of Effort (days) / Niveau d'effort estimatif (jours)	Linguistic Profile / Profile linguistique	Required Level(s) of Security / Niveau(x) de sécurité requis

Statement of Work (tasks, deliverables, reports, etc.) / Énoncé des travaux (tâches, livrables, rapports, etc.)

See attached / Voir pièce jointe

#### Period of Services / Période de service:

Initial Start Date / Date de début initiale :

Initial End Date / Date de fin initiale :

Extended End Date (See Reason for the Amendment) / Date de fin prolongée (voir Raison pour la modification):

☐ Option To Extend Initial End Date / Option pour prolonger la date de fin initiale

Optional End Date(S) / Date(s) de fin optionnelle(s)	Status / Statut
	<input type="radio"/> In Effect / en vigueur

Travel Requirement(s) / Exigence(s) de voyage : n/a

Work Location(s) / Lieu(x) de travail :

**PART 2** (completed by the Contractor and/or the Technical/Project Authority) / **PARTIE 2** (complété par le Contracteur et/ou le Responsable technique / Chargé du projet)

### Contractor Resource(s) and Estimated Cost / Ressource(s) du Contracteur et Coût total estimatif

Note: once approved, only the following resources may provide services under this TA. / Nota : une fois approuvée, seules les ressources suivantes peuvent fournir des services sous la présente AT

Name / Nom Category and Level / Catégorie et Niveau	PWGSC Security File No. / N° du dossier de sécurité TPSGC	Linguistic Profile / Profil linguistique	Per Diem Rate / Taux journalier	Estimated Level of Effort (days) / Niveau d'effort estimatif (jours)	Total Estimated Cost / Coût total estimatif
0					\$0.00
0					\$0.00

Estimated Cost / Coût estimatif	<b>\$0.00</b>
Total Estimated Travel and Living Cost / Coût total estimatif de voyage et de vie	<b>\$0.00</b>
<b>Total Estimated Cost / Coût total estimatif</b>	<b>\$0.00</b>

### PART 3 - TA APPROVAL BY CANADA / PARTIE 3 - APPROBATION DE L'AT PAR LE CANADA

<p>By signing this TA, the authorized client authority and/or the PWGSC Contracting Authority certify(ies) that the content of this TA is in accordance with the conditions of the Contract.</p> <p>The client's authorization limit is <b>\$200,000</b>. When the value of a TA and its amendments (excluding Applicable Taxes) is in excess of this limit, the TA must be signed by the authorized client and forwarded to the PWGSC Contracting Authority for authorization.</p>		<p>En apposant sa signature sur l'AT, le client autorisé et/ou l'autorité contractante de TPSGC atteste(nt) que le contenu de cette AT est conforme aux conditions du contrat.</p> <p>La limite d'autorisation du client est <b>\$200,000</b>. Lorsque la valeur de l'AT et ses modifications (excluant les taxes applicables) dépasse cette limite, l'AT doit être signée par le client autorisé et transmise à l'autorité contractante de TPSGC pour autorisation.</p>	
Name of Authorized Client / Nom du client autorisé	Date	Name of Contracting Authority / Nom de l'autorité contractante	Date
Signature		Signature	

### PART 4 - CONTRACTOR SIGNATURE / PARTIE 4 - SIGNATURE DU CONTRACTEUR

<p>Name and Title of individual authorized to sign on behalf of the Contractor / Nom et titre Signature de la personne autorisée à signer au nom de l'entrepreneur</p>		Signature	Date
--	--	-----------	------

## **Appendix F to Annex A**

### **Resources Assessment Criteria and Response Tables**

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

#### **1.0 Mandatory Resource Assessment Criteria**

The experience required for a Mandatory Resource Requirement must be demonstrated through one or multiple referenced projects and each referenced project must have a minimum duration of three (3) months in order to be accepted.

<b>Note to Bidders:</b> <i>The following tables apply to Workstream 1 only.</i>
---

**1.1 Programmer/Software Developer – Specialty in IBM InfoSphere Information Server (IIS) DataStage and QualityStage**

**Experience and Expertise of the Proposed Programmer/Software Developer – Specialty in IBM InfoSphere Information Server (IIS) – DataStage and QualityStage**

**Name of proposed Resource:** \_\_\_\_\_

**The Bidder MUST demonstrate that the Proposed Programmer/Software Developer – Specialty in IBM InfoSphere Information Server (IIS) – DataStage and QualityStage has:**

Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
<b>M.1</b>	<p>A minimum of ten (10) years of experience, within the last twenty (20) years, performing the following tasks as a programmer/software developer:</p> <ul style="list-style-type: none"><li>• Design detailed programs, flow charts, and diagrams indicating mathematical computation and sequence of machine operations necessary to copy and process data and print the results.</li><li>• Translate detailed flow charts into coded machine instructions and confer with technical personnel in planning programs.</li><li>• Verify accuracy and completeness of programs by preparing sample data, and testing them by means of system acceptance test runs made by operating personnel.</li><li>• Correct program errors by revising instructions or altering the sequence of operations.</li><li>• Perform unit testing, and assemble specifications, flow charts, diagrams, layouts, programming and operating instructions to document applications for later modification or reference.</li></ul>			

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**Experience and Expertise of the Proposed Programmer/Software Developer – Specialty in IBM InfoSphere Information Server (IIS) – DataStage and QualityStage**

**Name of proposed Resource:** \_\_\_\_\_

**The Bidder MUST demonstrate that the Proposed Programmer/Software Developer – Specialty in IBM InfoSphere Information Server (IIS) – DataStage and QualityStage has:**

Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
<b>M.2</b>	A minimum of three (3) years of experience, within the last ten (10) years, working as a programmer/software developer developing solutions using IIS DataStage or QualityStage to prepare, cleanse, and standardize data for Master Data Management (MDM) consumption in large scale projects (project value of \$6 million or greater) at an enterprise level with multiple stakeholders (greater than 2).			



**1.2 Programmer/Software Developer – Specialty in IBM Master Data Management (MDM) – Java Development**

**Experience and Expertise of the Proposed Programmer/Software Developer – Specialty in IBM Master Data Management (MDM) – Java Development**

**Name of proposed Resource:** \_\_\_\_\_

**The Bidder MUST demonstrate that the Proposed Programmer/Software Developer – Specialty in IBM Master Data Management (MDM) – Java Development has:**

Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
<b>M.1</b>	<p>at least ten (10) years of experience, within the last twenty (20) years, performing the following tasks as a programmer/software developer:</p> <ul style="list-style-type: none"><li>• Design detailed programs, flow charts, and diagrams indicating mathematical computation and sequence of machine operations necessary to copy and process data and print the results.</li><li>• Translate detailed flow charts into coded machine instructions and confer with technical personnel in planning programs.</li><li>• Verify accuracy and completeness of programs by preparing sample data, and testing them by means of system acceptance test runs made by operating personnel.</li><li>• Correct program errors by revising instructions or altering the sequence of operations.</li><li>• Perform unit testing, and assemble specifications, flow charts, diagrams, layouts, programming and operating instructions to document applications for later modification or reference.</li></ul>			

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**Experience and Expertise of the Proposed Programmer/Software Developer – Specialty in IBM Master Data Management (MDM) – Java Development**

**Name of proposed Resource:** \_\_\_\_\_

**The Bidder MUST demonstrate that the Proposed Programmer/Software Developer – Specialty in IBM Master Data Management (MDM) – Java Development has:**

Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
<b>M.2</b>	A minimum of three (3) years of experience, within the last ten (10) years, working as a Java programmer/software developer developing IBM Master Data Management (MDM)* solutions, aligned with a Service Oriented Architecture (SOA), in large scale projects (project value of \$6 million or greater) at an enterprise level with multiple stakeholders (greater than 2).  *Or previous versions or instances.			

**1.3 Programmer/Software Developer – Specialty in pME (probabilistic Matching Engine) – Matching algorithm development**

**Experience and Expertise of the Proposed Programmer/Software Developer – Specialty in IBM pME (probabilistic Matching Engine) – Matching algorithm development**

**Name of proposed Resource:** \_\_\_\_\_

**The Bidder MUST demonstrate that the Proposed Programmer/Software Developer – Specialty in IBM pME (probabilistic Matching Engine) – Matching algorithm development has:**

Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
<b>M.1</b>	<p>a minimum of ten (10) years of experience, within the last twenty (20) years, performing the following tasks as a programmer/software developer:</p> <ul style="list-style-type: none"><li>• Design detailed programs, flow charts, and diagrams indicating mathematical computation and sequence of machine operations necessary to copy and process data and print the results.</li><li>• Translate detailed flow charts into coded machine instructions and confer with technical personnel in planning programs.</li><li>• Verify accuracy and completeness of programs by preparing sample data, and testing them by means of system acceptance test runs made by operating personnel.</li><li>• Correct program errors by revising instructions or altering the sequence of operations.</li><li>• Perform unit testing, and assemble specifications, flow charts, diagrams, layouts, programming and operating instructions to document applications for later modification or reference.</li></ul>			

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**Experience and Expertise of the Proposed Programmer/Software Developer – Specialty in IBM pME (probabilistic Matching Engine) – Matching algorithm development**

**Name of proposed Resource:** \_\_\_\_\_

**The Bidder MUST demonstrate that the Proposed Programmer/Software Developer – Specialty in IBM pME (probabilistic Matching Engine) – Matching algorithm development has:**

Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
<b>M.2</b>	A minimum of three (3) years of experience, within the last ten (10) years, working as a programmer/software developer developing IBM Master Data Management (MDM)* based solutions, aligned with a Service Oriented Architecture (SOA), in large scale projects (project value of \$6 million or greater) at an enterprise level with multiple stakeholders (greater than 2).  *Or previous versions or instances.			

#### 1.4 Programmer/Software Developer – Specialty in IBM InfoSphere Identity Insight (ISII)

##### Experience and Expertise of the Proposed Programmer/Software Developer – Specialty in IBM InfoSphere Identity Insight (ISII)

Name of proposed Resource: \_\_\_\_\_

The Bidder **MUST** demonstrate that the Proposed Programmer/Software Developer – Specialty in IBM InfoSphere Identity Insight (ISII) has:

Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
<b>M.1</b>	<p>A minimum of ten (10) years of experience, within the last twenty (20) years, performing the following tasks as a programmer/software developer:</p> <ul style="list-style-type: none"> <li>• Design detailed programs, flow charts, and diagrams indicating mathematical computation and sequence of machine operations necessary to copy and process data and print the results.</li> <li>• Translate detailed flow charts into coded machine instructions and confer with technical personnel in planning programs.</li> <li>• Verify accuracy and completeness of programs by preparing sample data, and testing them by means of system acceptance test runs made by operating personnel.</li> <li>• Correct program errors by revising instructions or altering the sequence of operations.</li> <li>• Perform unit testing, and assemble specifications, flow charts, diagrams, layouts, programming and operating instructions to document applications for later modification or reference.</li> </ul>			

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**Experience and Expertise of the Proposed Programmer/Software Developer – Specialty in IBM InfoSphere Identity Insight (ISII)**

**Name of proposed Resource:** \_\_\_\_\_

**The Bidder MUST demonstrate that the Proposed Programmer/Software Developer – Specialty in IBM InfoSphere Identity Insight (ISII) has:**

Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
<b>M.2</b>	A minimum of three (3) years of experience, within the last ten (10) years, working as a programmer/software developer developing IBM InfoSphere Identity Insight (ISII)* solutions, aligned with a Service Oriented Architecture (SOA), in large scale projects (project value of \$6 million or greater) at an enterprise level with multiple stakeholders (greater than 2).  *Or previous versions or instances.			

