

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

INNOVATION, SCIENCE AND ECONOMIC DEVELOPMENT CANADA/INNOVATION SCIENCES ET DÉVELOPPEMENT ÉCONOMIQUE CANADA  
CHIEF INFORMATICS OFFICE/BUREAU PRINCIPAL DE L'INFORMATIQUE  
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325C

**REQUEST FOR PROPOSAL  
DEMANDE DE PROPOSITION**

**Proposal To: Innovation, Science and Economic Development 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 thereof.

**Proposition à: Innovation, sciences et développement économique 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 toutes feuilles ci-annexées, au(x) prix indiqué(s)

**Comments – Commentaires**

**This document contains a Security Requirement**

**Vendor/Firm Name and address  
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**Issuing Office – Bureau de distribution**

Innovation, Science and Economic Development Canada / Innovation, sciences et développement économique Canada  
Chief Information Office/Bureau principal de l'information  
235 Queen, Ottawa, Ontario  
K1A 0H5

<b>Title – Titre</b> TBIPS – P.9 Project Manager – level 3 CIO/CIPO Business Solutions Branch (CBSB)	
<b>Solicitation No. – N° de l'invitation</b> IC401651	<b>Date</b> January 10, 2017
<b>Client Reference No. – N° de référence du client</b> CIO/CBSB0064	
<b>GETS Reference No. – N° de référence de SEAG</b> 938-5/160701EW	
<b>File No. – N° du dossier</b> CIO/CBSB0064	<b>CCC No. / N° CCC - FMS No. /N° VME</b>
<b>Solicitation Closes – L'invitation prend fin</b> at – à : <b>2 :00 p.m.</b> on – le : <b>January 30, 2017</b>	<b>Time Zone Fuseau horaire</b>  <b>Eastern Standard Time (EST.)</b>
<b>F.O.B. - F.A.B.</b> <b>Plant-Usine:</b> <input type="checkbox"/> <b>Destination:</b> <input checked="" type="checkbox"/> <b>Other-Autre:</b> <input type="checkbox"/>	
<b>Address Inquiries to : - Adresser toutes questions à:</b> Melyssa Zawadka	<b>Buyer Id – Id de l'acheteur</b>
<b>Telephone No. – N° de téléphone :</b> 343-291-3848	<b>FAX No. – N° du télécopieur / E-mail – courriel</b> Melyssa.zawadka@canada.ca
<b>Destination – of Goods, Services, and Construction: Destination – des biens, services et construction :</b> See Herein	

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



**REQUEST FOR PROPOSAL (RFP) AGAINST A SUPPLY ARRANGEMENT FOR  
TASK-BASED INFORMATICS PROFESSIONAL SERVICES (TBIPS)  
FOR THE PROVISION OF AN  
P.9 PROJECT MANAGER LEVEL 3  
IT MODERNIZATION DIRECTORATE, CIPO BUSINESS SOLUTIONS BRANCH  
CIO, INNOVATION, SCIENCE AND ECONOMIC DEVELOPMENT (ISED)**

**ANY CONTRACT AS A RESULT OF THIS RFP WILL NOT EXCEED THE TBIPS TIER 1 SA DOLLAR VALUE OF \$2M  
INCLUDING APPLICABLE TAXES**

**There are no contractors performing services described in this RFP.**

This Model Bid Solicitation contains samples of the terms that will form the basis for any future requests for proposals (RFPs) under the Task-Based Informatics and Professional Services (TBIPS) Supply Arrangement (SA) method of supply.

To the extent possible, these Articles are written as they will appear in any future TBIPS RFP(s). However, individual RFPs and the Resulting Contract Clauses may be modified to suit individual Client requirements. For example, the nature of the requirement, the term of the resulting Contract, the evaluation methodology and the basis of payment clauses may all be tailored to individual Client requirements.

The Articles in the Resulting Contract Clauses are mandatory in their entirety, unless otherwise indicated. Acceptance of these Articles, in their entirety, as they appear in this Annex, is a Mandatory requirement of this RFSA. Suppliers submitting an Offer containing statements implying that their Offer is conditional on modification of these clauses or containing terms and conditions that purport to supersede these clauses or derogate from them will be considered non-responsive.

**Offerors with concerns regarding the provisions of the Model Bid Solicitation (including the Resulting Contract Clauses) should raise such concerns in accordance with the Enquiries provision of this RFSA**

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## PART 1 – GENERAL INFORMATION

### 1.1 INTRODUCTION

This document states the terms and conditions that apply to bid solicitation number IC401651. It is divided into seven parts plus annexes and, attachments as follows:

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

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

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

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

**Part 5 Certifications:** includes the certifications to be provided;

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

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

**The annexes include the Statement of Work, the Evaluation Criteria, the Basis of Payment, the Basis of Selection, the Security Requirement Checklist, the Bid Submission Form and the Task Authorization.**

### 1.2 SUMMARY

- a. This bid solicitation is being issued to satisfy the requirement of Innovation, Science and Economic Development (ISED) for Task-Based Informatics Professional Services (TBIPS) under the TBIPS Supply Arrangement (SA) method of supply.
- b. It is intended to result in the award of one contract for one (1) year, plus three (3) 1 year irrevocable option periods allowing Canada to extend the term of the contract(s).
- c. There is a security requirement associated with this requirement. For additional information, see Part 6 – Security, Financial and Other Requirements, and Part 7 – Resulting Contract Clauses. Bidders should consult the "[Security Requirements on PWGSC Bid Solicitations – Instructions for Bidders](http://ssi-iss.tpsgc-pwgsc.gc.ca)" document on the Departmental Standard Procurement Documents (<http://ssi-iss.tpsgc-pwgsc.gc.ca>) Website.
- d. The requirement is subject to the provisions of the North American Free Trade Agreement (NAFTA), the Canada-Chile Free Trade Agreement (CCFTA), the Agreement on Internal Trade (AIT), the Canada-Korea Free Trade Agreement (CKFTA), the Canada-Columbia Free Trade Agreement (CCoIFTA), the Canada-Honduras Free Trade Agreement (CHFTA), the Canada-Peru Free Trade Agreement (CPFTA), the Canada-Panama Free Trade Agreement (CPanFTA), and the World Trade Organization Agreement on Government Procurement (WTO-AGP).
- e. The TBIPS Supply Arrangement EN578-055605/G 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.

Only selected TBIPS SA Holders currently holding a TBIPS SA for Tier 1 in the National Capital Region (NCR) under the EN578-055605/G series of SAs are invited to compete. SA Holders may not submit a bid in response to this bid solicitation unless they have been invited to do so. However, should an uninvited SA Holder wish to be invited, it may contact the Contracting Authority to request an invitation at any time prior to five days before the published bid closing date, and an invitation will be made to that SA Holder unless it would not be consistent with the efficient operation of the procurement system. In no circumstance will such an invitation require Canada to extend a bid closing date. The following SA Holders have been initially invited to bid on this requirement. Where additional invitations are made during the bid solicitation process, it may be that they are not reflected in a solicitation amendment:

1. Accenture Inc.

2. B.D.M.K. Consultants Inc.
  3. BP & M Government IM & IT Consulting Inc.
  4. Davidson Violette & Associates Inc.
  5. Donna Cona Inc.
  6. Eagle Professional Resources Inc.
  7. IBISKA Telecom Inc.
  8. NavPoint Consulting Group Inc.
  9. Randstad Interim Incorporated
  10. Robertson & Company Ltd.
  11. S.i. Systems Ltd.
  12. Systemscope Inc.
  13. T.E.S. Contract Services Inc.
  14. The AIM Group Inc.
  15. TPG Technology Consulting Ltd.
- f. 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/G as that joint venture at the time of bid closing in order to submit a bid.
- g. The Resource Categories described below are required on an as and when requested basis in accordance Annex "A" of the TBIPS RFSA:

Resource Category	Level of Expertise	Estimated Number of Resources Required
P.9 – Project Manager	Level 3	Suppliers to bid one, but requirement is up to five.

### 1.3 DEBRIEFINGS

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

## 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](#) issued by Public Works and Government Services Canada (PWGSC).
- 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, with the following modifications: with Subsection 5.4 amended by deleting “sixty (60) days” and inserting “180 days”. If there is a conflict between the provisions of 2003 and this document, this document prevails.

The text under subsections 4 and 5 of Section 01 – Integrity Provisions of 2003 referenced above is replaced by:

4. Bidders who are incorporated or who are a sole proprietorship, including those bidding as a joint venture, have already provided a list of names of all individuals who are directors of the Bidder, or the name of the owner, at the time of submitting an arrangement under the Request for Supply Arrangement (RFSA).  
Canada may, at any time, request that a Bidder provide properly completed and Signed Consent Forms ([Consent to a Criminal Record Verification form - PWGSC-TPSGC 229](#)) for any or all individuals aforementioned list within a specified time period. Failure to provide such Consent Forms within the time period provided will result in the bid being declared non-responsive.
5. The Bidder must diligently maintain this list up-to-date by informing Canada in writing of any change occurring during the validity period of the bid as well as during the period of any contract arising from this bid solicitation.

### 2.2 SUBMISSION OF BIDS

- a. Unless specified otherwise in the RFP, bids must be received by the Contract Authority at the location identified by the date, time and place indicated on page 1 of the solicitation.
- b. If your bid is transmitted by facsimile or electronic mail, Canada will not be responsible for late bids received at destination after the closing date and time, even if it was submitted before.

