



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

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

11 Laurier St., / 11, rue Laurier

Place du Portage, Phase III

Core 0B2 / Noyau 0B2

Gatineau

Québec

K1A 0S5

Bid Fax: (819) 997-9776

**REQUEST FOR PROPOSAL
DEMANDE DE PROPOSITION**

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

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

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

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

Comments - Commentaires

Vendor/Firm Name and Address

Raison sociale et adresse du

fournisseur/de l'entrepreneur

Issuing Office - Bureau de distribution

Informatics Professional Services - EL Division/Services
professionnels en informatique - division EL

4C2, Place du Portage

Gatineau

Québec

K1A 0S5

Title - Sujet RECORDS MANAGEMENT SERVICES	
Solicitation No. - N° de l'invitation EP470-161342/A	Date 2017-01-24
Client Reference No. - N° de référence du client 20161342	
GETS Reference No. - N° de référence de SEAG PW-\$\$EL-636-31021	
File No. - N° de dossier 636el.EP470-161342	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2017-02-15	Time Zone Fuseau horaire Eastern Standard Time EST
F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input type="checkbox"/> Other-Autre: <input type="checkbox"/>	
Address Enquiries to: - Adresser toutes questions à: Doyle, Ashton	Buyer Id - Id de l'acheteur 636el
Telephone No. - N° de téléphone (873) 469-4679 ()	FAX No. - N° de FAX (819) 956-7827
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction: Specified Herein Précisé dans les présentes	

Instructions: See Herein

Instructions: Voir aux présentes

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

**EE TABLE
BID SOLICITATION
FOR A CONTRACT AGAINST A SUPPLY ARRANGEMENT FOR TASK-
BASED INFORMATICS PROFESSIONAL SERVICES (TBIPS) FOR
BUSINESS CONSULTANT – LEVEL 3
FOR
PUBLIC WORKS AND GOVERNMENT SERVICES CANADA (PWGSC)**

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List of Annexes to the Resulting Contract:

Annex A Statement of Work

- Appendix A to Annex A : Tasking Assessment Procedure
- Appendix B to Annex A : Task Authorization Form
- Appendix C to Annex A : Resources Assessment Criteria and Response Table
- Appendix D to Annex A : Certifications at the TA Stage

Annex B Basis of Payment

Annex C Security Requirements Check List

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

-Attachment 3.1: Bid Submission Form

List of Attachment to Part 4 (Evaluation Procedures and Basis of Selection):

-Attachment 4.1: Bid Evaluation Criteria

-Attachment 4.2: Pricing Schedule

List of Attachment to Part 5 (Certifications):

-Attachment 5.1: Federal Contractors Program for Employment Equity - Certification

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FOR A CONTRACT AGAINST A SUPPLY ARRANGEMENT FOR TASK-
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PART 1 - GENERAL INFORMATION

1.1 Introduction

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

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

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

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

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

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

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

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

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

1.2 Summary

- (a) This bid solicitation is being issued to satisfy the requirement of Public Works and Government Services Canada (the "**Client**") for Task-Based Informatics Professional Services (TBIPS) under the TBIPS Supply Arrangement (SA) method of supply.
- (b) It is intended to result in the award of 1 contract for 3 years plus 2 one-year irrevocable options allowing Canada to extend the term of the contract.
- (c) There are security requirements associated with this requirement. For additional information, consult Part 6 - Security, Financial and Other Requirements, and Part 7 – Resulting Contract Clauses. For more information on personnel and organization security screening or security clauses, Bidders should refer to the, Industrial Security Program (ISP) of Public Works and Government Services Canada (<http://ssi-iss.tpsgc-pwgsc.gc.ca/index-eng.html>) website.
- (d) The requirement is subject to the provisions of the World Trade Organization Agreement on Government Procurement (WTO-AGP), the North American Free Trade Agreement (NAFTA), the Canada-Chile Free Trade Agreement (CCFTA), the Canada-Peru Free Trade Agreement (CPFTA),

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the Canada-Colombia Free Trade Agreement (CCoIFTA), and the Canada-Panama Free Trade Agreement (CPanFTA), and the Agreement on Internal Trade (AIT).

- (e) The Federal Contractor's Program (FCP) for employment equity applies to this procurement; see Part 5 – Certifications, Part 7 – Resulting Contract Clauses and the attachment titled "Federal Contractor's Program for Employment Equity – Certification."
- (f) Only TBIPS SA Holders currently holding a TBIPS SA for Tier 2, in all Resource Categories and in the National Capital Region under the EN578-055605 series of SAs are eligible to compete. The TBIPS SA EN578-055605 is incorporated by reference and forms part of this bid solicitation, as though expressly set out in it, subject to any express terms and conditions contained in this bid solicitation. The capitalized terms not defined in this bid solicitation have the meaning given to them in the TBIPS SA.
- (g) SA Holders that are invited to compete as a joint venture must submit a bid as that joint venture SA Holder, forming no other joint venture to bid. Any joint venture must be already qualified under the SA #EN578-055605 as that joint venture at the time of bid closing in order to submit a bid.
- (h) The Resource Category described below is required on an as and when requested basis in accordance with the TBIPS SA Annex "A":

RESOURCE CATEGORY	LEVEL OF EXPERTISE	ESTIMATED NUMBER OF RESOURCES REQUIRED
B.3 Business Consultant	LEVEL 3	2

1.3 Debriefings

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

PART 2 - BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

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

2.2 Submission of Bids

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

Bids must be delivered to the following location, by the time and date indicated at the top right hand corner of page one of the bid solicitation:

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

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

2.3 Enquiries - Bid Solicitation

- (a) All enquiries must be submitted in writing to the Contracting Authority no later than 5 calendar days before the bid closing date. Enquiries received after that time may not be answered.
- (b) Bidders should reference as accurately as possible the numbered item of the bid solicitation to which the enquiry relates. Care should be taken by Bidders to explain each question in sufficient detail in order to enable Canada to provide an accurate answer. Technical enquiries that are of a proprietary nature must be clearly marked "proprietary" at each relevant item. Items identified as "proprietary" will be treated as such except where Canada determines that the enquiry is not of a proprietary nature. Canada may edit the questions or may request that the Bidder do so, so that the proprietary nature of the question is eliminated, and the enquiry can be answered with copies

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

2.4 Former Public Servant

- (a) Contracts awarded to former public servants (FPS) in receipt of a pension or of a lump sum payment must bear the closest public scrutiny, and reflect fairness in the spending of public funds. In order to comply with Treasury Board policies and directives on contracts awarded to FPSs, Bidders must provide the information required below before contract award. If the answer to the questions and, as applicable the information required have not been received by the time the evaluation of bids is completed, Canada will inform the Bidder of a time frame within which to provide the information. Failure to comply with Canada's request and meet the requirement within the prescribed time frame will render the bid non-responsive.

(b) Definitions

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

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

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

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

(c) Former Public Servant in Receipt of a Pension

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

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

- (i). name of former public servant;
- (ii). date of termination of employment or retirement from the Public Service.

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

(d) Work Force Adjustment Directive

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

If so, the Bidder must provide the following information:

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

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

2.5 Applicable Laws

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

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

2.6 Improvement of Requirement During Solicitation Period

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

2.7 Volumetric Data

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

PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

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

- (i) Section I: Technical Bid (4 hard copies);
- (ii) Section II: Financial Bid (2 hard copies);
- (iii) Section III: Certifications not included in the Technical Bid (2 hard copies).

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

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

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

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

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

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

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

- (D) the entities otherwise do not deal with one another at arm's length, or each of them does not deal at arm's length with the same third party.
- (iii) Individual members of a joint venture cannot participate in another bid, either by submitting a bid alone or by participating in another joint venture.

(e) Joint Venture Experience:

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

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

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

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

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

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

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

That show in total 100 billable days.

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

3.2 Section I: Technical Bid

(a) The technical bid consists of the following:

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

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

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

- (iii) **Substantiation of Technical Compliance:** The technical bid must substantiate the compliance with the specific articles of Attachment "4.1", which is the requested format for providing the substantiation. The substantiation must not simply be a repetition of the requirement(s), but must explain and demonstrate how the Bidder will meet the requirements and carry out the required Work. Simply stating that the Bidder or its proposed solution or resources comply is not sufficient. Where Canada determines that the substantiation is not complete, the Bidder will be considered non-responsive and disqualified. The substantiation may refer to additional documentation submitted with the bid - this information can be referenced in the "Bidder's Response" column of Attachment "4.1", where Bidders are requested to indicate where in the bid the reference material can be found, including the title of the document, and the page and paragraph numbers; where the reference is not sufficiently precise, Canada may request that the Bidder direct Canada to the appropriate location in the documentation.
- (iv) **For Proposed Resources:** The technical bid must include résumés for the resources as identified in Attachment "4.1". The same individual must not be proposed for more than one Resource Category. The Technical bid must demonstrate that each proposed individual meets the qualification requirements described (including any educational requirements, work experience requirements, and professional designation or membership requirements). With respect to the proposed resources:
- (A) Proposed resources may be employees of the Bidder or employees of a subcontractor, or these individuals may be independent contractors to whom the Bidder would subcontract a portion of the Work (refer to Part 5, Certifications).
- (B) For educational requirements for a particular degree, designation or certificate, PWGSC will only consider educational programs that were successfully completed by the resource by the time of bid closing. If the degree, designation

or certification was issued by an educational institution outside of Canada, the Bidder must provide a copy of the results of the academic credential assessment and qualification recognition service issued by an agency or organization recognized by the Canadian Information Centre for International Credentials (CICIC).

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

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

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

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

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

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

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

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

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

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

3.3 Section II: Financial Bid

- (a) **Pricing:** Bidders must submit their financial bid in accordance Pricing Schedule provided in Attachment "4.2". The total amount of Applicable Taxes must be shown separately, if applicable. Unless otherwise indicated, bidders must include a single, firm, all-inclusive per diem rate quoted in Canadian dollars in each cell requiring an entry in the pricing tables.
- (b) **Variation in Resource Rates By Time Period:** For any given resource category, where the financial tables provided by Canada allow different firm rates to be charged for a resource category during different time periods:
- (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

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

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

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

4.2 Technical Evaluation

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

Only a certain number of resources per Resource Category will be evaluated as part of this bid solicitation as identified in Attachment 4.1. Additional Resources will only be assessed after contract award once specific tasks are requested of the Contractor. After contract award, the

Task Authorization process will be in accordance with Part 7 – Resulting Contract Clauses, the Article titled “Task Authorization”. When a Task Authorization Form (TA Form) is issued, the Contractor will be requested to propose a resource to satisfy the specific requirement based on the TA Form’s Statement of Work. The proposed resource will then be assessed against the criteria identified in the Contract’s Statement of Work in accordance with Appendix C of Annex A.

(d) **Reference Checks:**

- (i) Whether or not to conduct reference checks is discretionary. However, if PWGSC chooses to conduct reference checks for any given rated or mandatory requirement, it will check the references for that requirement for all bidders who have not, at that point, been found non-responsive.
- (ii) For reference checks, Canada will conduct the reference check in writing by email. Canada will send all email reference check requests to contacts supplied by all the Bidders within a 48-hour period using the email address provided in the bid. Canada will not award any points and/or a bidder will not meet the mandatory experience requirement (as applicable) unless the response is received within 5 working days of the date that Canada’s email was sent.
- (iii) On the third working day after sending out the reference check request, if Canada has not received a response, Canada will notify the Bidder by email, to allow the Bidder to contact its reference directly to ensure that it responds to Canada within 5 working days. If the individual named by a Bidder is unavailable when required during the evaluation period, the Bidder may provide the name and email address of an alternate contact person from the same customer. Bidders will only be provided with this opportunity once for each customer, and only if the originally named individual is unavailable to respond (i.e., the Bidder will not be provided with an opportunity to submit the name of an alternate contact person if the original contact person indicates that he or she is unwilling or unable to respond). The Bidder will have 1 working day to submit the name of a new contact. That contact will again be given 5 working days to respond once Canada sends its reference check request.
- (iv) Wherever information provided by a reference differs from the information supplied by the Bidder, the information supplied by the reference will be the information evaluated.
- (v) Points will not be allocated and/or a bidder will not meet the mandatory experience requirement (as applicable) if (1) the reference customer states he or she is unable or unwilling to provide the information requested, or (2) the customer reference is not a customer of the Bidder itself (for example, the customer cannot be the customer of an affiliate of the Bidder instead of being a customer of the Bidder itself). Nor will points be allocated or a mandatory met if the customer is itself an affiliate or other entity that does not deal at arm’s length with the Bidder.

