

RETURN BIDS TO :

**RETOURNER LES
SOUMISSIONS À:**

Bid Receiving Shared Services Canada
Services Partagés Canada
180 Kent Street
Ottawa, Ontario
K1G 4A8
13th Floor

REQUEST FOR PROPOSAL

DEMANDE DE PROPOSITION

Proposal To: Shared 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 thereof.

Proposition aux: Services partagés Canada
Nous offrons par la présente de vendre à Sa Majesté la Reine du chef du Canada, aux conditions énoncées

Instructions : See Herein
ou incluses par référence dans la présente et aux annexes ci-jointes, les biens, services et construction
Instructions: Voir aux présentes
énumérés ici sur toute feuille ci-annexées, au(x) prix indiqué(s)

Comments - Commentaires

This document contains a Security Requirement

Vendor/Firm Name and address
Raison sociale et adresse du fournisseur/de l'entrepreneur

Issuing Office – Bureau de distribution

Shared Services Canada – SA Authority
Procurement Operations
180 Kent Street
Ottawa, Ontario
K1G 4A8

Title – Sujet Professional Services - CIO Support Services		
Solicitation No. – N° de l'invitation 2B0KB-16-4710	Date March 28, 2017	
Client Reference No. – N° référence du client R4710		
Buy & Sell Reference No. – N° de reference de SEAG 2B0KB-16-4710		
File No. – N° de dossier R4710	TBIPS Supply Arrangement EN578-05-5605	
Solicitation Closes – L'invitation prend fin at – à 2:00 PM on – le May 2, 2017		Time Zone Fuseau horaire Eastern Daylight Saving Time EDST
F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input type="checkbox"/> Other-Autre: <input type="checkbox"/>		
Address Inquiries to : - Adresser toutes questions à: Megan Lamont		Buyer Id – Id de l'acheteur CAU
Telephone No. – N° de téléphone : 613-219-7204		FAX No. – N° de FAX 613-948-0990
Destination – of Goods, Services, and Construction: Destination – des biens, services et construction : See Herein		

Delivery required - Livraison exigée See Herein	Delivered Offered – Livraison proposée
Vendor/firm Name and address Raison sociale et adresse du fournisseur/de l'entrepreneur	
Facsimile No. – N° de télécopieur Telephone No. – N° de téléphone	
Name and title of person authorized to sign on behalf of Vendor/firm (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



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PART 1 - GENERAL INFORMATION

1.1 Introduction

The bid solicitation 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: includes the certifications to be provided;
- Part 6 Security, Financial and Other Requirements: includes specific requirements that must be addressed by bidders; and
- Part 7 Resulting Contract Clauses: includes the clauses and conditions that will apply to any resulting contract.

The Annexes include the Statement of Work, the Basis of Payment, the Security Requirements Checklist, the Insurance Requirements and any other annexes.

1.2 Summary

- (a) This bid solicitation is being issued to satisfy the requirement of the Shared 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 one contract for a period from Contract Award to June 30, 2019, plus two (2) one (1) year irrevocable options allowing Canada to extend the term of the contract.
- (c) There is a security requirement associated with this requirement. For additional information, see Part 6 - Security, Financial and Other Requirements, and Part 7 - Resulting Contract Clauses. Bidders should consult the "Security Requirements on PWGSC Bid Solicitations - Instructions for Bidders" document on the Departmental Standard Procurement Documents (<http://www.tpsgc-pwgsc.gc.ca/app-acq/lc-pl/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 Agreement on Internal Trade (AIT); the Canada-Peru Free Trade Agreement (CPFTA); The Canada-Columbia Free Trade Agreement; and the Canada-Panama Free Trade Agreement if it is in force.
- (e) Only selected TBIPS SA Holders currently holding a TBIPS SA for Tier 2 in the National Capital Region under the EN578-055605/I series of Supply Arrangements (SAs) are invited to compete. The TBIPS Supply Arrangement EN578-055605/I 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.



- (f) The following Categories of Personnel are required on an “as and when requested” basis in accordance with Annex “B” of the TBIPS SA:

TBIPS ID	Resource Category	Level
A.1	Application Architect	3
A.7	Programmer/Analyst	2
A.8	System Analyst	3
A.12	Web Architect	3
A.13	A.13 Web Designer	3
A.14	A.14 Web Developer	3
I.1	Data Conversion Specialist	3
I.3	Database Analyst / IM Administrator	2
I.4	Data/IM Modeller	2
I.5	IM Architect	2
I.5	IM Architect	3
I.5	IM Architect	3
B.1	Business Analyst	3
B.2	Business Architect	2
B.3	Business Consultant	2
B.5	Business Process Re-engineering (BPR) Consultant	2
B.14	Technical Writer	3
P.1	Change Management Consultant	3
P.7	Project Coordinator	2
P.9	Project Manager	3
P.11	Quality Assurance Specialist / Analyst	2
P.12	Risk Management Specialist	2
C.7	IT Security Design Specialist	3
C.16	PIA Specialist	3



1.3 Debriefings

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

1.4 Conflict of Interest – Unfair Advantage

1. In order to protect the integrity of the procurement process, bidders are advised that Canada may reject a bid in the following circumstances:
 - a. if the Bidder, any of its subcontractors, any of their respective employees or former employees was involved in any manner in the preparation of the bid solicitation or in any situation of conflict of interest or appearance of conflict of interest;
 - b. if the Bidder, any of its subcontractors, any of their respective employees or former employees had access to information related to the bid solicitation that was not available to other bidders and that would, in Canada's opinion, give or appear to give the Bidder an unfair advantage.
2. The experience acquired by a bidder who is providing or has provided the goods and services described in the bid solicitation (or similar goods or services) will not, in itself, be considered by Canada as conferring an unfair advantage or creating a conflict of interest. This bidder remains however subject to the criteria established above.
3. Where Canada intends to reject a bid under this section, the Contracting Authority will inform the Bidder and provide the Bidder an opportunity to make representations before making a final decision. Bidders who are in doubt about a particular situation should contact the Contracting Authority before bid closing. By submitting a bid, the Bidder represents that it does not consider itself to be in conflict of interest nor to have an unfair advantage. The Bidder acknowledges that it is within Canada's sole discretion to determine whether a conflict of interest, unfair advantage or an appearance of conflict of interest or unfair advantage exists.



PART 2 - BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

All instructions, clauses and conditions identified in the bid solicitation by number, date and title are set out in the *Standard Acquisition Clauses and Conditions* (<http://ccua-sacc.tpsgc-pwgsc.gc.ca/pub/ach-eng.jsp>) Manual issued by Public Works and Government Services Canada.

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

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

Subsection 5.4 of 2003, Standard Instructions - Goods or Services - Competitive Requirements, is amended as follows:

Delete: sixty (60) days

Insert: one hundred twenty (120) days

2.2 Submission of Bids

Bids must be submitted only to Shared Services Canada (SSC) Procurement Operations by the date, time and place indicated on page 1 of the bid solicitation.

Due to the nature of the bid solicitation, bids transmitted by facsimile to SSC will not be accepted.

2.3 Enquiries - Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than five (5) calendar days before the bid closing date. Enquiries received after that time may not be answered.

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

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

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



2.5 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.

2.6 Volumetric Data

The Total Estimated # resources 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 number of resources per year will be consistent with this data. It is provided purely for information purposes.

TBIPS ID	Resource Category	Level	Estimated # of Resources
A.1	Application Architect	3	2
A.7	Programmer/Analyst	2	1
A.8	System Analyst	3	2
A.12	Web Architect	3	5
A.13	A.13 Web Designer	3	1
A.14	A.14 Web Developer	3	1
I.1	Data Conversion Specialist	3	2
I.3	Database Analyst / IM Administrator	2	3
I.4	Data/IM Modeller	2	2
I.5	IM Architect	2	9
B.1	Business Analyst	3	2
B.2	Business Architect	2	1
B.3	Business Consultant	2	3
B.5	Business Process Re-engineering (BPR) Consultant	2	1
P.1	Change Management Consultant	3	1
P.7	Project Coordinator	2	3
P.9	Project Manager	3	2
P.11	Quality Assurance Specialist / Analyst	2	1



P.12	Risk Management Specialist	2	1
C.7	IT Security Design Specialist	3	1
C.16	PIA Specialist	3	1



PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

Canada will accept electronic copies of the response e-mailed to:

Julie Watson-Bampton
julie.bampton@canada.ca

If electronic copies of the response are not e-mailed the following applies:

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

Section I: 3 soft copy on CD/DVD,

Section II: 1 soft copy on CD/DVD,

Section III: 1 soft copy on CD/DVD.

If there is a discrepancy between the wording of the soft copy and the hard copy, the wording of the hard copy will have priority over the wording of the soft copy.