### 2.3 FORMER PUBLIC SERVANT

- a. **Information Required**  
Contracts awarded to former public servants (FPS) in receipt of a pension or of a lump sum payment must bear the closest public scrutiny, and reflect fairness in the spending of public funds. In order to comply with Treasury Board policies and directives on contracts with FPS, bidders must provide the information required below before contract award.
- b. **Definitions**  
For the purposes of this clause, “former public servant” [is any former member of a department as defined in the Financial Administration Act](#), R.S., 1985, c. F-11, a former member of the Canadian Armed Forces or a former member of the Royal Canadian Mounted Police. A former public servant may be:  
an individual;  
an individual who has incorporated;  
a partnership made of former public servants; or  
a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.

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



reduce the size of the Public Service. The lump sum payment period does not include the period of severance pay, which is measured in a like manner.

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

**c. Former Public Servant in Receipt of a Pension**

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

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

**name of former public servant;**

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

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

**d. Work Force Adjustment Directive**

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

**If so, the Bidder must provide the following information:**

**name of former public servant;**

**conditions of the lump sum payment incentive;**

**date of termination of employment;**

**amount of lump sum payment;**

**rate of pay on which lump sum payment is based;**

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

**number and amount (professional fees) of other contracts subject to the restrictions of a work force adjustment program.**

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

## 2.4 ENQUIRIES – BID SOLICITATION

- a. All enquiries must be submitted in writing to the Contracting Authority no later than five working 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.

## 2.5 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: A bidder may, at its 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.***

## 2.6 IMPROVEMENT OF REQUIREMENT DURING SOLICITATION PERIOD

If 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.



## 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 (1 electronic copy)
  - ii. Section II: Financial Bid ( 1 electronic copy)
  - iii. Section III: Certifications not included in the Technical Bid (1 electronic 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:** The 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 \(http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html\)](http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html). To assist Canada in reaching its objectives, bidders are encouraged to:
- i. use paper containing fibre certified as originating from a sustainably-managed forest and/or containing minimum 30% recycled content; and
  - ii. use an environmentally-preferable format including black and white printing instead of colour printing, printing double sided/duplex, using staples or clips instead of cerlox, duo tangs or binders.
- d. **Submission of Only One Bid from a Bidding Group:**
- i. The submission of more than one bid from members of the same bidding group is not permitted in response to this bid solicitation. If members of a bidding group participate in more than one bid, Canada will set aside all bids received from members of that bidding group.
  - ii. For the purposes of this article, "bidding group" means all entities (whether those entities include one or more natural persons, corporations, partnerships, limited liability partnerships, etc.) that are related to one another. Regardless of the jurisdiction where any of the entities concerned is incorporated or otherwise formed as a matter of law, entities are considered "**related**" for the purposes of this bid solicitation 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.
- 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. 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.
  - 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 submitted this information within the period set by the Contracting Authority, its bid will be declared non-responsive.
  - iv. 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.
  - v. 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

The technical bid consists of the following:

- i. **Bid Submission Form:** Bidders are requested to include the Bid Submission Form – Annex “(F)” 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, the Bidder’s Procurement Business Number, the Bidder’s status under the Federal Contractors Program for Employment Equity, 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. **Substantiation of Technical Compliance:**  
 The technical bid must substantiate the compliance with the specific articles of Annex “(B)”, 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 product complies 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 Annex “(B)”, 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.



- iii. **For Proposed Resources:** The technical bid must include résumés for the resources as identified in Annex “(B)”. 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
  - B. For educational requirements for a particular degree, designation or certificate, Canada will only consider educational programmes that were successfully completed by the resource by the time of bid closing.
  - 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 be an accredited or otherwise recognized body, institution or entity.
  - D. For work experience, Canada will not consider experience gained as part of an educational programme, except for experience gained through a formal cooperative programme at a post-secondary institution.
  - E. 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 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.
- iv. **Customer Reference Contact Information:** The Bidder must provide customer references who must each confirm, **if** requested by Canada the facts identified in the Bidder’s bid, as required by Annex “(B)”. For each customer reference, the Bidder must, at a minimum, provide the name, the telephone number and e-mail address for a contact person. Bidders are also requested to include the title of the contact person. If there is a conflict between the information provided by the customer reference and the bid, the information provided by the customer reference will be evaluated instead of the information in the bid. If the named individual is unavailable when required during the evaluation period, the Bidder may provide the name and contact information of an alternate contact from the same customer.

### 3.3 SECTION II: FINANCIAL BID

- a. **Pricing:** Bidders must submit their financial bid in accordance with the Basis of Payment provided in Annex “C” of this bid solicitation. 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 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:
  - i. the rate bid must not increase by more than 5% from one time period to the next, and
  - ii. 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.

### 3.4 SECTION III: CERTIFICATIONS

Bidders must submit the certifications required under Part 5 that have not been included in the Technical Bid.

## PART 4 – EVALUATION PROCEDURES AND BASIS OF SELECTION

### 4.1 EVALUATION PROCEDURES

- a. Bids will be evaluated 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 Canada 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 Interviews**: If Canada wishes to interview the Bidder and/or any or all of the resources proposed by the Bidder to fulfill the requirements of the bid solicitation, the Bidder will have two working days following notice by the Contracting Authority to make any necessary arrangements (at the Bidder's sole cost) for the interview to take place at a location specified by Canada. **If Canada wishes to interview, a Bidder representative will accompany the requested resources to the interview and will observe the interview.**
  - iii. **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 two working days of a request by the Contracting Authority.
  - iv. **Extension of Time**: If additional time is required by the Bidder, the Contracting Authority may grant an extension in his or her sole discretion.

### 4.2 TECHNICAL EVALUATION

- a. **Mandatory Technical Criteria** :

Each bid will be reviewed to determine whether it meets 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 considered non-responsive and be disqualified. The Mandatory evaluation criteria are described in Annex "(B)"- Evaluation Criteria.
- b. **Point-Rated Technical Criteria**:

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. The rated requirements are described in Annex "(B)" - Evaluation Criteria
- c. **Reference Checks** :
  - i. **If a reference check is performed**, Canada will conduct the reference check in writing by e-mail. 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 unless the response is received within 5 working days of the date that Canada's email was sent.

- ii. 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 5 working days will not be extended to provide additional time for the new contact to respond.
- iii. Wherever information provided by a reference differs from the information supplied by the Bidder, the information supplied by the reference will be the information evaluated.
- iv. Points will not be allocated and/or a bidder will not meet the mandatory experience requirement (as applicable) if (1) the reference customer states he or she is unable or unwilling to provide the information requested, or (2) the customer reference is not a customer of the Bidder itself (for example, the customer cannot be the customer of an affiliate of the Bidder instead of being a customer of the Bidder itself). Nor will points be allocated or a mandatory met if the customer is itself an affiliate or other entity that does not deal at arm's length with the Bidder.
- v. Whether or not to conduct reference checks is discretionary. However, if Canada 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.
- vi. Number of Resources Evaluated: Only a certain number of resources per Resource Category will be evaluated as part of this bid solicitation as identified in Annex ("B"). 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 Contractor's Statement of Work in accordance with Annex ("A")

#### 4.3 FINANCIAL EVALUATION

Unless otherwise specified in the RFP, the financial evaluation will be conducted by calculating the Total Estimated Cost using the Pricing Tables completed by the bidders. The Bidder must provide ONE firm, all inclusive, per diem rates for the Category of Personnel being proposed in accordance with the bid solicitation. See Annex "(C).

##### (a) **Mandatory Financial Criteria**

###### (i) **Formulas 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.

###### (ii) **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 for professional services bid, Canada may, but will have no obligation to, require price support for any rates proposed (either for all or for specific resource categories). Examples of price support that Canada would consider satisfactory include:

- a. documentation (such as billing records) that shows that the Bidder has recently provided and invoiced another customer (with whom the Bidder deals at arm's length) for services similar to the services that would be provided by the relevant resource category, where those services were provided for at least one month and the fees charged are equal to or less than the rate offered to Canada (to protect the privacy of the customer, the Bidder may black out the customer's name and personal information on the invoice submitted to Canada);



- b. a signed contract between the Bidder and an individual qualified (based on the qualifications described in this bid solicitation) to provide services under the relevant resource category, where the amount payable under that contract by the Bidder to the resource is equal to or less than the rate bid for that resource category;
- c. a signed contract with a subcontractor who will perform the work under any resulting contract, which provides that the required services will be provided at a rate that is equal to or less than the rate bid for the relevant resource category (and where the resource meets all the qualifications described in this bid solicitation); or
- d. details regarding the salary paid to and benefits provided to the individuals employed by the Bidder qualified (based on the qualifications described in this bid solicitation) to provide services under the relevant resource category, where the amount of compensation, when converted to a per diem or hourly rate (as applicable), is equal to or less than the rate bid for that resource category.

Once Canada requests substantiation of the rates bid for any resource category, it is the sole responsibility of the Bidder to submit information (either the information described in the examples above, or other information that demonstrates that it will be able to recover its own costs based on the rates it has 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, while, at a minimum, recovering its own costs. Where Canada determines that the information provided by the Bidder does not demonstrate the Bidder's ability to recover its own costs in providing the relevant resource, Canada may declare the bid non-compliant, if the rate bid is at least 35% of or lower than the median price bid by compliant bidders for the first year of the resulting contract for the relevant resource(s). Only the Firm Per Diem Rates of proposals that are technically responsive will be considered.

#### 4.4 BASIS OF SELECTION

A bid must comply with the requirements of the bid solicitation and meet all mandatory criteria to be declared responsive. The responsive bid as determined by the established pre-determined selection criteria will be recommended for contract award.