**1.5 Programmer/Software Developer – Specialty in IBM Global Name Management (GNM)**

**Experience and Expertise of the Proposed Programmer/Software Developer – Specialty in IBM Global Name Management (GNM)**

**Name of proposed Resource:** \_\_\_\_\_

**The Bidder MUST demonstrate that the Proposed Programmer/Software Developer – Specialty in IBM Global Name Management (GNM) has:**

Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
<b>M.1</b>	<p>A minimum of ten (10) years of experience, within the last twenty (20) years, performing the following tasks as a programmer/software developer:</p> <ul style="list-style-type: none"><li>• Design detailed programs, flow charts, and diagrams indicating mathematical computation and sequence of machine operations necessary to copy and process data and print the results.</li><li>• Translate detailed flow charts into coded machine instructions and confer with technical personnel in planning programs.</li><li>• Verify accuracy and completeness of programs by preparing sample data, and testing them by means of system acceptance test runs made by operating personnel.</li><li>• Correct program errors by revising instructions or altering the sequence of operations.</li><li>• Perform unit testing, and assemble specifications, flow charts, diagrams, layouts, programming and operating instructions to document applications for later modification or reference.</li></ul>			

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**Experience and Expertise of the Proposed Programmer/Software Developer – Specialty in IBM Global Name Management (GNM)**

**Name of proposed Resource:** \_\_\_\_\_

**The Bidder MUST demonstrate that the Proposed Programmer/Software Developer – Specialty in IBM Global Name Management (GNM) has:**

Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
<b>M.2</b>	A minimum of three (3) years of experience, within the last ten (10) years, working as a programmer/software developer developing IBM Global Name Manager (GNM) solutions, aligned with a Service Oriented Architecture (SOA), in large scale projects (project value of \$6 million or greater) at an enterprise level with multiple stakeholders (greater than 2).			



**1.6 Application/Software Architect – Specialty in IBM Master Data Management (MDM) Server**

**Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM Master Data Management (MDM) Server**

**Name of proposed Resource:** \_\_\_\_\_

**The Bidder MUST demonstrate that the Proposed Application/Software Architect – Specialty in IBM Master Data Management (MDM) Server has:**

Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
<b>M.1</b>	<p>A minimum of ten (10) years of experience, within the last twenty (20) years, performing the following tasks as an application/software architect:</p> <ul style="list-style-type: none"><li>• Develop technical architectures, frameworks and strategies, either for an organization or for a major application area, to meet the business and application requirements.</li><li>• Identify the policies and requirements that drive out a particular solution.</li><li>• Analyse and evaluate alternative technology solutions to meet business problems.</li><li>• Ensures the integration of all or key aspects of technology solutions.</li><li>• Monitor industry trends to ensure that solutions fit with government and industry directions for technology.</li><li>• Analyse functional requirements to identify information, procedures and decision flows.</li><li>• Evaluate existing procedures and methods, identify and document database content, structure, and application sub-systems, and develop data dictionary.</li><li>• Define and document interfaces of manual to automated operations within application sub-systems, to external systems and between new and existing systems.</li><li>• Define input and output sources, including detailed plan for technical design phase.</li></ul>			

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**Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM Master Data Management (MDM) Server**

**Name of proposed Resource:** \_\_\_\_\_

**The Bidder MUST demonstrate that the Proposed Application/Software Architect – Specialty in IBM Master Data Management (MDM) Server has:**

Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
<b>M.2</b>	a minimum of three (3) years of experience, within the last ten (10) years, working as an application/software architect on the design, prototyping, components integration and oversight, as part of an IBM Master Data Management (MDM)* large scale (project value of \$6 million or greater) solution implementation, aligned with a Service Oriented Architecture (SOA), at an enterprise level with multiple stakeholders (greater than 2) with 20 million records or more.  *Or previous versions or instances.			

**1.7 Application/Software Architect – Specialty in IBM InfoSphere Information Server (IIS) DataStage and QualityStage**

**Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM InfoSphere Information Server (IIS) DataStage and QualityStage**

**Name of proposed Resource:** \_\_\_\_\_

**The Bidder MUST demonstrate that the Proposed Application/Software Architect – Specialty in IBM InfoSphere Information Server (IIS) DataStage and QualityStage has:**

Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
<b>M.1</b>	<p>A minimum of ten (10) years of experience, within the last twenty (20) years, performing the following tasks as an application/software architect:</p> <ul style="list-style-type: none"><li>• Develop technical architectures, frameworks and strategies, either for an organization or for a major application area, to meet the business and application requirements.</li><li>• Identify the policies and requirements that drive out a particular solution.</li><li>• Analyse and evaluate alternative technology solutions to meet business problems.</li><li>• Ensures the integration of all or key aspects of technology solutions.</li><li>• Monitor industry trends to ensure that solutions fit with government and industry directions for technology.</li><li>• Analyse functional requirements to identify information, procedures and decision flows.</li><li>• Evaluate existing procedures and methods, identify and document database content, structure, and application sub-systems, and develop data dictionary.</li><li>• Define and document interfaces of manual to automated operations within application sub-systems, to external systems and between new and existing systems.</li><li>• Define input and output sources, including detailed plan for technical design phase.</li><li>• Identify and document system specific standards relating to programming, documentation and testing, covering program libraries, data dictionaries, naming conventions, etc.</li></ul>			

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**Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM InfoSphere Information Server (IIS) DataStage and QualityStage**

Name of proposed Resource: \_\_\_\_\_

**The Bidder MUST demonstrate that the Proposed Application/Software Architect – Specialty in IBM InfoSphere Information Server (IIS) DataStage and QualityStage has:**

Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
<b>M.2</b>	A minimum of three (3) years of experience, within the last ten (10) years, working as an application/software architect, on the design, prototyping, components integration and oversight, as part of an IBM InfoSphere Information Server DataStage or QualityStage large scale (project value of \$6 million or greater) solution implementation at an enterprise level with multiple stakeholders (greater than 2).			

**1.8 Application/Software Architect – Specialty in IBM InfoSphere Identity Insight (ISII)**

**Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM InfoSphere Identity Insight (ISII)**

**Name of proposed Resource:** \_\_\_\_\_

**The Bidder MUST demonstrate that the Proposed Application/Software Architect – Specialty in IBM InfoSphere Identity Insight (ISII) has:**

Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
<b>M.1</b>	<p>A minimum of ten (10) years of experience, within the last twenty (20) years, performing the following tasks as an application/software architect:</p> <ul style="list-style-type: none"><li>• Develop technical architectures, frameworks and strategies, either for an organization or for a major application area, to meet the business and application requirements.</li><li>• Identify the policies and requirements that drive out a particular solution.</li><li>• Analyse and evaluate alternative technology solutions to meet business problems.</li><li>• Ensures the integration of all or key aspects of technology solutions.</li><li>• Monitor industry trends to ensure that solutions fit with government and industry directions for technology.</li><li>• Analyse functional requirements to identify information, procedures and decision flows.</li><li>• Evaluate existing procedures and methods, identify and document database content, structure, and application sub-systems, and develop data dictionary.</li><li>• Define and document interfaces of manual to automated operations within application sub-systems, to external systems and between new and existing systems.</li><li>• Define input and output sources, including detailed plan for technical design phase.</li><li>• Identify and document system specific standards relating to programming, documentation and testing, covering program libraries, data dictionaries, naming conventions, etc.</li></ul>			

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**Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM InfoSphere Identity Insight (ISII)**

Name of proposed Resource: \_\_\_\_\_

**The Bidder MUST demonstrate that the Proposed Application/Software Architect – Specialty in IBM InfoSphere Identity Insight (ISII) has:**

Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
<b>M.2</b>	A minimum of two (2) years of experience, within the last eight (8) years, working as an application/software architect on the design, prototyping, components integration and oversight, as part of an IBM InfoSphere Identity Insight (ISII)* large scale project (project value of \$6 million or greater) solution implementation, aligned with a Service Oriented Architecture (SOA), at an enterprise level with multiple stakeholders (greater than 2).  *Or previous versions or instances.			

**1.9 Business System Analyst – Specialty in IBM Master Data Management (MDM) - Data Governance**

**Experience and Expertise of the Proposed Business Systems Analyst – Specialty in IBM Master Data Management (MDM) - Data Governance**

Name of proposed Resource: \_\_\_\_\_

**The Bidder MUST demonstrate that the Proposed Business Systems Analyst – Specialty in IBM Master Data Management (MDM) - Data Governance has:**

Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
<b>M.1</b>	<p>A minimum of ten (10) years of experience, within the last twenty (20) years, performing the following tasks as a business system analyst:</p> <ul style="list-style-type: none"><li>• Establish Master Data policies and procedures to ensure data meets defined quality targets;</li><li>• Establish the policies for setting up, maintaining, validating and cleansing party data;</li><li>• Maintain changes to data process maps, document new processes and support ongoing audit requirement;</li><li>• Act as subject matter expert and support projects to ensure that processes meet data policies and procedures best practices;</li><li>• Assist teams in the creation of business rules, entities, party attributes;</li><li>• Evaluate existing procedures and methods, identify and document items such as database content, structure, application subsystems, and develop data dictionary;</li><li>• Review and analyse application data model and MDM data model;</li><li>• Identify and resolve data quality issues</li></ul>			

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**Experience and Expertise of the Proposed Business Systems Analyst – Specialty in IBM Master Data Management (MDM) - Data Governance**

Name of proposed Resource: \_\_\_\_\_

The Bidder **MUST** demonstrate that the Proposed Business Systems Analyst – Specialty in IBM Master Data Management (MDM) - Data Governance has:

Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
<b>M.2</b>	A minimum of three (3) years of experience, within the last eight (8) years, working as a business system analyst responsible for the Data Governance of a large scale MDM solution implementation (project value of \$6 million or greater) at an enterprise level with multiple stakeholders (greater than 2).			