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

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

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

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

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

3.1.1

Multiple bids from the same Bidder (or a bid from a Bidder and another bid from any of its affiliates) are not permitted in response to this bid solicitation. Each Bidder must submit only a single bid. For the purpose of this bid solicitation, individual members of a joint venture cannot participate in another bid, either by submitting a bid alone or by participating in another joint venture. If any Bidder submits more than one bid (or an affiliate also submits a bid), either on its own or as part of a joint venture, Canada will choose in its discretion which bid to consider.



3.2 Section I: Technical Bid

3.2.1 The technical bid consists of the following:

- (i) **Bid Submission Form:** Bidders are requested to include the Bid Submission Form - Attachment 1 with their bids. It provides a common form in which Bidders can provide information required for evaluation and contract award, such as a contact name, the Bidder's Procurement Business Number, the Bidder's status under the Federal Contractors Program for Employment Equity, etc. Using the form to provide this information is not mandatory, but it is recommended. If Canada determines that the information required by the Bid Submission Form is incomplete or requires correction, Canada will provide the Bidder with an opportunity to do so.
- (ii) **Substantiation of Technical Compliance:** The technical bid must substantiate the compliance with the specific articles of Attachment 2, 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 as of bid closing date. Simply stating that the Bidder complies is not sufficient. Where Canada determines that the substantiation is not complete, the Bidder will be considered non-responsive and disqualified. The substantiation may refer to additional documentation submitted with the bid - this information can be referenced in the "Reference to additional documentation within the bid" columns of Attachment 2, where bidders are requested to indicate where in their bid the reference material can be found, including the title of the document, and the page and paragraph numbers; where the reference is not sufficiently precise, Canada may request that the Bidder direct Canada to the appropriate location in the documentation.
- (iii) **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.
Extension of Time: If additional time is required by the Bidder, the Contracting Authority may grant an extension in his or her sole discretion.
- (iv) **Customer Reference Contact Information:** When requested by Canada, the Bidder must provide customer references who must each confirm, the facts identified in the Bidder's bid. For each customer reference, the Bidder must, at a minimum, provide the name and either the telephone number or e-mail address for a contact person. Bidders are also requested to include the title of the contact person. If the named individual is unavailable when required during the evaluation period, the Bidder may provide the name and contact information of an alternate contact from the same customer.
- (v) **Proposed Resources:** The technical bid must include résumés for the resources identified in the bid solicitation. 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) as of bid closing date. 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, Canada will only consider educational programs that were successfully completed by the resource by the time of bid closing.



- (C) For requirements relating to professional designation or membership, the resource must have the required designation or membership by the time of bid closing and must continue, where applicable, to be a member in good standing of the profession's governing body throughout the evaluation and Contract Period.
- (D) For work experience, Canada 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, Canada will disregard any information about experience if the technical bid does not include the relevant date(s) (month and year) for the experience claimed (i.e., the start date and end date).
- (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. Only listing experience without providing any supporting data to describe responsibilities, duties and relevance to the requirement, or reusing the same wording as this bid solicitation, will not be considered "demonstrated" for evaluation purposes. The Bidder 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, only one project will be counted toward any requirements that relate to the individual's length of experience.

(vi) **Security Clearance:** Bidders must submit the following security information for each of the proposed resources with their bids on or before this bid solicitation's closing date.

Security Information:	Supplier to insert data
Name of individual as it appears on security clearance application form – MANDATORY	
Date of birth – OPTIONAL	
Level of security clearance obtained – MANDATORY	
Validity period of security clearance obtained – MANDATORY	
Security Screening Certificate and Briefing Form file number – MANDATORY	
Name of the entity under which the security clearance was obtained – MANDATORY	
Name of federal Government Department under which security clearance was obtained. If the Federal Government Department is other than PWGSC, provide the name, telephone and fax numbers of the security clearance contact person within that department – MANDATORY	
If the security clearance is in the process, the date the application was submitted to CIISD with the level of security clearance requested. – OPTIONAL	

3.3 Section II: Financial Bid

3.3.1 Bidders must submit their financial bid in accordance with the Basis of Payment in Annex "B."

Section III: Certifications

Bidders must submit the certifications required under Part 5.



ATTACHMENT 1 TO PART 3

BID SUBMISSION FORM

BID SUBMISSION FORM	
Bidder's full legal name	
Authorized Representative of Bidder for evaluation purposes (e.g., clarifications)	Name
	Title
	Address
	Telephone #
	Fax #
	Email
Bidder's Procurement Business Number (PBN) <i>[see the Standard Instructions 2003]</i>	
Jurisdiction of Contract: Province 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 5 of the bid solicitation entitled Former Public Servant Certification for a definition of "Former Public Servant".	<p>Is the Bidder a FPS in receipt of a pension as defined in the bid solicitation? Yes ____ No ____</p> <p>If yes, provide the information required by the Article in Part 5 entitled "Former Public Servant Certification"</p>
	<p>Is the Bidder a FPS who received a lump sum payment under the terms of a work force reduction program? Yes ____ No ____</p> <p>If yes, provide the information required by the Article in Part 5 entitled "Former Public Servant Certification"</p>

Federal Contractors Program for Employment Equity (FCP EE) Certification:

On behalf of the bidder, by signing below, I also confirm that the bidder [*check the box that applies*]:



If the bidder is exempt, please indicate the basis for the exemption to the right. If the bidder does not fall within the exceptions enumerated to the right, the Program requirements do apply and the bidder is required either to:

- (a) submit to the Department of HRSD form LAB 1168, Certificate of Commitment to Implement Employment Equity, DULY SIGNED; or
- (b) submit a valid Certificate number confirming its adherence to the FCP-EE.

Bidders are requested to include their FCP EE Certification or signed LAB 1168 with their bid; if this information is not provided in the bid, it must be provided upon request by the Contracting Authority during evaluation.

For joint ventures, be sure to provide this information for each of the members of the joint venture.

Number of FTEs [Bidders are requested to indicate, the total number of full-time-equivalent positions that would be created and maintained by the bidder if it were awarded the Contract. This information is for information purposes only and will not be evaluated.]

Security Clearance Level of Bidder

[include both the level and the date it was granted]

On behalf of the bidder, by signing below, I confirm that I have read the entire bid solicitation including the documents incorporated by reference into the bid solicitation and I certify that:

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

Signature of Authorized Representative of Bidder

(a) is not subject to Federal Contractors Program for Employment Equity (FCP-EE), because it has a workforce of less than 100 permanent full or part-time employees in Canada;

(b) is not subject to FCP-EE, because it is a regulated employer under the *Employment Equity Act*,

(c) is subject to the requirements of FCP-EE, because it has a workforce of 100 or more permanent full or part-time employees in Canada, but has not previously obtained a certificate number from the Department of Human Resources and Skills Development (HRSD) (having not bid on requirements of \$200,000 or more), in which case a duly signed certificate of commitment is attached; OR

(d) is subject to FCP-EE, and has a valid certification number as follows: _____ (and has not been declared an Ineligible Contractor by HRSD).



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 SSC 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. **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 Corporate and Technical Criteria:** Each bid will be reviewed to determine whether it meets the mandatory requirements of the bid solicitation. All elements of the bid solicitation that are mandatory requirements are identified specifically with the words “must” or “mandatory”. Bids that do not comply with each and every mandatory requirement will be considered non-responsive and be disqualified. The mandatory evaluation criteria are described in Attachment 2 herein.
- b) **Point-Rated Technical Criteria:** Each bid will be rated by assigning a score to the rated requirements, which are identified in the bid solicitation by the word “rated” or by reference to a score. Bidders who fail to submit complete bids with all the information requested by this bid solicitation will be rated accordingly. Bids that do not obtain the required pass mark of 70% for the point-rated technical criteria specified in this bid solicitation for each proposed resource will be considered non-responsive and be disqualified. The rated evaluation criteria are described in Attachment 2.
- c) **Joint Venture Experience:** In accordance with Attachment 2 to PART 3 herein, except where expressly provided otherwise, at least one member of a joint venture Bidder must meet any given mandatory and rated requirement of this solicitation. Joint venture members cannot pool their abilities to satisfy any single mandatory and rated requirement of this solicitation. Wherever substantiation of a mandatory and rated requirement is required, the Bidder is requested to indicate which joint venture member satisfies the requirement. Any Bidder with questions regarding the way in which a joint venture proposal will be evaluated should raise such questions through the Enquiries process as early as possible during the solicitation period.

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 services, 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 requirement, 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 or in the case of a rated requirement no points



would be allocated.

d) Reference Checks: 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 allocate any points nor 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 Bidder, the information supplied by the reference will be the information assessed. Points will not be allocated nor a mandatory criteria considered as met if the reference customer is not a customer of the Bidder itself (for example, the customer cannot be the customer of an affiliate of the Bidder). Nor will points be allocated nor a mandatory criterion considered as met if the customer is itself an affiliate or other entity that does not deal at arm's length with the Bidder. Crown references will be accepted.

e) Technically Responsive Bid: A technically responsive bid is one that complies with the following:

To be declared responsive, a bid must:

- a. comply with all the requirements of the bid solicitation;
- b. meet all Corporate Technical mandatory criteria and
- c. meet a minimum of 70% rated

Bids not meeting (a), (b) and (c) will be declared non-responsive.