- (a) 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.
- (b) If more than one bidder is ranked first because of identical overall scores, then the bidder with the lowest per diem rate will become the top-ranked bidder.
- (c) Notification of Evaluation Results: All invited SA Holders who respond to a TBIPS RFP will be notified in writing regarding the outcome of the RFP process. This notice will include the following information:
  - i. Solicitation Number;
  - ii. Company name of winning bidder;
  - iii. Total points scored of winning bidder (for multiple resource requirements only)
  - iv. Total value of contract awarded;
  - v. Number of responses received by the Contracting Authority; and
  - vi. Total points scored per individual bidder (Note: bidders will only receive their own total points scored and not the score of the other bidders)

## PART 5 – CERTIFICATIONS

Bidders must provide the required certifications to be awarded a contract. Canada will declare a bid non-responsive if the required certifications are not completed and submitted in accordance with the articles below.

Compliance with the certifications bidders provide to Canada is subject to verification by Canada during the bid evaluation period (before award of a contract) and after award of a contract. The Contracting Authority will have the right to ask for additional information to verify bidders' compliance with the certifications before award of a contract. The bid will be declared non-responsive if any certification made by the Bidder is untrue, whether made knowingly or unknowingly. Failure to comply with the certifications or to comply with the request of the Contracting Authority for additional information will also render the bid non-responsive.

The certifications listed below should be completed and submitted with the bid, but may be submitted afterwards. If any of these required certifications is not completed and submitted as requested, the Contracting Authority will so inform the Bidder and provide the Bidder 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 that time period will render the bid non-responsive.

### 5.1 FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY – BID CERTIFICATION

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

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

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

The Bidder must provide the Contracting Authority with a completed annex 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 annex Federal Contractors Program for Employment Equity - Certification, for each member of the Joint Venture.

### 5.2 PROFESSIONAL SERVICES RESOURCES

- a. By submitting a bid, the Bidder certifies that, should it be 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.

**For a contract(s) estimated at \$400K or less ONLY, the following applies:**

- i. Following verification from the Contract Authority, should the resulting Contract be awarded within 30 days from the solicitation closing date, the proposed resource must be available to perform the services in accordance with the Contract. If during the verification, the proposed resource is no longer available, the next ranked compliant bidder will be awarded the Contract.
  - ii. Should the resulting Contract not be awarded within 30 days from the solicitation closing date, and the proposed resource is no longer available to perform the services due to circumstances beyond the control of the bidder, that bidder will have an opportunity to replace the resource with a replacement of equivalent or higher qualifications and experience as determined by the solicitation's evaluation criteria.
- b. 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.



- c. 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.

- d. If the 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.

### 5.3 CERTIFICATION OF LANGUAGE

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.



## PART 6 – SECURITY, FINANCIAL AND OTHER REQUIREMENTS

### 6.1 SECURITY REQUIREMENT

#### ***Mandatory at bid closing***

- a. At the date of bid closing, 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 each meet the security requirement as indicated in Part 7 – Resulting Contract Clauses.
- b. For additional information on security requirements, bidders should consult the "[Security Requirements for PWGSC Bid Solicitations – Instructions to Bidders](#)" document on the Departmental Standard Procurement Documents Website.
- c. In the case of a joint venture bidder, each member of the joint venture must meet the security 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(s):** Under the Contract, the "**Client**" is Innovation, Science and Economic Development (ISED).
- 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 Project 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.

**Location of Services:** Services must be delivered as requested to the locations specified in the Contract, which delivery locations must exclude any area subject to one of the Comprehensive Land Claim Agreements (CLCAs).

### 7.2 TASK AUTHORIZATION (“TA”)

- a. **As and When Requested Task Authorizations:** The Work or a portion of the Work to be performed under the Contract 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.

**Assessment of Resources Proposed at TA Stage:** Processes for issuing, responding to and assessing Task Authorizations are further detailed here.

- b. **Form and Content of 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 (“G”)
  - ii. The draft Task Authorization will contain the details of the activities to be performed, and must contain the following information, if applicable :
    - A. a 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 category of resources and the number required;
    - E. a description of the work for the task outlining the activities to be performed and identifying any deliverables (such as reports);
    - F. the start and completion dates;
    - G. milestone dates for deliverables and payments (if applicable);



- H. the number of person-days of effort required;
  - I. whether the work requires on-site activities and the location;
  - J. the language profile of the resources required;
  - K. the level of security clearance required of resources;
  - L. the price payable to the Contractor for performing the task, with an indication of whether it is a firm price or a maximum TA price (and, for maximum price task authorizations, the TA must indicate how the final amount payable will be determined; where the TA does not indicate how the final amount payable will be determined, the amount payable is the amount, up to the maximum, that the Contractor demonstrates was actually worked on the project, by submitting time sheets filled in at the time of the work by the individual resources to support the charges); and
  - M. any other constraints that might affect the completion of the task.
- c. **Contractor's Response to Draft Task Authorization:** The Contractor must provide the Technical Authority, within 2 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.
- d. **Task Authorization Limit and Authorities for Validly Issuing Task Authorizations:**  
To be validly issued, a TA must be signed by 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 TAs at any time, or reduce the dollar value threshold described in sub-article (A) above; any suspension or reduction notice is effective upon receipt.
- e. **Periodic Usage Reports:**
- i. The Contractor must compile and maintain records on its provision of services to the federal government under validly issued TAs issued under the Contract. The Contractor must provide this data to Canada in accordance with the reporting requirements detailed below. If any required information is not available, the Contractor must indicate the reason. If services are not provided during a given period, the Contractor must still provide a "NIL" report. The Contractor must submit the periodic usage reports 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. April 1 to June 30;
    - B. July 1 to September 30;
    - C. October 1 to December 31; and
    - D. January 1 to March 31.The data must be submitted to the Contracting Authority no later than 30 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 the 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 TA (GST or HST extra);
    - E. the total amount (GST or HST extra) expended to date;
    - F. the start and completion date; and

- G. the active status, as applicable (e.g., indicate whether work is in progress or if Canada has cancelled or suspended the TA, etc.).
- iv. Each report must also contain the following cumulative information for all the validly issued TAs (as amended):
  - A. the amount (GST or HST extra) specified in the contract (as last amended, if applicable) as Canada's total liability to the contractor for all validly issued TAs; and
  - B. the total amount, GST or HST extra, expended to date against all validly issued TA's.
- f. **Consolidation of TAs 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 TAs for administrative purposes.

### 7.3 STANDARD CLAUSES AND CONDITIONS

All clauses and conditions identified in the Contract by number, date and title are set out in the [Standard Acquisition Clauses and Conditions Manual](#) issued by Public Works and Government Services Canada.

a. **General Conditions:**

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

The text under Subsection 04 of Section 41 – Code of Conduct and Certifications, of General Conditions 2035 referenced above are replaced by:

During the entire period of the Contract, the Contractor must diligently update, by written notice to the Contracting Authority, the list of names of all individuals who are directors of the Contractor whenever there is a change. As well, whenever requested by Canada, the Contractor must provide the corresponding Consent Forms.

With respect to Section 30 - Termination for Convenience, of General Conditions 2035, unless already present, 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. 4006 (2010-08-16), Supplemental General Conditions – Contractor to Own Intellectual Property Rights in Foreground Information.

### 7.4 SECURITY REQUIREMENT

The Security Requirement Check List (SRCL and related clauses), as set out under Annex "A" to Part B to the Supply Arrangement, applies to the Contract.



PWGSC FILE # Common PS SRCL #4

1. The Contractor/Offeror must, at all times during the performance of the Contract/Standing Offer/Supply Arrangement, 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).
2. The Contractor/Offeror personnel requiring access to sensitive work site(s) must EACH hold a valid personnel security screening at the level of SECRET, granted or approved by CISD/PWGSC.
3. Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of CISD/PWGSC.
4. The Contractor/Offer must comply with the provisions of the:
  - a. Security Requirements Check List and security guide (if applicable), attached at Annex "E";
  - b. Industrial Security Manual (Latest Edition).

## 7.5 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 February 28, 2018; 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 three (3) 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 formal contract amendment.

## 7.6 AUTHORITIES

### a. Contracting Authority

The Contracting Authority for the Contract is:

Name: Melyssa Zawadka  
Title: Contracts & Procurement Officer  
Organization: Chief Information Office Sector  
Address: 235 Queen Street, Ottawa ON, K1A0H5, room 325C  
E-mail address: [Melyssa.zawadka@canada.ca](mailto:Melyssa.zawadka@canada.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. Project Authority

The Project Authority name will be provided at contract award.



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

c. **Vendor representative**

**7.7 PAYMENT**

a. **Basis of Payment**

i. **Professional Services provided under a Task Authorization with a Firm Price:** For professional services requested by Canada, in accordance with a valid issued Task Authorization, Canada will pay the Contractor the firm price set out in the Task Authorization ( based on the firm, all-inclusive per diem rates set out in Annex "(C)", Basis of Payment, Applicable taxes extra. Partial days will be prorated based on actual hours worked based on a 7.5 hour workday

Estimated Cost: \$ \_\_\_\_\_

ii. **Pre-Authorized Travel and Living Expenses:**

Canada will not pay any travel or living expenses associated with performing the Work.

iii. **Applicable Taxes :**

Estimated Cost: \$ \_\_\_\_\_

iv. **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.

v. **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 (or proposes instead to provide someone from an alternate category at a different rate), whether or not Canada terminates the Contract as a whole, Canada may impose sanctions or take other measures in accordance with the PWGSC Vendor Performance Policy (or equivalent) then in effect, which 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.

vi. **Purpose of Estimates:** All estimated costs contained in the Contract are included solely for the administrative purposes of Canada and do not represent a commitment on the part of Canada to purchase services in these amounts. Any commitment to purchase specific amounts or values of services is described elsewhere in the Contract.

b. **Limitation of Expenditure** Canada's total liability to the Contractor under the Contract must not exceed the amount set out on page one of the Contract, less any Applicable taxes. With respect to the amount set out on page one of the Contract, Customs duties are included and Goods and Services Tax or Harmonized Sales Tax is included, if applicable. Any commitments to purchase specific amounts or values of goods or services are described elsewhere in the Contract.

i. No increase in the total liability of Canada or in the price of the Work resulting from any design changes, modifications or interpretations of the Work, will be authorized or paid to the Contractor unless these design changes, modifications or interpretations have been approved, in writing, by the Contracting Authority before their incorporation into the Work. The Contractor must not perform any work or provide any service that would result in Canada's total liability being exceed before obtaining the written approval of the Contracting Authority. The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum when:

A. It is 75 percent committed, or

B. 4 months before the Contract expiry date, or

C. as soon as the Contractor considers that the contract funds provided are inadequate for the completion of the Work, whichever comes first?