4.3 Financial Evaluation

- (a) There are two possible financial evaluation methods for this requirement. The first method will be used if three or more bids are determined responsive (see (b) Financial Evaluation - Method A below). The second method will be used if fewer than three bids are determined responsive (see (c) Financial Evaluation - Method B below).
- (b) **Financial Evaluation - Method A:** The following financial evaluation method will be used if three or more bids are determined responsive:
 - (i) **Calculation of Total Bid Price:** The financial evaluation will be conducted using the pricing tables completed by the Bidders and the Firm Per Diem Median Rate Evaluation Method explained below. A financial calculation will occur for each Bidder by multiplying its firm per diem rates, or Median Rate(s) if applicable, for the Initial Contract Period and the option period(s) with the estimated number of days of work for each period, for all the

Resource Categories stated in Attachment 4.2 - Pricing Schedule. The sum of such rates will constitute the Total Bid Price for that Bidder.

(ii) Firm Per Diem Median Rate Evaluation

(A) Use: The firm per diem median rate calculation will apply to modify the rate to be assessed in the financial evaluation of a Bidder, where that Bidder submits a firm per diem rate for a resource category that is lower than the Lower Band Limit as calculated below. The firm per diem median rate calculation is for evaluation purposes only, and the actual submitted per diem rate will be used in any resulting contract in all instances.

(B) Calculation for both the Initial Contract Period and the Option Period medians: Using the per diem rate proposed for each individual Resource Category a Median Rate will be determined for each Resource Category for the Initial Contract Period, and for each of the option period(s). For each Resource Category, the Median Rate will be calculated using the median function in Microsoft Excel. A Lower Band Limit will be calculated for each Resource Category and will represent a range that encompasses the Median Rate to a value of minus (-) 20% of the Median Rate. If a Bidder bids a firm per diem rate for a Resource Category that is lower than the Lower Band Limit, that Bidder's financial evaluation will be conducted using a per diem rate equal to the Median Rate for that Resource Category.

For example, if the Median Rate is determined to be \$500 for a Resource Category, the Lower Band Limit would be minus (-) 20% of \$500, or \$400. If a Bidder proposes a firm per diem rate that is lower than \$400, the Median Rate of \$500 will be used in the Bidder's financial evaluation for that Resource Category.

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

(i) Calculation of Total Bid Price: The financial evaluation will be conducted using the pricing tables completed by the Bidders. A financial calculation will occur for each Bidder by multiplying its firm per diem rates for the Initial Contract Period and the option period(s) with the estimated number of days of work for each period, for all the Resource Categories stated in Attachment 4.2 - Pricing Schedule. The sum of such rates will constitute the Total Bid Price for that Bidder.

(d) Substantiation of Professional Services Rates

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

- (i)** an invoice (referencing a contract serial number or other unique contract identifier) that shows that the Bidder has provided and invoiced a customer (with whom the Bidder deals at arm's length) for services performed for that customer similar to the services that would be provided in the relevant resource category, where those services were provided for at least three months within the eighteen months before the date of this request for rate substantiation, and the fees charged were equal to or less than the rate offered to Canada;
- (ii)** in relation to the invoice in (i), evidence from the Bidder's customer that the services identified in the invoice include at least 50% of the tasks listed in the Statement of Work for the category of resource being assessed for an unreasonably low rate. This evidence must consist of either a copy of the contract (which must describe the services to be

provided and demonstrate that at least 50% of the tasks to be performed are the same as those to be performed under the Statement of Work in this bid solicitation) or the customer's signed certification that the services subject to the charges in the invoice included at least 50% of the same tasks to be performed under the Statement of Work in this bid solicitation; and

- (iii) in respect of each contract for which an invoice is submitted as substantiation, a résumé for the resource that provided the services under that contract that demonstrates that, in relation to the resource category for which the rates are being substantiated, the resource would meet the mandatory requirements and achieve any required pass mark for any rated criteria; and
- (iv) the name, telephone number and, if available, e-mail address of a contact person at the customer who received each invoice submitted under (i), so that Canada may verify any information provided by the Bidder.

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

(e) Formulae in Pricing Tables

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

4.4 Basis of Selection

- (a) A bid must comply with the requirements of the bid solicitation, meet all mandatory evaluation criteria and obtain the required pass marks for the point rated criteria identified in this bid solicitation to be declared responsive.
- (b) The responsive bid that obtains the highest Total Bidder Score will be recommended for award of a contract. For any given Bidder, the greatest possible Total Technical Score is 70 while the greatest possible Total Financial Score is 30.

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

$$\frac{\text{Technical Score}}{\text{Maximum Technical Points (bidders, please refer to the maximum technical points in Attachment 4.1)}} \times 70 = \text{Total Technical Score}$$

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

$$\frac{\text{Lowest Financial Evaluated Price}}{\text{The Bidder's Financial Evaluated Price}} \times 30 = \text{Total Financial Score}$$

- (iii) Calculation of the Total Bidder Score: The Total Bidder Score will be computed for each responsive bid in accordance with the following formula:

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

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- (c) In the event of identical Total Bidder Scores occurring, then the bid with the highest Total Technical Score will become the top-ranked bidder.
- (d) One contract may be awarded in total as a result of this bid solicitation.
- (e) 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.

PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

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

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

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

5.1 Certifications Precedent to Contract Award and Additional Information

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

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

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

Canada will have the right to declare a bid non-responsive if the Bidder, or any member of the Bidder if the Bidder is a Joint Venture, appears on the "[FCP Limited Eligibility to Bid](http://www.labour.gc.ca/eng/standards_equity/eq/emp/fcp/list/inelig.shtml)" list at the time of contract award.

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

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

5.2 Additional Certifications Precedent to Contract Award

(a) Professional Services Resources

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

accurate. Furthermore, the Bidder warrants that every individual proposed by the Bidder for the requirement is capable of performing the Work described in the resulting contract.

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

(b) Certification of Language - Bilingual Essential

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

(c) Submission of Only One Bid

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

PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS

6.1 Security Requirement

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

6.2 Financial Capability

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

PART 7 - RESULTING CONTRACT CLAUSES

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

7.1 Requirement

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

7.2 Task Authorization

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

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

- (ii) The quarterly periods are defined as follows:

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

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

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

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

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

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

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

7.3 Minimum Work Guarantee

- (a) In this clause,

- (i) **"Maximum Contract Value"** means the amount specified in the **"Limitation of Expenditure"** clause set out in the Contract (excluding Applicable Taxes); and
- (ii) **"Minimum Contract Value"** means \$20,000.00.

- (b) Canada's obligation under the Contract is to request Work in the amount of the Minimum Contract Value or, at Canada's option, to pay the Contractor at the end of the Contract in accordance with sub-article (c), subject to sub-article (d). In consideration of such obligation, the Contractor agrees to stand in readiness throughout the Contract Period to perform the Work described in the Contract. Canada's maximum liability for work performed under the Contract must not exceed the Maximum Contract Value, unless an increase is authorized in writing by the Contracting Authority.

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

7.4 Standard Clauses and Conditions

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

(a) **General Conditions:**

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

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

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

(b) **Supplemental General Conditions:**

The following Supplemental General Conditions:

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

7.5 Security Requirement

The following security requirements (SRCL #6 and related clauses provided by ISP) as set out under Annex "B" to the Supply Arrangement, applies to and forms part of the Contract.

SECURITY REQUIREMENT FOR CANADIAN SUPPLIER: PWGSC FILE COMMON-PS-SRCL#6

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

7.6 Contract Period

- (a) **Contract Period:** The "**Contract Period**" is the entire period of time during which the Contractor is obliged to perform the Work, which includes:
 - (iii) The "**Initial Contract Period**", which begins on the date the Contract is awarded and ends 3 years later; and
 - (iv) 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 2 additional 1-year periods under the same terms and conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions set out in the Basis of Payment.
 - (ii) Canada may exercise this option at any time by sending a written notice to the Contractor before the expiry date of the Contract. The option may only be exercised by the Contracting Authority, and will be evidenced, for administrative purposes only, through a contract amendment.

7.7 Authorities

(a) Contracting Authority

The Contracting Authority for the Contract is:

Name: Ashton Doyle
Title: Supply Officer
Public Works and Government Services Canada
Acquisitions Branch
Directorate: Space, Innovation, and Informatics Projects Directorate
Address: 11 Laurier St., Gatineau, Québec
Telephone: 873-469-4679
E-mail address: Ashton.doyle@tpsgc-pwgsc.gc.ca

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

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

The Technical Authority for the Contract is:

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

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

(c) Contractor's Representative

(To be determined at contract award)

7.8 Proactive Disclosure of Contracts with Former Public Servants

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

7.9 Payment

(a) Basis of Payment

- (i) **Professional Services provided under a Task Authorization with a Maximum Price:** For professional services requested by Canada, in accordance with a validly issued Task Authorization, Canada will pay the Contractor, in arrears, up to the Maximum Price for the TA, for actual time worked and any resulting deliverables in accordance with the firm all-inclusive per diem rates set out in Annex B, Basis of Payment, Applicable Taxes extra. Partial days will be prorated based on actual hours worked based on a 7.5-hour workday.
- (ii) **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.
- (iii) **Professional Services Rates:** In Canada's experience, bidders from time to time propose rates at the time of bidding for one or more Resource Categories that they later refuse to honour, on the basis that these rates do not allow them to recover their own costs and/or make a profit. This denies Canada of the benefit of the awarded contract. If the Contractor does not respond or refuses to provide an individual with the qualifications described in the Contract within the time described in the Contract (or proposes instead to provide someone from an alternate category at a different rate), whether or not Canada terminates the Contract as a whole or in part or chooses to exercise any of the rights provided to it under the general conditions, Canada may impose sanctions or take other measures in accordance with the PWGSC Vendor Performance Corrective Measure Policy (or equivalent) then in effect, which measures may include an assessment that results in conditions applied against the Contractor to be fulfilled before doing further business with Canada, or full debarment of the Contractor from bidding on future requirements.

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

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- (i) Canada's total liability to the Contractor under the Contract for all validly issued Task Authorizations (TAs), inclusive of any revisions, must not exceed the amount set out on page 1 of the Contract, less any Applicable taxes. With respect to the amount set out on page 1 of the Contract, Customs duties are included and Applicable Taxes are included
 - (ii) No increase in the total liability of Canada will be authorized or paid to the Contractor unless an increase has been approved, in writing, by the Contracting Authority.
 - (iii) The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:
 - (A) when it is 75 percent committed, or
 - (B) 4 months before the contract expiry date, or
 - (C) As soon as the Contractor considers that the sum is inadequate for the completion of the Work required in all authorized TAs, inclusive of any revisions, whichever comes first.
 - (i) If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority a written estimate for the additional funds required. Providing this information does not increase Canada's liability.
 - (c) **Method of Payment for Task Authorizations with a Maximum Price:** For each Task Authorization validly issued under the Contract that contains a maximum price:
 - (i) Canada will pay the Contractor no more frequently than once a month in accordance with the Basis of Payment. The Contractor must submit time sheets for each resource showing the days and hours worked to support the charges claimed in the invoice.
 - (ii) Once Canada has paid the maximum TA price, Canada will not be required to make any further payment, but the Contractor must complete all the work described in the TA, all of which is required to be performed for the maximum TA price. If the work described in the TA is completed in less time than anticipated, and the actual time worked (as supported by the time sheets) at the rates set out in the Contract is less than the maximum TA price, Canada is only required to pay for the time spent performing the work related to that TA.
 - (d) **Time Verification**