The evaluation will be based on the highest responsive combined rating of technical merit and price. The ratio will be 70% for the technical merit and 30% for the price.

To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of 70%.

4.3 Financial Evaluation

- a) The financial evaluation will be conducted using the firm per diem rates provided by the technically responsive bid(s) to calculate the Total Financial Score.
- b) There are two financial evaluation methods possible for this requirement. Method 1 will be used if 3 or more bids are determined to be technically responsive (see 4.3 (c)), and Method 2 will be used if fewer than 3 bids are determined to be technically responsive (see 4.3 (d)).

METHOD 1: The following financial evaluation method will be used if 3 or more bids are determined to be technically responsive:

STEP 1

ESTABLISHING THE LOWER AND UPPER MEDIAN BANDS FOR EACH PERIOD AND EACH CATEGORY OF PERSONNEL:



The Contracting Authority will establish, for each period and each Category of Personnel, the median band limits based on the firm per diem rates proposed by the technically responsive bids. For each period and each Category of Personnel, the median will be calculated using the median function in Microsoft Excel and will represent a range that encompasses the lower median rate to a value of minus (-) 20% of the median, and an upper median rate to a value of plus (+) 30% of the median.

STEP 2

POINT ALLOCATION:

Points will be allocated for each period and each Category of Personnel as follow:

- (A) If a firm per diem rate for any given period and Category of Personnel is either lower than the established lower median band limit or higher than the established upper median band limit for that period and Category of Personnel, the Bidder who proposed such rate will be allocated 0 points for that period and Category of Personnel.
- (B) If a firm per diem rate for any given period and Category of Personnel is within the established upper and lower median band limits for that period and Category of Personnel, the Bidder who proposed such rate will obtain points for that period and Category of Personnel based on the following calculation, which will be rounded to two decimal places:

$$\frac{\text{Lowest proposed firm per diem rate within the median band limits}}{\text{Bidder's proposed firm per diem rate}} \times \text{Points Assigned (see Table 1)}$$

- (C) If a firm per diem rate for any given period and Category of Personnel is within the established median band limits for that period and Category of Personnel and is the lowest proposed firm per diem rate, the Bidder who proposed such rate will be allocated the applicable points assigned at Table 1 for that period and Category of Personnel.

STEP 3

TOTAL FINANCIAL SCORE:

Points allocated under STEP 2 for each period and Category of Personnel will be added together and rounded to two decimal places to produce the Total Financial Score. Bidders will find attached an example of a financial evaluation using Method 1, refer to **TABLE 2, ATTACHMENT 1 TO PART 4**.

TABLE 1			
TBIPS ID	CATEGORY OF PERSONNEL	LEVEL	POINTS ASSIGNED
A.1	Application Architect	3	300 (200 pts contract period – 50 points per option period)
A.7	Programmer/Analyst	2	300 (200 pts contract period – 50 points per option period)
A.8	System Analyst	3	300 (200 pts contract period – 50 points per option period)
A.12	Web Architect	3	300 (200 pts contract period – 50 points per option period)
A.13	A.13 Web Designer	3	300 (200 pts contract period – 50 points per option period)



TABLE 1			
TBIPS ID	CATEGORY OF PERSONNEL	LEVEL	POINTS ASSIGNED
A.14	A.14 Web Developer	3	300 (200 pts contract period – 50 points per option period)
I.1	Data Conversion Specialist	3	300 (200 pts contract period – 50 points per option period)
I.3	Database Analyst / IM Administrator	2	300 (200 pts contract period – 50 points per option period)
I.4	Data/IM Modeller	2	300 (200 pts contract period – 50 points per option period)
I.5	IM Architect	2	300 (200 pts contract period – 50 points per option period)
I.5	IM Architect	3	300 (200 pts contract period – 50 points per option period)
I.5	IM Architect	3	300 (200 pts contract period – 50 points per option period)
B.1	Business Analyst	3	300 (200 pts contract period – 50 points per option period)
B.2	Business Architect	2	300 (200 pts contract period – 50 points per option period)
B.3	Business Consultant	2	300 (200 pts contract period – 50 points per option period)
B.5	Business Process Re-engineering (BPR) Consultant	2	300 (200 pts contract period – 50 points per option period)
B.14	Technical Writer	3	300 (200 pts contract period – 50 points per option period)
P.1	Change Management Consultant	3	300 (200 pts contract period – 50 points per option period)
P.7	Project Coordinator	2	300 (200 pts contract period – 50 points per option period)
P.9	Project Manager	3	300 (200 pts contract period – 50 points per option period)
P.11	Quality Assurance Specialist / Analyst	2	300 (200 pts contract period – 50 points per option period)
P.12	Risk Management Specialist	2	300 (200 pts contract period – 50 points per option period)
C.7	IT Security Design Specialist	3	300 (200 pts contract period – 50 points per option period)
C.16	PIA Specialist	3	300 (200 pts contract period – 50 points per option period)
MAXIMUM FINANCIAL POINTS			7200



METHOD 2: The following financial evaluation method will be used if fewer than 3 bids are determined to be technically responsive:

STEP 1

POINT ALLOCATION:

Points will be allocated to the Bidder, for each period and each Category of Personnel, using the following calculation which will be rounded to two decimal places:

$$\frac{\text{Lowest proposed firm per diem rate}}{\text{Bidder's proposed firm per diem rate}} \times \text{Points Assigned at TABLE 1 above}$$

The Bidder with the lowest proposed firm per diem rate will be allocated the applicable points assigned at TABLE 1 above.

STEP 2

TOTAL FINANCIAL SCORE:

Points allocated under STEP 1, for each period and each Category of Personnel, will be added together and rounded to two decimal places, to produce the Total Financial Score for each Bidder.

4.4 Basis of Selection

- (a) The technically responsive bid that obtains the highest Total Bidder Score will be recommended for award of a contract.

STAGE 1 - Calculation of the Total Bidder Score: The Total Bidder Score will be computed for each technically responsive bid in accordance with the following formula:

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

The total possible Final Technical Score is 70 while the total possible Final Financial Score is 30.

STAGE 2 - Calculation of Final Technical Score: The Final Technical Score will be computed for each technically responsive bid by converting the Total Technical Score obtained for the point-rated technical criteria using the following formula, rounded to 2 decimal places:

$$\frac{\text{Total Technical Score}}{\text{Maximum Technical Points (125 pts.)}} \times 70 = \text{Final Technical Score}$$

STAGE 3 - Calculation of Final Financial Score: The Final Financial Score will be computed for each technically responsive bid by converting the Total Financial Score obtained for the financial evaluation using the following formula rounded to 2 decimal places:

$$\frac{\text{Total Financial Score}}{\text{Maximum Financial Points (7200 pts.)}} \times 30 = \text{Final Financial Score}$$

- (b) 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.
- (c) If more than one bidder is ranked first because of identical overall scores, then the bidder with the highest Total Financial Score will become the top-ranked bidder



ATTACHMENT 1 TO PART 4

EXAMPLE OF A FINANCIAL EVALUATION USING METHOD 1

TABLE 2							
Resource Category	Points Assigned	Bidder 1		Bidder 2		Bidder 3	
		Year 1	Year 2	Year 1	Year 2	Year 1	Year 2
Programmer Analyst	150 (75 pts. per year)	\$400.00	\$400.00	\$420.00	\$450.00	\$450.00	\$450.00
Business Analyst	100 (50 pts. per year)	\$600.00	\$600.00	\$600.00	\$620.00	\$650.00	\$820.00
Project Manager	50 (25 pts. per year)	\$555.00	\$900.00	\$750.00	\$800.00	\$700.00	\$800.00
TOTAL	300						

STEP 1 - ESTABLISHING THE LOWER AND UPPER MEDIAN BANDS FOR EACH PERIOD AND EACH CATEGORY OF PERSONNEL

(Median 1)	For the Programmer Resource Category, the year 1 median would be \$420.00. The lower median band limit would be \$336.00 and higher median band limit would be \$546.00.
(Median 2)	For the Programmer Resource Category, the year 2 median would be \$450.00. The lower median band limit would be \$360.00 and higher median band limit would be \$585.00.
(Median 3)	For the Business Analyst Resource Category, the year 1 median would be \$600.00. The lower median band limit would be \$480.00 and higher median band limit would be \$780.00.
(Median 4)	For the Business Analyst Resource Category, the year 2 median would be \$620.00. The lower median band limit would be \$496.00 and higher median band limit would be \$806.00.
(Median 5)	For the Project Manager Resource Category, the year 1 median would be \$700.00. The lower median band limit would be \$560.00 and higher median band limit would be \$910.00.
(Median 6)	For the Project Manager Resource Category, the year 2 median would be \$800.00. The lower median band limit would be \$640.00 and higher median band limit would be \$1,040.00.