- ii. 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 Authorization 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 is 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. **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.

## 7.8 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 of each invoice to the person identified at contract award.

## 7.9 CERTIFICATIONS

- a. Compliance with the certifications provided by the Contractor in its bid or any TA quotation is a condition of the Contract and subject to verification by Canada during the entire Contract Period. If the Contractor does not comply with any certification or it is determined that any certification made by the Contractor is untrue, whether made knowingly or unknowingly, Canada has the right, under the default provision of the Contract, to terminate the Contract for default.

## 7.10 APPLICABLE LAWS

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

### 7.11 PRIORITY OF DOCUMENTS

If there is a discrepancy between the wordings 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. 4006 (2010-08-16), Supplemental General Conditions – Contractor to Own Intellectual Property Rights in Foreground Information;
- c. General Conditions 2035 (2016-04-04);
- d. Annex A, Statement of Work
- e. Annex B, Evaluation Criteria
- f. Annex C, Basis of Payment;
- g. Annex D, Basis of Selection
- h. Annex E, Security Requirements Check List;
- i. Supply Arrangement Number EN578-055605/xxx/EI (the "**Supply Arrangement**")
- j. the Contractor's bid dated **MONTH/DAY/YEAR**

### 7.12 INSURANCE REQUIREMENTS

#### a. **Compliance with Insurance Requirements**

1. 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.
2. 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.
3. 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**

1. 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.
2. The Commercial General Liability policy must include the following:
  - a. Additional Insured: Canada is added as an additional insured, but only with respect to liability arising out of the Contractor's performance of the Contract. The interest of Canada should read as follows: Canada, as represented by Public Works and Government Services Canada.
  - b. Bodily Injury and Property Damage to third parties arising out of the operations of the Contractor.



- c. Products and Completed Operations: Coverage for bodily injury or property damage arising out of goods or products manufactured, sold, handled, or distributed by the Contractor and/or arising out of operations that have been completed by the Contractor.
  - d. Personal Injury: While not limited to, the coverage must include Violation of Privacy, Libel and Slander, False Arrest, Detention or Imprisonment and Defamation of Character.
  - e. Cross Liability/Separation of Insured's: 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**
- 1. 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.
  - 2. 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.
  - 3. 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.

### 7.13 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 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 its breach of confidentiality under the Contract. Each of the Parties is also liable for all indirect, special or consequential damages in respect of its 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 in any way relating to the Contract, including :
    - 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 paragraph (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 backup kept by Canada. Canada is responsible for maintaining an adequate backup 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, 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 paragraph (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 paragraph c.

## 7.14 JOINT VENTURE

- a. The Contractor confirms that the name of the joint venture is \_\_\_\_\_ and that it is comprised of the following members: *[list all the joint venture members named in the Contractor's original bid]*.
- b. With respect to the relationship among the members of the joint venture Contractor, each member agrees, represents and warrants (as applicable) that:

- i. \_\_\_\_\_ 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.*

## 7.15 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, and 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 Project 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 Section titled "Replacement of Specific Individuals" is deleted and the following applies instead:

### Replacement of Specific Individuals

1. If the Contractor is unable to provide the services of any specific individual identified in the Contract to perform the services, the Contractor must within five working days of the individual's departure or failure to commence Work (or, if Canada has requested the replacement, within ten working days of Canada's notice of the requirement for a replacement) provide to the Contracting Authority:
  - a. the name, qualifications and experience of a proposed replacement immediately available for Work; and
  - b. security information on the proposed replacement as specified by Canada, if applicable.The replacement must have qualifications and experience that meet or exceed those obtained for the original resource.
2. 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 for default under Section titled "Default of the Contractor", or
  - b. assess the information provided under (c) (i) above or, if it has not yet been provided, require the Contractor propose a replacement to be rated by the Project Authority. The replacement must have qualifications and experiences that meet or exceed those obtained for the original resource and be acceptable to Canada. Upon assessment of the replacement, Canada may accept the replacement, exercise the rights in (ii) (A) above, or require another replacement in accordance with this subarticle (c).

3. Where an Excusable Delay applies, Canada may require (c) (ii) (B) above instead of terminating under the "Excusable Delay" Section. 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. The Contractor must not, in any event, allow performance of the Work by unauthorized replacement persons. The Contracting Authority may order that a 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 that a resource stop performing the Work does not relieve the Contractor from its responsibility to meet the requirements of the Contract.
4. The obligations in this article apply despite any changes that Canada may have made to the Client's operating environment.

#### 7.16 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.

#### 7.17 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. The Contractor represents and warrants that all those statements are true and acknowledges that Canada relied on those statements in awarding the Contract. 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, 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.

#### 7.18 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 Project 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.

#### 7.19 GOVERNMENT PROPERTY

Canada agrees to supply the Contractor with the items listed below (the "**Government Property**"). The section of the General Conditions entitled "Government Property" also applies to the use of the Government Property by the Contractor.

*Innovation, Science and Economic Development (ISED) will provide, and ID pass, an office space (cubicle) with desktop computer and access to a network printer.*

#### 7.20 TRANSITION SERVICES AT END OF CONTRACT PERIOD

The Contractor agrees that, in the period leading up to the end of the Contract Period and for up to three months afterwards, it will make all reasonable efforts to assist Canada in the transition from the Contract to a new contract with another supplier. The Contractor agrees that there will be no charge for these services.

## **ANNEX A – STATEMENT OF WORK**

### **1. MANDATE**

Innovation, Science and Economic Development (ISED), formerly Industry Canada, works with Canadians in all areas of the economy and in all parts of the country to improve conditions for investment, enhance Canada's innovation performance, increase Canada's share of global trade and build a fair, efficient and competitive marketplace.

This includes managing Canada's airwaves and overseeing its bankruptcy, incorporation, intellectual property and measurement systems; providing financing and industry research tools to help businesses develop, import and export; encouraging scientific research; and protecting and promoting the interests of Canadian consumers.

### **2. ORGANIZATION**

The Chief Information Office (CIO) is mandated to maximize Industry Canada's business performance through modern and progressive management of information management (IM) and information technology (IT) services, policies, and resources. The CIO Branch is specifically responsible for:

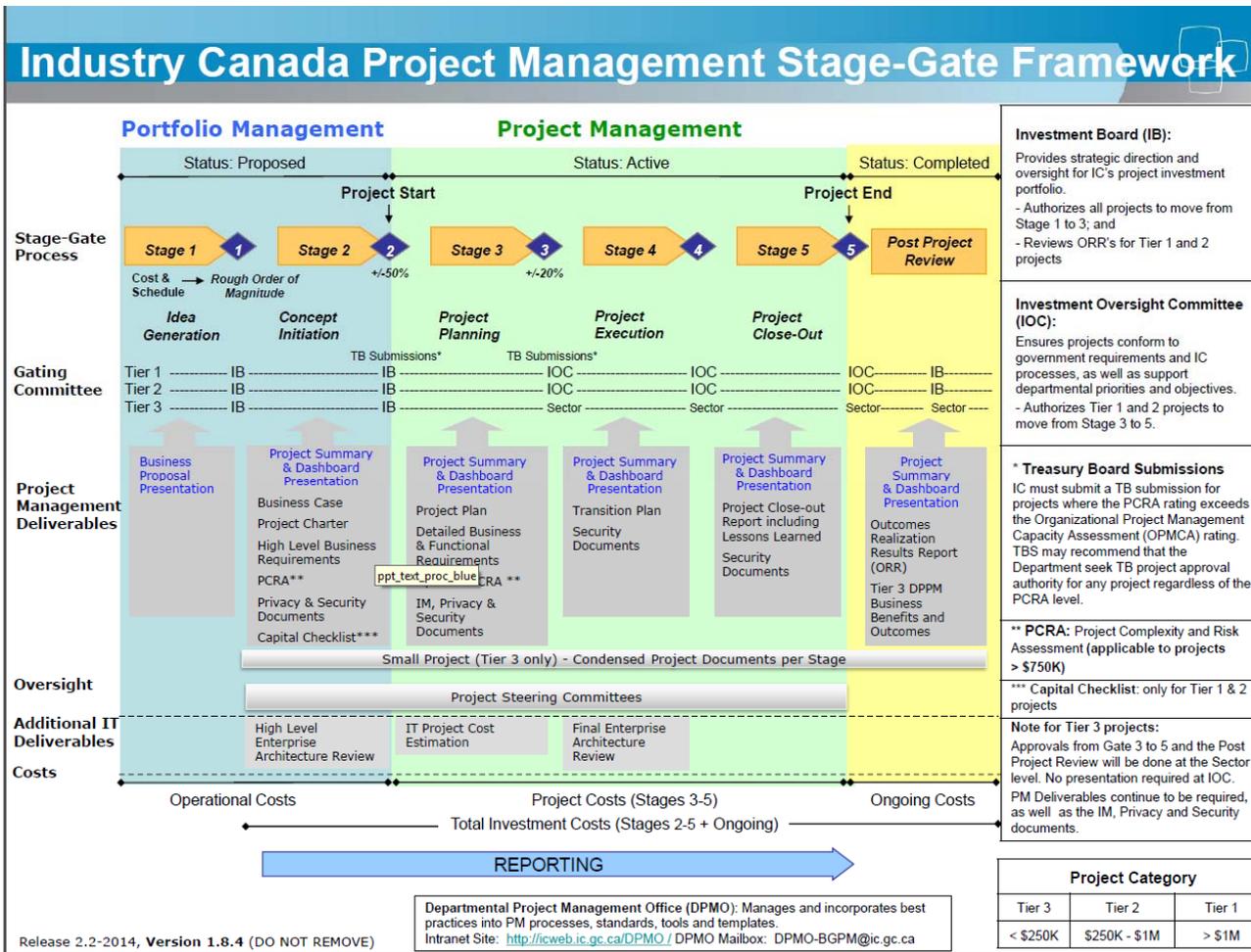
- Establishing IM/IT strategies and policies that support the overall mandate of the Department and are consistent with established funding envelopes;
- Aligning IM/IT resources with departmental priorities and IM/IT plans through a practical governance structure;
- Providing high-quality, affordable IM/IT services to departmental business partners;
- Providing high-quality and responsive support to departmental IM/IT users; and
- Establishing department-wide technology standards and architecture to maximize opportunities for horizontal investments in IM/IT across the department.