Time charged and the accuracy of the Contractor's time recording system are subject to verification by Canada, before or after payment is made to the Contractor. If verification is done after payment, the Contract must repay any overpayment, at Canada's request.
 - (e) **Payment Credits**
 - (i) **Failure to Provide Resource:**
 - (A) If the Contractor does not provide a required professional services resource that has all the required qualifications within the time prescribed by the Contract, the Contractor must credit to Canada an amount equal to the per diem rate (based on a 7.5-hour workday) of the required resource for each day (or partial day) of delay in providing the resource, up to a maximum of 10 days.
 - (B) **Corrective Measures:** If credits are payable under this Article for two consecutive months or for three months in any 12-month period, the Contractor must submit a written action plan describing measures it will implement or actions it will undertake to eliminate the recurrence of the problem. The Contractor will have five working days to deliver the action plan to the Client and the Contracting Authority and 20 working days to rectify the underlying problem.
 - (C) **Termination for Failure to Meet Availability Level:** In addition to any other rights it has under the Contract, Canada may terminate the Contract for default in
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accordance with the General Conditions by giving the Contractor three months' written notice of its intent, if any of the following apply:

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

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

- (ii) **Credits Apply during Entire Contract Period:** The Parties agree that the credits apply throughout the Contract Period.
 - (iii) **Credits represent Liquidated Damages:** The Parties agree that the credits are liquidated damages and represent their best pre-estimate of the loss to Canada in the event of the applicable failure. No credit is intended to be, nor will it be construed as, a penalty.
 - (iv) **Canada's Right to Obtain Payment:** The Parties agree that these credits are a liquidated debt. To collect the credits, Canada has the right to hold back, draw back, deduct or set off from and against any money Canada owes to the Contractor from time to time.
 - (v) **Canada's Rights & Remedies not Limited:** The Parties agree that nothing in this Article limits any other rights or remedies to which Canada is entitled under the Contract (including the right to terminate the Contract for default) or under the law generally.
 - (vi) **Audit Rights:** The Contractor's calculation of credits under the Contract is subject to verification by government audit, at the Contracting Authority's discretion, before or after payment is made to the Contractor. The Contractor must cooperate fully with Canada during the conduct of any audit by providing Canada with access to any records and systems that Canada considers necessary to ensure that all credits have been accurately credited to Canada in the Contractor's invoices. If an audit demonstrates that past invoices contained errors in the calculation of the credits, the Contractor must pay to Canada the amount the audit reveals was required to be credited to Canada, plus interest, from the date Canada remitted the excess payment until the date of the refund (the interest rate is the Bank of Canada's discount annual rate of interest in effect on the date the credit was first owed to Canada, plus 1.25% per year). If, as a result of conducting an audit, Canada determines that the Contractor's records or systems for identifying, calculating or recording the credits are inadequate, the Contractor must implement any additional measures required by the Contracting Authority.
- (f) **No Responsibility to Pay for Work not performed due to Closure of Government Offices**
- (i) Where the Contractor, its employees, subcontractors, or agents are providing services on government premises under the Contract and those premises are inaccessible because of the evacuation or closure of government offices, and as a result no work is performed, Canada is not responsible for paying the Contractor for work that otherwise would have been performed if there had been no evacuation or closure.
 - (ii) If, as a result of any strike or lock-out, the Contractor or its employees, subcontractors or agents cannot obtain access to government premises and, as a result, no work is performed, Canada is not responsible for paying the Contractor for work that otherwise would have been performed if the Contractor had been able to gain access to the premises

7.10 Invoicing Instructions

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

7.11 Certifications

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

7.12 Federal Contractors Program for Employment Equity - Default by Contractor

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

7.13 Applicable Laws

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

7.14 Priority of Documents

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

- (a) these Articles of Agreement, including any individual SACC clauses incorporated by reference in these Articles of Agreement;
- (b) Supplemental General Conditions, in the following order:
 - (i) 4006 (2010-08-16), Supplemental General Conditions - Contractor to Own Intellectual Property Rights in Foreground Information;
- (c) General Conditions 2035 (2016-04-04), Higher Complexity - Services;
- (d) Annex A, Statement of Work - Annex A including its Appendices as follows;
 - (i) Appendix A to Annex A - Tasking Assessment Procedure;
 - (ii) Appendix B to Annex A - Task Authorization (TA) Form;
 - (iii) Appendix C to Annex A - Resource Assessment Criteria and Response Table;
 - (iv) Appendix D to Annex A - Certifications at the TA stage;
- (e) Annex B, Basis of Payment;

- (f) Annex C, Security Requirements Check List;
- (g) the validly issued Task Authorizations and any required certifications (including all of their annexes, if any); and
- (h) the Contractor's bid dated _____ (insert date of bid) (if the bid was clarified or amended, insert the time of contract award), as clarified on _____ "or" as amended _____ (insert date(s) of clarification(s) or amendment(s) if applicable.)

7.15 Foreign Nationals (Canadian Contractor)

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

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

7.16 Foreign Nationals (Foreign Contractor)

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

7.17 Insurance Requirements

(a) Compliance with Insurance Requirements

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

(b) Commercial General Liability Insurance

- (i) The Contractor must obtain Commercial General Liability Insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature, but for not less than \$2,000,000 per accident or occurrence and in the annual aggregate.
- (ii) The Commercial General Liability policy must include the following:
 - (A) Additional Insured: Canada is added as an additional insured, but only with respect to liability arising out of the Contractor's performance of the Contract. The interest of Canada should read as follows: Canada, as represented by Public Works and Government Services Canada.
 - (B) Bodily Injury and Property Damage to third parties arising out of the operations of the Contractor.

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

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

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

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

7.18 Limitation of Liability - Information Management/Information Technology

- (a) This section applies despite any other provision of the Contract and replaces the section of the general conditions entitled "Liability". Any reference in this section to damages caused by the Contractor also includes damages caused by its employees, as well as its subcontractors, agents, and representatives, and any of their employees. This section applies regardless of

whether the claim is based in contract, tort, or another cause of action. The Contractor is not liable to Canada with respect to the performance of or failure to perform the Contract, except as described in this section and in any section of the Contract pre-establishing any liquidated damages. The Contractor is only liable for indirect, special or consequential damages to the extent described in this Article, even if it has been made aware of the potential for those damages.

(b) **First Party Liability:**

- (i) The Contractor is fully liable for all damages to Canada, including indirect, special or consequential damages, caused by the Contractor's performance or failure to perform the Contract that relate to:
 - (A) any infringement of intellectual property rights to the extent the Contractor breaches the section of the General Conditions entitled "Intellectual Property Infringement and Royalties";
 - (B) physical injury, including death.
- (ii) The Contractor is liable for all direct damages caused by the Contractor's performance or failure to perform the Contract affecting real or tangible personal property owned, possessed, or occupied by Canada.
- (iii) Each of the Parties is liable for all direct damages resulting from any breach of confidentiality under the Contract. Each of the Parties is also liable for all indirect, special or consequential damages in respect of any unauthorized disclosure of the other Party's trade secrets (or trade secrets of a third party provided by one Party to another under the Contract) relating to information technology.
- (iv) The Contractor is liable for all direct damages relating to any encumbrance or claim relating to any portion of the Work for which Canada has made any payment. This does not apply to encumbrances or claims relating to intellectual property rights, which are addressed under (i)(A) above.
- (v) The Contractor is also liable for any other direct damages to Canada caused by the Contractor's performance or failure to perform the Contract that relate to:
 - (A) any breach of the warranty obligations under the Contract, up to the total amount paid by Canada (including any applicable taxes) for the goods and services affected by the breach of warranty; and
 - (B) Any other direct damages, including all identifiable direct costs to Canada associated with re-procuring the Work from another party if the Contract is terminated either in whole or in part for default, up to an aggregate maximum for this subparagraph (B) of the greater of .75 times the total estimated cost (meaning the dollar amount shown on the first page of the Contract in the cell titled "Total Estimated Cost" or shown on each call-up, purchase order or other document used to order goods or services under this instrument), or \$1,000,000.00.

In any case, the total liability of the Contractor under subparagraph (v) will not exceed the total estimated cost (as defined above) for the Contract or \$1,000,000.00, whichever is more.
- (vi) If Canada's records or data are harmed as a result of the Contractor's negligence or willful act, the Contractor's only liability is, at the Contractor's own expense, to restore Canada's records and data using the most recent back-up kept by Canada. Canada is responsible for maintaining an adequate back-up of its records and data.

(c) **Third Party Claims:**

- (i) Regardless of whether a third party makes its claim against Canada or the Contractor, each Party agrees that it is liable for any damages that it causes to any third party in

connection with the Contract as set out in a settlement agreement or as finally determined by a court of competent jurisdiction, where the court determines that the Parties are jointly and severally liable or that one Party is solely and directly liable to the third party. The amount of the liability will be the amount set out in the settlement agreement or determined by the court to have been the Party's portion of the damages to the third party. No settlement agreement is binding on a Party unless its authorized representative has approved the agreement in writing.

- (ii) If Canada is required, as a result of joint and several liability or joint and solidarily liable, to pay a third party in respect of damages caused by the Contractor, the Contractor must reimburse Canada by the amount finally determined by a court of competent jurisdiction to be the Contractor's portion of the damages to the third party. However, despite Sub-article (i), with respect to special, indirect, and consequential damages of third parties covered by this Section, the Contractor is only liable for reimbursing Canada for the Contractor's portion of those damages that Canada is required by a court to pay to a third party as a result of joint and several liability that relate to the infringement of a third party's intellectual property rights; physical injury of a third party, including death; damages affecting a third party's real or tangible personal property; liens or encumbrances on any portion of the Work; or breach of confidentiality.
- (iii) The Parties are only liable to one another for damages to third parties to the extent described in this Sub-article (c).

7.19 Joint Venture Contractor

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

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

7.20 Professional Services - General

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

Replacement of Specific Individuals

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

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

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

- (ii) Subject to an Excusable Delay, where Canada becomes aware that a specific individual identified under the Contract to provide services has not been provided or is not performing, the Contracting Authority may elect to:

- (A) exercise Canada's rights or remedies under the Contract or at law, including terminating the Contract in whole or in part for default under the Article titled "Default of the Contractor", or
 - (B) assess the information provided under (c) (i) above or, if it has not yet been provided, require the Contractor to propose a replacement to be rated by the Technical Authority. The replacement must have qualifications and experience that are similar or exceed those obtained for the original resource and be acceptable to Canada. Upon assessment of the replacement, Canada may accept the replacement, exercise the rights in (ii) (A) above, or require another replacement in accordance with this sub-article (c).

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

- (iii) The Contractor must not, in any event, allow performance of the Work by unauthorized replacement persons. The Contracting Authority may order that an original or replacement resource stop performing the Work. In such a case, the Contractor must immediately comply with the order. The fact that the Contracting Authority does not order a resource to stop performing the Work does not relieve the Contractor from its responsibility to meet the requirements of the Contract.

- (iv) The obligations in this article apply despite any changes that Canada may have made to the Client's operating environment.

7.21 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.

7.22 Representations and Warranties

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

7.23 Access to Canada's Property and Facilities

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

7.24 Identification Protocol Responsibilities

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

- (a) Contractor Representatives who attend a Government of Canada meeting (whether internal or external to Canada's offices) must identify themselves as Contractor Representatives prior to the commencement of the meeting, to ensure that each meeting participant is aware of the fact that the individual is not an employee of the Government of Canada;
- (b) During the performance of any Work at a Government of Canada site, each Contractor Representative must be clearly identified at all times as being a Contractor Representative; and
- (c) If a Contractor Representative requires the use of the Government of Canada's e-mail system in the performance of the Work, then the individual must clearly identify him or herself as an agent or subcontractor of the Contractor in all electronic mail in the signature block as well as under "Properties." This identification protocol must also be used in all other correspondence, communication, and documentation.
- (d) If Canada determines that the Contractor is in breach of any obligation stated in this Article, upon written notice from Canada the Contractor must submit a written action plan describing corrective measures it will implement to eliminate the recurrence of the problem. The Contractor will have five working days to deliver the action plan to the Client and the Contracting Authority, and twenty working days to rectify the underlying problem.

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- (e) In addition to any other rights it has under the Contract, Canada may terminate the Contract for default if the corrective measures required of the Contractor described above are not met.

ANNEX A

STATEMENT OF WORK

1. Background

The Treasury Board Secretariat (TBS) Directive on Recordkeeping was issued on June 1, 2009, to ensure that “departments have effective record keeping practices in place” by May 2015, to manage their Information Resources of Business Value (IRBV) and Information Resources of Enduring Value (IREV).

