



**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**

**SOLICITATION AMENDMENT**

**MODIFICATION DE L'INVITATION**

The referenced document is hereby revised; unless otherwise indicated, all other terms and conditions of the Solicitation remain the same.

Ce document est par la présente révisé; sauf indication contraire, les modalités de l'invitation demeurent les mêmes.

**Comments - Commentaires**

**Vendor/Firm Name and Address**

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

**Issuing Office - Bureau de distribution**

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

<b>Title - Sujet</b> RECORDS MANAGEMENT SERVICES	
<b>Solicitation No. - N° de l'invitation</b> EP470-161342/A	<b>Amendment No. - N° modif.</b> 003
<b>Client Reference No. - N° de référence du client</b> 20161342	<b>Date</b> 2017-02-15
<b>GETS Reference No. - N° de référence de SEAG</b> PW-\$\$EL-636-31021	
<b>File No. - N° de dossier</b> 636el.EP470-161342	<b>CCC No./N° CCC - FMS No./N° VME</b>
<b>Solicitation Closes - L'invitation prend fin</b> <b>at - à 02:00 PM</b> <b>on - le 2017-02-23</b>	
<b>Time Zone</b> <b>Fuseau horaire</b> Eastern Standard Time EST	
<b>F.O.B. - F.A.B.</b> <b>Plant-Usine:</b> <input type="checkbox"/> <b>Destination:</b> <input type="checkbox"/> <b>Other-Autre:</b> <input type="checkbox"/>	
<b>Address Enquiries to: - Adresser toutes questions à:</b> Doyle, Ashton	<b>Buyer Id - Id de l'acheteur</b> 636el
<b>Telephone No. - N° de téléphone</b> (873) 469-4679 ( )	<b>FAX No. - N° de FAX</b> (819) 956-7827
<b>Destination - of Goods, Services, and Construction:</b> <b>Destination - des biens, services et construction:</b>	

**Instructions: See Herein**

**Instructions: Voir aux présentes**

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

This Amendment number 003 is raised to extend the closing date of the RFP, respond to the following bidder questions and apply changes to the RFP:

**The following changes apply to the RFP:**

1. At **Page 1, Closing Date** of the RFP, the following change applies:

**Delete:**

**Solicitation Closes - L'invitation prend fin**  
**at - à 02:00 PM**  
**on - le 2017-02-17**  
**Eastern Standard Time EST**

**Insert:**

**Solicitation Closes - L'invitation prend fin**  
**at - à 02:00 PM**  
**on - le 2017-02-23**  
**Eastern Standard Time EST**

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**Question #001**

In order to obtain the extra points, do all of the projects listed for the requirement need to relate to real properties, or does only one of the projects need to relate to real properties to obtain the 5 points?

**Response #001**

Only one of the projects needs to have been for an organization in the business of Real Property Management to obtain an additional 5 points.

**Question #002**

Rated criteria R2 – R9 request that experience be obtained within the last 5 years. Would PWGSC consider extending this to experience within the last 10 years?

**Question #003**

Many of the rated requirements award extra points if “the organization was in the business of real property management”. Could you please elaborate on what would qualify as being in the business of real property management? For example, would organization / departments such as DIAND, Atomic Energy, DRDC qualify?

**The following changes apply to the RFP:**

At **Attachment 4.1 – Bid Evaluation Criteria** of the RFP, amend as follows:

**Delete:**

**Section 2. Point Rated Requirements** in its entirety.

**Insert:**

## 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: <a href="http://www.cicic.ca/">http://www.cicic.ca/</a></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 seven (7) years prior to solicitation closing date.</p> <p>** To demonstrate compliance the project must list the following:</p> <ul style="list-style-type: none"> <li>Client Organization;</li> <li>Work description outlining the circumstances surrounding the</li> </ul>	10	<p>5 points</p> <p>Additional maximum of 5 points if the organization was in *the business of Real Property Management</p> <p><i>*The business of real property management is defined as: management of real property (i.e. management of buildings, dams, bridges or space, rental or leases; management of building/construction projects, management of real estate space allocations, management of real estate portfolios,</i></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
	activities; <ul style="list-style-type: none"> <li>• Work duration, including start and end dates in months and years; and</li> <li>• Client contact name, title, current telephone number and email address.</li> </ul>		<i>management of building maintenance etc.)</i>	
R.3	Experience, performing the following activities for an organization of a minimum of 500 active information technology users, within the last ten (10) years prior to solicitation closing date: <ul style="list-style-type: none"> <li>• Identified and documented all available Information resources of Business Value (IRBV);</li> <li>• Identified and documented all available Information Resources of Enduring Value (IREV);</li> <li>• Determined in conjunction with functional experts appropriate retention periods for all identified IRBVs and IREVs and established a document retention schedule reference SBBN / MIDA)<sup>1</sup>;</li> <li>• Submitted and negotiated the approval of a modern Record Disposition Authority (RDA)</li> </ul>	10	1 point per activity, up to a maximum of 5 points  Additional maximum of 5 Points if the organization was in *the business of Real Property Management  <i>*The business of real property management is defined as: management of real property (i.e. management of buildings, dams, bridges or space, rental or leases; management of building/construction projects, management of real estate space allocations, management of real estate portfolios, management of building maintenance etc.)</i>	

<sup>1</sup> 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"> <li>Prepared Record Series Identifiers (RSI) for the above.</li> </ul> <p>** To demonstrate compliance the projects must list the following:</p> <ul style="list-style-type: none"> <li>Client Organization;</li> <li>Work description outlining the circumstances surrounding the activities;</li> <li>Work duration, including start and end dates in months and years; and</li> <li>Client contact name, title, current telephone number and email address.</li> </ul>			
R.4	<p>Experience developing compendiums for the following, for an organization of at least 500 active information technology users, within the last ten (10) years prior to solicitation closing date:</p> <ul style="list-style-type: none"> <li>Document naming conventions;</li> <li>Metadata model processes;</li> <li>Document security programs</li> <li>Enterprise document management system resource strategies;</li> <li>Business process rules for Information Management and Record Keeping.</li> </ul>	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
	<p>** To demonstrate compliance the projects must list the following:</p> <ul style="list-style-type: none"> <li>• Client Organization;</li> <li>• Work description outlining the circumstances surrounding the activities;</li> <li>• Work duration, including start and end dates in months and years; and</li> <li>• Client contact name, title, current telephone number and email address.</li> </ul>			
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"> <li>• The configuration of an enterprise electronic document management system repository for all users;</li> <li>• The design of an enterprise electronic document management system permissions model; <u>and</u></li> <li>• The design of an enterprise electronic document management system classification structure and record series identifiers.</li> </ul> <p>** To demonstrate compliance the</p>	10	<p>5 points</p> <p>Additional maximum of 5 points if the organization was in *the business of Real Property Management</p> <p><i>*The business of real property management is defined as: management of real property (i.e. management of buildings, dams, bridges or space, rental or leases; management of building/construction projects, management of real estate space allocations, management of real estate portfolios, management of building maintenance etc.)</i></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>projects must list the following:</p> <ul style="list-style-type: none"> <li>• Client Organization;</li> <li>• Work description outlining the circumstances surrounding the activities;</li> <li>• Work duration, including start and end dates in months and years; and</li> <li>• Client contact name, title, current telephone number and email address.</li> </ul>			
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 ten (10) years prior to solicitation closing date.</p> <p><b>** To demonstrate compliance the projects must list the following:</b></p> <ul style="list-style-type: none"> <li>• Client Organization;</li> <li>• Work description outlining the circumstances surrounding the activities;</li> <li>• Work duration, including start and end dates in months and years; and</li> <li>• Client contact name, title, current telephone number and email address.</li> </ul>	<b>10</b>	<p>5 points</p> <p>Additional maximum of 5 points if the organization was in *the business of Real Property Management</p> <p><i>*The business of real property management is defined as: management of real property (i.e. management of buildings, dams, bridges or space, rental or leases; management of building/construction projects, management of real estate space allocations, management of real estate portfolios, management of building maintenance etc.)</i></p>	
R.7	Experience performing the following	<b>5</b>	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: \_\_\_\_\_