Within the CIO the CIPO (Canadian Intellectual Property Office) Solutions Branch is responsible for the IT modernization and the maintenance of existing systems to support CIPO business units. The services are delivered through two organizational directorates.

- IT Modernization
- CIPO Development and Support

### **3. BACKGROUND**

The CIO uses a stage gate governance model to facilitate the delivery of IT projects. The progression from one State-Gate to the next is subject to ISED approvals, as well as wider Government of Canada initiatives. Projects may be halted, redefined or cancelled at any stage, at which point the Project Management Resource may, at the CIO's discretion, be reassigned temporarily or permanently to another project(s). Alternatively, should (a) project(s) fail to proceed to later Stage-Gates, the resulting contract may be reduced in scope or terminated early.



#### 4. PROJECT OBJECTIVES/REQUIREMENTS

The CIPO Modernized IP Case and Workflow Solution for Trademarks, Patents and Copyright and Industrial Design will modernize CIPO's Trademarks, Patents, Copyright, Industrial Design (National or Hague System) International, National and Correspondence generation solutions by developing end to end IP transaction capabilities that will improve business processes and support ongoing regulatory and business changes. The new solution for international and national processing will interface with existing services and sub-systems and with the solutions that will be deployed as part of the Trademarks, Patents E-filing, CIPO Document Access System, Integrated Financial Services, Client Relationship Management and CIPO Enterprise Content Management projects. This solution will enable CIPO to:

- Upgrade Trademark's, Patents and Copyright/Industrial Design (CID) operational systems with state of the art technology;
- Improve traceability of IP transaction/events in support of Business Intelligence processes;
- Ease of workflow configuration to increase business agility to facilitate process improvements;
- Improve tools for employees to do their work more easily and efficiently in order to meet the increasing pressure and demands of their daily workload; and
- Realize considerable savings by not having to maintain and improve Trademarks', Patents and CID legacy system and specialized contractors.

## 5. SCOPE OF WORK / KEY ACTIVITIES

Currently the ITM Directorate has a requirement for a Senior Project Manager (level 3) to assist the current IT Modernization management team with project management of the Industry Canada IP Case Management and Workflow Solution for Trademarks, Patents and CID. Duties and tasks may but not be limited to the following:

- Manage projects within scope, quality, time, and cost constraints with minimal oversight from ITM Director or Program Manager;
- Manage day-to-day project team activities and stakeholder communications;
- Effectively apply project management methodology and enforce IC project processes and standards accordingly;
- Develop project estimates for client approval;
- Create, execute and maintain project work plans and revise as appropriate to meet changing needs and project demands;
- Manage project schedule and budget against baseline;
- Create and manage the schedule of a matrix team;
- Analyze/review business requirements to validate functional and non-functional requirements;
- Communicate with senior management and stakeholders from a technological and non-technological perspective;
- Effectively manage project scope by ensuring any changes are documented and approved through the change management process;
- Develop and implement impact assessment of COTS customization and integration on Operations and the IC technical infrastructure;
- Review/analyze other project interdependencies and requirements to ensure alignment at the ITM program level;
- Proactively identify project issues and risks and create successful action plans for resolving issues and mitigating risks; minimize project exposure and risk;
- Proactively set and manage project stakeholder expectations;
- Measure project performance using appropriate tools and techniques;
- Track and report on project milestones and provide status reports to management, project team, and other project stakeholders;
- Build strong relationships with business and technical stakeholders and develop a deep understanding of their business objectives;
- Negotiate implementation date with client; and
- Other related duties.

## 6. OTHER PROJECT DETAILS

### 6.1 Constraints

The resource must work within constraints imposed by the department, such as government policies and mandatory procedures, current and proposed related activities, security, sensitivity to other interests, protection of the environment, conservation of resources and other relevant restrictions and work space as required.

### 6.2 Work Location

The contractor will carry out the work on Innovation, Science and Economic Development (ISED) premises located at 235 Queen Street, Ottawa, Ontario.

### 6.3 Travel

No travel or living expenses will be reimbursed under the contract.

## 7. MANAGEMENT OF THE PROJECT

This resource reports to an ITM Project Manager and/or ITM Project Authority.

## ANNEX B: EVALUATION CRITERIA

### Instructions - Mandatory and Point Rated Tables/Grids

***Failure to comply with the following instructions will render the technical proposal non-compliant.***

#### Technical Proposal:

- Projects must be specific to the criteria and copying/pasting the criteria does not demonstrate experience.
- Bidders must provide the following information in their technical response to the technical evaluation criteria:
  - Project #
  - Client Organization/Project Name
  - Duration (month/year to month/year)
  - Total level of work effort (# years/# months)
- Listing technical criteria without substantiating detailed professional work experience will cause the proposal to be considered non-compliant.
- Work experience gained as part of an educational program will not be considered except for experience gained through a formal co-operative program at a post-secondary institution.

#### Résumé:

- For each project that is cited as experience within the technical proposal, the following information must be identified on the proposed resource's résumé:
  - The name of the client organization (to whom the services were provided);
  - A brief description of the type and scope of services that meets the identified criteria provided by the resource;
  - The dates and duration of the project (indicating the years/months of engagement and the start and end dates of the work); and
  - A description of the work as it relates to the stated mandatory or point-rated criteria.
  - For work experience to be considered, the 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.

#### Validation of Information:

- Innovation, Science and Economic Development (ISED) reserves the right to validate any or all of the information supplied by the bidder from the supplied project reference(s) prior to contract award and will document the responses and results of the Mandatory project references.
- Innovation, Science and Economic Development (ISED) reserves the right to interview all candidates required to validate the Mandatory Criteria and/or to adjust the points assigned in the Point-rated Criteria.
  - The candidates will be given 48 hours advance notice of the time and place of the interview.
  - The interview is expected to take no more than 45 minutes in duration.
  - The questions will relate to the information presented in the Technical Proposal and résumé of the proposed resource as it relates to the Evaluation Criteria and the Statement of Work.

**If Canada wishes to interview, a Bidder representative will accompany the requested resources to the interview and will observe the interview.**

#### Use of Information by the Contractor

All drawings, software codes, reports, data, documents, or materials, provided to the Contractor by the Crown shall be used solely in support of this requirement. The Contractor shall be required to secure it from unauthorized use and shall not release it to any third party, person or agency external to Innovation, Science and Economic Development (ISED) without the express written permission of the Project Authority. Such material(s) shall be returned to the Project Authority upon completion of each tasking or when requested by the Project Authority.

**MANDATORY EVALUATION CRITERIA**  
**TBIPS Category: P.9 Project Manager Level 3**  
**ISED Category: Senior Project Manager**

**INSTRUCTIONS**

Bidders **MUST** respond to the following mandatory evaluation criteria **IN THE ORDER SHOWN**. Any proposal which fails to meet all of the mandatory criteria will be eliminated from further consideration and will be deemed **NON-COMPLIANT**.

Bidders **MUST** provide **ONLY** the following information in their technical grid response to the mandatory resource criteria listed below. Failure to follow the instructions will render the proposal **NON-COMPLIANT**.

- Project #
- Client Organization/Project Name
- Duration (month/year to month/year)
- Total level of work effort (# years/# months)

**NOTE:** For evaluation purposes, each of the mandatory criteria numbers (#'s) **MUST** be mapped to the specific corresponding line items (**not at the summary level**) within the cited projects of the proposed resource's résumé or the proposal will be deemed **NON-COMPLIANT**.