In order to provide high level governance, the TBS *Management Accountability Framework* (MAF) annual assessments will be used to measure and monitor the department's compliance with the requirements of the relevant policies and directives and the achievement of expected results.

Public Works and Government Services Canada (PWGSC) manages the largest and most diverse portfolio of real estate in Canada and is the Government of Canada's real property expert. Through its real property business line, PWGSC provides federal departments and organizations with a full range of affordable and productive work environments of real property services, as well as strategic and expert advice that supports the Government of Canada in the delivery of programs to Canadians.

Real Property professionals include office accommodation specialists; architects; engineers; real estate experts; and asset and facility managers. Activities in delivering real property services is equally diverse; from the initial investment strategies, the construction or leasing of facilities, to the maintenance, repair and disposal of real property assets.

The Government of Canada's (GoC) overarching *Policy on Information Management* and subsequent *Directive on Recordkeeping* (prepared and maintained by Treasury Board Secretariat of Canada (TBS)) outline requirements for all GoC employees to manage their records. The goal of the Directive on Recordkeeping is to establish government-wide practices to manage and protect the integrity of information resources. Knowledge Management & Systems (KM&S) Directorate is the Real Property Branch's designated Records and Information Management lead organization responsible to ensure compliance with TBS mandated policies, directives, standards and all Government of Canada relevant policies, acts and guidelines.

2. Scope

The Real Property Branch (RPB) of Public Works and Government Services Canada (PWGSC) requires informatics professional services, on an “as and when requested” basis in the National Capital Region (NCR). The Contractor must provide the services of a Business Consultant, Level 3, with expertise in business process improvement in the area of records and information management to support the Branch transformation initiatives.

In 2009, the Government of Canada established the Open Government Initiative which includes three streams: Open Dialogue; Open Information; and Open Data. In partnership with the PWGSC Chief Information Officer Branch, Real Property Branch is responsible for the obligations listed in the Department's **Open Government Implementation Plan** (OGIP) (see **Appendix A**), the widening of access to information as directed by the Government of Canada's Open Government Action Plan and the provision of suitable Data Sets to be posted on the Government of Canada's Open Government Portal. The Contractor resources will be required to assist in certain activities associated with Open Government.

The Email Transformation Initiative is also a Government-of-Canada (GoC)-wide project to essentially move all GoC Departments to a single instance implementation of an email system. Real Property Branch (RPB) has more than 1800 employee accounts, plus additional resource accounts, in the National Capital Area, which all must be moved to the new email system. Contractor resources will be asked to assist in the successful transition of RPB to the new system.

3. Objectives

The Director of KM&S is the designated Information Management Senior Official for Real Property Branch (RPB) and is responsible for ensuring the Branch meets all requirements defined in the **Directive on Recordkeeping**¹, including managing information resources efficiently and effectively to support the outcomes of the branch's programs and services; ensure that information management is an integral component of the branch's programs, services and activities ensuring high quality, readily available and authoritative information in support of decision making and reporting; ensure that integrated governance and accountability structures are in place to support information management activities; apply a common information management approach resulting in seamless and integrated information within the branch while respecting security and privacy rights; continuously improving the management of information by monitoring, assessing and reporting on information management activities among other things. In addition to the mandated requirements, the Branch objective is to be "Audit Ready" (Commission of Enquiry "ready", Legal Hold "ready" and Official Correspondence "ready") through the adoption of a new record keeping culture based on the published *Recordkeeping (RK) Roadmap* of Library and Archives Canada (LAC), a standardized approach to record keeping to be applied across the Government of Canada.

The Department's Chief Information Officer Branch (CIOB) is leading the transformation to the new Record Keeping and Information Management standards through the development of an Enterprise Knowledge and Information Management Strategy (EKIMS). The responsibility for the implementation of this long-term strategy, which includes multiple activities, falls to the Branch and will in some degree direct and impact the work of the Contractor. A list of these activities can be found in **Appendix B** of this document entitled **EKIMS Roadmap**.

In order to effectively manage the Branch IRBV's, the Branch adopted the *RK Roadmap*, which consists of five main steps: the first three (Classification, Identification and Consolidation) were leveraged to create a branch File Classification Plan; begin the implementation of GCDOCS (Government of Canada's version of Open Text's Content Server version 2010); and create a new Records Disposition Authority (RDA).

A new corporate repository, GCDOCS, was rolled out to Public Works and Government Services Canada (PWGSC) and the implementation has begun for Real Property Branch. The process of finalizing the GCDOCS implementation will take place during the 2016/17 Government of Canada fiscal years and beyond. GCDOCS requires ongoing maintenance and usage will need to be monitored to ensure that the branch is following Steps 4 (Use and Maintenance) and 5 (Disposition) of the **LAC RK Roadmap** (see **Appendix C** below). In addition, IRBV's must be migrated from legacy repositories such as shared drives and EDRM (PWGSC's version of Open Text's Docs Open product) into GCDOCS.

PWGSC has also begun pilots of new Record Keeping / IM applications such as Microsoft SharePoint, Microsoft Dynamics, CCM Enterprise and others. Although the timing for their implementation has not

¹ The Treasury Board Secretariat (TBS) Directive on Recordkeeping was issued on June 1, 2009. The Directive can be found on TBS site at <http://tbs-sct.gc.ca/pol/doc-eng.aspx?id=16552>

been established yet, the Contractor will be required to participate in projects to provide branch-wide solutions for these types of products.

4. Location of Work

Most of the work will be conducted at the client's premises in the National Capital Region. Some limited work with regional representatives may be conducted using teleconference facilities provided by the Crown.

The contractor will perform the majority of the work in English but must be able to communicate in both official languages.

The Contractor will be provided with access to GCDOCS.

5. Tasks and Activities

The Business Consultant Level 3 responsibilities include, but are not limited to, the following tasks:

- Provide expert advice on document disposition, management of paper holdings in RPB Sectors and paper holdings in Archives.
- Provide expert advice on implementing a Paper-to-Digital Strategy and a Preservation Strategy.
- Provide expert advice on methods to migrate IRBV's and IREV's from legacy repositories to GCDOCS (Open Text's Content Server).
- Provide expert advice on communication activities to ensure stakeholder engagement.
- Provide technical and expert advice on the implementation and use of Information Management technologies including GCDOCS (Open Text's Content Server); MS SharePoint; MS Dynamics; CCM Enterprise; EDRM (Open Text's DOCS Open); and "Cloud" repositories.
- Provide expert advice on the reduction of the Branch's electronic holdings and the eventual sun-setting of Shared Drives and legacy document repositories.
- Provide expert advice on the transfer of RPB Electronic records of enduring value to Library and Archives Canada.
- Liaise with LAC to develop a map of all previous classification systems and a "Crosswalk" to current systems of document classification (to assist LAC and RPB with the management of all currently maintained physical records).
- Provide expert and technical advice on configuring the GCDOCS National RPB Workspace (e.g., Naming Conventions; Metadata Model Processes and Procedures; Role Group Strategy; Business Rules compendium; Security controls; and Record Series Identifiers).
- Provide expert advice on the development of IM Governance processes and Reporting tools.
- Develop an RPB Change Management strategy and build an RPB Change Advisory Board Community.
- Conduct client consultations to establish deliverables for Open Government (identify data sets which RPB can make available for the Open Government portal).
- Provide strategic advice on the implementation of GCDOCS.
- Create Business Unit specific (director level) Working Guides to assist RPB users in filing documents into the correct IM classifications in GCDOCS (working guides are needed to provide a simple and easy way to educate users on the strategy and use of GCDOCS and its tools).
- Provide expert advice and technical support for the implementation of the Email Transformation Initiative (ETI).
- Develop strategic implementation plans and provide training and guidance to RPB clients on application upgrades from CCM Mercury to CCM Enterprise.

- Review the *TB Directive on Recordkeeping* to identify any gaps and assess RPB's level of compliance.
- Ensure that all documents accurately reflect the current strategic objectives of RPB's IM transformation.

6. Meetings

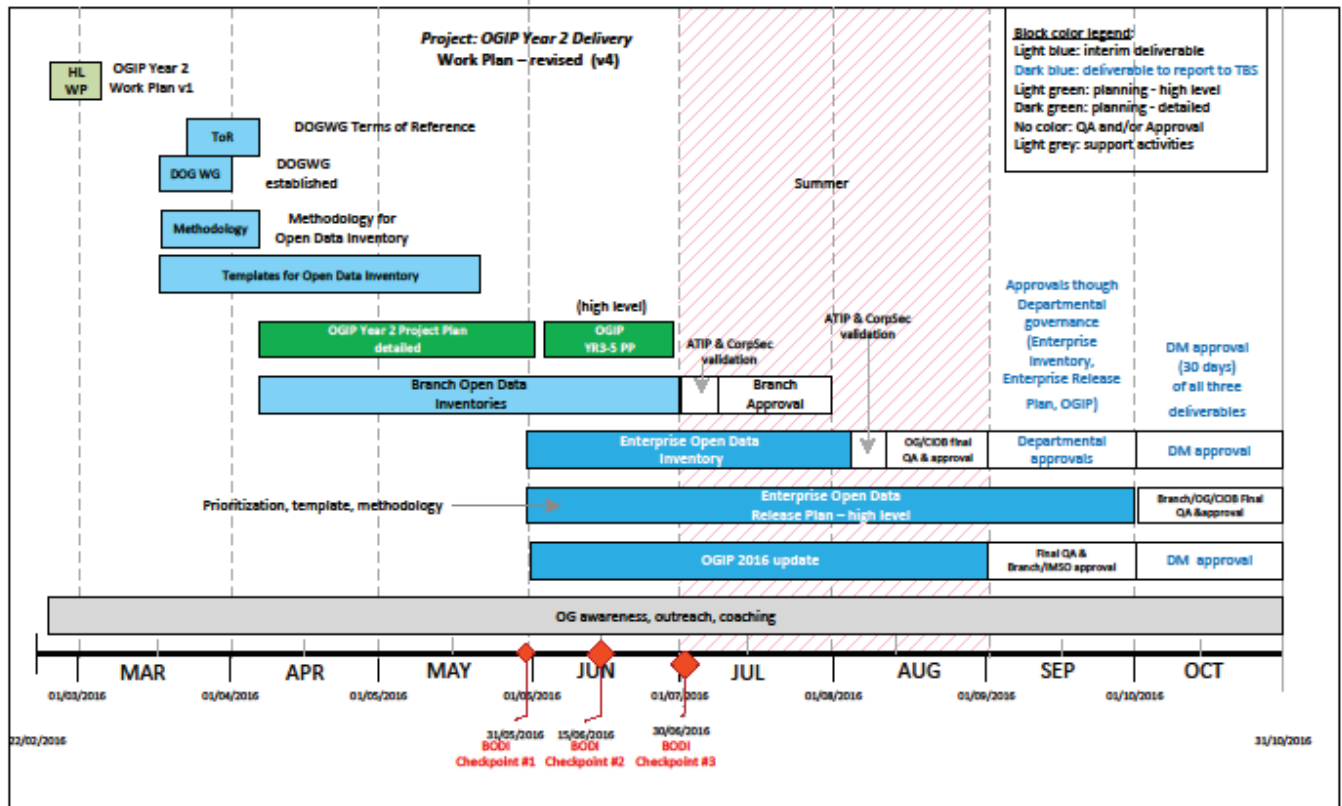
The Business Consultant will:

- Attend daily morning Project Meetings in order to provide update and address issues
- Attend RPB Round Table Sessions to provide advice and make presentations to RPB Information Management / Recordkeeping Stakeholders
- Attend as required and provide expert and technical advice to the Departmental Information Management Committee (DIMC), the Information Management Specialist Working Group (IMSWG) and the Departmental Open Government Working Group, on behalf of the RMI team.
- Attend and make presentations to RPB business user groups meetings