**1.10 Technology Architect - Specialty in IBM Master Data Management (MDM) Configuration and Release Management**

<b>Experience and Expertise of the Proposed Technology Architect – Specialty in IBM Master Data Management (MDM) Configuration and Release Management</b>				
Name of proposed Resource: _____				
The Bidder <b>MUST</b> demonstrate that the Proposed Technology Architect – Specialty in IBM Master Data Management (MDM) Configuration and Release Management has:				
Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
<b>M.1</b>	<p>A minimum of ten (10) years of experience, within the last twenty (20) years, performing the following tasks as a technology architect:</p> <ul style="list-style-type: none"> <li>• Prepare implementation plans and strategy in preparation of solutions' deployments</li> <li>• Develop, implement and maintain automated build and load deployment scripts</li> <li>• Maintain and support project source repository</li> <li>• Configure and optimize technical installations including the integration of technical components.</li> <li>• Ensure alignment of releases in both development and testing environments.</li> </ul>			
<b>M.2</b>	<p>A minimum of three (3) years of experience, within the last ten (10) years, working as a technology architect working on the configuration, optimization and deployment of an IBM MDM* integrated project solution implementation, aligned with a Service Oriented Architecture (SOA), in large scale projects (project value of \$6 million or greater) at an enterprise level with multiple stakeholders (greater than 2).</p> <p>*Or previous MDM versions or instances.</p>			

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**Note to Bidders:** *The following tables apply to Workstream 2 only.*

**1.11 Programmer/Software Developer – Specialty in IBM Integration BUS (IIB) – Enterprise Service Bus (ESB)**

**Experience and Expertise of the Proposed Programmer/Software Developer – Specialty in IBM Integration BUS (IIB) – Enterprise Service Bus (ESB)**

**Name of proposed Resource:** \_\_\_\_\_

**The Bidder MUST demonstrate that the Proposed Programmer/Software Developer – Specialty in IBM Integration BUS (IIB) – Enterprise Service Bus (ESB) has:**

Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
<b>M.1</b>	<p>A minimum of ten (10) years of experience, within the last twenty (20) years, performing the following tasks as a programmer/software developer:</p> <ul style="list-style-type: none"><li>• Design detailed programs, flow charts, and diagrams indicating mathematical computation and sequence of machine operations necessary to copy and process data and print the results.</li><li>• Translate detailed flow charts into coded machine instructions and confer with technical personnel in planning programs.</li><li>• Verify accuracy and completeness of programs by preparing sample data, and testing them by means of system acceptance test runs made by operating personnel.</li><li>• Correct program errors by revising instructions or altering the sequence of operations.</li><li>• Perform unit testing, and assemble specifications, flow charts, diagrams, layouts, programming and operating instructions to document applications for later modification or reference.</li></ul>			

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**Experience and Expertise of the Proposed Programmer/Software Developer – Specialty in IBM Integration BUS (IIB) – Enterprise Service Bus (ESB)**

**Name of proposed Resource:** \_\_\_\_\_

**The Bidder MUST demonstrate that the Proposed Programmer/Software Developer – Specialty in IBM Integration BUS (IIB) – Enterprise Service Bus (ESB) has:**

Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
<b>M.2</b>	A minimum of three (3) years of experience, within the last ten (10) years, working as a programmer/software developer developing IBM Integration Bus (IIB) - Enterprise Service Bus (ESB)* solutions, aligned with a Service Oriented Architecture (SOA), in large scale projects (project value of \$6 million or greater) at an enterprise level with multiple stakeholders (greater than 2).  *Or previous versions or instances.			

**1.12 Programmer/Software Developer - Specialty in IBM Business Process Manager (BPM) Advanced**

**Experience and Expertise of the Proposed Programmer/Software Developer - Specialty in IBM Business Process Manager (BPM) Advanced**

**Name of proposed Resource:** \_\_\_\_\_

**The Bidder MUST demonstrate that the Proposed Programmer/Software Developer - Specialty in IBM Business Process Manager (BPM) Advanced has:**

Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
<b>M.1</b>	<p>A minimum of ten (10) years of experience, within the last twenty (20) years, performing the following tasks as a programmer/software developer:</p> <ul style="list-style-type: none"><li>• Design detailed programs, flow charts, and diagrams indicating mathematical computation and sequence of machine operations necessary to copy and process data and print the results.</li><li>• Translate detailed flow charts into coded machine instructions and confer with technical personnel in planning programs.</li><li>• Verify accuracy and completeness of programs by preparing sample data, and testing them by means of system acceptance test runs made by operating personnel.</li><li>• Correct program errors by revising instructions or altering the sequence of operations.</li><li>• Perform unit testing, and assemble specifications, flow charts, diagrams, layouts, programming and operating instructions to document applications for later modification or reference.</li></ul>			

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**Experience and Expertise of the Proposed Programmer/Software Developer - Specialty in IBM Business Process Manager (BPM) Advanced**

**Name of proposed Resource:** \_\_\_\_\_

**The Bidder MUST demonstrate that the Proposed Programmer/Software Developer - Specialty in IBM Business Process Manager (BPM) Advanced has:**

Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
<b>M.2</b>	A minimum of three (3) years of experience, within the last ten (10) years, working as a programmer/software developer developing IBM Business Process Management (BPM)* solutions, aligned with a Service Oriented Architecture (SOA), on large scale projects (project value of \$6 million or greater) at an enterprise level with multiple stakeholders (greater than 2).  *Or previous versions or instances.			

**1.13 Programmer/Software Developer – Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced**

**Experience and Expertise of the Proposed Programmer/Software Developer – Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced**

**Name of proposed Resource:** \_\_\_\_\_

**The Bidder MUST demonstrate that the Proposed Programmer/Software Developer – Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced has:**

Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
<b>M.1</b>	<p>A minimum of ten (10) years of experience, within the last twenty (20) years, performing the following tasks as a programmer/software developer:</p> <ul style="list-style-type: none"><li>• Design detailed programs, flow charts, and diagrams indicating mathematical computation and sequence of machine operations necessary to copy and process data and print the results.</li><li>• Translate detailed flow charts into coded machine instructions and confer with technical personnel in planning programs.</li><li>• Verify accuracy and completeness of programs by preparing sample data, and testing them by means of system acceptance test runs made by operating personnel.</li><li>• Correct program errors by revising instructions or altering the sequence of operations.</li><li>• Perform unit testing, and assemble specifications, flow charts, diagrams, layouts, programming and operating instructions to document applications for later modification or reference.</li></ul>			

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**Experience and Expertise of the Proposed Programmer/Software Developer – Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced**

**Name of proposed Resource:** \_\_\_\_\_

**The Bidder MUST demonstrate that the Proposed Programmer/Software Developer – Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced has:**

Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
<b>M.2</b>	<p>A minimum of three (3) years of experience, within the last ten (10) years, working as a programmer/software developer developing IBM Operational Decision Management (ODM)* solutions including the creation of executable object models (XOM), business object models (BOM), and the authoring of rules for a rules engine**, aligned with a Service Oriented Architecture (SOA), in large scale projects (project value of \$6 million or greater) at an enterprise level with multiple stakeholders (greater than 2).</p> <p>*Or previous versions or instances.</p> <p>**includes separate Business rules and Business events components prior to creation of IBM Operational Decision Management (ODM) (Advanced).</p>			



**1.14 Application/Software Architect – Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)**

**Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)**

**Name of proposed Resource:** \_\_\_\_\_

**The Bidder MUST demonstrate that the Proposed Application/Software Architect – Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) has:**

Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
<b>M.1</b>	<p>A minimum of ten (10) years of experience, within the last twenty (20) years, performing the following tasks as an application/software architect:</p> <ul style="list-style-type: none"><li>• Develop technical architectures, frameworks and strategies, either for an organization or for a major application area, to meet the business and application requirements.</li><li>• Identify the policies and requirements that drive out a particular solution.</li><li>• Analyse and evaluate alternative technology solutions to meet business problems.</li><li>• Ensures the integration of all aspects of technology solutions.</li><li>• Monitor industry trends to ensure that solutions fit with government and industry directions for technology.</li><li>• Analyse functional requirements to identify information, procedures and decision flows.</li><li>• Evaluate existing procedures and methods, identify and document database content, structure, and application sub-systems, and develop data dictionary.</li><li>• Define and document interfaces of manual to automated operations within application sub-systems, to external systems and between new and existing systems.</li><li>• Define input and output sources, including detailed plan for technical design phase, and obtain approval of the system proposal.</li><li>• Identify and document system specific standards relating to programming, documentation and testing, covering program libraries, data dictionaries, naming conventions, etc.</li></ul>			

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**Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)**

**Name of proposed Resource:** \_\_\_\_\_

**The Bidder MUST demonstrate that the Proposed Application/Software Architect – Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) has:**

Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
<b>M.2</b>	A minimum of three (3) years of experience, within the last ten (10) years, working as an application/software architect on the design, prototyping, components integration and oversight, as part of an IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)* large scale (project value of \$6 million or greater) solution implementation, aligned with a Service Oriented Architecture (SOA), at an enterprise level with multiple stakeholders (greater than 2).  *Or previous versions or instances.			

**1.15 Application/Software Architect – Specialty in IBM Business Process Manager (BPM) Advanced**

<b>Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM Business Process Manager (BPM) Advanced</b>				
Name of proposed Resource: _____				
The Bidder <b>MUST</b> demonstrate that the Proposed Application/Software Architect – Specialty in IBM Business Process Manager (BPM) Advanced has:				
Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
<b>M.1</b>	<p>A minimum of ten (10) years of experience, within the last twenty (20) years, performing the following tasks as an application/software architect:</p> <ul style="list-style-type: none"> <li>• Develop technical architectures, frameworks and strategies, either for an organization or for a major application area, to meet the business and application requirements.</li> <li>• Identify the policies and requirements that drive out a particular solution.</li> <li>• Analyse and evaluate alternative technology solutions to meet business problems.</li> <li>• Ensures the integration of all or key aspects of technology solutions.</li> <li>• Monitor industry trends to ensure that solutions fit with government and industry directions for technology.</li> <li>• Analyse functional requirements to identify information, procedures and decision flows.</li> <li>• Evaluate existing procedures and methods, identify and document database content, structure, and application sub-systems, and develop data dictionary.</li> <li>• Define and document interfaces of manual to automated operations within application sub-systems, to external systems and between new and existing systems.</li> <li>• Define input and output sources, including detailed plan for technical design phase.</li> </ul>			

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**Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM Business Process Manager (BPM) Advanced**

**Name of proposed Resource:** \_\_\_\_\_

**The Bidder MUST demonstrate that the Proposed Application/Software Architect – Specialty in IBM Business Process Manager (BPM) Advanced has:**

Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
<b>M.2</b>	A minimum of three (3) years of experience, within the last ten (10) years, working as an application/software architect on the design, prototyping, components integration and oversight, as part of an IBM Business Process Management (BPM)* Advanced large scale (project value of \$6 million or greater) solution implementation, aligned with a Service Oriented Architecture (SOA), at an enterprise level with multiple stakeholders (greater than 2).  *Or previous versions or instances.			

**1.16 Application/Software Architect – Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced**

**Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced**

**Name of proposed Resource:** \_\_\_\_\_

**The Bidder MUST demonstrate that the Proposed Application/Software Architect – Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced has:**

Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
<b>M.1</b>	<p>A minimum of ten (10) years of experience, within the last twenty (20) years, performing the following tasks as an application/software architect:</p> <ul style="list-style-type: none"> <li>• Develop technical architectures, frameworks and strategies, either for an organization or for a major application area, to meet the business and application requirements.</li> <li>• Identify the policies and requirements that drive out a particular solution.</li> <li>• Analyse and evaluate alternative technology solutions to meet business problems.</li> <li>• Ensures the integration of all aspects of technology solutions.</li> <li>• Monitor industry trends to ensure that solutions fit with government and industry directions for technology.</li> <li>• Analyse functional requirements to identify information, procedures and decision flows.</li> <li>• Evaluate existing procedures and methods, identify and document database content, structure, and application sub-systems, and develop data dictionary.</li> <li>• Define and document interfaces of manual to automated operations within application sub-systems, to external systems and between new and existing systems.</li> <li>• Define input and output sources, including detailed plan for technical design phase, and obtain approval of the system proposal.</li> <li>• Identify and document system specific standards relating to programming, documentation and testing, covering program libraries, data dictionaries, naming conventions, etc.</li> </ul>			

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**Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced**

**Name of proposed Resource:** \_\_\_\_\_

**The Bidder MUST demonstrate that the Proposed Application/Software Architect – Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced has:**

Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
<b>M.2</b>	A minimum of three (3) years of experience, within the last ten (10) years, working as an application/software architect on the design, prototyping, components integration and oversight, as part of an IBM Operational Decision Manager (ODM)*, large scale (project value of \$6 million or greater) solution implementation, aligned with a Service Oriented Architecture (SOA), at an enterprise level with multiple stakeholders (greater than 2).  *Or previous versions or instances.			