**TECHNICAL GRID EXAMPLE:**

Criteria #	Stream # – Stream Name Resource Category Name - Level X  Mandatory Criteria	Required Supporting Information
<b>M1</b>	The proposal must demonstrate that the proposed resource has greater than two (2) years professional work experience developing XXXXXX.	<p><b>Project #</b> Industry Canada – XYZ Project January 2015 – May 2015 5 months</p> <p><b>Project #</b> Industry Canada – ABC Project September 2012 - December 2014 2 years 4 months</p> <p><b>Total: 2 years 9 months</b></p>

Criteria #	<b>Stream 5 – Project Management Services P.9 – Project Manager - Level 3</b>  <b>Corporate Mandatory Criteria</b>	Required Supporting Information
<b>M1</b>	<p>The Bidder must provide corporate references for three (3) distinct and separate Government of Canada (GoC) client department/agency/crown corporation or provincial government corporate reference contracts for Project Manager resource requirements.</p> <p>The following contract parameters must be cited for each of the corporate references:</p> <ul style="list-style-type: none"> <li>• Each contract cited must include Project Managers to be provided to the client on “as and when” needed basis;</li> <li>• Each client contract cited must have a minimum duration of one (1) year;</li> <li>• Each client contract cited must include the number of business analysts (not including re-allocation or replacement of existing contracted resources) that have been utilized on the contract;</li> <li>• Each client contract cited must have a minimum total contract value of \$250,000.00; and</li> <li>• Each contract cited must include the following information:               <ul style="list-style-type: none"> <li>○ the client organization;</li> <li>○ the contract number;</li> <li>○ contract start and end dates (DD/MM/YYYY to DD/MM/YYYY);</li> <li>○ a brief description of the services provided;</li> <li>○ the GoC employee name, title and telephone number and/or email address of the client’s project and/or technical authority; <b>and</b></li> <li>○ the contract authority responsible for the issuance of the contract.</li> </ul> </li> </ul>	<p>Provide examples of corporate references for which the Bidder provided 3 separate and distinct organization reference contracts.</p>
Criteria #	<b>Stream 5 – Project Management Services P.9 – Project Manager - Level 3</b>  <b>Resource Mandatory Criteria</b>	Required Supporting Information
<b>M2</b>	<p>If the proposed resource has been contracted at Innovation Science and Economic Development (formerly Industry Canada) within the last five (5) years, the Bidder must provide the following information for reference checking purposes:</p> <ul style="list-style-type: none"> <li>• Innovation, Science and Economic Devel-</li> </ul>	<p>If the proposed resource has been contracted by Industry Canada Innovation, Science and Economic Development (formerly Industry Canada) within the last five (5) years, provide:</p> <ul style="list-style-type: none"> <li>• Science and Economic Devel-</li> </ul>

	<p>opment (Industry Canada) client/project authority name,</p> <ul style="list-style-type: none"> <li>• telephone number /email</li> </ul> <p>In the event that the Innovation, Science and Economic Development (Industry Canada) reference check outlines that the proposed resource's contract was terminated for non-performance, the criterion will be deemed non-compliant and no further consideration will be given to the Bidder's technical proposal.</p>	<p>opment (Industry Canada) client/project authority name,</p> <ul style="list-style-type: none"> <li>• telephone number /email</li> </ul> <p>If the proposed resource has NOT been contracted by Innovation, Science and Economic Development (Industry Canada) within the last five (5) years, nothing is required for M2.</p>
<b>M3</b>	<p>The proposal must also demonstrate that the proposed resources possesses the qualifications specified in the TBIPS SA by providing a detailed résumé stating the proposed individual's work experience and other relevant details, which clearly indicate that the individual meets the minimum years of related experience as outlined in the TBIPS – Stream 5/Project Management Services– resource category description for a Project Manager – level 3.</p> <p>The proposed resource must have greater than (&gt;) ten (10) years professional work experience as a Senior Project Manager in an IT environment.</p>	<p>Provide examples of projects for which the proposed resource has professional work experience as a Senior Project Manager.</p> <p>For each project cited, Bidders must include a project description in the proposed resource's résumé to provide context of the role performed.</p> <p>The sum of all the examples must exceed 10 years.</p>
<b>M4</b>	<p>The proposed resource must have a minimum of ten (10) years professional work experience defining and documenting the following for IT projects:</p> <ol style="list-style-type: none"> <li>scope (a description of the project scope must be included)</li> <li>objectives</li> <li>plans</li> </ol> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>• Each bullet cited within a project in the résumé <b>must</b> follow the following format (M4a to M4c).</li> <li>• All of the three (3) criteria must be addressed within <b>each</b> project cited.</li> </ul> <p><b>Definition:</b> An IT project is defined as the delivery of an IT system.</p>	<p>Provide examples of projects for which the proposed resource has professional work experience defining and documenting the scope, objectives and plan for IT projects.</p> <p>Bidders must include a description of the project scope in the proposed resource's résumé to provide context.</p> <p>The sum of all the examples must equal or exceed 10 years.</p>
<b>M5</b>	<p>The proposed resource must have a minimum of five (5) years professional work experience providing strategic guidance and recommendations to senior management on transformation initiatives.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>○ For each project cited, a description of the recommendations <b>must</b> be included <b>and</b> the outcomes of the recommendations.</li> </ul> <p><b>Definition:</b> A transformation program/initiatives are defined as a complete overhaul of an organization's information technology (IT) systems. IT transfor-</p>	<p>Provide examples of projects for which the proposed resource has professional work experience providing strategic guidance to senior management on transformation initiatives for factors including risk, costs, options and feasibility of implementation.</p> <p>For each project cited, a description of the recommendations and outcomes must be included.</p> <p>The sum of all the examples must equal</p>



	<p>mation can involve changes to network architecture, hardware, software and how data is stored and accessed.</p>	<p>or exceed 5 years.</p>
<b>M6</b>	<p>The proposed resource must have professional work experience as a senior project manager/program manager leading multi-project initiatives within a program with a value over \$3M and minimum project duration of greater than (&gt;) one (1) year.</p>	<p>Provide examples of projects for which the proposed resource has professional work experience leading multi-project initiatives within a program with a value over \$3M and &gt;1 year.</p>
<b>M7</b>	<p>The Bidder must provide three (3) relevant Federal or Provincial Government (including crown corporations and agencies) IT client references where the proposed resource has worked as a Senior Project Manager on projects in an environment similar to that described in Annex A – Statement of Work within the last fifteen (15) years.</p> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>○ Each projects cited must have a continuous (full-time equivalent) work effort greater than six (6) months.</li> <li>○ One (1) of the client project references must involve the decommissioning and replacement of large legacy systems as part of a GoC IT Modernization project <b>and</b> where the proposed resource was responsible for leading the project from “cradle to grave” (project initiation to close).</li> </ul> <p><b>Definition:</b> An IT project is defined as the delivery of an IT system.</p>	<p>Provide 3 client reference projects for which the proposed resource has demonstrated senior project management work experience.</p> <p>The sum of all the examples must equal or exceed 3 projects</p>
<b>M8</b>	<p>The proposed resource must have professional work experience preparing IM/IT project budgets (estimates, resourcing etc.).</p>	<p>Provide examples of projects for which the proposed resource demonstrated professional work experience preparing IM/IT projects budgets.</p>

**POINT-RATED EVALUATION CRITERIA**

In order to qualify for the rating process, proposals **MUST** respond to the following rated requirements **IN THE ORDER SHOWN**. Any proposal which fails to achieve an overall minimum technical rating of 70% will be eliminated from further consideration.

**INSTRUCTIONS**

Bidders **MUST** respond to the following point-rated evaluation criteria **IN THE ORDER SHOWN**. Any proposal which fails to meet all of the mandatory criteria will be eliminated from further consideration and will be deemed **NON-COMPLIANT**.

Bidders **MUST** provide **ONLY** the following information in their technical grid to the point-rated resource criteria listed below. Failure to follow the instructions will render the proposal **NON-COMPLIANT**.

- Project #
- Client Organization/Project Name
- Duration (month/year to month/year)
- Total level of work effort (# years/# months)

**NOTE:** For evaluation purposes, each of the point-rated criteria numbers (#'s) **MUST** be mapped to the corresponding line items (**not at the summary level**) within the cited projects of the proposed resource's résumé or the proposal will be deemed **NON-COMPLIANT**.

**TECHNICAL GRID EXAMPLE:**

Criteria #	Stream # – Stream Name Resource Category Name - Level X Point Rated Criteria	Required Supporting Information	Max Points
PR1	Demonstrated professional experience XXXX.  >36 months = 10 points >30 months up to 36 months = 8 points >24 months up to 30 months = 6 points >18 months up to 24 months = 4 points >12 months up to 18 months = 2 points ≤12 months = 0 points	<b>Project #</b> Industry Canada – ABC Project September 2012 - December 2014 2 years 4 months  <b>Project #</b> Industry Canada – XYZ Project January 2010 - August 2012 2 years 8 months  <b>Total: 5 years</b>	10 points



Criteria #	<b>Stream 5 – Project Management Services P.9 – Project Manager - Level 3</b>  <b>Point Rated Criteria</b>	<b>Required Supporting Information</b>	<b>Max Points</b>
<b>PR1</b>	<p>Demonstrated professional work experience as a senior project manager/program manager leading large scale multi-projects within an IT transformation program with a total value exceeding \$5M.</p> <p> <b>&gt; \$25 million = 15 points</b>  <b>&gt; \$20 million = 12 points</b>  <b>&gt; \$15 million = 9 points</b>  <b>&gt; \$10 million = 6 points</b>  <b>&gt; \$5 million = 3 points</b> </p> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>o Each project cited <b>must</b> have a minimum duration of one (1) year.</li> <li>o Each project cited <b>must</b> include a description of the IT transformation program within the proposed resource's résumé.</li> </ul> <p><b>Definition:</b> A transformation program is defined as a complete overhaul of an organization's information technology (IT) systems. IT transformation can involve changes to network architecture, hardware, software and how data is stored and accessed.</p>	<p>Provide examples of projects for which the proposed resource demonstrated professional work experience as a senior project manager/ program manager leading large scale multi-projects within an IT transformation program with a total value exceeding \$5M.</p> <p>Bidders must include a description of the IT transformation program in the proposed resource's résumé to provide context.</p>	<p><b>15 points</b></p>
<b>PR2</b>	<p>Demonstrated professional work experience developing risk strategies and plans that include the following:</p> <ul style="list-style-type: none"> <li>a. planning</li> <li>b. identification</li> <li>c. analysis</li> <li>d. response</li> <li>e. mitigation</li> </ul> <p> <b>5 projects = 15 points</b>  <b>4 projects = 12 points</b>  <b>3 projects = 9 points</b>  <b>2 projects = 6 points</b>  <b>1 project = 3 points</b> </p> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>o Each project cited <b>must</b> include a complete description of the risk strategy and plan for validation purposes.</li> <li>o Each bullet cited within a project in the résumé <b>must</b> follow the following format (PR2a to PR2e).</li> </ul>	<p>Provide examples of projects for which the proposed resource demonstrated professional work experience developing risk strategies and plans.</p> <p>Bidders must include a description of the elements of the risk strategy and plan in the proposed resource's résumé to provide context.</p>	<p><b>15 points</b></p>
<b>PR3</b>	<p>Demonstrated professional work experience on</p>	<p>Provide examples of projects for which</p>	<p><b>10 points</b></p>