STEP 2 - POINT ALLOCATION

Bidder 1:	
Programmer Analyst Year 1	= 75 points (lowest rate within the lower and upper median band limits)



Programmer Analyst Year 2	= 75 points (lowest rate within the lower and upper median band limits)
Business Analyst Year 1	= 50 points (lowest rate within the lower and upper median band limits)
Business Analyst Year 2	= 50 points (lowest rate within the lower and upper median band limits)
Project Manager - Year 1	= 0 points (outside the lower and higher median band limits)
Project Manager Year 2	= 22 points (based on the following calculation = (Lowest rate of \$800.00 / Bidder's proposed rate of \$900.00) Multiplied by 25 pts)
Bidder 2:	
Programmer Analyst Year 1	= 71 points (based on the following calculation = (Lowest rate of \$400.00 / Bidder's proposed rate of \$420.00) Multiplied by 75 pts)
Programmer Analyst Year 2	= 67 points (based on the following calculation = (Lowest rate of \$400.00 / Bidder's proposed rate of \$450.00) Multiplied by 75 pts)
Business Analyst Year 1	= 50 points (lowest price within the lower and upper median band limits)
Business Analyst Year 2	= 48 points (based on the following calculation = (Lowest rate of \$600.00 / Bidder's proposed rate of \$620.00) Multiplied by 50 pts)
Project Manager Year 1	= 23 points (based on the following calculation = (Lowest rate of \$700.00 / Bidder's proposed rate of \$750.00) Multiplied by 25 pts)
Project Manager Year 2	= 25 points (lowest price within the lower and upper median band limits)
Bidder 3:	
Programmer Analyst Year 1	= 67 points (based on the following calculation = (Lowest rate of \$400.00 / Bidder's proposed rate of \$450.00) Multiplied by 75 pts)
Programmer Analyst Year 2	= 67 points (based on the following calculation = (Lowest rate of \$400.00 / Bidder's proposed rate of \$450.00) Multiplied by 75 pts)
Business Analyst Year 1	= 46 points (based on the following calculation = (Lowest rate of \$600.00 / Bidder's proposed rate of \$650.00) Multiplied by 75 pts)
Business Analyst - Year 2	= 0 points (outside the lower and higher median band limits)
Project Manager Year 1	= 25 points (lowest price within the lower and upper median band limits)
Project Manager Year 2	= 25 points (lowest price within the lower and upper median band limits)



STEP 3 - TOTAL FINANCIAL SCORE

Bidder 1

$75 + 75 + 50 + 50 + 0 + 22 =$ Total Financial Score of 272 points out of a possible 300 points

Bidder 2

$71 + 67 + 50 + 48 + 23 + 25 =$ Total Financial Score of 284 points out of a possible 300 points

Bidder 3

$67 + 67 + 46 + 0 + 25 + 25 =$ Total Financial Score of 230 points out of a possible 300 points



ATTACHMENT 2 TO PART 4

1.5 Technical Evaluation

1.1.1 Mandatory Technical Criteria

The TBIPS SA Holder must comply with the Mandatory Requirements specified below.

This list of qualifications is essential and must be met by the contractor to perform the required tasks and produce deliverables outlined in the Statement of Work. The information provided about the proposed contractor must clearly describe how each of the qualifications in the list is met. Failure to adequately describe how a qualification is met will be determined as “not met”. If requested, the contractor must provide examples and reference information (may be checked) of their experience in the following:

For the resource proposed, the Bidder must include an up to date resume.

To facilitate bid preparation and evaluation, Bidders must prepare and submit their proposal using the tables provided. When completing the resource grids, the specific information which demonstrates the requested criteria and reference to the page number of the resume should be incorporated so that the evaluator can verify this information. It is not acceptable that the tables should contain all the project information from the resume. Only the specific answer should be provided

The experience of the proposed resource must be clearly identified by providing the company name, the duration in months, the start and end dates, contact name, and contact phone number of each project or contract as of bid closing.

In the case where the timelines of two or more projects or experience overlap, the duration of time common to each project/experience will not be counted more than once.

Corporate Technical Mandatory Evaluation Criteria

No.	Description	Met / Not Met	Cross Reference to Proposal		
M1	The Bidder must have demonstrated contract experience in delivering informatics services supplying all Categories of Personnel listed in the table below for the required minimum billable days per Category of Personnel.				
	<table border="1"> <thead> <tr> <th data-bbox="272 1457 764 1530">Category of Personnel</th> <th data-bbox="764 1457 985 1530">Minimum Billable Days</th> </tr> </thead> </table>			Category of Personnel	Minimum Billable Days
	Category of Personnel			Minimum Billable Days	
	Application Architect - Level 3			880	
	Web Architect - Level 3			880	
	Web Designer - Level 3			880	
	Web Developer - Level 3			1760	
Programmer/Analyst - Level 2	3740				



System Analyst - Level 3	1760		
Business Analyst - Level 3	5060		
Technical Writer - Level 3	880		
Business Architect- Level 2	880		
Business Consultant – Level 2	880		
Business Process Re-engineering (BPR) Consultant – Level 2	880		
PIA Specialist - Level 3	880		
IT Security Design Specialist - Level 3	880		
Data Conversion Specialist – Level 3	880		
Database Analyst / IM Administrator – Level 2	880		
Data/IM Modeller – Level 2	1100		
IM Architect – Level 2	880		
IM Architect – Level 3	880		
Change Management Consultant - Level 3	1144		
Quality Assurance Specialist/Analyst – Level 2	880		
Risk Management Specialist – Level 2	880		
Project Coordinator - Level 2	1320		
Project Manager - Level 3	1320		
<p>To be accepted,</p> <p>(a) The services must have been provided under a maximum of five contracts;</p> <p>(b) The referenced contracts must have been awarded within the 10 years preceding the closing date of this bid solicitation; and</p> <p>(c) Bidders must demonstrate that the work delivered by each Category of Personnel includes at least 50% of</p>			



	<p>the associated tasks listed in the Statement of Work at Annex B of this bid solicitation for that Category of Personnel.</p> <p>The Bidder's substantiation of technical compliance with Criteria ID M.1 must be demonstrated by completing Appendices A and B to Attachment 2.</p>		
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Rated Criteria

No.	Rated Evaluation Criteria	Points	Referenced Section/Page in Bidder's Proposal
R1	<p>The Bidder should demonstrate its billable days experience in excess of the minimum billable days required in Criteria ID M.1.</p> <p>To be accepted,</p> <p>(a) The services are required to have been provided under the same five contracts used to demonstrate the Bidder's compliance with Criteria ID M.1; and</p> <p>(b) The work delivered by each Category of Personnel is required to include at least 50% of the associated tasks listed in the Statement of Work at Annex B of this bid solicitation for that Category of Personnel.</p> <p>The Bidder's demonstrated "Total Billable Days" provided in response to Criteria ID M.1, using Appendix A to Attachment 2, will be used to evaluate this criterion.</p> <p>The Bidder will be awarded points, to a maximum of 100, for billable days in excess of the minimums identified in the table of Criteria ID M.1, as demonstrated in the example evaluation scenario below.</p> <p>The Bidder's substantiation of technical compliance with Criteria ID R.1 will be demonstrated using Appendices A and B to Attachment 2, completed by the Bidder to substantiate its compliance with Criteria ID M.1.</p> <p>Maximum 100</p>		

Example Evaluation Scenario for Criteria ID R.1

CATEGORY OF PERSONNEL	BILLABLE DAYS			
	(A)	(B)	(C)	(D)
	BILLABLE DAYS PROVIDED BY BIDDER	MINIMUM IDENTIFIED UNDER M1	BIDDER EXCESS	BIDDER % INCREASE TO A MAXIMUM OF 100



			(C)=(A)-(B)	(D)=(C)/(B)*100
PIA Specialist	1,450	880	570	64
Business Architect	1,155	825	330	40
Business Process Re-engineering (BPR) Consultant	635	275	360	100
Risk Management Specialist	435	275	160	58
BIDDER SCORE = SUM OF (D) FOR ALL 4 CATEGORIES / 4				65.5

R2	<p>The Bidder should demonstrate its total billable experience (in dollars) in delivering informatics services for large scale projects within the 5 years preceding the closing date of this bid solicitation, by using Appendix B of Attachment 2.</p> <p>The Bidder will be awarded points as follows for the sum of Total Billable Value demonstrated:</p> <ul style="list-style-type: none"> \$3M to < \$6M - 5 points \$6M to < \$9M - 10 points \$9M to < \$12M - 15 points \$12M to < \$15 - 20 points \$15M plus - 25 points 		
	MAXIMUM AVAILABLE POINTS - 125		
	MINIMUM POINTS REQUIRED - 87		



APPENDIX A TO ATTACHMENT 2 TO PART 4

BILLABLE DAYS RESPONSE TEMPLATE FOR CRITERIA ID M.1 AND R.1

By submitting a bid in response to this bid solicitation, the Bidder certifies that:

- (a) all billable days provided in this appendix occurred under the following contracts for all listed Categories of Personnel; and
- (b) the work delivered by each Category of Personnel provided in this appendix includes at least 50% of the associated tasks listed in the Statement of Work at Annex B of this bid solicitation for that Category of Personnel.