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**1.17 Test Coordinator - Specialty in Test coordination of one or many of the following Products: IBM MDM, IBM BPM, IBM IIS DataStage and QualityStage, IBM IIB-ESB, IBM ODM Standard and Advanced**

Experience and Expertise of the Proposed Test Coordinator – Specialty in IBM products				
Name of proposed Resource: _____				
The Bidder <b>MUST</b> demonstrate that the Proposed Test Coordinator – Specialty in IBM products has:				
Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
<b>M.1</b>	A minimum of ten (10) years of experience, within the last twenty (20) years, performing the following tasks as a test coordinator: <ul style="list-style-type: none"><li>• Develop and provide advice, guidance and coordination efforts for test strategies and plans, selection of automated testing tools, and identification of resources required for testing.</li><li>• Plan, organize, schedule, and report on testing efforts for large systems including the execution of systems integration tests, specialized tests, and user acceptance testing (e.g., stress tests).</li></ul>			
<b>M.2</b>	A minimum of two (2) years of experience, working as a test coordinator, within the last ten (10) years, planning, scheduling, coordinating and reporting on the testing phase of a large scale (project value of \$6 million or greater) IBM Master Data Management (MDM)* solution and/or an IBM Enterprise Service Bus (ESB)* solution implementation at an enterprise level with multiple stakeholders (greater than 2) and multiple integration points.  *Or previous versions or instances.			

**1.18 Technology Architect - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) Configuration and Release Management**

**Experience and Expertise of the Proposed Technology Architect – Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) Configuration and Release Management**

**Name of proposed Resource:** \_\_\_\_\_

**The Bidder MUST demonstrate that the Proposed Technology Architect – Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) Configuration and Release Management has:**

Criteria	Mandatory Requirement	Bidder's response		
		INSERT PAGE # OF RESUME	Met	Not Met
<b>M.1</b>	A minimum of ten (10) years of experience, within the last twenty (20) years, performing the following tasks as a technology architect: <ul style="list-style-type: none"><li>• Prepare implementation plans and strategy in preparation of solutions' deployments</li><li>• Develop, implement and maintain automated build and load deployment scripts</li><li>• Maintain and support project source repository</li><li>• Configure and optimize technical installations including the integration of technical components.</li><li>• Ensure alignment of releases in both development and testing environments.</li></ul>			
<b>M.2</b>	A minimum of three (3) years of experience, within the last ten (10) years, working as a technology architect on the configuration, optimization and deployment of an IBM Integration Bus (IIB) - Enterprise Service Bus (ESB)* project solution implementation, aligned with a Service Oriented Architecture (SOA), in large scale projects (project value of \$6 million or greater) at an enterprise level with multiple stakeholders (greater than 2).  *Or previous versions or instances.			



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## 2.0 Point-Rated Resource Assessment Criteria:

The experience required for a Mandatory Resource Requirement should be demonstrated through one or multiple referenced projects and each referenced project should have a minimum duration of three (3) months in order to be accepted.

<b>Note to Bidders:</b> <i>The following tables apply to Workstream 1 only.</i>
---

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**2.1 Programmer/Software Developer - Specialty in IBM InfoSphere Information Server (IIS) DataStage and QualityStage**

**Experience and Expertise of the Proposed Programmer/Software Developer - Specialty in IBM Information Server (IIS) DataStage and QualityStage**

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Programmer/Software Developer - Specialty in IBM Information Server (IIS) DataStage and QualityStage has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
R.1	Experience, within the last ten (10) years, working as an programmer/software developer developing solutions using IIS DataStage or QualityStage to prepare, cleanse, and standardize data for Master Data Management (MDM) consumption in large scale projects (project value of \$6 million or greater) at an enterprise level with multiple stakeholders (greater than 2).	15	<ul style="list-style-type: none"><li>• 3+ to 4 years = 5 points</li><li>• 4+ to 5 years = 10 points</li><li>• 5+ years = 15 points</li></ul>	

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**Experience and Expertise of the Proposed Programmer/Software Developer - Specialty in IBM Information Server (IIS) DataStage and QualityStage**

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Programmer/Software Developer - Specialty in IBM Information Server (IIS) DataStage and QualityStage has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
R.2	<p>Experience, within the last ten (10) years, working as a programmer/software developer on large scale projects (project value of \$6 million or greater) with an IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)* component that required an integration with one or more of the following products:</p> <ul style="list-style-type: none"><li>• IBM Operational Decision Manager (ODM)* Standard or Advance</li><li>• IBM InfoSphere Identity Insight (ISII)*</li><li>• IBM Master Data Management (MDM)*</li><li>• IBM Global Name Manager (GNM)</li><li>• IBM InfoSphere Information Server DataStage or QualityStage</li><li>• IBM Business Process Management (BPM)* Advanced</li></ul> <p>*Or previous versions or instances.</p>	15	<ul style="list-style-type: none"><li>• 1 to 2 years = 5 points</li><li>• 2+ to 3 years = 10 points</li><li>• 3+ years = 15 points</li></ul>	

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**Experience and Expertise of the Proposed Programmer/Software Developer - Specialty in IBM Information Server (IIS) DataStage and QualityStage**

**Name of proposed Resource:** \_\_\_\_\_

**The Bidder SHOULD demonstrate that the Proposed Programmer/Software Developer - Specialty in IBM Information Server (IIS) DataStage and QualityStage has:**

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
<b>R.3</b>	Experience, within the last ten (10) years, working as a programmer/software developer on projects with an ESB component for a government* client.  *Government may include the Federal, Provincial or Municipal Government. The Government of Canada includes any department, agency, board of the Government of Canada or a Crown corporation.	5	<ul style="list-style-type: none"><li>• 1 to 2 years = 1 points</li><li>• 2+ to 3 years = 3 points</li><li>• 3+ years = 5 points</li></ul>	
<b>Maximum available points</b>		<b>35</b>		
<b>Minimum points required</b>		<b>21</b>		

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**2.2 Programmer/Software Developer - Specialty in IBM Master Data Management (MDM) – Java Development**

**Experience and Expertise of the Proposed Programmer/Software Developer - Specialty in IBM Master Data Management (MDM) – Java Development**

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Programmer/Software Developer - Specialty in IBM Master Data Management (MDM) – Java Development has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
<b>R.1</b>	In addition to M2, experience, within the last ten (10) years, working as a Java programmer/software developer developing IBM Master Data Management (MDM)* solutions, aligned with a Service Oriented Architecture (SOA), in large scale projects (project value of \$6 million or greater) at an enterprise level with multiple stakeholders (greater than 2).  *Or previous versions or instances	15	<ul style="list-style-type: none"><li>• 3+ to 4 years = 5 points</li><li>• 4+ to 5 years = 10 points</li><li>• 5+ years = 15 points</li></ul>	

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**Experience and Expertise of the Proposed Programmer/Software Developer - Specialty in IBM Master Data Management (MDM) – Java Development**

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Programmer/Software Developer - Specialty in IBM Master Data Management (MDM) – Java Development has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
<b>R.2</b>	<p>Experience, within the last ten (10) years, working as a programmer/software developer on large scale projects (project value of \$6 million or greater) with a Master Data Management (MDM)* component with integration of one or more of the following products:</p> <ul style="list-style-type: none"> <li>• IBM Enterprise Service Bus (ESB)*</li> <li>• IBM DataStage or QualityStage</li> </ul> <p>*Or previous versions or instances</p>	15	<ul style="list-style-type: none"> <li>• 1 to 2 years = 5 points</li> <li>• 2+ to 3 years = 10 points</li> <li>• 3+ years = 15 points</li> </ul>	
<b>R.3</b>	<p>Experience, within the last ten (10) years, working as a programmer/software developer on projects with an MDM component for a government client.</p> <p>*Government may include the Federal, Provincial or Municipal Government. The Government of Canada includes any department, agency, board of the Government of Canada or a Crown corporation.</p>	5	<ul style="list-style-type: none"> <li>• 1 to 2 years = 1 points</li> <li>• 2+ to 3 years = 3 points</li> <li>• 3+ years = 5 points</li> </ul>	
<b>Maximum available points</b>		<b>35</b>		
<b>Minimum points required</b>		<b>21</b>		

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**2.3 Programmer/Software Developer - Specialty in pME (probabilistic Matching Engine)  
– Matching algorithm development**

**Experience and Expertise of the Proposed Programmer/Software Developer - Specialty in  
pME (probabilistic Matching Engine) – Matching algorithm development**

**Name of proposed Resource:** \_\_\_\_\_

**The Bidder SHOULD demonstrate that the Proposed Programmer/Software Developer -  
Specialty in pME (probabilistic Matching Engine) – Matching algorithm development has:**

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
R.1	Experience, within the last ten (10) years, working as a programmer/software developer configuring the probabilistic and deterministic engines within an IBM Master Data Management (MDM)* solution implementation, in large scale projects (project value of \$6 million or greater) at an enterprise level with multiple stakeholders (greater than 2).  *Or previous versions or instances.	15	<ul style="list-style-type: none"><li>• 1 to 2 years = 5 points</li><li>• 2+ to 3 years = 10 points</li><li>• 3+ years = 15 points</li></ul>	

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**Experience and Expertise of the Proposed Programmer/Software Developer - Specialty in pME (probabilistic Matching Engine) – Matching algorithm development**

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Programmer/Software Developer - Specialty in pME (probabilistic Matching Engine) – Matching algorithm development has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
<b>R.2</b>	<p>Experience, within the last ten (10) years, working as a programmer/software developer on a large scale project (project value of \$6 million or greater) with an MDM* component with integration of one or more of the following products:</p> <ul style="list-style-type: none"> <li>IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)*</li> <li>IBM InfoSphere Information Server DataStage or QualityStage</li> </ul> <p>*Or previous versions or instances.</p>	15	<ul style="list-style-type: none"> <li>1 to 2 years = 5 points</li> <li>2+ to 3 years = 10 points</li> <li>3+ years = 15 points</li> </ul>	
<b>R.3</b>	<p>Experience, within the last ten (10) years, working as a programmer/software developer on projects with an MDM component for a government* client.</p> <p>*Government may include the Federal, Provincial or Municipal Government. The Government of Canada includes any department, agency, board of the Government of Canada or a Crown corporation.</p>	5	<ul style="list-style-type: none"> <li>1 to 2 years = 1 points</li> <li>2+ to 3 years = 3 points</li> <li>3+ years = 5 points</li> </ul>	
<b>Maximum available points</b>		<b>35</b>		
<b>Minimum points required</b>		<b>21</b>		



**2.4 Programmer/Software Developer - Specialty in IBM Infosphere Identity Insight (ISII)**

**Experience and Expertise of the Proposed Programmer/Software Developer - Specialty in IBM Infosphere Identity Insight (ISII)**

**Name of proposed Resource:** \_\_\_\_\_

**The Bidder SHOULD demonstrate that the Proposed Programmer/Software Developer - Specialty in IBM Infosphere Identity Insight (ISII) has:**

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
<b>R.1</b>	In addition to M2, experience, within the last ten (10) years, working as a programmer/software developer developing IBM InfoSphere Identity Insight (ISII)* solutions, aligned with a Service Oriented Architecture (SOA), in large scale projects (project value of \$6 million or greater) at an enterprise level with multiple stakeholders (greater than 2).  *Or previous versions or instances.	15	<ul style="list-style-type: none"><li>• 3+ to 4 years = 5 points</li><li>• 4+ to 5 years = 10 points</li><li>• 5+ years = 15 points</li></ul>	

**Experience and Expertise of the Proposed Programmer/Software Developer - Specialty in IBM Infosphere Identity Insight (ISII)**

**Name of proposed Resource:** \_\_\_\_\_

**The Bidder SHOULD demonstrate that the Proposed Programmer/Software Developer - Specialty in IBM Infosphere Identity Insight (ISII) has:**