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			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
	<p>activities for an organization of at least 500 active information technology users, within the last ten (10) years prior to solicitation closing date:</p> <ul style="list-style-type: none"> <li>Developed IM/RK training materials ( i.e., "How To" reference materials, Dictionaries / Thesaurus and guides);</li> <li>Prepared documents outlining Record Keeping Roles and Responsibilities;</li> <li>Provided Enterprise Electronic Document Management System training on "Strategy for Use";</li> <li>Provided Mentoring and Coaching to Enterprise Electronic Document Management System Support Personnel;</li> <li>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).</li> </ul> <p>** To demonstrate compliance the projects must list the following:</p> <ul style="list-style-type: none"> <li>Client Organization;</li> </ul>			



### Experience and Expertise of the Proposed Business Consultant, Level 3

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

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#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
	<ul style="list-style-type: none"> <li>Work description outlining the circumstances surrounding the activities;</li> <li>Work duration, including start and end dates in months and years; and</li> <li>Client contact name, title, current telephone number and email address.</li> </ul>			
<b>R.8</b>	<p>Experience performing all of the following activities for an organization of at least 1500 active information technology users, within the last seven (7) years prior to solicitation closing date:</p> <ul style="list-style-type: none"> <li>Developing strategies for "Shared Drive" reformation / disposition; <u>and</u></li> <li>Creating migration processes and plans for moving existing electronic documents (from Legacy systems) into a new Enterprise Electronic Document Management System.</li> </ul> <p><b>** To demonstrate compliance the projects must list the following:</b></p> <ul style="list-style-type: none"> <li>Client Organization;</li> <li>Work description outlining the circumstances surrounding the activities;</li> <li>Work duration, including start and end dates in months and</li> </ul>	<b>25</b>	<p>10 points</p> <p>Additional maximum of 10 Points if the system referenced is GCDOCS, as used by the Government of Canada</p> <p>Additional maximum of 5 Points if the organization was in *the business of Real Property Management</p> <p><i>*The business of real property management is defined as: management of real property (i.e. management of buildings, dams, bridges or space, rental or leases; management of building/construction projects, management of real estate space allocations, management of real estate portfolios, management of building maintenance etc.)</i></p>	

Experience and Expertise of the Proposed Business Consultant, Level 3				
Name of proposed Resource: _____				
The Bidder <b>SHOULD</b> demonstrate that the Proposed Business Consultant, Level 3 has:				
			BIDDER'S RESPONSE	
#	RATED CRITERIA	POINTS MAX	DEMONSTRATED EXPERIENCE	INSERT PAGE # OF RESUME
	years; and  <ul style="list-style-type: none"> <li>Client contact name, title, current telephone number and email address.</li> </ul>			
<b>R.9</b>	Experience using the following Electronic Records and Document Management Systems, within the last ten (10) years prior to solicitation closing date:  <ul style="list-style-type: none"> <li>Open Text Docs Open or GCDOCS (Government of Canada version);</li> <li>Open Text E-Docs or EDRMS / RDIMS / Other (Government of Canada version);</li> <li>SAP Content Server;</li> <li>CCM Mercury;</li> <li>CCM Enterprise;</li> <li>Microsoft SharePoint;</li> <li>Microsoft Dynamics.</li> </ul> ** To demonstrate compliance the projects must list the following:  <ul style="list-style-type: none"> <li>Client Organization;</li> <li>Work description outlining the circumstances surrounding the use of the application(s);</li> <li>Work duration, including start and end dates in months and</li> </ul>	<b>5</b>	1 point per activity up to a maximum of 5 points	

Solicitation No. - N° de l'invitation  
EP470-161342  
Client Ref. No. - N° de réf. du client

Amd. No. - N° de la modif.  
003  
File No. - N° du dossier

Buyer ID - Id de l'acheteur  
636EL  
CCC No./N° CCC - FMS No./N° VME

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
	years; and <ul style="list-style-type: none"><li>Client contact name, title, current telephone number and email address.</li></ul>			
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.				

**ALL OTHER TERMS AND CONDITIONS REMAIN UNCHANGED**