CATEGORY OF PERSONNEL	NUMBER OF BILLABLE DAYS					Total Billable Days
	Cross Reference to Contract Reference #	Cross Reference to Contract Reference #	Cross Reference to Contract Reference #	Cross Reference to Contract Reference #	Cross Reference to Contract Reference #	
Application Architect - Level 3						
Programmer/Analyst - Level 2						
System Analyst - Level 3						
Web Architect - Level 3						
Web Designer - Level 3						
Web Developer - Level 3						
Data Conversion Specialist – Level 3						
Database Analyst / IM Administrator – Level 2						
Data/IM Modeller – Level 2						
IM Architect – Level 2						
IM Architect – Level 3						



PIA Specialist - Level 3						
IT Security Design Specialist - Level 3						
Business Analyst - Level 3						
Business Architect- Level 2						
Business Consultant – Level 2						
BPR Consultant – Level 2						
Technical Writer - Level 3						
Change Management Consultant - Level 3						
Project Coordinator - Level 2						
Project Manager - Level 3						
Quality Assurance Specialist/Analyst – Level 2						
Risk Management Specialist – Level 2						



**APPENDIX B TO ATTACHMENT 2 TO PART 4
CONTRACT REFERENCE RESPONSE TEMPLATE**

Bidders must demonstrate that the work delivered by each Category of Personnel includes at least 50% of the associated tasks listed in the Statement of Work at Annex B of this bid solicitation for that Category of Personnel.

CONTRACT REFERENCE #: _____	
Bidder Name:	
CUSTOMER REFERENCE CONTACT INFORMATION	
Name of Organization:	Contact Name:
E-mail address:	Telephone number:
CONTRACT DETAILS	
Contract Title and description:	
Contract Start Date (mm/yy):	Contract End Date (mm/yy):
Total Billable Value (in dollars):	
RESOURCE DETAILS	
Category of Personnel and Level	Tasks performed under the contract with a cross reference to each specific SOW associated task



PART 5 - CERTIFICATIONS

Bidders must provide the required certifications to be awarded a contract. Canada will declare a bid non-responsive if the required certifications are not completed and submitted as requested.

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

5.1 Certifications Required with the Bid

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

5.2 Federal Contractors Program - Certification

- (a) The Federal Contractors Program for Employment Equity (FCP) requires that some suppliers bidding for federal government contracts, valued at \$200,000 or more (including all applicable taxes), make a formal commitment to implement employment equity. This is a condition precedent to contract award. If the Bidder is subject to the FCP, evidence of its commitment must be provided before the award of the Contract.
- (b) Suppliers who have been declared ineligible contractors by Human Resources and Skills Development Canada (HRSDC) are no longer eligible to receive government contracts over the threshold for solicitation of bids as set out in the *Government Contract Regulations*. Suppliers may be declared ineligible contractors either as a result of a finding of non-compliance by HRSDC, or following their voluntary withdrawal from the FCP for a reason other than the reduction of their workforce to fewer than 100 employees. Any bids from ineligible contractors will be declared non-responsive.
- (c) If the Bidder does not fall within the exceptions enumerated in (d)(i) or (ii) below, or does not have a valid certificate number confirming its adherence to the FCP, the Bidder must fax (819-953-8768) a copy of the signed form LAB 1168, Certificate of Commitment to Implement Employment Equity to the Labour Branch of HRSDC.
- (d) Each bidder is requested to indicate in its bid whether it is:
 - (i) not subject to FCP, having a workforce of fewer than 100 permanent full or part-time employees in Canada;
 - (ii) not subject to FCP, being a regulated employer under the *Employment Equity Act*, S.C. 1995, c. 44;
 - (iii) subject to the requirements of FCP, because it has a workforce of 100 or more permanent full or part-time employees in Canada, but it has not previously obtained a certificate number from HRSD (because it has not bid before on requirements of \$200,000 or more), in which case a duly signed certificate of commitment is required from the Bidder; or
 - (iv) subject to FCP-EE, and has a valid certification number (i.e., has not been declared an ineligible contractor by HRSDC).
- (e) Further information on the FCP-EE is available on the following HRSDC Website:

<http://www.hrsdc.gc.ca/en/gateways/topics/wzp-gxr.shtml>.



5.3 Former Public Servant Certification

- (a) Contracts with 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 spending public funds. In order to comply with Treasury Board policies and directives on contracts with FPS, bidders must provide the information required below.
- (b) For the purposes of this clause,
 - (i) **"former public servant"** means a 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 and includes:
 - (A) an individual;
 - (B) an individual who has incorporated;
 - (C) a partnership made of former public servants; or
 - (D) a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.
 - (ii) **"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 Public Service. The lump sum payment period does not include the period of severance pay, which is measured in a like manner.
 - (iii) **"pension"** means, in the context of the fee abatement formula, 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 *Canadian Pension Plan Act*, R.S., 1985, c. C-8.
- (c) If the Bidder is an FPS in receipt of a pension as defined above, the Bidder must provide the following information:
 - (i) name of former public servant;
 - (ii) date of termination of employment or retirement from the Public Service.
- (d) If the Bidder is an FPS who received a lump sum payment pursuant to the terms of a work force reduction program, 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; and
 - (vii) number and amount (professional fees) of other contracts subject to the restrictions of a work force reduction program.
- (e) For all contracts awarded during the lump sum payment period, the total amount of fee that may be paid to a FPS who received a lump sum payment is \$5,000, including the Goods and Services Tax or Harmonized Sales Tax.
- (f) By submitting a bid, the Bidder certifies that the information submitted by the Bidder in response to the above requirements is accurate and complete.

5.4 Status and Availability of Resources

- (a) By submitting a bid, the Bidder certifies that, should it be awarded a contract as a result of the bid solicitation, every individual proposed in its response to Task Authorizations will be available to perform the Work as required by Canada's representatives and at the time specified in the TA or as agreed to with Canada's representatives. If for reasons beyond its control, the Bidder is unable to provide the services of an individual named in the TA, the Bidder may propose a substitute with



similar qualifications and experience. The Bidder must advise the Contracting Authority of the reason for the substitution and provide the name, qualifications and experience of the proposed replacement. For the purposes of this clause, only the following reasons will be considered as beyond the control of the Bidder: death, sickness, retirement, resignation, dismissal for cause or termination of an agreement for default.

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

5.5 Education and Experience

- (a) 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.
- (b) All of the resources proposed must meet the minimum experience requirements detailed in the Supply Arrangement for the Category of Personnel for which they are being proposed. The SA Holder acknowledges that the Department of Public Works and Government Services Canada reserves the right to verify this certification prior to contract award or during contract performance and that untrue statements may result in the proposal being declared non-responsive or any other action which the Minister may consider appropriate.

5.6 Certification of Language - English Essential

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

5.7 Code of Conduct and Certifications

By submitting a bid, the Bidder certifies, for himself and his affiliates, to be in compliance with the Code of Conduct and Certifications clause of the Standard instructions. The related documentation hereinafter mentioned will help Canada in confirming that the certifications are true. By submitting a bid, the Bidder certifies that it is aware, and that its affiliates are aware, that Canada may request additional information, certifications, consent forms and other evidentiary elements proving identity or eligibility. Canada may also verify the information provided by the Bidder, including the information relating to the acts or convictions specified herein, through independent research, use of any government resources or by contacting third parties. Canada will declare non-responsive any bid in respect of which the information requested is missing or inaccurate, or in respect of which the information contained in the certifications is found to be untrue, in any respect, by Canada. The Bidder and any of the Bidder's affiliates, will also be required to remain free and clear of any acts or convictions specified herein during the period of any contract arising from this bid solicitation.

Bidders who are incorporated, including those bidding as a joint venture, must provide with their bid a complete list of names of all individuals who are currently directors of the Bidder ([See Annex D](#)). Bidders bidding as sole proprietorship, including those bidding as a joint venture, must provide the name of the owner with their bid. Bidders bidding as societies, firms, partnerships or associations of persons do not need to provide lists of names. If the required names 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 will render the bid non-responsive. Providing the required names is a mandatory



requirement for contract award.