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
<b>R.2</b>	<p>Experience, within the last ten (10) years, working as a programmer/software developer on large scale projects (project value of \$6 million or greater) with an IBM InfoSphere Identity Insight (ISII)* component with integration of one or more of the following products:</p> <ul style="list-style-type: none"> <li>• IBM Operational Decision Manager (ODM)* Standard or Advanced</li> <li>• IBM Integration Service Bus (IIB) – Enterprise Service Bus (ESB)*</li> <li>• IBM Master Data Management(MDM)*</li> </ul> <p>*Or previous versions or instances.</p>	15	<ul style="list-style-type: none"> <li>• 1 to 2 years = 5 points</li> <li>• 2+ to 3 years = 10 points</li> <li>• 3+ years = 15 points</li> </ul>	
<b>R.3</b>	<p>Experience, within the last ten (10) years, working as a programmer/software developer on projects with a relationship analytical tool for a government* client.</p> <p>*Government may include the Federal, Provincial or Municipal Government. The Government of Canada includes any department, agency, board of the Government of Canada or a Crown corporation.</p>	5	<ul style="list-style-type: none"> <li>• 1 to 2 years = 1 points</li> <li>• 2+ to 3 years = 3 points</li> <li>• 3+ years = 5 points</li> </ul>	
<b>Maximum available points</b>		<b>35</b>		
<b>Minimum points required</b>		<b>21</b>		

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## 2.5 Programmer/Software Developer - Specialty in IBM Global Name Management (GNM)

### Experience and Expertise of the Proposed Programmer/Software Developer - Specialty in IBM Global Name Management (GNM)

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Programmer/Software Developer - Specialty in IBM Global Name Management (GNM) has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
R.1	In addition to M2, experience, within the last ten (10) years, working as a programmer/software developer developing IBM Global Name Manager (GNM) solutions, aligned with a Service Oriented Architecture (SOA), in large scale projects (project value of \$6 million or greater) at an enterprise level with multiple stakeholders (greater than 2).	15	<ul style="list-style-type: none"><li>• 3+ to 4 years = 5 points</li><li>• 4+ to 5 years = 10 points</li><li>• 5+ years = 15 points</li></ul>	

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**Experience and Expertise of the Proposed Programmer/Software Developer - Specialty in IBM Global Name Management (GNM)**

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Programmer/Software Developer - Specialty in IBM Global Name Management (GNM) has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
R.2	<p>Experience, within the last ten (10) years, working as a programmer/software developer on a large scale project or initiative (value of \$10 million or greater) with a GNM component with integration of one or more of the following products:</p> <ul style="list-style-type: none"><li>• IBM Operational Decision Manager (ODM)* Standard or Advanced</li><li>• IBM InfoSphere Identity Insight (ISII)*</li><li>• IBM Master Data Management (MDM)*</li><li>• IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)*</li><li>• IBM InfoSphere Information Server DataStage or QualityStage</li><li>• IBM Business Process Management (BPM)*</li></ul> <p>*Or previous versions or instances.</p>	15	<ul style="list-style-type: none"><li>• 1 to 2 years = 5 points</li><li>• 2+ to 3 years = 10 points</li><li>• 3+ years = 15 points</li></ul>	

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**Experience and Expertise of the Proposed Programmer/Software Developer - Specialty in IBM Global Name Management (GNM)**

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Programmer/Software Developer - Specialty in IBM Global Name Management (GNM) has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
<b>R.3</b>	Experience, within the last ten (10) years, working as a programmer/software developer on projects with a Global Name Management (GNM) component for a government* client.  *Government may include the Federal, Provincial or Municipal Government. The Government of Canada includes any department, agency, board of the Government of Canada or a Crown corporation.	5	<ul style="list-style-type: none"><li>• 1 to 2 years = 1 points</li><li>• 2+ to 3 years = 3 points</li><li>• 3+ years = 5 points</li></ul>	
<b>Maximum available points</b>		<b>35</b>		
<b>Minimum points required</b>		<b>21</b>		

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## 2.6 Application/Software Architect – Specialty in IBM Master Data Management (MDM) Server

### Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM Master Data Management (MDM) Server

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Application/Software Architect – Specialty in IBM Master Data Management (MDM) Server has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
R.1	<p>In addition to M2, experience, within the last ten (10) years, working as an application/software architect on the design, prototyping, components integration and oversight, as part of an IBM Master Data Management (MDM)* large scale (project value of \$6 million or greater) solution implementation, aligned with a Service Oriented Architecture (SOA), at an enterprise level with multiple stakeholders (greater than 2) with 20 million records or more.</p> <p>*Or previous versions or instances.</p>	15	<ul style="list-style-type: none"><li>• 3+ to 4 years = 5 points</li><li>• 4+ to 5 years = 10 points</li><li>• 5+ years = 15 points</li></ul>	

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**Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM Master Data Management (MDM) Server**

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Application/Software Architect – Specialty in IBM Master Data Management (MDM) Server has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
<b>R.2</b>	Experience, as an application/software architect, within the last ten (10) years, performing the integration of IBM MDM* with one or more of the following IBM products: <ul style="list-style-type: none"><li>• IBM Business Process Management (BPM)* Advanced</li><li>• IBM IIS* – DataStage or Quality Stage</li><li>• IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)*</li></ul> <p>*Or previous versions or instances.</p>	15	<ul style="list-style-type: none"><li>• 1 to 2 years = 5 points</li><li>• 2+ to 3 years = 10 points</li><li>• 3+ years = 15 points</li></ul>	

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**Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM Master Data Management (MDM) Server**

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Application/Software Architect – Specialty in IBM Master Data Management (MDM) Server has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
R.3	<p>Experience, as an application/software architect, within the last ten (10) years, in the development of security requirements* of an IBM MDM** implementation that required integration with one or more of the following COTS:</p> <ul style="list-style-type: none"><li>• IBM Operational Decision Manager (ODM)** Standard or Advanced</li><li>• IBM InfoSphere Identity Insight (ISII)**</li><li>• IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)**</li><li>• IBM Global Name Manager (GNM)</li><li>• IBM InfoSphere Information Server DataStage or QualityStage</li><li>• IBM Business Process Management (BPM)** Advanced</li></ul> <p>*Security requirements include the integration of MDM with other products part of a solution and alignment with security frameworks, security policies, and guidelines.</p> <p>**Or previous versions or instances.</p>	15	<ul style="list-style-type: none"><li>• 1 to 2 years = 5 points</li><li>• 2+ to 3 years = 10 points</li><li>• 3+ years = 15 points</li></ul>	



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**Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM Master Data Management (MDM) Server**

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Application/Software Architect – Specialty in IBM Master Data Management (MDM) Server has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
<b>R.4</b>	Experience, within the last ten (10) years, working as an application/software architect on projects with an MDM component for a government* client.  *Government may include the Federal, Provincial or Municipal Government. The Government of Canada includes any department, agency, board of the Government of Canada or a Crown corporation.	5	<ul style="list-style-type: none"><li>• 1 to 2 years = 1 points</li><li>• 2+ to 3 years = 3 points</li><li>• 3+ years = 5 points</li></ul>	
<b>Maximum available points</b>		<b>50</b>		
<b>Minimum points required</b>		<b>30</b>		

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**2.7 Application/Software Architect – Specialty in IBM InfoSphere Information Server (IIS) DataStage and QualityStage**

**Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM InfoSphere Information Server (IIS) DataStage and QualityStage**

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Application/Software Architect – Specialty in IBM InfoSphere Information Server (IIS) DataStage and QualityStage has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
R.1	In addition to M2, experience, within the last ten (10) years, working as an application/software architect on the design, prototyping, components integration and oversight, as part of an IBM InfoSphere Information Server DataStage or QualityStage large scale (project value of \$6 million or greater) solution implementation at an enterprise level with multiple stakeholders (greater than 2).	15	<ul style="list-style-type: none"><li>• 3+ to 4 years = 5 points</li><li>• 4+ to 5 years = 10 points</li><li>• 5+ years = 15 points</li></ul>	

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**Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM InfoSphere Information Server (IIS) DataStage and QualityStage**

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Application/Software Architect – Specialty in IBM InfoSphere Information Server (IIS) DataStage and QualityStage has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
<b>R.2</b>	<p>Experience, as an application/software architect, within the last ten (10) years, performing the integration of IBM DataStage or QualityStage with one or more of the following IBM products:</p> <ul style="list-style-type: none"><li>• IBM Business Process Management (BPM)* Advanced</li><li>• IBM Master Data Management(MDM)*</li><li>• IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)*</li></ul> <p>*Or previous versions or instances.</p>	15	<ul style="list-style-type: none"><li>• 1 to 2 years = 5 points</li><li>• 2+ to 3 years = 10 points</li><li>• 3+ years = 15 points</li></ul>	

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**Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM InfoSphere Information Server (IIS) DataStage and QualityStage**

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Application/Software Architect – Specialty in IBM InfoSphere Information Server (IIS) DataStage and QualityStage has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
<b>R.3</b>	<p>Experience, as an application/software architect, within the last ten (10) years, in the development of security requirements* of an IBM InfoSphere Information Server DataStage or QualityStage implementation that required an integration with one or more of the following COTS:</p> <ul style="list-style-type: none"><li>• IBM Operational Decision Manager (ODM)** Standard or Advanced</li><li>• IBM InfoSphere Identity Insight (ISII)**</li><li>• IBM Master Data Management(MDM)**</li><li>• IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)**</li><li>• IBM Global Name Manager (GNM)</li><li>• IBM Business Process Management (BPM)** Advanced</li></ul> <p>*Security requirements include the integration of IIS DS/QS with other products part of a solution and alignment with security frameworks, security policies, and guidelines.</p> <p>**Or previous versions or instances.</p>	15	<ul style="list-style-type: none"><li>• 1 to 2 years = 5 points</li><li>• 2+ to 3 years = 10 points</li><li>• 3+ years = 15 points</li></ul>	

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**Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM InfoSphere Information Server (IIS) DataStage and QualityStage**

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Application/Software Architect – Specialty in IBM InfoSphere Information Server (IIS) DataStage and QualityStage has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
<b>R.4</b>	Experience, within the last ten (10) years, working as an application/software architect on projects using an ETL product for a government* client.  *Government may include the Federal, Provincial or Municipal Government. The Government of Canada includes any department, agency, board of the Government of Canada or a Crown corporation.	5	<ul style="list-style-type: none"><li>• 1 to 2 years = 1 points</li><li>• 2+ to 3 years = 3 points</li><li>• 3+ years = 5 points</li></ul>	
<b>Maximum available points</b>		<b>50</b>		
<b>Minimum points required</b>		<b>30</b>		

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## 2.8 Application/Software Architect – Specialty in IBM InfoSphere Identity Insight (ISII)

### Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM InfoSphere Identity Insight (ISII)

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Application/Software Architect – Specialty in IBM InfoSphere Identity Insight (ISII) has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
R.1	<p>In addition to M2, experience within the last eight (8) years, working as an application/software architect on the design, prototyping, components integration and oversight, as part of an IBM InfoSphere Identity Insight (ISII)* large scale project (project value of \$6 million or greater) solution implementation, aligned with a Service Oriented Architecture (SOA), at an enterprise level with multiple stakeholders (greater than 2).</p> <p>*Or previous versions or instances</p>	15	<ul style="list-style-type: none"><li>• 2+ to 3 years = 5 points</li><li>• 3+ to 4 years = 10 points</li><li>• 4+ years = 15 points</li></ul>	

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**Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM InfoSphere Identity Insight (ISII)**