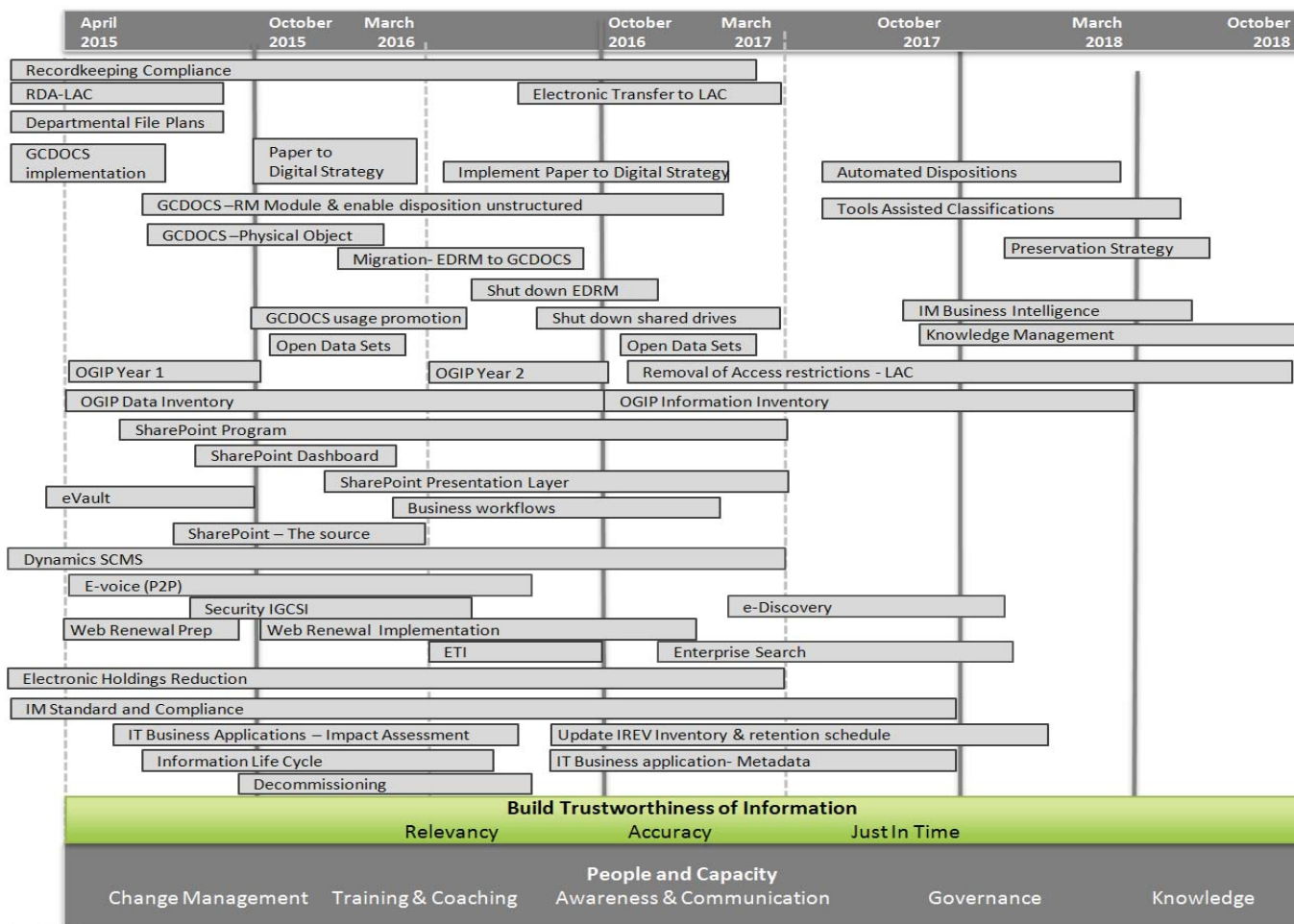
7. Deliverables

1. Develop new RPB business processes in support of the Government of Canada-wide Records Management Initiative.
2. Develop a long-term action plan (3-years) for the maintenance of GCDOCS.
3. Facilitate Branch sessions with Real Property Subject Matter Experts and provide IM support when required.
4. Develop training strategies and materials on new IM responsibilities and technologies and provide training to RPB Clients (business organizations across Real Property Branch) on the following topics: Document and Email Clean-up; Repository Migration; and the sanctioned use of GCDOCS (this will account for 15% of one consultant's time).
5. Develop Performance Measurement Criteria to monitor and enable reporting on progress and achievements of the Branch implementation of records management activities.
6. Brief Stakeholder groups on IM technologies, standards or best practices for audiences of over 10 participants.
7. Deliver Informational Presentations on IM technologies, standards or best practices to user groups of over 5 participants.
8. Facilitate brainstorming sessions on IM technologies, standards or best practices for audiences of over 10 participants.
9. Train and coach user groups on IM technologies, standards or best practices for audiences of over 5 participants.

Appendix A



Appendix B



Appendix C

LAC Recordkeeping Roadmap

Step 1 – Classification

- a) Consolidate File Plans: streamline and align file classification structures/taxonomies.
- b) Define Records Repository Structure: determine and apply optimized file classification structure(s) to records repositories.
- c) Classify and Store Information Resources of Business Value: ensure all information resources of business value are classified appropriately and stored in an approved, corporate repository.
- d) Establish Retention Schedules: assign appropriate retention schedules (periods) for all Information Resources of Business Value as per established records disposition authorities (RDA's).
- e) Consolidate File Plans: streamline and align file classification structures and taxonomies.
- f) Define Records Repository Structure: determine and apply optimized file classification structure(s) to records repositories.
- g) Classify and Store Information Resources of Business Value: ensure all information resources of business value are classified appropriately and stored in an approved, corporate repository.
- h) Establish Retention Schedules: assign appropriate retention schedules (periods) for all information resources of business value as per established records disposition authorities (RDAs).

Step 2 – Identification

- a) Develop Inventory of Repositories and Identify Information Contained Within: for all information resources deemed to be non-transitory value, develop an inventory of Information repositories that established where these resources are stored.
- b) Determine Accountability for Information: the source and ownership of the information resources should be captured within the repository inventory – this will establish an accountability baseline for the stewardship of information resources of business value.

Step 3 – Consolidation

- a) Plan for Fewer Repositories: target reduction in # of repositories (e.g., common Enterprise Document and Records Management System (EDRMS), streamlining shared drives, etc.).
- b) Rationalize Information Resources: isolate and dispose of information of transitory value, held in multiple repositories, focusing on retaining and storing the authoritative versions of Information resources of business value only.
- c) Establish Rules Moving Forward: define specific processes and develop support documentation for employees to maintain and protect information holdings of value (e.g., setting guidelines/limits on repository storage capacity, instituting regular triage/cleansing activities, designating shared drives as transitory space when GCDocs is in place, etc.).

Step 4 – Use and Maintenance

- a) Use Stored Records: use Information Resources of Business Value to support informed decision making in the delivery of programs and services, meeting ATIP/legislative requirements, etc.
- b) Document Record Keeping Practices: ensure that approved recordkeeping practices, processes, and rules applying to Information Resources of Business Value, in all formats, are documented and maintained on a regular basis.
- c) Monitor Employee Activity: Develop and implement a regular reporting process to monitor use of identified repositories such as (E-mail, personal drives, etc.).
- d) Take Corrective Action: Ensure corrective action is taken when problems arise (following up with employees routinely exceeding storage limits, incorrect filing to file classification structure(s), etc.).

Step 5 – Disposition

- a) Apply MIDA's: apply Multi-institutional Disposition Authorities as appropriate.
- b) Define and Apply ISDAs: define and apply existing institution-specific Record Disposition Authorities (RDA's) as appropriate.
- c) Document Disposition Process: develop and implement a documented disposition process for all Information Resources of Business Value.
- d) Dispose Accordingly: adhering to the documented disposition process, dispose of information resources on a regular basis, based on applicable record disposition authorities, associated retention schedule (periods) and in accordance with relevant legislation.

Glossary of Terms

- **BRIMA** – Branch/Regional Information Management Authority
- **CAB** – Change Advisory Board
- **EDRMS** – Enterprise Document and Records Management System
- **EKIMS** – Enterprise Knowledge and Information Management Strategy
- **OGIP** – Open Government Implementation Plan (see attached)
- **GCDOS** – A Government-wide, shared solution for document and record management that will enable employees to find and share information more efficiently, and retain corporate memory
- **IRBV** – Information Resources of Business Value are published and unpublished materials, regardless of medium or form, which are created or acquired because they enable and document decision-making in support of programs, services and ongoing operations, and support departmental reporting, performance and accountability requirements. Source: [Directive on Recordkeeping](#), Treasury Board of Canada Secretariat
- **IREV** – Information Resources of Enduring Value – Enduring value is determined by Library and Archives Canada, and refers to that which may have long-term significance, historical importance, and form part of our documentary heritage. Information resources of enduring value are a subset of information resources of business value (IRBV), which are defined by departments. Source: On Second Thought Advisory
- **KMS** – Knowledge Management and Systems directorate
- **LAC** – Library and Archives Canada
- **PWGSC** – Public Works and Government Services Canada
- **RDA** – Records Disposition Authority
- **RMI** – Records Management Initiative
- **RPB** – Real Property Branch
- **Sun-setting** – the practice of retiring obsolete or redundant business applications without losing access to the legacy (historical) information
- **TBS** – Treasury Board Secretariat
- **TBS Directive on Recordkeeping:** <http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=16552>
- **TBS Policy on Information Management:** <http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12742>

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ANNEX B

BASIS OF PAYMENT

INITIAL CONTRACT PERIOD:

Initial Contract Period (Date of Contract award for a period of 3 years)		
Resource Category	Level of Expertise	Firm Per Diem Rate
Business Consultant	Level 3	

OPTION PERIODS:

Option Period 1 (_____ to _____)		
Resource Category	Level of Expertise	Firm Per Diem Rate
Business Consultant	Level 3	

Option Period 2 (_____ to _____)		
Resource Category	Level of Expertise	Firm Per Diem Rate
Business Consultant	Level 3	

ANNEX C

SECURITY REQUIREMENTS CHECK LIST

Government of Canada / Gouvernement du Canada		Contract Number / Numéro du contrat EP470-161342	
		Security Classification / Classification de sécurité UNCLASSIFIED	
RECEIVED DEC 01 2016			
SECURITY REQUIREMENTS CHECK LIST (SRCL) LISTE DE VÉRIFICATION DES EXIGENCES RELATIVES À LA SÉCURITÉ (LVERS)			
PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE			
1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine Canada		2. Branch or Directorate / Direction générale ou Direction RPB	
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 Consultant contract			
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 <input type="checkbox"/> Yes <input type="checkbox"/> Non <input type="checkbox"/> 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 <input type="checkbox"/> Yes <input type="checkbox"/> Non <input type="checkbox"/> Oui			
5. c) Indicate the type of access required / Indiquer le type d'accès requis			
6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? (Specify the level of access using the chart in Question 7. c) (Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c) <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes <input type="checkbox"/> Non <input type="checkbox"/> Oui			
6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé. <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> Non <input type="checkbox"/> 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 <input type="checkbox"/> Yes <input type="checkbox"/> Non <input type="checkbox"/> Oui			
7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès			
Canada <input checked="" type="checkbox"/>		NATO / OTAN <input type="checkbox"/>	Foreign / Étranger <input type="checkbox"/>
7. b) Release restrictions / Restrictions relatives à la diffusion			
No release restrictions / Aucune restriction relative à la diffusion <input checked="" type="checkbox"/>		All NATO countries / Tous les pays de l'OTAN <input type="checkbox"/>	No release restrictions / Aucune restriction relative à la diffusion <input type="checkbox"/>
Not releasable / À ne pas diffuser <input type="checkbox"/>			
Restricted to: / Limité à: <input type="checkbox"/>		Restricted to: / Limité à: <input type="checkbox"/>	Restricted to: / Limité à: <input type="checkbox"/>
Specify country(ies): / Préciser le(s) pays:		Specify country(ies): / Préciser le(s) pays:	Specify country(ies): / Préciser le(s) pays:
7. c) Level of information / Niveau d'information			
PROTECTED A / PROTÉGÉ A <input type="checkbox"/>		NATO UNCLASSIFIED <input type="checkbox"/>	PROTECTED A / PROTÉGÉ A <input type="checkbox"/>
PROTECTED B / PROTÉGÉ B <input checked="" type="checkbox"/>		NATO NON CLASSIFIED <input type="checkbox"/>	PROTECTED B / PROTÉGÉ B <input type="checkbox"/>
PROTECTED C / PROTÉGÉ C <input type="checkbox"/>		NATO RESTRICTED / NATO DIFFUSION RESTREINTE <input type="checkbox"/>	PROTECTED C / PROTÉGÉ C <input type="checkbox"/>
CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>		NATO CONFIDENTIAL / NATO CONFIDENTIEL <input type="checkbox"/>	CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>
SECRET <input type="checkbox"/>		NATO SECRET <input type="checkbox"/>	SECRET <input type="checkbox"/>
TOP SECRET <input type="checkbox"/>		COSMIC TOP SECRET <input type="checkbox"/>	TOP SECRET <input type="checkbox"/>
TOP SECRET (SIGINT) <input type="checkbox"/>		COSMIC TRÈS SECRET <input type="checkbox"/>	TRÈS SECRET <input type="checkbox"/>
			TOP SECRET (SIGINT) <input type="checkbox"/>
			TRÈS SECRET (SIGINT) <input type="checkbox"/>