Canada may, at any time, request that a Bidder provide properly completed and Signed Consent Forms (Consent to a Criminal Record Verification Form - PWGSC -TPSGC 229) (<http://www.tpsgc-pwgsc.gc.ca/app-acq/forms/229-eng.html>) for any or all individuals aforementioned within the time specified. Failure to provide such Consent Forms within the time period provided will result in the bid being declared non-responsive.



PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS

1. Security Requirement

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

- (a) the Bidder must hold a valid organization security clearance as indicated in Part 7 - Resulting Contract Clauses;
- (b) the Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work site(s) must meet the security requirement as indicated in Part 7 - Resulting Contract Clauses;
- (c) the Bidder must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites.

1.2 For additional information on security requirements, bidders should consult the "[Security Requirements for PWGSC Bid Solicitations - Instructions for Bidders](http://www.tpsgc-pwgsc.gc.ca/app-acq/lc-pl/lc-pl-eng.html#a31)" (<http://www.tpsgc-pwgsc.gc.ca/app-acq/lc-pl/lc-pl-eng.html#a31>) document on the Departmental Standard Procurement Documents Web site.



PART 7 - RESULTING CONTRACT CLAUSES

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

1. Statement of Work

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

2 Task Authorization (TA)

- (a) **Purpose of a TA:** Services to be provided under the Contract on an as-and-when-requested basis will be ordered by Canada using Appendix B to Annex B - Task Authorization Request and Acceptance Form ("TA Form").
- (b) **TA Procedures:** The procedures for issuing, responding to, assessing and approving Task Authorizations are described in Appendix A to Annex B.
- (c) **Authority to Issue a TA:** The Contracting Authority will be the only authority to issue tasks authorizations.
- (d) **Charges for Work under a TA:** The Contractor must not charge Canada anything more than the price set out in the TA unless Canada has issued a TA amendment authorizing the increased expenditure. Canada will not pay the Contractor for any design changes, modifications or interpretations of the Work unless they have been approved, in writing, by the Contracting Authority before being incorporated into the Work.
- (e) **Task Authorization Quotations:** The Contractor is required to submit a responsive quotation in response to every TA Form issued to it by Canada. In addition to Canada's other rights to terminate the Contract, Canada may immediately, and without further notice, terminate the Contract for default if during the Contract Period the Contractor in at least three instances has either not responded or has not submitted responsive quotations when issued a TA Form. A responsive quotation is one that is submitted within the time stated in the TA Form and meets all requirements of the TA issued, including quoting the required number of resources that meet the minimum experience and other requirements of the Categories of Personnel identified in the TA at pricing not exceeding the rates of Annex B.
- (f) **Consolidation of TAs for Administrative Purposes:** The Contract may be amended from time to time to reflect all TAs issued and approved by Canada to date, to document the Work performed under those TAs for administrative purposes.
 - (a) **TA Reports:** The Contractor must submit to the Contracting Authority a TA report on a quarterly basis that identifies each TA issued during that quarter and its dollar value.
 - (b) **Period of Services:** No Task Authorizations may be entered into after the expiry date of the Contract.

3. Standard Clauses and Conditions

All clauses and conditions identified in the Contract by number, date and title are set out in the [Standard Acquisition Clauses and Conditions](http://ccua-sacc.tpsgc-pwgsc.gc.ca/pub/acho-eng.jsp) (<http://ccua-sacc.tpsgc-pwgsc.gc.ca/pub/acho-eng.jsp>) Manual issued by Public Works and Government Services Canada.

4. General Conditions

2003 (2016-04-04), General Conditions - Higher Complexity - Services, apply to and form part of the Contract.

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



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

With respect to Section 30 - Termination for Convenience, of General Conditions 2003, unless already present, Subsection 04 is deleted and replaced with the following Subsections 04, 05 and 06:

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

4.2 Supplemental General Conditions

4006 (2010-08-16), apply to and form part of the Contract.

5.0 Security Requirement

SECURITY REQUIREMENT FOR CANADIAN SUPPLIER: SRCL#19

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



6.0 Term of Contract

6.1 Period of the Contract

- a. **Contract Period** : The "**Contract Period**" is the entire period of time during which the Contractor is obliged to perform the Work, **which includes** :
 - i. The "**Initial Contract Period**", which begins on the date the Contract is awarded and ends June 30, 2019; and
 - ii. the period during which the Contract is extended, if Canada chooses to exercise any options set out in the Contract.
- b. **Option to Extend the Contract** :
 - i. The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to two (2) additional one year option 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.

Canada may exercise this option at any time by sending a written notice to the Contractor before the expiry date of the Contract. The option may only be exercised by the Contracting Authority, and will be evidenced, for administrative purposes only, through a formal contract amendment

7. Authorities

7.1 Contracting Authority

The Contracting Authority for the Contract is:

Name:	<u>Megan Lamont</u>
Title:	<u>Team Leader</u>
Organization:	<u>Shared Services Canada</u>
Address:	<u>180 Kent Street, Ottawa, Ontario, K1G 4A8</u>
Telephone:	<u>(613) 219-7204</u>
Facsimile:	<u>(613) 960-6007</u>
E-mail Address:	<u>Megan.Lamont@canada.ca</u>

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.

7.2 Technical Authority

The Technical Authority for the Contract is: **(Will be provided at contract award)**

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

The Technical Authority named above is the representative of the department or agency for whom the Work is being carried out under the Contract and is responsible for all matters concerning the technical



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

**7.3 Contractor's Representative
(Will be provided at contract award)**

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

8. Payment

8.1 Basis of Payment

For the provision of professional services the Contractor will be paid for actual time worked, 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.

Estimated Cost: [\$ _____]

Applicable Taxes :

Estimated Cost: [\$ _____]

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.

Professional Services Rates: In Canada's experience, bidders from time to time propose rates at the time of bidding for one or more Resource Categories that they later refuse to honour, on the basis that these rates do not allow them to recover their own costs and/or make a profit. This denies Canada of the benefit of the awarded contract. If the Contractor does not respond or refuses to provide an individual with the qualifications described in the Contract (or proposes instead to provide someone from an alternate category at a different rate), whether or not Canada terminates the Contract as a whole, Canada may impose sanctions or take other measures in accordance with the PWGSC Vendor Performance Policy (or equivalent) then in effect, which may include an assessment that results in conditions applied against the Contractor to be fulfilled before doing further business with Canada, or full debarment of the Contractor from bidding on future requirements.

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

Overtime Rates: Any work performed in excess of 7.5 hours a day, shall be performed only upon the written authorization of the Project Authority. Payment of such time worked shall be paid at the applicable



per diem rate as specified in the Contract, prorated over an hourly basis. Hourly rates shall be determined by dividing the applicable per diem rate by 7.5.

On-call Rates: Services Provided Pursuant to Requirement On-Call Services

For Professional Services provided, the Contractor shall be paid one-tenth (1/10) the hourly rate of Resource Classifications associated with the person that is on-call.

8.2 Limitation of Expenditure

1. Canada's total liability to the Contractor under the Contract must not exceed \$ _____. and Goods and Services Tax or Harmonized Sales Tax is extra, if applicable.
2. No increase in the total liability of Canada or in the price of the Work resulting from any design changes, modifications or interpretations of the Work, will be authorized or paid to the Contractor unless these design changes, modifications or interpretations have been approved, in writing, by the Contracting Authority before their incorporation into the Work. The Contractor must not perform any work or provide any service that would result in Canada's total liability being exceeded before obtaining the written approval of the Contracting Authority. The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:
 - a. when it is 75 percent committed, or
 - b. four (4) months before the contract expiry date, or
 - c. as soon as the Contractor considers that the contract funds provided are inadequate for the completion of the Work,whichever comes first.
3. If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority a written estimate for the additional funds required. Provision of such information by the Contractor does not increase Canada's liability.

8.3 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 Contractor must repay any overpayment, at Canada's request.

9. Invoicing Instructions

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

Each invoice must be supported by:

- a. a copy of time sheets to support the time claimed;
 - b. a copy of the release document and any other documents as specified in the Contract;
 - c. a copy of the invoices, receipts, vouchers for all direct expenses, and all travel and living expenses;
 - d. a copy of the monthly progress report.
2. Invoices must be distributed as follows:

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



10. Certifications

- 10.1 Compliance with the certifications provided by the Contractor in its bid is a condition of the Contract and subject to verification by Canada during the term of the Contract. If the Contractor does not comply with any certification or 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.