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Application/Software Architect – Specialty in IBM InfoSphere Identity Insight (ISII) has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
R.2	Experience, as an application/software architect, within the last eight (8) years, performing the integration of IBM InfoSphere Identity Insight with one or more of the following IBM products: <ul style="list-style-type: none"><li>• IBM Master Data Management(MDM)</li><li>• IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)</li></ul>	15	<ul style="list-style-type: none"><li>• 1 to 2 years = 5 points</li><li>• 2+ to 3 years = 10 points</li><li>• 3+ years = 15 points</li></ul>	

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**Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM InfoSphere Identity Insight (ISII)**

Name of proposed Resource: \_\_\_\_\_

**The Bidder SHOULD demonstrate that the Proposed Application/Software Architect – Specialty in IBM InfoSphere Identity Insight (ISII) has:**

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
R.3	<p>Experience, within the last eight (8) years, as an application/software architect in the development of security requirements* of an IBM InfoSphere Identity Insight (ISII)** implementation that required an integration with one or more of the following COTS:</p> <ul style="list-style-type: none"><li>• IBM Operational Decision Manager (ODM)** Standard or Advanced</li><li>• IBM Master Data Management (MDM)**</li><li>• IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)**</li><li>• IBM Global Name Manager (GNM)</li><li>• IBM InfoSphere Information Server DataStage or QualityStage</li><li>• IBM Business Process Management (BPM)** Advanced</li></ul> <p>*Security requirements include the integration of IBM InfoSphere Identity Insight with other products part of a solution and alignment with security frameworks, security policies, and guidelines.</p> <p>*Or previous versions or instances.</p>	15	<ul style="list-style-type: none"><li>• 1 to 2 years = 5 points</li><li>• 2+ to 3 years = 10 points</li><li>• 3+ years = 15 points</li></ul>	



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**Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM InfoSphere Identity Insight (ISII)**

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Application/Software Architect – Specialty in IBM InfoSphere Identity Insight (ISII) has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
<b>R.4</b>	Experience, within the last ten (10) years, working as an application/software architect on projects with a relationship analytical tool for a government* client.  *Government may include the Federal, Provincial or Municipal Government. The Government of Canada includes any department, agency, board of the Government of Canada or a Crown corporation.	5	<ul style="list-style-type: none"><li>• 1 to 2 years = 1 points</li><li>• 2+ to 3 years = 3 points</li><li>• 3+ years = 5 points</li></ul>	
<b>Maximum available points</b>		<b>50</b>		
<b>Minimum points required</b>		<b>30</b>		

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**2.9 Business System Analyst – Specialty in IBM Master Data Management (MDM) - Data Governance**

**Experience and Expertise of the Proposed Business System Analyst – Specialty in IBM Master Data Management (MDM) - Data Governance**

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Business System Analyst – Specialty in IBM Master Data Management (MDM) - Data Governance has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
R.1	In addition to M2, experience, within the last eight (8) years, working as a business system analyst responsible for the Data Governance of a large scale MDM solution implementation (project value of \$6 million or greater) at an enterprise level with multiple stakeholders (greater than 2).	15	<ul style="list-style-type: none"><li>• 3+ to 4 years = 5 points</li><li>• 4+ to 5 years = 10 points</li><li>• 5+ years = 15 points</li></ul>	

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**Experience and Expertise of the Proposed Business System Analyst – Specialty in IBM Master Data Management (MDM) - Data Governance**

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Business System Analyst – Specialty in IBM Master Data Management (MDM) - Data Governance has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
R.2	Experience, within the last eight (8) years, working as a business system analyst responsible for the Data Stewardship and working with an IBM MDM* Data Stewardship interface of a large scale (project value of \$6 million or greater) IBM MDM solution implementation at an enterprise level with multiple stakeholders (greater than 2).  *Or previous versions or instances	15	<ul style="list-style-type: none"><li>• 2 to 3 years = 5 points</li><li>• 3+ to 4 years = 10 points</li><li>• 4+ years = 15 points</li></ul>	
R.3	Experience, within the last ten (10) years, working as a business system analyst on projects that required the integration of an MDM component for a government* client.  *Government may include the Federal, Provincial or Municipal Government. The Government of Canada includes any department, agency, board of the Government of Canada or a Crown corporation.	5	<ul style="list-style-type: none"><li>• 1 to 2 years = 1 points</li><li>• 2+ to 3 years = 3 points</li><li>• 3+ years = 5 points</li></ul>	
Maximum available points		35		
Minimum points required		21		

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**2.10 Technology Architect – Specialty in IBM Master Data Management (MDM)  
Configuration/Release Management**

**Experience and Expertise of the Proposed Technology Architect - Specialty in IBM Master Data Management (MDM) Configuration/Release Management**

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Technology Architect - Specialty in IBM Master Data Management (MDM) Configuration/Release Management has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
R.1	Experience, working as a technology architect, within the last ten (10) years, developing, implementing and maintaining automated build and load deployment scripts for an IBM MDM* project.  *Or previous MDM versions or instances.	15	<ul style="list-style-type: none"><li>• 1+ to 2 years = 5 points</li><li>• 2+ to 3 years = 10 points</li><li>• 3+ years = 15 points</li></ul>	

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**Experience and Expertise of the Proposed Technology Architect - Specialty in IBM Master Data Management (MDM) Configuration/Release Management**

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Technology Architect - Specialty in IBM Master Data Management (MDM) Configuration/Release Management has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
R.2	Experience, within the last ten (10) years, performing the maintenance of an MDM project application source code repository.	15	<ul style="list-style-type: none"><li>• 1 to 2 years = 5 points</li><li>• 2+ to 3 years = 10 points</li><li>• 3+ years = 15 points</li></ul>	
R.3	Experience, within the last ten (10) years, working as a technology architect on projects that required the integration, deployment, and configuration of an MDM component for a government* client.  *Government may include the Federal, Provincial or Municipal Government. The Government of Canada includes any department, agency, board of the Government of Canada or a Crown corporation.	5	<ul style="list-style-type: none"><li>• 1 to 2 years = 1 points</li><li>• 2+ to 3 years = 3 points</li><li>• 3+ years = 5 points</li></ul>	
Maximum available points		35		
Minimum points required		21		

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**Note to Bidders:** *The following tables apply to Workstream 2 only.*

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**2.11 Programmer/Software Developer - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)**

**Experience and Expertise of the Proposed Programmer/Software Developer - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)**

**Name of proposed Resource:** \_\_\_\_\_

**The Bidder SHOULD demonstrate that the Proposed Programmer/Software Developer - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) has:**

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
<b>R.1</b>	In addition to M2, experience, within the last ten (10) years, working as a programmer/software developer developing IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)* solutions, aligned with a Service Oriented Architecture (SOA), in large scale projects (project value of \$6 million or greater) at an enterprise level with multiple stakeholders (greater than 2).  *Or previous versions or instances.	15	<ul style="list-style-type: none"><li>• 3+ to 4 years = 5 points</li><li>• 4+ to 5 years = 10 points</li><li>• 5+ years = 15 points</li></ul>	

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**Experience and Expertise of the Proposed Programmer/Software Developer - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)**

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Programmer/Software Developer - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
R.2	<p>Experience, within the last ten (10) years, working as a programmer/software developer on large scale projects (project value of \$6 million or greater) with an IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)* component that required an integration with one or more of the following products:</p> <ul style="list-style-type: none"><li>• IBM Operational Decision Manager (ODM)* Standard or Advanced</li><li>• IBM InfoSphere Identity Insight (ISII)*</li><li>• IBM Master Data Management (MDM)*</li><li>• IBM Global Name Manager (GNM)</li><li>• IBM InfoSphere Information Server DataStage or QualityStage</li><li>• IBM Business Process Management (BPM)* Advanced</li></ul> <p>*Or previous versions or instances.</p>	15	<ul style="list-style-type: none"><li>• 1 to 2 years = 5 points</li><li>• 2+ to 3 years = 10 points</li><li>• 3+ years = 15 points</li></ul>	



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**Experience and Expertise of the Proposed Programmer/Software Developer - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)**

**Name of proposed Resource:** \_\_\_\_\_

**The Bidder SHOULD demonstrate that the Proposed Programmer/Software Developer - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) has:**

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
<b>R.3</b>	Experience, within the last ten (10) years, working as a programmer/software developer on projects with an ESB component for a government* client.  *Government may include the Federal, Provincial or Municipal Government. The Government of Canada includes any department, agency, board of the Government of Canada or a Crown corporation.	5	<ul style="list-style-type: none"><li>• 1 to 2 years = 1 points</li><li>• 2+ to 3 years = 3 points</li><li>• 3+ years = 5 points</li></ul>	
<b>Maximum available points</b>		<b>35</b>		
<b>Minimum points required</b>		<b>21</b>		

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**2.12 Programmer/Software Developer - Specialty in IBM Business Process Manager (BPM) Advanced**

**Experience and Expertise of the Proposed Programmer/Software Developer - Specialty in IBM Business Process Manager (BPM) Advanced**

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Programmer/Software Developer - Specialty in IBM Business Process Manager (BPM) Advanced has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
R.1	In addition to M2, experience, within the last ten (10) years, working as programmer/software developer developing IBM Business Process Management (BPM)* solutions, aligned with a Service Oriented Architecture (SOA), on large scale projects (project value of \$6 million or greater) at an enterprise level with multiple stakeholders (greater than 2).  *Or previous versions or instances.	15	<ul style="list-style-type: none"><li>• 3+ to 4 years = 5 points</li><li>• 4+ to 5 years = 10 points</li><li>• 5+ years = 15 points</li></ul>	

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**Experience and Expertise of the Proposed Programmer/Software Developer - Specialty in IBM Business Process Manager (BPM) Advanced**

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Programmer/Software Developer - Specialty in IBM Business Process Manager (BPM) Advanced has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
<b>R.2</b>	<p>Experience, within the last ten (10) years, working as a programmer/software developer on large scale projects with a IBM Business Process Management (BPM)* component with integration of one or more of the following products:</p> <ul style="list-style-type: none"> <li>IBM Operational Decision Manager (ODM)* Standard or Advanced</li> <li>IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)*</li> <li>IBM Master Data Management(MDM)*</li> </ul> <p>*Or previous versions or instances.</p>	15	<ul style="list-style-type: none"> <li>1 to 2 years = 5 points</li> <li>2+ to 3 years = 10 points</li> <li>3+ years = 15 points</li> </ul>	
<b>R.3</b>	<p>Experience, within the last ten (10) years, working as a programmer/software developer on projects with a BPM component for a government* client.</p> <p>*Government may include the Federal, Provincial or Municipal Government. The Government of Canada includes any department, agency, board of the Government of Canada or a Crown corporation.</p>	5	<ul style="list-style-type: none"> <li>1 to 2 years = 1 points</li> <li>2+ to 3 years = 3 points</li> <li>3+ years = 5 points</li> </ul>	
<b>Maximum available points</b>		<b>35</b>		
<b>Minimum points required</b>		<b>21</b>		

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**2.13 Programmer/Software Developer - Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced**

**Experience and Expertise of the Proposed Programmer/Software Developer - Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced**

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Programmer/Software Developer - Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
R.1	<p>In addition to M2, experience, within the last ten (10) years, working as a programmer/software developer developing IBM Operational Decision Management (ODM)* solutions including the creation of executable object models (XOM), business object models (BOM), and the authoring of rules for a rules engine**, aligned with a Service Oriented Architecture (SOA), in large scale projects (project value of \$6 million or greater) at an enterprise level with multiple stakeholders (greater than 2).</p> <p>*Or previous versions or instances.</p> <p>**Includes separate Business rules and Business events components prior to creation of IBM ODM (Advanced).</p>	15	<ul style="list-style-type: none"><li>• 3+ to 4 years = 5 points</li><li>• 4+ to 5 years = 10 points</li><li>• 5+ years = 15 points</li></ul>	