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Security Classification / Classification de sécurité
UNCLASSIFIED

Canada



Government
of Canada

Gouvernement
du Canada

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PART A (continued) / PARTIE A (suite)			
8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets? Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS? If Yes, indicate the level of sensitivity: Dans l'affirmative, indiquer le niveau de sensibilité:			
<input checked="" type="checkbox"/>	No Non	<input type="checkbox"/>	Yes Oui
9. Will the supplier require access to extremely sensitive INFOSEC information or assets? Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate?			
<input checked="" type="checkbox"/>	No Non	<input type="checkbox"/>	Yes Oui
Short Title(s) of material / Titre(s) abrégé(s) du matériel: Document Number / Numéro du document:			
PART B - PERSONNEL (SUPPLIER) / PARTIE B - PERSONNEL (FOURNISSEUR)			
10. a) Personnel security screening level required / Niveau de contrôle de la sécurité du personnel requis			
<input checked="" type="checkbox"/> RELIABILITY STATUS COTE DE FIABILITE	<input type="checkbox"/> CONFIDENTIAL CONFIDENTIEL	<input type="checkbox"/> SECRET SECRET	<input type="checkbox"/> TOP SECRET TRÈS SECRET
<input type="checkbox"/> TOP SECRET- SIGINT TRÈS SECRET - SIGINT	<input type="checkbox"/> NATO CONFIDENTIAL NATO CONFIDENTIEL	<input type="checkbox"/> NATO SECRET NATO SECRET	<input type="checkbox"/> COSMIC TOP SECRET COSMIC TRÈS SECRET
<input type="checkbox"/> SITE ACCESS ACCÈS AUX EMPLACEMENTS			
Special comments: Commentaires spéciaux: _____			
NOTE: If multiple levels of screening are identified, a Security Classification Guide must be provided. REMARQUE: Si plusieurs niveaux de contrôle de sécurité sont requis, un guide de classification de la sécurité doit être fourni.			
10. b) May unscreened personnel be used for portions of the work? Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail?			
<input checked="" type="checkbox"/>	No Non	<input type="checkbox"/>	Yes Oui
If Yes, will unscreened personnel be escorted? Dans l'affirmative, le personnel en question sera-t-il escorté?			
<input checked="" type="checkbox"/>	No Non	<input type="checkbox"/>	Yes Oui
PART C - SAFEGUARDS (SUPPLIER) / PARTIE C - MESURES DE PROTECTION (FOURNISSEUR)			
INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS			
11. a) Will the supplier be required to receive and store PROTECTED and/or CLASSIFIED information or assets on its site or premises? Le fournisseur sera-t-il tenu de recevoir et d'entreposer sur place des renseignements ou des biens PROTÉGÉS et/ou CLASSIFIÉS?			
<input checked="" type="checkbox"/>	No Non	<input type="checkbox"/>	Yes Oui
11. b) Will the supplier be required to safeguard COMSEC information or assets? Le fournisseur sera-t-il tenu de protéger des renseignements ou des biens COMSEC?			
<input checked="" type="checkbox"/>	No Non	<input type="checkbox"/>	Yes Oui
PRODUCTION			
11. c) Will the production (manufacture, and/or repair and/or modification) of PROTECTED and/or CLASSIFIED material or equipment occur at the supplier's site or premises? Les installations du fournisseur serviront-elles à la production (fabrication et/ou réparation et/ou modification) de matériel PROTÉGÉ et/ou CLASSIFIÉ?			
<input checked="" type="checkbox"/>	No Non	<input type="checkbox"/>	Yes Oui
INFORMATION TECHNOLOGY (IT) MEDIA / SUPPORT RELATIF À LA TECHNOLOGIE DE L'INFORMATION (TI)			
11. d) Will the supplier be required to use its IT systems to electronically process, produce or store PROTECTED and/or CLASSIFIED information or data? Le fournisseur sera-t-il tenu d'utiliser ses propres systèmes informatiques pour traiter, produire ou stocker électroniquement des renseignements ou des données PROTÉGÉS et/ou CLASSIFIÉS?			
<input checked="" type="checkbox"/>	No Non	<input type="checkbox"/>	Yes Oui
11. e) Will there be an electronic link between the supplier's IT systems and the government department or agency? Disposera-t-on d'un lien électronique entre le système informatique du fournisseur et celui du ministère ou de l'agence gouvernementale?			
<input checked="" type="checkbox"/>	No Non	<input type="checkbox"/>	Yes Oui

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité
UNCLASSIFIED

Canada



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

For users completing the form manually use the summary chart below to indicate the category(ies) and level(s) of safeguarding required at the supplier's site(s) or premises.

Les utilisateurs qui remplissent le formulaire manuellement doivent utiliser le tableau récapitulatif ci-dessous pour indiquer, pour chaque catégorie, les niveaux de sauvegarde requis aux installations du fournisseur.

For users completing the form online (via the Internet), the summary chart is automatically populated by your responses to previous questions.

Dans le cas des utilisateurs qui remplissent le formulaire en ligne (par Internet), les réponses aux questions précédentes sont automatiquement saisies dans le tableau récapitulatif.

SUMMARY CHART / TABLEAU RÉCAPITULATIF

Category Catégorie	PROTECTED PROTÉGÉ			CLASSIFIED CLASSIFIÉ		NATO				COMSEC				
	A	B	C	CONFIDENTIAL CONFIDENTIEL	SECRET	TOP SECRET TRÈS SECRET	NATO RESTRICTED NATO DIFFUSION RESTRICTÉE	NATO CONFIDENTIAL NATO CONFIDENTIEL	NATO SECRET	COSMIC TOP SECRET COSMIC TRÈS SECRET	PROTECTED PROTÉGÉ			TOP SECRET TRÈS SECRET
											A	B	C	
Information / Assemblage Renseignements / Plans 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 indiquer qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).

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ATTACHMENT 3.1
BID SUBMISSION FORM

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

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If it does not, the security clearance is not valid for the Bidder.]		
<p>On behalf of the Bidder, by signing below, I confirm that I have read the entire bid solicitation including the documents incorporated by reference into the bid solicitation and I certify that:</p> <ol style="list-style-type: none">1. The Bidder considers itself and its proposed resources able to meet all the mandatory requirements described in the bid solicitation;2. This bid is valid for the period requested in the bid solicitation;3. All the information provided in the bid is complete, true and accurate; and4. 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		

ATTACHMENT 4.1 BID EVALUATION CRITERIA

PERSONNEL QUALIFICATION REQUIREMENTS

1. MANDATORY REQUIREMENTS:

Experience and Expertise of the Proposed Business Consultant, Level 3			
Name of proposed Resource: _____			
The Bidder MUST demonstrate that the Proposed Business Consultant, Level 3 has:			
Criteria	Mandatory Requirement	Bidder's Response	
		Demonstrated experience (Bidders to insert data)	Insert page # of resume
M.1	<p>A minimum of ten years' experience, prior to solicitation closing date, performing a minimum of four (4) of the following activities:</p> <ul style="list-style-type: none">Developing an Information Management / Recordkeeping Framework;Researching Requirements for Information Management / Recordkeeping Solutions;Developing Technical aspects of Information Management / Recordkeeping Solutions;Creating Project Plans for the implementation of an Information Management / Recordkeeping Solution;Creating a Project Charter for the implementation of an Information Management / Recordkeeping Solution;Implementing Information Management / Recordkeeping Solutions;Maintaining an Information Management / Recordkeeping Environment;"Sun-setting" an Information Management / Recordkeeping Environment. <p>For the experience to be considered, the resource must have performed the chosen activities for a minimum of six</p>		

	<p>months for an organization of a minimum of 200 active information technology users.</p> <p>** To demonstrate compliance the projects must list the following:</p> <ul style="list-style-type: none"> • Client Organization; • Project description outlining the circumstances surrounding the activities; • Project duration, including start and end dates in months and years; and • Client contact name, title, current telephone number and email address. 		
M.2	<p>A minimum of ten years' experience, prior to solicitation closing date, performing all of the following activities :</p> <ul style="list-style-type: none"> • Briefing Stakeholder groups on IM technologies, standards or best practices; • Delivering Informational Presentations on IM technologies, standards or best practices to user groups; • Facilitating brainstorming sessions on IM technologies, standards or best practices; • Training and Coaching users groups on IM technologies, standards or best practices. <p>The Bidder must provide two reference projects where the resource was responsible for the activities listed above.</p> <p>For each reference project to be considered, the duration must be a minimum of six months for an organization of a minimum of 200 active information technology users, in a Federal, Provincial or Municipal Government (Canada) setting.</p>		

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	<p>** To demonstrate compliance the projects must list the following:</p> <ul style="list-style-type: none"> • Client Organization; • Project description outlining the circumstances surrounding the presentations; • Project duration, including start and end dates in months and years; and • Client contact name, title, current telephone number and email address. 		
--	--	--	--

2. POINT RATED REQUIREMENTS

Experience and Expertise of the Proposed Business Consultant, Level 3				
Name of proposed Resource: _____				
The Bidder SHOULD demonstrate that the Proposed Business Consultant, Level 3 has:				
			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
R.1	<p>An undergraduate degree and a Masters level degree from a recognized Canadian University or the equivalent as established by a recognized Canadian academic credentials assessment service*, if obtained outside Canada.</p> <p>*The list of recognized organizations can be found under the Canadian Information Centre for International Credentials website, at the following address: http://www.cicic.ca/</p> <p>**A copy of the Degree must be submitted with the proposal.</p>	10	<p>Undergraduate degree = 5 points</p> <p>Masters level degree = Additional 5 points</p>	
R.2	<p>Experience building and preparing for use a function-based file classification plan for an organization of a minimum of 500 active information technology users, within the last five (5) years prior to solicitation closing date.</p>	10	<p>5 points</p> <p>Additional 5 points if the organization was in the business of Real Property Management</p>	

Experience and Expertise of the Proposed Business Consultant, Level 3				
Name of proposed Resource: _____				
The Bidder SHOULD demonstrate that the Proposed Business Consultant, Level 3 has:				
			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
	<p>** To demonstrate compliance the project must list the following:</p> <ul style="list-style-type: none"> • Client Organization; • Work description outlining the circumstances surrounding the activities; • Work duration, including start and end dates in months and years; and • Client contact name, title, current telephone number and email address. 			
R.3	<p>Experience, performing the following activities for an organization of a minimum of 500 active information technology users, within the last five (5) years prior to solicitation closing date:</p> <ul style="list-style-type: none"> • Identified and documented all available Information resources of Business Value (IRBV); • Identified and documented all available Information Resources of Enduring Value (IREV); • Determined in conjunction with functional experts appropriate retention periods for all identified IRBVs and IREVs and established a document retention schedule reference SBBN / MIDA)²; • Submitted and negotiated the approval of a modern Record Disposition Authority (RDA) 	10	<p>1 point per activity, up to a maximum of 5 points</p> <p>Additional 5 Points if the organization was in the business of Real Property Management</p>	

² Subject Based Block Numeric (SBBN) and Multi-Institutional Disposition Authority (MIDA)