	<p>business transformation projects that included the integration of COTS (commercial off the shelf) software into the GoC technological landscape (e.g. MDM (master data management), GCDOCS (enterprise document and records management), CRM (client relationship management), BIA (business intelligence analytics), SAP etc.)</p> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>o Three (3) of the cited projects <b>must</b> have a project value greater than (&gt;) \$15 million.</li> <li>o Each project cited <b>must</b> identify the name of the COTS software product.</li> </ul> <p><b>5 projects = 10 points</b>  <b>4 projects = 8 points</b>  <b>3 projects = 6 points</b>  <b>2 projects = 4 points</b>  <b>1 project = 2 points</b></p> <p><b>Definition:</b> A transformation program is defined as a complete overhaul of an organization's information technology (IT) systems. IT transformation can involve changes to network architecture, hardware, software and how data is stored and accessed.</p>	<p>the proposed resource demonstrated professional work experience on business transformation projects that included the integration of COTS software into the GoC technological landscape.</p> <p>For validation purposes, for each project cited, the Bidder must include the name of the COTS product in the proposed resource's résumé.</p>	
<p><b>PR4</b></p>	<p>Demonstrated professional work experience developing and implementing solutions in a shared services delivery model.</p> <p><b>2 projects = 10 points</b>  <b>1 project = 5 points</b></p> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>o The proposed resource <b>must</b> have a continuous (full-time equivalent) work effort duration of greater than one (1) year.</li> <li>o Each project cited <b>must</b> have a budget greater than \$5 million.</li> </ul> <p><b>Definition:</b> Shared Services is a service model designed to gain efficiencies in routine processing by leveraging common practices and enabling technology for multiple organizations.</p>	<p>Provide examples of projects for which the proposed resource demonstrated professional work experience developing and implementing a shared services model.</p>	<p><b>10 points</b></p>
<p><b>PR5</b></p>	<p>Demonstrated professional work experience performing IM/IT solutions options analysis.</p> <p><b>2 projects = 10 points</b>  <b>1 project = 5 points</b></p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>o Each project cited must have a continuous (full-time equivalent) work effort greater than six (6) months.</li> </ul>	<p>Provide examples of projects for which the proposed resource demonstrated professional work experience performing IM/IT solutions options analysis.</p>	<p><b>10 points</b></p>



<b>PR6</b>	<p>The proposed resource has one or more of the following project management certifications.</p> <ul style="list-style-type: none"> <li>• <b>MSP (Managing Successful Programmes)</b></li> <li>• <b>PMP (Project Management Professional)</b></li> <li>• <b>Prince 2 certification</b></li> <li>• <b>Masters in Project Management</b></li> </ul>	<p>Copy(ies) of the certification(s) must be included in the proposal.</p>	<b>5 points</b>
<b>PR7</b>	<p>The proposed resource holds an undergraduate degree or diploma in information technology/ computer sciences or similar discipline from a recognized university or college.</p>	<p>A copy of the degree or diploma must be included in the proposal.</p>	<b>5 points</b>
<p><b>70% Required to pass Resource Requirements Total</b></p>			<p><b>= 49 points = 70 points</b></p>

**Proposed resources must possess the experience and qualifications detailed in the applicable Resource Evaluation Grid and are available to begin work within ten (10) business days following contract award unless otherwise agreed to by both parties.**

**ANNEX C: BASIS OF PAYMENT**

The Contractor will be paid in accordance with the following Basis of Payment for Work performed pursuant to the Contract.

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

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

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

CONTRACT PERIOD:			Initial Contract Period (Date of Contract to February 28, 2018)			
	(B)	(C)	(D)	(E)	(F)	(G)
Category of Personnel	Level of Expertise	Name of Proposed Resource	Number of Days	Firm Per Diem Rate	% Discount	Total Cost D x [E - (ExF)]
P.9 Project Manager	Level 3		240	\$	N/A	\$
<b>Total Estimated Initial Contract Cost:</b>						<b>\$ &lt;TBD&gt;</b>

OPTION PERIODS:			Option Period 1 (March 1, 2018 to February 28, 2019)			
	(B)	(C)	(D)	(E)	(F)	(G)
Category of Personnel	Level of Expertise	Name of Proposed Resource	Number of Days	Firm Per Diem Rate	% Discount	Total Cost D x [E - (ExF)]
P.9 Project Manager	Level 3		240	\$	N/A	\$
<b>Total Estimated Initial Option 1 Cost:</b>						<b>\$ &lt;TBD&gt;</b>

			Option Period 2 (March 1, 2019 to February 29, 2020)			
	(B)	(C)	(D)	(E)	(F)	(G)
Category of Personnel	Level of Expertise	Name of Proposed Resource	Number of Days	Firm Per Diem Rate	% Discount	Total Cost D x [E - (ExF)]
P.9 Project Manager	Level 3		240	\$	N/A	\$
<b>Total Estimated Initial Option 2 Cost:</b>						<b>\$ &lt;TBD&gt;</b>

			Option Period 3 (March 1, 2020 to February 28, 2021)			
	(B)	(C)	(D)	(E)	(F)	(G)
Category of Personnel	Level of Expertise	Name of Proposed Resource	Number of Days	Firm Per Diem Rate	% Discount	Total Cost D x [E - (ExF)]
P.9 Project Manager	Level 3		240	\$	N/A	\$
<b>Total Estimated Initial Option 3 Cost:</b>						<b>\$ &lt;TBD&gt;</b>

Total Estimated Cost: \$

## ANNEX D: BASIS OF SELECTION

It is understood by the parties submitting proposals that, to qualify, bidders **must** meet all mandatory requirements as well as the minimum score identified for the point-rated criteria.

The Method of Selection to issue the resulting Contract is the technically responsive proposal that obtains the highest combined rating of technical merit and price and will be calculated as indicated in Supplier Selection Method below.

### 1.1 SUPPLIER SELECTION METHOD:

The contractor will be selected on the basis of the highest responsive combined rating of technical merit and price. The total proposal rating of each proposal will be calculated as follows:

#### Rating of Technical Proposal

$$\frac{\text{Total Technical Points}}{\text{Maximum Technical Points}} \times 80 \text{ points}$$

#### Rating of Financial Proposal

$$\frac{\text{Lowest Total Estimated Cost of all Technically Compliant Bidders}}{\text{All other Total Estimated Cost of Individual Supplier bids}} \times 20 \text{ points}$$

#### Total Proposal Rating

Total Proposal Rating = Technical rating + Financial Rating.

**ANNEX E: SECURITY REQUIREMENT CHECK LIST**

 Government of Canada / Gouvernement du Canada	Contract Number / Numéro du contrat Common PS SRCL#4 Security Classification / Classification de sécurité UNCLASSIFIED
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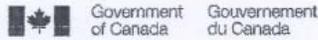
**SECURITY REQUIREMENTS CHECK LIST (SRCL)  
LISTE DE VÉRIFICATION DES EXIGENCES RELATIVES À LA SÉCURITÉ (LVERS)**

<b>PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE</b>		
1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine <small>Public Works and Government Services Canada</small>	2. Branch or Directorate / Direction générale ou Direction Acquisitions Branch	
3. a) Subcontract Number / Numéro du contrat de sous-traitance	3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant	
4. Brief Description of Work / Brève description du travail Professional Services - Standing Offers and Supply Arrangements		
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 checked="" type="checkbox"/> No / Non <input 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 type="checkbox"/> No / Non <input checked="" 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 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 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 type="checkbox"/>	NATO UNCLASSIFIED / NATO NON CLASSIFIÉ <input type="checkbox"/>	PROTECTED A / PROTÉGÉ A <input type="checkbox"/>
PROTECTED B / PROTÉGÉ B <input type="checkbox"/>	NATO RESTRICTED / NATO DIFFUSION RESTREINTE <input type="checkbox"/>	PROTECTED B / PROTÉGÉ B <input type="checkbox"/>
PROTECTED C / PROTÉGÉ C <input 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 <input type="checkbox"/>	COSMIC TOP SECRET / COSMIC TRÈS SECRET <input type="checkbox"/>	SECRET <input type="checkbox"/>
TOP SECRET <input type="checkbox"/>		TOP SECRET <input type="checkbox"/>
TRÈS SECRET <input type="checkbox"/>		TRÈS SECRET <input type="checkbox"/>
TOP SECRET (SIGINT) <input type="checkbox"/>		TOP SECRET (SIGINT) <input type="checkbox"/>
TRÈS SECRET (SIGINT) <input type="checkbox"/>		TRÈS SECRET (SIGINT) <input type="checkbox"/>