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**Experience and Expertise of the Proposed Programmer/Software Developer - Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced**

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Programmer/Software Developer - Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
R.2	<p>Experience, within the last ten (10) years, working as a programmer/software developer on large scale projects with an IBM Operational Decision Management (ODM)* component with integration of one or more of the following products:</p> <ul style="list-style-type: none"><li>• IBM Business Process Management (BPM)*</li><li>• IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)*</li><li>• IBM Master Data Management (MDM)*</li></ul> <p>*Or previous versions or instances.</p>	15	<ul style="list-style-type: none"><li>• 1 to 2 years = 5 points</li><li>• 2+ to 3 years = 10 points</li><li>• 3+ years = 15 points</li></ul>	
R.3	<p>Experience, within the last five (5) years, working as a programmer/software developer on projects with an IBM Operational Decision Management (ODM)* component with volumes equal to or exceeding 10 million transactions per year.</p> <p>*Or previous versions or instances.</p>	5	<ul style="list-style-type: none"><li>• 10 million to 12 million transactions = 1 point</li><li>• 12+ million to 14 million transactions = 3 points</li><li>• 14+ million transactions per year = 5 points</li></ul>	

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**Experience and Expertise of the Proposed Programmer/Software Developer - Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced**

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Programmer/Software Developer - Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
<b>R.4</b>	Experience, within the last ten (10) years, working as a programmer/software developer on projects with a rule engine component for a government* client.  *Government may include the Federal, Provincial or Municipal Government. The Government of Canada includes any department, agency, board of the Government of Canada or a Crown corporation.	5	<ul style="list-style-type: none"><li>• 1 to 2 years = 1 points</li><li>• 2+ to 3 years = 3 points</li><li>• 3+ years = 5 points</li></ul>	
<b>Maximum available points</b>		<b>40</b>		
<b>Minimum points required</b>		<b>24</b>		

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**2.14 Application/Software Architect – Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)**

**Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)**

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Application/Software Architect – Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
R.1	Experience, as an application/software architect, within the last ten (10) years, on the design, prototyping, components integration and oversight, as part of an IBM Integration Bus (IIB)* – Enterprise Service Bus (ESB) large scale (project value of \$6 million or greater) solution implementation, aligned with a Service Oriented Architecture (SOA), at an enterprise level with multiple stakeholders (greater than 2).  *Or previous versions or instances.	15	<ul style="list-style-type: none"><li>• 3+ to 4 years = 5 points</li><li>• 4+ to 5 years = 10 points</li><li>• 5+ years = 15 points</li></ul>	

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**Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)**

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Application/Software Architect – Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
R.2	<p>Experience, as an application/software architect, within the last ten (10) years, performing the integration of IBM IIB-ESB* with one or more of the following products:</p> <ul style="list-style-type: none"><li>• IBM Operational Decision Manager (ODM)* Standard or Advanced</li><li>• IBM InfoSphere Identity Insight (ISII)*</li><li>• IBM Master Data Management (MDM)*</li><li>• IBM Business Process Management (BPM)* Advanced</li></ul> <p>*Or previous versions or instances.</p>	15	<ul style="list-style-type: none"><li>• 1 to 2 years = 5 points</li><li>• 2+ to 3 years = 10 points</li><li>• 3+ years = 15 points</li></ul>	



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**Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)**

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Application/Software Architect – Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
R.3	<p>Experience, as an application/software architect, within the last ten (10) years, in the development of security requirements* of an IBM IIB-ESB* implementation that required integration with one or more of the following COTS:</p> <ul style="list-style-type: none"><li>• Master Data Management (MDM)**</li><li>• IBM Business Process Management (BPM)** Advanced</li><li>• IBM Operational Decision Manager (ODM)** Standard or Advanced</li><li>• IBM InfoSphere Identity Insight (ISII)**</li><li>• IBM Global Name Manager (GNM)</li><li>• IBM InfoSphere Information Server DataStage or QualityStage</li></ul> <p>*Security requirements include the integration of MDM with other products part of a solution and alignment with security frameworks, security policies, and guidelines.</p> <p>**Or previous versions or instances.</p>	15	<ul style="list-style-type: none"><li>• 1 to 2 years = 5 points</li><li>• 2+ to 3 years = 10 points</li><li>• 3+ years = 15 points</li></ul>	

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**Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)**

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Application/Software Architect – Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
<b>R.4</b>	Experience, within the last ten (10) years, working as an application/software architect on projects with an ESB component for a government* client.  *Government may include the Federal, Provincial or Municipal Government. The Government of Canada includes any department, agency, board of the Government of Canada or a Crown corporation.	5	<ul style="list-style-type: none"><li>• 1 to 2 years = 1 points</li><li>• 2+ to 3 years = 3 points</li><li>• 3+ years = 5 points</li></ul>	
<b>Maximum available points</b>		<b>50</b>		
<b>Minimum points required</b>		<b>30</b>		

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**2.15 Application/Software Architect – Specialty in IBM Business Process Manager (BPM) Advanced**

**Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM Business Process Manager (BPM) Advanced**

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Application/Software Architect – Specialty in IBM Business Process Manager (BPM) Advanced has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
R.1	<p>In addition to M2, experience, within the last ten (10) years, working as an application/software architect on the design, prototyping, components integration and oversight, as part of an IBM Business Process Management (BPM)* Advanced large scale (project value of \$6 million or greater) solution implementation, aligned with a Service Oriented Architecture (SOA), at an enterprise level with multiple stakeholders (greater than 2).</p> <p>*Or previous versions or instances.</p>	15	<ul style="list-style-type: none"><li>• 3+ to 4 years = 5 points</li><li>• 4+ to 5 years = 10 points</li><li>• 5+ years = 15 points</li></ul>	

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**Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM Business Process Manager (BPM) Advanced**

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Application/Software Architect – Specialty in IBM Business Process Manager (BPM) Advanced has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
<b>R.2</b>	Experience as an application/software architect, within the last ten (10) years, performing the integration of IBM Business Process Management (BPM)* with one or more of the following IBM products: <ul style="list-style-type: none"><li>• IBM Master Data Management(MDM)*</li><li>• IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)*</li></ul> *Or previous versions or instances.	15	<ul style="list-style-type: none"><li>• 1 to 2 years = 5 points</li><li>• 2+ to 3 years = 10 points</li><li>• 3+ years = 15 points</li></ul>	

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**Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM Business Process Manager (BPM) Advanced**

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Application/Software Architect – Specialty in IBM Business Process Manager (BPM) Advanced has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
R.3	<p>Experience, within the last ten (10) years, as an application/software architect in the development of security requirements* of an IBM Business Process Management (BPM) implementation that required an integration with one or more of the following COTS:</p> <ul style="list-style-type: none"><li>• IBM Operational Decision Manager (ODM)** Standard or Advanced</li><li>• IBM InfoSphere Identity Insight (ISII)**</li><li>• IBM Master Data Management(MDM)**</li><li>• IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)**</li><li>• IBM Global Name Manager (GNM)</li><li>• IBM InfoSphere Information Server DataStage or QualityStage</li></ul> <p>*Security requirements include the integration of BPM with other products part of a solution and alignment with security frameworks, security policies, and guidelines.</p> <p>**Or previous versions or instances.</p>	15	<ul style="list-style-type: none"><li>• 1 to 2 years = 5 points</li><li>• 2+ to 3 years = 10 points</li><li>• 3+ years = 15 points</li></ul>	

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**Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM Business Process Manager (BPM) Advanced**

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Application/Software Architect – Specialty in IBM Business Process Manager (BPM) Advanced has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
<b>R.4</b>	Experience, within the last ten (10) years, working as an application/software architect on a project(s) with a BPM component for a government* client.  *Government may include the Federal, Provincial or Municipal Government. The Government of Canada includes any department, agency, board of the Government of Canada or a Crown corporation.	5	<ul style="list-style-type: none"><li>• 1 to 2 years = 1 points</li><li>• 2+ to 3 years = 3 points</li><li>• 3+ years = 5 points</li></ul>	
<b>Maximum available points</b>		<b>50</b>		
<b>Minimum points required</b>		<b>30</b>		

**2.16 Application/Software Architect – Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced**

**Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced**

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Application/Software Architect – Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
<b>R.1</b>	<p>In addition to M2, experience, within the last ten (10) years, working as an application/software architect on the design, prototyping, components integration and oversight, as part of an IBM Operational Decision Manager (ODM)*, large scale (project value of \$6 million or greater) solution implementation, aligned with a Service Oriented Architecture (SOA), at an enterprise level with multiple stakeholders (greater than 2).</p> <p>*Or previous versions or instances.</p>	15	<ul style="list-style-type: none"> <li>• 3+ to 4 years = 5 points</li> <li>• 4+ to 5 years = 10 points</li> <li>• 5+ years = 15 points</li> </ul>	

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**Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced**

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Application/Software Architect – Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
R.2	<p>Experience, within the last ten (10) years, working as an application/software architect on the integration of IBM Operational Decision Manager (ODM)* with one or more of the following IBM products listed below on a large scale project (project value of \$6 million or greater) solution implementation at an enterprise level with multiple stakeholders (greater than 2).</p> <ul style="list-style-type: none"><li>• IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)*</li><li>• IBM Business Process Management (BPM)* Advanced</li><li>• IBM InfoSphere Information Server (IIS) DataStage or QualityStage</li></ul> <p>*Or previous versions or instances,</p>	15	<ul style="list-style-type: none"><li>• 1 to 2 years = 5 points</li><li>• 2+ to 3 years = 10 points</li><li>• 3+ years = 15 points</li></ul>	



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**Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced**

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Application/Software Architect – Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
R.3	<p>Experience, within the last ten (10) years, as an application/software architect in the development of security requirements* of a solution implementation that required integration with one or more of the following COTS:</p> <ul style="list-style-type: none"><li>• IBM Operational Decision Manager (ODM)** Standard or Advanced</li><li>• IBM InfoSphere Identity Insight (ISII)**</li><li>• IBM Master Data Management(MDM)**</li><li>• IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)**</li><li>• IBM Global Name Manager (GNM)</li><li>• IBM InfoSphere Information Server DataStage or QualityStage</li><li>• IBM Business Process Management (BPM)** Advanced</li></ul> <p>*Security requirements include the integration of IBM Operational Decision Manager (ODM) Standard or Advanced with other products part of a solution and alignment with security frameworks, security policies, and guidelines.</p> <p>**Or previous versions or instances.</p>	15	<ul style="list-style-type: none"><li>• 1 to 2 years = 5 points</li><li>• 2+ to 3 years = 10 points</li><li>• 3+ years = 15 points</li></ul>	

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**Experience and Expertise of the Proposed Application/Software Architect – Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced**

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Application/Software Architect – Specialty in IBM Operational Decision Manager (ODM) Standard and Advanced has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
<b>R.4</b>	Experience, within the last ten (10) years, working as an application/software architect on projects with a rule engine for a government* client.  *Government may include the Federal, Provincial or Municipal Government. The Government of Canada includes any department, agency, board of the Government of Canada or a Crown corporation.	5	<ul style="list-style-type: none"><li>• 1 to 2 years = 1 points</li><li>• 2+ to 3 years = 3 points</li><li>• 3+ years = 5 points</li></ul>	
<b>Maximum available points</b>		<b>50</b>		
<b>Minimum points required</b>		<b>30</b>		