Experience and Expertise of the Proposed Business Consultant, Level 3				
Name of proposed Resource: _____				
The Bidder SHOULD demonstrate that the Proposed Business Consultant, Level 3 has:				
			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
	<ul style="list-style-type: none"> Prepared Record Series Identifiers (RSI) for the above. <p>** To demonstrate compliance the projects must list the following:</p> <ul style="list-style-type: none"> Client Organization; Work description outlining the circumstances surrounding the activities; Work duration, including start and end dates in months and years; and Client contact name, title, current telephone number and email address. 			
R.4	<p>Experience developing compendiums for the following, for an organization of at least 500 active information technology users, within the last five (5) years prior to solicitation closing date:</p> <ul style="list-style-type: none"> Document naming conventions; Metadata model processes; Document security programs Enterprise document management system resource strategies; Business process rules for Information Management and Record Keeping. <p>** To demonstrate compliance the projects must list the following:</p> <ul style="list-style-type: none"> Client Organization; 	5	1 point per activity, up to a maximum of 5 points	

Experience and Expertise of the Proposed Business Consultant, Level 3				
Name of proposed Resource: _____				
The Bidder SHOULD demonstrate that the Proposed Business Consultant, Level 3 has:				
			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
	<ul style="list-style-type: none"> Work description outlining the circumstances surrounding the activities; Work duration, including start and end dates in months and years; and Client contact name, title, current telephone number and email address. 			
R.5	<p>experience performing all of the following activities for an organization of a minimum of 500 active information technology users, within the last five (5) years prior to solicitation closing date:</p> <ul style="list-style-type: none"> The configuration of an enterprise electronic document management system repository for all users; The design of an enterprise electronic document management system permissions model; <u>and</u> The design of an enterprise electronic document management system classification structure and record series identifiers. <p>** To demonstrate compliance the projects must list the following:</p> <ul style="list-style-type: none"> Client Organization; Work description outlining the circumstances surrounding the activities; 	10	<p>5 points</p> <p>Additional 5 points if the organization was in the business of Real Property Management</p>	

Experience and Expertise of the Proposed Business Consultant, Level 3				
Name of proposed Resource: _____				
The Bidder SHOULD demonstrate that the Proposed Business Consultant, Level 3 has:				
			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
	<ul style="list-style-type: none"> Work duration, including start and end dates in months and years; and Client contact name, title, current telephone number and email address. 			
R.6	<p>Experience creating an Information Management Governance process and system for an organization of a minimum of 500 active information technology users, within the last five (5) years prior to solicitation closing date.</p> <p>** To demonstrate compliance the projects must list the following:</p> <ul style="list-style-type: none"> Client Organization; Work description outlining the circumstances surrounding the activities; Work duration, including start and end dates in months and years; and Client contact name, title, current telephone number and email address. 	10	<p>5 points</p> <p>Additional 5 points if the organization was in the business of Real Property Management</p>	
R.7	<p>Experience performing the following activities for an organization of at least 500 active information technology users, within the last five (5) years prior to solicitation closing date:</p> <ul style="list-style-type: none"> Developed IM/RK training materials (i.e., "How To" reference materials, Dictionaries / Thesaurus and guides); 	5	1 point per activity up to a maximum of 5 points	

Experience and Expertise of the Proposed Business Consultant, Level 3				
Name of proposed Resource: _____				
The Bidder SHOULD demonstrate that the Proposed Business Consultant, Level 3 has:				
			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
	<ul style="list-style-type: none"> Prepared documents outlining Record Keeping Roles and Responsibilities; Provided Enterprise Electronic Document Management System training on "Strategy for Use"; Provided Mentoring and Coaching to Enterprise Electronic Document Management System Support Personnel; Presented "Introductory" sessions to Management and staff on preparations for the transition to a new Enterprise Electronic Document Management System (clean-up, how to organize and good RK practices). <p>** To demonstrate compliance the projects must list the following:</p> <ul style="list-style-type: none"> Client Organization; Work description outlining the circumstances surrounding the activities; Work duration, including start and end dates in months and years; and Client contact name, title, current telephone number and email address. 			
R.8	Experience performing all of the following activities for an organization of at least 1500 active information technology users, within	25	10 points Additional 10 Points if the system referenced is	

Experience and Expertise of the Proposed Business Consultant, Level 3				
Name of proposed Resource: _____				
The Bidder SHOULD demonstrate that the Proposed Business Consultant, Level 3 has:				
			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
	<p>the last five (5) years prior to solicitation closing date:</p> <ul style="list-style-type: none"> Developing strategies for "Shared Drive" reformation / disposition; <u>and</u> Creating migration processes and plans for moving existing electronic documents (from Legacy systems) into a new Enterprise Electronic Document Management System. <p>** To demonstrate compliance the projects must list the following:</p> <ul style="list-style-type: none"> Client Organization; Work description outlining the circumstances surrounding the activities; Work duration, including start and end dates in months and years; and Client contact name, title, current telephone number and email address. 		<p>GCDOCS, as used by the Government of Canada</p> <p>Additional 5 Points if the organization was in the business of Real Property Management</p>	
R.9	<p>Experience using the following Electronic Records and Document Management Systems, within the last five (5) years prior to solicitation closing date:</p> <ul style="list-style-type: none"> Open Text Docs Open or GCDOCS (Government of Canada version); Open Text E-Docs or EDRMS / RDIMS / Other (Government of Canada version); SAP Content Server; 	5	1 point per activity up to a maximum of 5 points	

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Experience and Expertise of the Proposed Business Consultant, Level 3				
Name of proposed Resource: _____				
The Bidder SHOULD demonstrate that the Proposed Business Consultant, Level 3 has:				
			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
	<ul style="list-style-type: none">• CCM Mercury;• CCM Enterprise;• Microsoft SharePoint;• Microsoft Dynamics. <p>** To demonstrate compliance the projects must list the following:</p> <ul style="list-style-type: none">• Client Organization;• Work description outlining the circumstances surrounding the use of the application(s);• Work duration, including start and end dates in months and years; and• Client contact name, title, current telephone number and email address.			
MAX. AVAILABLE POINTS		90		
MIN. POINTS REQUIRED		63		
Note: Proposals that do not meet the above minimum pass mark of 63 points for the proposed resource, will be found non-responsive.				

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ATTACHMENT 4.2

PRICING SCHEDULE

In respect of the "Estimated Number of Days" listed below in (C*) the estimated number of days is for evaluation purposes only during the solicitation process and does not represent a commitment of the future usage.

Initial Contract Period:

Initial Contract Period				
Date of Contract award for a period of 3 years				
	(B)	(C)	(D)	(E)
Resource Category	Level of Expertise	Estimated Number of Days	Firm Per Diem Rate	Total Cost (C x D)
Business Consultant	Level 3	1500	\$	\$
Total Price Initial Contract Period				\$ <TBD>

Option Periods:

Option Period 1				
_____ to _____				
	(B)	(C)	(D)	(E)
Resource Category	Level of Expertise	Estimated Number of Days	Firm Per Diem Rate	Total Cost (C x D)
Business Consultant	Level 3	500	\$	\$
Total Price Option Period 1				\$ <TBD>

Option Period 2				
_____ to _____				
	(B)	(C)	(D)	(E)
Resource Category	Level of Expertise	Estimated Number of Days	Firm Per Diem Rate	Total Cost (C x D)
Business Consultant	Level 3	500	\$	\$
Total Price Option Period 2				\$ <TBD>

Total Bid Price	
(Initial Contract Period + Option Period 1 + Option Period 2)	\$ <TBD>

APPENDIX A TO ANNEX A

TASKING ASSESSMENT PROCEDURE

1. Where a requirement for a specific task is identified, a draft Task Authorization Form (TA Form) as attached at Appendix B to Annex A will be provided to the Contractor. Once a draft TA Form is received, the Contractor must submit to the Technical Authority a quotation of rates to supply the requested Resource Categories based on the information identified in the TA Form. The quotation must be signed and submitted to Canada within the time for response identified in the TA Form. The Contractor will be given a minimum of 48 hours turnaround time to submit a quotation.
2. For each proposed resource the Contractor must supply a résumé, the requested security clearance information and must complete the Response Tables at Appendix C of Annex A applicable to the Resource Categories identified in the draft TA. The same individual must not be proposed for more than one Resource Category. The résumés must demonstrate that each proposed individual meets the qualification requirements described (including any educational requirements, work experience requirements, and professional designation or membership requirements). With respect to the proposed resources:
 - (i) Proposed resources may be employees of the Contractor or employees of a subcontractor, or these individuals may be independent contractors to whom the Contractor would subcontract a portion of the Work. (Refer to Appendix D to Annex A, Certifications).
 - (ii) For educational requirements for a particular degree, designation or certificate, Canada will only consider educational programmes that were successfully completed by the resource before the date the draft TA was first issued to the Contractor.
 - (iii) For requirements relating to professional designation or membership, the resource must have the required designation or membership by the time of draft TA issuance and must continue, where applicable, to be a member in good standing of the profession or membership throughout the assessment period and Contract Period. Where the designation or membership must be demonstrated through a certification, diploma or degree, such document must be current, valid and issued by the entity specified in this Contract or if the entity is not specified, the issuer must have been an accredited or otherwise recognized body, institution or entity at the time the document was issued.
 - (iv) For work experience, Canada will not consider experience gained as part of an educational programme, except for experience gained through a formal co-operative programme at a post-secondary institution.
 - (v) For any requirements that specify a particular time period (e.g., 2 years) of work experience, Canada will disregard any information about experience if the résumé does not include the relevant dates (month and year) for the experience claimed (i.e., the start date and end date). Canada will evaluate only the duration that the resource actually worked on a project or projects (from his or her start date to end date), instead of the overall start and end date of a project or a combination of projects in which a resource has participated.
 - (vi) A résumé must not simply indicate the title of the individual's position, but must demonstrate that the resource has the required work experience by explaining the responsibilities and work performed by the individual while in that position. Only listing experience without providing any supporting data to describe responsibilities, duties and relevance to the requirement, or reusing the same wording as the TA Form, will not be considered "demonstrated" for the purposes of the assessment. The Contractor should provide complete details as to where, when, month and year, and how, through which activities/responsibilities, the stated qualifications / experience were obtained. In situations in which a proposed resource worked at the same time on more than one

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

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

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APPENDIX B TO ANNEX A



Public Works and
Government Services
Canada

Travaux publics et
Services gouvernementaux
Canada

TASK AUTHORIZATION FORM FORMULAIRE D'AUTORISATION DE TÂCHES

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

A. General Information / Informations générales

Contract Number / Numéro du contrat :

Contractor Name / Nom du Contracteur :

Task Authorization (TA) No.

N° de l'autorisation de tâches (AT) :

Commitment No.

N° de l'engagement :

Financial Coding

Code financier :

Date of Issuance

Date d'émission :

Response required by
Réponse requise
d'ici le :

B. For Amendments Only / Aux fins de modification seulement

Amendment No. / N° de la modification :

Reason for the Amendment / Raison pour la modification :

C. TA Requirements / Exigences relatives à l'AT

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

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

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

See attached / Voir pièce jointe

Period of Services / Période de service:

Initial Start Date / Date de début initiale :

Initial End Date / Date de fin initiale :

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

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

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

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

n/a

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

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

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

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

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

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0					\$0.00
0					\$0.00
Estimated Cost / Coût estimatif					\$0.00
Total Estimated Travel and Living Cost / Coût total estimatif de voyage et de vie					\$0.00
Total Estimated Cost / Coût total estimatif					\$0.00

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

By signing this TA, the authorized client authority and/or the PWGSC Contracting Authority certify(ies) that the content of this TA is in accordance with the conditions of the Contract.

En apposant sa signature sur l'AT, le client autorisé et/ou l'autorité contractante de TPSGC atteste(nt) que le contenu de cette AT est conforme aux conditions du contrat.

The client's authorization limit is \$300,000. When the value of a TA and its amendments (excluding Applicable Taxes) is in excess of this limit, the TA must be signed by the authorized client and forwarded to the PWGSC Contracting Authority for authorization.

La limite d'autorisation du client est \$300,000. Lorsque la valeur de l'AT et ses modifications (excluant les taxes applicables) dépasse cette limite, l'AT doit être signée par le client autorisé et transmise à l'autorité contractante de TPSGC pour autorisation.