11. Applicable Laws

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

12. Priority of Documents

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

- (a) the Articles of Agreement;
- (b) the general conditions 2035 2014-09-25, General Conditions - Higher Complexity - Services;
- (c) Annex A, Statement of Work;
- (d) Annex B, Basis of Payment;
- (e) Annex C, Security Requirements Check List
- (g) the Contractor's bid dated _____ (*insert date of bid*)

13. Foreign Nationals (Canadian Contractor)

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

14. Insurance Requirements

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

15. Limitation of Liability

1. 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 section, even if it has been made aware of the potential for those damages.
2. First Party Liability:
 - a. 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:



- i. any infringement of intellectual property rights to the extent the Contractor breaches the section of the general conditions entitled "Intellectual Property Infringement and Royalties";
 - ii. physical injury, including death.
 - b. 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.
 - c. Each of the Parties is liable for all direct damages resulting from its breach of confidentiality under the Contract. Each of the Parties is also liable for all indirect, special or consequential damages in respect of its unauthorized disclosure of the other Party's trade secrets (or trade secrets of a third party provided by one Party to another under the Contract) relating to information technology.
 - d. 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 (a) above.
 - e. 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:
 - i. 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
 - ii. 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 (ii) of the greater of .75 times the total estimated cost (meaning the dollar amount shown on the first page of the Contract in the block 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 \$200,000.00.
 - iii. In any case, the total liability of the Contractor under paragraph (e) will not exceed the total estimated cost (as defined above) for the Contract or \$200,000.00, whichever is more.
 - f. 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.
3. Third Party Claims:
 - a. 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.

- b. If Canada is required, as a result of joint and several liability, to pay a third party in respect of damages caused by the Contractor, the Contractor must reimburse Canada by the amount finally determined by a court of competent jurisdiction to be the Contractor's portion of the damages to the third party. However, despite paragraph (a), 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.
- c. The Parties are only liable to one another for damages to third parties to the extent described in this paragraph 3.

16. Joint Venture Contractor

- a. Supply Arrangement (SA) Holder's who wish to submit their proposal as a joint venture must have already been qualified under the SA # EN578-055605/D as a joint venture.
- b. The Contractor confirms that the name of the joint venture is _____ and that it is comprised of the following members: **[all the joint venture members named in the Contractor's bid will be listed]**.
- c. With respect to the relationship among the members of the joint venture Contractor, each member agrees, represents and warrants (as applicable) that:
 - (i) _____ has been appointed as the "representative member" of the joint venture Contractor and has fully authority to act as agent for each member regarding all matters relating to the Contract;
 - (ii) by giving notice to the representative member, Canada will be considered to have given notice to all the members of the joint venture Contractor; and
 - (iii) all payments made by Canada to the representative member will act as a release by all the members.
- d. 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.
- e. All the members are jointly and severally or solidarily liable for the performance of the entire Contract.
- f. 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

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.

17. Professional Services – General

- a. The Contractor must provide professional services on request as specified in this Contract. Where in the Contract a specific individual is identified as required to perform the Work, the Contractor must make such person available to perform the work within 10 working days of the issuance of the Contract or the TA (whichever first contains instructions from Canada for that individual to report to the Work site). Where such a specific individual is unavailable to perform the Work, Canada may elect to either (i) exercise its rights or remedies under the Contract or at law (including terminating the Contract for default), or (ii) Canada may require the Contractor to propose the replacement of the specific individual in accordance with the Article titled,



"Replacement of Specific Individuals" in the General Conditions 2035. This obligation applies despite any changes that Canada may have made to any hardware, software or any other aspect of the Client's operating environment. In respect of any given Category of Personnel, any replacement resource will be rated by the Technical Authority and the score obtained must be equal or superior.

- b. If there must be a change in a resource performing work under the Contract (which must in any case comply with the requirements in the section of the General Conditions entitled "Replacement of Specific Individuals"), the Contractor must make the replacement available for work within 10 working days of the departure of the existing resource (or, if Canada has requested the replacement, within 15 working days of Canada's notice of the requirement for a replacement).
- c. All resources provided by the Contractor must meet the qualifications described in the Contract (including those relating to previous experience, professional designation, education, and language proficiency) and must be competent to provide the required services by any delivery dates described in the Contract. The resource must be approved by Canada prior to the replacement at the Work site.
- d. The Contractor must monitor its employees to ensure satisfactory performance and that progress of the Work is maintained to Canada's satisfaction. A Contractor representative will meet with the Technical Authority on a regular basis (as specified by Canada) to discuss the performance of its resources and to resolve any issues at hand.
- e. If the Contractor fails to meet any of its obligations under this Article, or fails to deliver any deliverable 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 10 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.

18. 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.

19. Representations and Warranties

The Contractor made statements regarding its and its proposed resources experience and expertise in its bid that resulted in the award of the Contract and 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, 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.

20. Conflict of Interest - Unfair Advantage

1. In order to protect the integrity of the procurement process, bidders are advised that Canada may reject a bid in the following circumstances:



- a. if the Bidder, any of its subcontractors, any of their respective employees or former employees was involved in any manner in the preparation of the bid solicitation or in any situation of conflict of interest or appearance of conflict of interest;
 - b. if the Bidder, any of its subcontractors, any of their respective employees or former employees had access to information related to the bid solicitation that was not available to other bidders and that would, in Canada's opinion, give or appear to give the Bidder an unfair advantage.
2. The experience acquired by a bidder who is providing or has provided the goods and services described in the bid solicitation (or similar goods or services) will not, in itself, be considered by Canada as conferring an unfair advantage or creating a conflict of interest. This bidder remains however subject to the criteria established above.
3. Where Canada intends to reject a bid under this section, the Contracting Authority will inform the Bidder and provide the Bidder an opportunity to make representations before making a final decision. Bidders who are in doubt about a particular situation should contact the Contracting Authority before bid closing. By submitting a bid, the Bidder represents that it does not consider itself to be in conflict of interest nor to have an unfair advantage. The Bidder acknowledges that it is within Canada's sole discretion to determine whether a conflict of interest, unfair advantage or an appearance of conflict of interest or unfair advantage exists.

21. Materials and Tools

All materials and tools required in the performance of the work including office space, associated supplies, computing devices and telephony equipment are to be provided by the vendor unless otherwise agreed to by the designated technical authority

22. Electronic Procurement & Payment Support

- 22.1 SSC is working on an initiative that is expected to provide it with e-functionality from procurement through payment (the "**EPP system**"). SSC's suppliers will be required to interface with that functionality.
- 22.2 Because the functionality will not be ready at the time of contract award, if Canada wishes for the Contractor to interface with the EPP system during the Contract Period, Canada will issue a Request for Quotation regarding the work required for the Contractor to interface with the EPP system. The Contractor's Quotation Response will not be subject to a Service Delivery Interval. The Quotation Response must include, at a minimum:
- a) Per diem rates for any resources who would perform the work and the level of effort required; and
 - b) Any costs for hardware or software that will be required, including development costs to be performed by third parties.
- 22.3 The Parties agree to work cooperatively to determine the work involved and a reasonable ceiling price for that work. If the Parties agree to proceed with that work, Canada will issue a Contract Amendment documenting the ceiling price associated with the work. The Contractor will be required to submit a Service Design for approval by Canada and the work associated with the development of any EPP system interfaces will be treated as a Service Project.
- 22.4 Canada will pay the Contractor, in arrears, up to the ceiling price established in the contract amendment, for actual time worked and any resulting deliverables in accordance with firm, all-inclusive per diem rates set out in the relevant contract amendment, with GST/HST extra. Partial days will be prorated based on actual hours worked based on a 7.5-hour workday. When submitting its invoices, the Contractor must show the actual time worked by each resource,



and/or the amount paid to any subcontractor. With respect to any expenses, the Contractor will be required to demonstrate the out-of-pocket amount spent and will be reimbursed without the addition of any overhead.



ANNEX A STATEMENT OF WORK

1. OBJECTIVE

To acquire 26 categories of Informatics professional services from the private sector by using the Task-Based Informatics Professional Services (TBIPS) supply arrangement on an as required basis. The period of the contract is for 2 years at \$4 million per year with an option to extend the contract(s) for an additional 2 years at \$4 million per year. The total value of the contract is estimated at \$16 million over a 4 year period.

1.1 BACKGROUND

The Office of the Chief Information Office (CIO), at Shared Services Canada (SSC), is responsible for providing internal Information Technology (IT) and Information Management (IM) Services to SSC. Since SSC is a new department created in 2011, many of its internal services have to be organized from scratch, including IT and IM services for SSC internal clients. The role of the CIO is to enable and optimize the best possible IM/IT solution for business /clients within SSC; Capitalize on opportunities for ruthless standardization and be a model CIO shop for GoC.

In addition, the basic Operating Principles of the CIO are to allow Clients to define requirements while CIO selects/architects solutions; Balance the needs of the client and enterprise; Provide a Single Point of Contract for Clients; Use a Risk Managed Approach where Risks (e.g., security) are visible and managed; and provide transparency in Decision Making through Process & Governance.

In SSC for the CIO to fulfill its role: Clients must bring all internal IM/IT related business requirements to the CIO; All agreements for internal IM/IT solutions must be signed by the CIO; and all procurement of IM/IT products, tools, solutions for internal use must be signed off by the CIO.