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité  
UNCLASSIFIED





Contract Number / Numéro du contrat
Common PS SRCL#4
Security Classification / Classification de sécurité UNCLASSIFIED

**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<br>COTE DE FIABILITE   | <input type="checkbox"/> CONFIDENTIAL<br>CONFIDENTIEL           | <input checked="" type="checkbox"/> SECRET<br>SECRET | <input type="checkbox"/> TOP SECRET<br>TRÈS SECRET               |
| <input type="checkbox"/> TOP SECRET-SIGINT<br>TRÈS SECRET - SIGINT | <input type="checkbox"/> NATO CONFIDENTIAL<br>NATO CONFIDENTIEL | <input type="checkbox"/> NATO SECRET<br>NATO SECRET  | <input type="checkbox"/> COSMIC TOP SECRET<br>COSMIC TRÈS SECRET |
| <input type="checkbox"/> SITE ACCESS<br>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)**

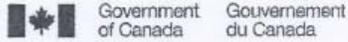
11. d) Will the supplier be required to use its IT systems to electronically process, produce or store PROTECTED and/or CLASSIFIED information or data?  
Le fournisseur sera-t-il tenu d'utiliser ses propres systèmes informatiques pour traiter, produire ou stocker électroniquement des renseignements ou 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

TBS/SCT 360-103(2004/12)

Security Classification / Classification de sécurité UNCLASSIFIED
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Contract Number / Numéro du contrat
Common PS SRCL#4
Security Classification / Classification de sécurité UNCLASSIFIED

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

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

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

**SUMMARY CHART / TABLEAU RÉCAPITULATIF**

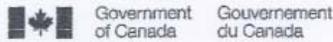
Category Catégorie	PROTECTED PROTÉGÉ			CLASSIFIED CLASSIFIÉ			NATO				COMSEC					
	A	B	C	CONFIDENTIAL	SECRET	TOP SECRET Très SECRET	NATO RESTRICTED NATO DIFFUSION RESTRIGÉE	NATO CONFIDENTIAL NATO CONFIDENTIEL	NATO SECRET	COSMIC TOP SECRET COSMIC Très SECRET	PROTECTED PROTÉGÉ			CONFIDENTIAL	SECRET	TOP 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).

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité UNCLASSIFIED
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Contract Number / Numéro du contrat Common PS SRCL#4
Security Classification / Classification de sécurité UNCLASSIFIED

PART D - AUTHORIZATION / PARTIE D - AUTORISATION			
13. Organization Project Authority / Chargé de projet de l'organisme			
Name (print) - Nom (en lettres moulées) Centralized Professional Services System, CPSS		Title - Titre Professional Services - Methods of Supply	Signature <i>Philippe Leman</i>
Telephone No. - N° de téléphone 000-000-0000	Facsimile No. - N° de télécopieur 000-000-0000	E-mail address - Adresse courriel SSPC.CPSS@tpsgc-pwgsc.gc.ca	Date 2012/03/13
14. Organization Security Authority / Responsable de la sécurité de l'organisme			
Name (print) - Nom (en lettres moulées) Charron, Annick		Title - Titre SO	Signature <i>Annick Charron</i>
Telephone No. - N° de téléphone 819-956-0615	Facsimile No. - N° de télécopieur 819-934-1449	E-mail address - Adresse courriel annick.charron@tpsgc-pwgsc.gc.ca	Date <i>March 20, 2012</i>
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?			<input type="checkbox"/> No / Non <input type="checkbox"/> 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 <i>Jacques Saumur</i>
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date <i>27-MARCH-2012</i>

Jacques Saumur  
Contract Security Officer, Contract Security Division  
Jacques.Saumur@tpsgc-pwgsc.gc.ca  
Tel/Tél - 613-948-1732 / Fax/Télé - 613-954-4171

**ANNEX F: BID SUBMISSION FORM**

<i>(to be filled in by Bidder)</i>			
<b>Bidder's full legal name</b>			
<b>Authorized Representative of Bidder for evaluation purposes (e.g., clarifications)</b>	Name		
	Title		
	Address		
	Telephone #		
	Fax #		
	Email		
<b>Bidder's Procurement Business Number (PBN)</b> <i>[see the Standard Instructions 2003]</i>			
<b>Jurisdiction of Contract:</b> Province in Canada the bidder wishes to be the legal jurisdiction applicable to any resulting contract (if other than as specified in solicitation)	As per TBIPS Holder Supply Arrangement.		
<b>Former Public Servants</b>  See the Article in Part 5 of the bid solicitation entitled Former Public Servant Certification 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 5 entitled "Former Public Servant Certification"		
	Is the Bidder a FPS who received a lump sum payment under the terms of a work force reduction program? Yes ____ No ____  If yes, provide the information required by the Article in Part 5 entitled "Former Public Servant Certification"		
<b>Canadian Content Certification</b>  As described in the solicitation, bids with at least 80% Canadian content are being given a preference.  [For the definition of Canadian goods and services, consult the PWGSC SACC clause A3050T]	On behalf of the bidder, by signing below, I confirm that <i>[check the box that applies]</i> :		
	At least 80 percent of the bid price consists of Canadian goods and services (as defined in the solicitation)		
	Less than 80 percent of the bid price consists of Canadian goods and services (as defined in the solicitation)		

<p><b>Federal Contractors Program for Employment Equity (FCP EE) Certification:</b></p> <p>If the bidder is exempt, please indicate the basis for the exemption to the right. If the bidder does not fall within the exceptions enumerated to the right, the Program requirements do apply and the bidder is required either to:</p> <p>(a) Submit to the Department of HRSD form LAB 1168, Certificate of Commitment to Implement Employment Equity, DULY SIGNED; or</p> <p>(b) Submit a valid Certificate number confirming its adherence to the FCP-EE.</p> <p>Bidders are requested to include their FCP EE Certification or signed LAB 1168 with their bid; if this information is not provided in the bid, it must be provided upon request by the Contracting Authority during evaluation.</p> <p>For joint ventures, be sure to provide this information for each of the members of the joint venture.</p>	<p>On behalf of the bidder, by signing below, I also confirm that the bidder [check the box that applies]:</p>	
	<p>(a) is not subject to Federal Contractors Program for Employment Equity (FCP-EE), because it has a workforce of less than 100 permanent full or part-time employees in Canada;</p>	
	<p>(b) is not subject to FCP-EE, because it is a regulated employer under the <i>Employment Equity Act</i>;</p>	
	<p>(c) is subject to the requirements of FCP-EE, because it has a workforce of 100 or more permanent full or part-time employees in Canada, but has not previously obtained a certificate number from the Department of Human Resources and Skills Development (HRSD) (having not bid on requirements of \$1,000,000 or more), in which case a duly signed certificate of commitment is attached; OR</p>	
	<p>(d) is subject to FCP-EE, and has a valid certification number as follows: _____ (and has not been declared an Ineligible Contractor by HRSD).</p>	
<p><b>Security Clearance Level of Bidder</b></p> <p>[include both the CISC security clearance number, level and the date it was granted]</p>		
<p><b>Security Clearance Level of Bidder's Individual Resources</b> (add additional resources on another page, if required)</p>		
<p>i. Name of Individual as it appears on security clearance application</p>	<p>i.</p>	
<p>ii. Level of Security clearance obtained and expiry date:</p>	<p>ii.</p>	
<p>iii. Validity period of security clearance obtained</p>	<p>iii.</p>	
<p>iv. Security Screening Certificated and Briefing Form file number</p>	<p>iv.</p>	
<p>v. Date of birth of individual</p>	<p>v.</p>	
<p>vi. Has the individual ever worked in Industry Canada</p>	<p>vi.</p>	
<p>vii. If the individual has a Canada.ca email, please provide.</p>	<p>vii.</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:

1. The bidder considers itself and its products able to meet all the mandatory requirements described in the bid solicitation;
2. This bid is valid for the period requested in the bid solicitation;
3. All the information provided in the bid is complete, true and accurate; and
4. If the bidder is awarded a contract, it will accept all the terms and conditions set out in the resulting contract clauses included in the bid solicitation.

**Signature of Authorized Representative of Bidder**



**ANNEX G: TASK AUTHORIZATION FORM**

**AUTHORIZATION OF SERVICES TO BE PERFORMED  
ON AN AS-AND-WHEN-REQUESTED BASIS**

Contractor:		Contract No.:	
CAS Commitment No.:		GST Financial Code:	
Task Authorization No.:		Date:	
<b>1.0 DESCRIPTION OF THE TASK / WORK TO BE PERFORMED</b>			
<b>2.0 PERIOD OF SERVICES</b>			
From:		To:	
<b>3.0 SERVICES TO BE PERFORMED FOR: (LOCATION / ADDRESS)</b>			
<b>4.0 AUTHORITIES</b>			
		Responsibility Centre:	
<b>5.0 COST</b>			
<b>Category and Level of Personnel</b>	<b>Per Diem Rate</b>	<b>No. of Days to Perform the Tasks/Work</b>	<b>Total</b>
			\$
		<b>GST/HST</b>	\$
		<b>TOTAL</b>	\$
<p>You are requested 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 services listed herein and on any attached sheets at the price set out therefore.</p>			
<b>6.0 SIGNATURES</b>			
<b>Project/Contracting Authority:</b>		<b>Signature:</b>	
<p>Check Either Option (To be filled out by Supplier)</p> <p><input type="checkbox"/> I accept this task authorization. <b>The proposed contractor is:</b></p> <p><input type="checkbox"/> I do not accept this task authorization because _____</p>			
<b>Name of Contractor authorized to sign (type or print):</b>		<b>Title of Contractor authorized to sign (type or print):</b>	
<b>Date:</b>			
<b>Signature:</b>			