Name of Authorized Client / Nom du client autorisé

Date

Name of Contracting Authority / Nom de l'autorité contractante

Date

Signature

Signature

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

Name and Title of Individual authorized to sign on behalf of the Contractor /
Nom et titre Signature de la personne autorisée à signer au nom de l'entrepreneur

Signature

Date

APPENDIX C TO ANNEX A

RESOURCES ASSESSMENT CRITERIA AND RESPONSE TABLE

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

1.0 Mandatory Resource Assessment Criteria:

Experience and Expertise of the Proposed Business Consultant, Level 3			
Name of proposed Resource: _____			
The Contractor MUST demonstrate that the Proposed Business Consultant, Level 3 has:			
Criteria	Mandatory Requirement	Contractor's Response	
		Demonstrated experience (Contractor to insert data)	Insert page # of resume
M.1	<p>A minimum of ten years' experience, prior to solicitation closing date, performing a minimum of four (4) of the following activities:</p> <ul style="list-style-type: none">• Developing an Information Management / Recordkeeping Framework;• Researching Requirements for Information Management / Recordkeeping Solutions;• Developing Technical aspects of Information Management / Recordkeeping Solutions;• Creating Project Plans for the implementation of an Information Management / Recordkeeping Solution;• Creating a Project Charter for the implementation of an Information Management / Recordkeeping Solution;• Implementing Information Management / Recordkeeping Solutions;• Maintaining an Information Management / Recordkeeping Environment;		

	<ul style="list-style-type: none">• “Sun-setting” an Information Management / Recordkeeping Environment. <p>For the experience to be considered, the resource must have performed the chosen activities for a minimum of six months for an organization of a minimum of 200 active information technology users.</p> <p>** To demonstrate compliance the projects must list the following:</p> <ul style="list-style-type: none">• Client Organization;• Project description outlining the circumstances surrounding the activities;• Project duration, including start and end dates in months and years; and• Client contact name, title, current telephone number and email address.		
M.2	<p>A minimum of ten years’ experience, prior to solicitation closing date, performing all of the following activities :</p> <ul style="list-style-type: none">• Briefing Stakeholder groups on IM technologies, standards or best practices;• Delivering Informational Presentations on IM technologies, standards or best practices to user groups;• Facilitating brainstorming sessions on IM technologies, standards or best practices;• Training and Coaching users groups on IM technologies, standards or best practices. <p>The Contractor must provide two reference projects where the resource was responsible for the activities listed above.</p> <p>For each reference project to be considered, the duration must be a minimum of six months for an</p>		

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	<p>organization of a minimum of 200 active information technology users, in a Federal, Provincial or Municipal Government (Canada) setting.</p> <p>** To demonstrate compliance the projects must list the following:</p> <ul style="list-style-type: none"> • Client Organization; • Project description outlining the circumstances surrounding the presentations; • Project duration, including start and end dates in months and years; and • Client contact name, title, current telephone number and email address. 		
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2.0 Point Rated Resource Assessment Criteria:

Experience and Expertise of the Proposed Business Consultant, Level 3				
Name of proposed Resource: _____				
The Contractor SHOULD demonstrate that the Proposed Business Consultant, Level 3 has:				
			CONTRACTOR'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
R.1	<p>An undergraduate degree and a Masters level degree from a recognized Canadian University or the equivalent as established by a recognized Canadian academic credentials assessment service*, if obtained outside Canada.</p> <p>*The list of recognized organizations can be found under the Canadian Information Centre for International Credentials website, at the following address: http://www.cicic.ca/</p> <p>**A copy of the Degree must be submitted with the proposal.</p>	10	<p>Undergraduate degree = 5 points</p> <p>Masters level degree = Additional 5 points</p>	
R.2	<p>Experience building and preparing for use a function-based file classification plan for an organization of a minimum of 500</p>	10	<p>5 points</p> <p>Additional 5 points if the organization was in the</p>	

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Experience and Expertise of the Proposed Business Consultant, Level 3				
Name of proposed Resource: _____				
The Contractor SHOULD demonstrate that the Proposed Business Consultant, Level 3 has:				
			CONTRACTOR'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
	<p>active information technology users, within the last five (5) years prior to solicitation closing date.</p> <p>** To demonstrate compliance the project must list the following:</p> <ul style="list-style-type: none">• Client Organization;• Work description outlining the circumstances surrounding the activities;• Work duration, including start and end dates in months and years; and• Client contact name, title, current telephone number and email address.		business of Real Property Management	

R.3	<p>Experience, performing the following activities for an organization of a minimum of 500 active information technology users, within the last five (5) years prior to solicitation closing date:</p> <ul style="list-style-type: none"> Identified and documented all available Information resources of Business Value (IRBV); Identified and documented all available Information Resources of Enduring Value (IREV); Determined in conjunction with functional experts appropriate retention periods for all identified IRBVs and IREVs and established a document retention schedule reference SBBN / MIDA³; Submitted and negotiated the approval of a modern Record Disposition Authority (RDA) Prepared Record Series Identifiers (RSI) for the above. <p>** To demonstrate compliance the projects must list the following:</p> <ul style="list-style-type: none"> Client Organization; Work description outlining the circumstances surrounding the activities; Work duration, including start and end dates in months and years; and Client contact name, title, current telephone number and email address. 	10	<p>1 point per activity, up to a maximum of 5 points</p> <p>Additional 5 Points if the organization was in the business of Real Property Management</p>	
R.4	<p>Experience developing compendiums for the following, for an organization of at least 500 active information technology users, within the last five (5) years prior to solicitation closing date:</p> <ul style="list-style-type: none"> Document naming conventions; 	5	<p>1 point per activity, up to a maximum of 5 points</p>	

Experience and Expertise of the Proposed Business Consultant, Level 3				
Name of proposed Resource: _____				
The Contractor SHOULD demonstrate that the Proposed Business Consultant, Level 3 has:				
			CONTRACTOR'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
	<ul style="list-style-type: none"> • Metadata model processes; • Document security programs • Enterprise document management system resource strategies; • Business process rules for Information Management and Record Keeping. <p>** To demonstrate compliance the projects must list the following:</p> <ul style="list-style-type: none"> • Client Organization; • Work description outlining the circumstances surrounding the activities; • Work duration, including start and end dates in months and years; and • Client contact name, title, current telephone number and email address. 			
R.5	<p>Experience performing all of the following activities for an organization of a minimum of 500 active information technology users, within the last five (5) years prior to solicitation closing date:</p> <ul style="list-style-type: none"> • The configuration of an enterprise electronic document management system repository for all users; • The design of an enterprise electronic document management system permissions model; <u>and</u> 	10	<p>5 points</p> <p>Additional 5 points if the organization was in the business of Real Property Management</p>	

³ Subject Based Block Numeric (SBBN) and Multi-Institutional Disposition Authority (MIDA)

Experience and Expertise of the Proposed Business Consultant, Level 3				
Name of proposed Resource: _____				
The Contractor SHOULD demonstrate that the Proposed Business Consultant, Level 3 has:				
			CONTRACTOR'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
	<ul style="list-style-type: none"> The design of an enterprise electronic document management system classification structure and record series identifiers. <p>** To demonstrate compliance the projects must list the following:</p> <ul style="list-style-type: none"> Client Organization; Work description outlining the circumstances surrounding the activities; Work duration, including start and end dates in months and years; and Client contact name, title, current telephone number and email address. 			
R.6	<p>Experience creating an Information Management Governance process and system for an organization of a minimum of 500 active information technology users, within the last five (5) years prior to solicitation closing date.</p> <p>** To demonstrate compliance the projects must list the following:</p> <ul style="list-style-type: none"> Client Organization; Work description outlining the circumstances surrounding the activities; Work duration, including start and end dates in months and years; and 	10	<p>5 points</p> <p>Additional 5 points if the organization was in the business of Real Property Management</p>	

Experience and Expertise of the Proposed Business Consultant, Level 3				
Name of proposed Resource: _____				
The Contractor SHOULD demonstrate that the Proposed Business Consultant, Level 3 has:				
			CONTRACTOR'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
	<ul style="list-style-type: none"> Client contact name, title, current telephone number and email address. 			
R.7	<p>Experience performing the following activities for an organization of at least 500 active information technology users, within the last five (5) years prior to solicitation closing date:</p> <ul style="list-style-type: none"> Developed IM/RK training materials (i.e., "How To" reference materials, Dictionaries / Thesaurus and guides); Prepared documents outlining Record Keeping Roles and Responsibilities; Provided Enterprise Electronic Document Management System training on "Strategy for Use"; Provided Mentoring and Coaching to Enterprise Electronic Document Management System Support Personnel; Presented "Introductory" sessions to Management and staff on preparations for the transition to a new Enterprise Electronic Document Management System (clean-up, how to organize and good RK practices). <p>** To demonstrate compliance the projects must list the following:</p>	5	1 point per activity up to a maximum of 5 points	

Experience and Expertise of the Proposed Business Consultant, Level 3				
Name of proposed Resource: _____				
The Contractor SHOULD demonstrate that the Proposed Business Consultant, Level 3 has:				
			CONTRACTOR'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
	<ul style="list-style-type: none"> Client Organization; Work description outlining the circumstances surrounding the activities; Work duration, including start and end dates in months and years; and Client contact name, title, current telephone number and email address. 			
R.8	<p>Experience performing all of the following activities for an organization of at least 1500 active information technology users, within the last five (5) years prior to solicitation closing date:</p> <ul style="list-style-type: none"> Developing strategies for "Shared Drive" reformation / disposition; <u>and</u> Creating migration processes and plans for moving existing electronic documents (from Legacy systems) into a new Enterprise Electronic Document Management System. <p>** To demonstrate compliance the projects must list the following:</p> <ul style="list-style-type: none"> Client Organization; Work description outlining the circumstances surrounding the activities; Work duration, including start and end dates in months and years; and 	25	<p>10 points</p> <p>Additional 10 Points if the system referenced is GCDOCS, as used by the Government of Canada</p> <p>Additional 5 Points if the organization was in the business of Real Property Management</p>	

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Experience and Expertise of the Proposed Business Consultant, Level 3				
Name of proposed Resource: _____				
The Contractor SHOULD demonstrate that the Proposed Business Consultant, Level 3 has:				
			CONTRACTOR'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
	<ul style="list-style-type: none"> Client contact name, title, current telephone number and email address. 			
R.9	<p>Experience using the following Electronic Records and Document Management Systems, within the last five (5) years prior to solicitation closing date:</p> <ul style="list-style-type: none"> Open Text Docs Open or GCDOCS (Government of Canada version); Open Text E-Docs or EDRMS / RDIMS / Other (Government of Canada version); SAP Content Server; CCM Mercury; CCM Enterprise; Microsoft SharePoint; Microsoft Dynamics. <p>** To demonstrate compliance the projects must list the following:</p> <ul style="list-style-type: none"> Client Organization; Work description outlining the circumstances surrounding the use of the application(s); Work duration, including start and end dates in months and years; and Client contact name, title, current telephone number and email address. 	5	1 point per activity up to a maximum of 5 points	
MAX. AVAILABLE POINTS		90		
MIN. POINTS REQUIRED		63		
Note: Proposals that do not meet the above minimum pass mark of 63 points for the proposed resource, will be found non-responsive.				

APPENDIX D TO ANNEX A

CERTIFICATIONS AT THE TA STAGE

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

1. CERTIFICATION OF EDUCATION AND EXPERIENCE

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

Print name of authorized individual & sign above

Date

2. CERTIFICATION OF AVAILABILITY OF PERSONNEL

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

Print name of authorized individual & sign above

Date

3. CERTIFICATION OF STATUS OF PERSONNEL

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

Print name of authorized individual & sign above

Date

4. CERTIFICATION OF LANGUAGE - Bilingual

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

Print name of authorized individual & sign above

Date

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5. SECURITY CLEARANCE:

The Contractor is requested to submit the following security information for each of the proposed resources.

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

ATTACHMENT 5.1
**FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY -
CERTIFICATION**

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

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

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

Complete both A and B.

A. Check only one of the following:

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

OR

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

B. Check only one of the following:

- ☐ B1. The Bidder is not a Joint Venture.

OR

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