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**2.17 Test Coordinator - Specialty in Test coordination of one or many of the following Products: IBM MDM, IBM BPM, IBM IIS DataStage and QualityStage, IBM IIB-ESB, IBM ODM Standard and Advanced**

**Experience and Expertise of the Proposed Test Coordinator – Specialty in IBM products**

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Test Coordinator – Specialty in IBM products has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
R.1	<p>In addition to M2, experience, working as a test coordinator, within the last ten (10) years, planning, scheduling, coordinating and reporting on the testing phase of a large scale (project value of \$6 million or greater) IBM Master Data Management (MDM)* solution and/or an IBM Enterprise Service Bus (ESB)* solution implementation at an enterprise level with multiple stakeholders (greater than 2) and multiple integration points.</p> <p>*Or previous versions or instances.</p>	15	<ul style="list-style-type: none"><li>• 2+ to 3 years = 5 points</li><li>• 3+ to 4 years = 10 points</li><li>• 4+ years = 15 points</li></ul>	

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**Experience and Expertise of the Proposed Test Coordinator – Specialty in IBM products**

**Name of proposed Resource:** \_\_\_\_\_

**The Bidder SHOULD demonstrate that the Proposed Test Coordinator – Specialty in IBM products has:**

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
R.2	<p>experience, within the last ten (10) years, working as a test coordinator to plan, schedule, and report on the functional and system integration testing of solutions that integrates at least two (2) of the following IBM components:</p> <ul style="list-style-type: none"><li>• IBM Operational Decision Manager (ODM)** Standard or Advanced</li><li>• IBM InfoSphere Identity Insight (ISII)**</li><li>• IBM Master Data Management (MDM)**</li><li>• IBM Integration Bus (IIB) – Enterprise Service Bus (ESB)**</li><li>• IBM Global Name Manager (GNM)</li><li>• IBM InfoSphere Information Server DataStage or QualityStage</li><li>• IBM Business Process Management (BPM)** Advanced</li></ul> <p>*Or previous versions or instances.</p>	15	<ul style="list-style-type: none"><li>• 2 to 3 years = 5 points</li><li>• 3+ to 4 years = 10 points</li><li>• 4+ years = 15 points</li></ul>	

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**Experience and Expertise of the Proposed Test Coordinator – Specialty in IBM products**

**Name of proposed Resource:** \_\_\_\_\_

**The Bidder SHOULD demonstrate that the Proposed Test Coordinator – Specialty in IBM products has:**

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
<b>R.3</b>	Experience, within the last ten (10) years, working as a test coordinator on projects that required the integration and testing of components aligned with a SOA and/or MDM for a government* client.  *Government may include the Federal, Provincial or Municipal Government. The Government of Canada includes any department, agency, board of the Government of Canada or a Crown corporation.	5	<ul style="list-style-type: none"><li>• 1 to 2 years = 1 points</li><li>• 2+ to 3 years = 3 points</li><li>• 3+ years = 5 points</li></ul>	
<b>Maximum available points</b>		<b>35</b>		
<b>Minimum points required</b>		<b>21</b>		

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**2.18 Technology Architect – Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) Configuration/Release Management**

**Experience and Expertise of the Proposed Technology Architect - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) Configuration/Release Management**

**Name of proposed Resource:** \_\_\_\_\_

**The Bidder SHOULD demonstrate that the Proposed Technology Architect - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) Configuration/Release Management has:**

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
R.1	Experience within the last ten (10) years working as a technology architect working on the configuration, optimization and deployment of an IBM Integration Bus (IIB) - Enterprise Service Bus (ESB)* project solution implementation, aligned with a Service Oriented Architecture (SOA), in large scale projects (project value of \$6 million or greater) at an enterprise level with multiple stakeholders (greater than 2).  *Or previous versions or instances.	15	<ul style="list-style-type: none"><li>• 3 to 4 years = 5 points</li><li>• 4+ to 5 years = 10 points</li><li>• 5+ years = 15 points</li></ul>	

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**Experience and Expertise of the Proposed Technology Architect - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) Configuration/Release Management**

Name of proposed Resource: \_\_\_\_\_

The Bidder **SHOULD** demonstrate that the Proposed Technology Architect - Specialty in IBM Integration Bus (IIB) – Enterprise Service Bus (ESB) Configuration/Release Management has:

			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
<b>R.2</b>	<p>Experience, within the last ten (10) years, as a technology architect performing the integration of IBM Integration Bus (IIB) - IBM Enterprise Service Bus (ESB)* with the IBM Business Process Management (BPM)* Advanced IBM product and one or more of the following IBM products:</p> <ul style="list-style-type: none"> <li>• IBM Operational Decision Manager (ODM)* Standard or Advanced</li> <li>• IBM InfoSphere Identity Insight (ISII)*</li> <li>• IBM Master Data Management(MDM)*</li> <li>• IBM Global Name Manager (GNM)</li> <li>• IBM InfoSphere Information Server DataStage or QualityStage</li> </ul> <p>*Or previous versions or instances.</p>	15	<ul style="list-style-type: none"> <li>• 1 to 2 years = 5 points</li> <li>• 2+ to 3 years = 10 points</li> <li>• 3+ years = 15 points</li> </ul>	
<b>R.3</b>	<p>Experience, within the last ten (10) years, working as a technology architect on projects with an MDM component for a government* client.</p> <p>*Government may include the Federal, Provincial or Municipal Government. The Government of Canada includes any department, agency, board of the Government of Canada or a Crown corporation.</p>	5	<ul style="list-style-type: none"> <li>• 1 to 2 years = 1 points</li> <li>• 2+ to 3 years = 3 points</li> <li>• 3+ years = 5 points</li> </ul>	
<b>Maximum available points</b>		<b>35</b>		
<b>Minimum points required</b>		<b>21</b>		





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

<b>PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE</b>		
1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine		2. Branch or Directorate / Direction générale ou Direction
CBSA		EAIM/CSP
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 Standing offer for the provision of Task Based informatics Professional Services to the Government of Canada		
5. a) Will the supplier require access to Controlled Goods? Le fournisseur aura-t-il accès à des marchandises contrôlées?		<input checked="" type="checkbox"/> No Non <input type="checkbox"/> Yes Oui
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?		<input checked="" type="checkbox"/> No Non <input type="checkbox"/> Yes Oui
6. Indicate the type of access required / Indiquer le type d'accès requis		
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)		<input type="checkbox"/> No Non <input checked="" type="checkbox"/> Yes Oui
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.		<input checked="" type="checkbox"/> No Non <input type="checkbox"/> Yes Oui
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?		<input checked="" type="checkbox"/> No Non <input type="checkbox"/> Yes Oui
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 <input checked="" type="checkbox"/>	NATO / OTAN <input type="checkbox"/>	Foreign / Étranger <input type="checkbox"/>
7. b) Release restrictions / Restrictions relatives à la diffusion		
No release restrictions Aucune restriction relative à la diffusion <input checked="" type="checkbox"/>	All NATO countries Tous les pays de l'OTAN <input type="checkbox"/>	No release restrictions Aucune restriction relative à la diffusion <input type="checkbox"/>
Not releasable À ne pas diffuser <input type="checkbox"/>		
Restricted to: / Limité à: <input type="checkbox"/>	Restricted to: / Limité à: <input type="checkbox"/>	Restricted to: / Limité à: <input type="checkbox"/>
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		
PROTECTED A PROTÉGÉ A <input checked="" type="checkbox"/>	NATO UNCLASSIFIED NATO NON CLASSIFIÉ <input type="checkbox"/>	PROTECTED A PROTÉGÉ A <input type="checkbox"/>
PROTECTED B PROTÉGÉ B <input checked="" type="checkbox"/>	NATO RESTRICTED NATO DIFFUSION RESTREINTE <input type="checkbox"/>	PROTECTED B PROTÉGÉ B <input type="checkbox"/>
PROTECTED C PROTÉGÉ C <input checked="" type="checkbox"/>	NATO CONFIDENTIAL NATO CONFIDENTIEL <input type="checkbox"/>	PROTECTED C PROTÉGÉ C <input type="checkbox"/>
CONFIDENTIAL CONFIDENTIEL <input type="checkbox"/>	NATO SECRET NATO SECRET <input type="checkbox"/>	CONFIDENTIAL CONFIDENTIEL <input type="checkbox"/>
SECRET SECRET <input checked="" type="checkbox"/>	COSMIC TOP SECRET COSMIC TRÈS SECRET <input type="checkbox"/>	SECRET SECRET <input type="checkbox"/>
TOP SECRET TRÈS SECRET <input type="checkbox"/>		TOP SECRET TRÈS SECRET <input type="checkbox"/>
TOP SECRET (SIGINT) TRÈS SECRET (SIGINT) <input type="checkbox"/>		TOP SECRET (SIGINT) TRÈS SECRET (SIGINT) <input type="checkbox"/>





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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? ☒ No ☐ Yes  
Non ☐ Oui  
If Yes, indicate the level of sensitivity:  
Dans l'affirmative, indiquer le niveau de sensibilité :

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 ☐ Yes  
Non ☐ 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

<input type="checkbox"/> RELIABILITY STATUS COTE DE FIABILITÉ	<input type="checkbox"/> CONFIDENTIAL CONFIDENTIEL	<input checked="" type="checkbox"/> SECRET SECRET	<input type="checkbox"/> TOP SECRET TRÈS SECRET
<input type="checkbox"/> TOP SECRET - SIGINT TRÈS SECRET - SIGINT	<input type="checkbox"/> NATO CONFIDENTIAL NATO CONFIDENTIEL	<input type="checkbox"/> NATO SECRET NATO SECRET	<input type="checkbox"/> COSMIC TOP SECRET COSMIC TRÈS SECRET
<input type="checkbox"/> 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 ☐ Yes  
Non ☐ Oui  
If Yes, will unscreened personnel be escorted?  
Dans l'affirmative, le personnel en question sera-t-il escorté? ☒ No ☐ Yes  
Non ☐ 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 ☐ Yes  
Non ☐ 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 ☐ Yes  
Non ☐ 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 ☐ Yes  
Non ☐ 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 ☐ Yes  
Non ☐ 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 ☐ Yes  
Non ☐ Oui



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**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			CONFIDENTIAL	SECRET	TOP SECRET  TRÈS SECRET
											A	B	C			
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, classifiez 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, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire et indiquez qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).





Government of Canada  
Gouvernement du Canada

Contract Number / Numéro du contrat

Security Classification / Classification de sécurité

**PART D - AUTHORIZATION / PARTIE D - AUTORISATION**

**13. Organization Project Authority / Chargé de projet de l'organisme**

Name (print) - Nom (en lettres moulées) Hien Kien Tsang		Title - Titre A/Director	Signature 	Date Aug 15 - 2015
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**14. Organization Security Authority / Responsable de la sécurité de l'organisme**

Name (print) - Nom (en lettres moulées) AHMED SALAH		Title - Titre SECURITY SPECIALIST	Signature 	Date 2016/08/17
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15. Are there additional instructions (e.g. Security Guide, Security Classification Guide) attached?  
Des instructions supplémentaires (p. ex. Guide de sécurité, Guide de classification de la sécurité) sont-elles jointes?

☒ No  
Non ☐ Yes  
Oui

**16. Procurement Officer / Agent d'approvisionnement**

Name (print) - Nom (en lettres moulées)		Title - Titre	Signature
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date

**17. Contracting Security Authority / Autorité contractante en matière de sécurité**

Name (print) - Nom (en lettres moulées)		Title - Titre	Signature
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date