Since SSC has a large and changing requirement for IT and IM internally, contract professionals both for the short and long term are required to fill internal Informatics needs. These needs will continue for the foreseeable future while SSC is being set up and to accommodate changing priorities as well as client requirements.

2. SCOPE OF WORK

- 2.1 The Contractor must provide Informatics Professional Services in twenty six resource categories. These professional services are required for a large number of projects all related to the CIO mandate, or in general activities related to conducting these projects (such as technical writers, project coordinators, and project managers).
- 2.2 The duration of projects may vary, for example, from two weeks to two years. The Contractor personnel involved in both shorter and longer-term projects must be prepared to perform the same tasks repetitively, during periods that may extend up to one year. The Contractor personnel involved in longer duration projects may be required to participate in either all of the project, or only the part of the project pertaining to their area of expertise (possibly while working in a preformed project team).
- 2.3 The Contractor personnel will work independently but also will take instructions from the CIO, its designate or other SSC representatives. Contents of the deliverables may vary and may include, for example: project plans; architecture studies requiring a high-level, broad view of technology; specifications for services requiring an intimate knowledge – both theoretical and practical – of a particular technology; or proof of concepts and technology trials requiring operational knowledge and hands-on experience.



- 2.4 The required services will be related to one or more of the following activities. These activities are not inclusive of the entire spectrum of activities which may require the involvement of Contractor personnel.
- 2.5 Review and confirm the various internal SSC Architectures in support of internal service delivery, systems development and integration strategies;
- 2.6 Provide advice on all aspects of the existing IT and IM strategies (including Data Management), more specifically on the integration components of various systems both in production and under development by SSC such as, but not limited to, Analytics and Business Intelligence (BI) systems, Information Management systems, ERP systems, workflow tools, web content management, customer relationship management and secure file transfer;
- 2.7 Provide the target blueprint for technology innovation that will serve as a baseline to establish buy versus build decisions for internal SSC solutions within the shared-services framework;
- 2.8 Development/support the internal SSC IM/IT vision, architecture, plans, strategies, policies, system development methodologies, Project Management frameworks and strategies;
- 2.9 Facilitate a strategy, direction and architecture for, but not limited to, the following IT and IM drivers for internal services:
 - a) Information Management Strategy
 - b) Document/Record/Data Management
 - c) Enterprise Applications Development/Maintenance
 - d) Enterprise Resource Planning and Support
 - e) Web Content Management
 - f) Workflow Solutions
 - g) Office Automation
 - h) Messaging and Collaborative Services
 - i) Web Services Framework
 - j) Server modernization
 - k) E-Applications development and delivery;
 - l) Data Analytics and Business Intelligence
- 2.10 Review system development and integration strategies;
- 2.11 Review architecture artifacts produced to date;
- 2.12 Provide advice on all aspects of the systems integration strategy;
- 2.13 Interact with both internal and external facing SSC sectors as required;
- 2.14 Plan and participate in the proof of concept activities of chosen products;
- 2.15 Support CIO in the acquisition of hardware and software and components;
- 2.16 Ensure technology architecture requirements align with SSC standards;
- 2.17 Participate as required in the request for proposal (RFP) evaluation teams after having first self-identified to SSC any potential conflict of interest;
- 2.18 Deliver technology architecture design, technical design and component design
- 2.19 Provide technical guidance to team members and CIO sector and SSC clients;



- 2.20 Assist in establishing design, development, acceptance and testing standards, guidelines and principles;
- 2.21 Provide model and document current technology architecture; design future state technology architecture based on business strategies and needs, as well the technology framework/architecture;
- 2.22 Define transition steps and plans to move from current to future application architectures, including interoperability with existing applications, interfaces and migration strategies where applicable;
- 2.23 Assist in reviewing and defining functional requirements, testing requirements, user interface designs, usability reviews, performance reviews, operability reviews;
- 2.24 Report methodology compliance and reuse profile as defined;
- 2.25 Identify tasks and track progress within the required area of responsibility;
- 2.26 Provide technical and engineering support to in a number of areas related to information technologies and telecommunications services;
- 2.27 Provide ongoing IT and IM professional advice and perform investigations into the ongoing, design, deployment, and management of secure business computing and telecommunications services in SSC and field locations remotely, and from other locations such as home offices, airports, train stations and hotels;
- 2.28 Assist in the practical deployment of plans, strategies, applications and services to meet the business and operational needs of the clients;
- 2.29 Coordinate and work with a multi-disciplinary team of specialist;
- 2.30 Provide professional IT support and assistance to clients for multiple business applications including ERP, IM, Data Management, Analytics and BI systems;
- 2.31 Document the results of project based on input from other team members;
- 2.32 Perform IT security risk management; and
- 2.33 Perform and/or review privacy impact assessments.

3. ROLE DESCRIPTIONS

The following provides a description of the proposed tasks and duties to be performed by each resource category.

3.1 A.1 - Application Architect – Level 3

The Technology Architect will be responsible for, but not limited to, the following tasks:

- Develop technical architectures, frameworks and strategies, either for an organization or for a major application area, to meet the business and application requirements.
- Identify the policies and requirements that drive out a particular solution.
- Analyze and evaluate alternative technology solutions to meet business problems.
- Ensures the integration of all aspects of technology solutions.



- Monitor industry trends to ensure that solutions fit with government and industry directions for technology.
- Provide information, direction and support for emerging technologies.
- Perform impact analysis of technology changes.
- Provide support to applications and/or technical support teams in the proper application of existing infrastructure.
- Review application and program design or technical infrastructure design to ensure adherence to standards and to recommend performance improvements.

3.2 A.12 - Web Architect – Level 3

The Web Architect will be responsible for, but not limited to, the following tasks:

- Define architecture to be used in web-based projects.
- Perform architectural modeling to ensure consistency of the design with existing work.
- Select the development language to be used for the project.
- Assess the impact of the new requirements on existing web applications.
- Develop code based upon the design and requirements documents.
- Write code to write and read from the database.
- Unit test the code prior to releasing it for the integration testing.
- Monitor the need for architectural changes as the project progresses.
- Develop test plans for testing the system.
- Ensure functionalities have been implemented according to specifications.
- Define assumptions and constraints of architecture with regard to physical structure and data collection.
- Develop post-implementation plan for monitoring/tracking architecture stability.

3.3 A.13 - Web Designer – Level 3

The Web Designer will be responsible for, but not limited to, the following tasks:

- Define architecture to be used in web-based projects.
- Create and apply designs that maximize usability of existing objects.
- Perform architectural modeling to ensure consistency of the design with existing work.
- Select the development language to be used for the project.
- Assess the impact of the new requirements on existing web applications.
- Develop code based upon the design and requirements documents.
- Write code to write and read from the database.
- Unit test the code prior to releasing it for the integration testing.
- Monitor the need for architectural changes as the project progresses.
- Develop test plans for testing the system.
- Ensure functionalities have been implemented according to specifications.
- Define assumptions and constraints of architecture with regard to physical structure and data collection.
- Develop post-implementation plan for monitoring/tracking architecture stability.

3.4 A.14 - Web Developer – Level 3

The Web Developer will be responsible for, but not limited to, the following tasks:



- Develop and prepare diagrammatic plans for web-based service delivery over the internet.
- Analyze the problems outlined by systems analyst/designers in term of such factors as style and extent of information to be transferred across the internet.
- Select and use the best available web development tools for linking the internet-based client to the departmental “back-end” information delivery programs and database.
- Design high usability web pages to meet the requirements.
- Verify accuracy and completeness of programs by preparing sample data, and testing them by means of system acceptance test runs made by operating personnel.
- Correct program errors by revising instructions or altering the sequence of operations.
- Test instructions, and assemble specifications, flow charts, diagram, layouts, programming and operating instructions to document applications for later modification or reference.

3.5 A.7 - Programmer/Analyst – Level 2 & 3

The Programmer/Analyst will be responsible for, but not limited to, the following tasks pertaining to SSC internal systems including ERP, Analytics, BI and IM systems:

- Create and modify code and software.
- Create and modify screens and reports.
- Gather and analyze data for the conduct of studies to establish the technical and economic feasibility of proposed computer systems, and for the development of functional and system design specifications.
- Design methods and procedures for small computer systems, interfaces, and sub-system of larger systems.
- Develop, test and implement interfaces, small computer systems, and sub-systems of larger systems.
- Produce forms, manuals, programs, data files, and procedures for systems and/or applications.

3.6 A.8 - System Analyst – Level 3

The System Analyst will be responsible for, but not limited to, the following tasks:

- Develop requirements, feasibility, cost, design, and specification documents for systems.
- Implement systems to support projects, departments, organizations or businesses.
- Translate business requirements into system design and specifications.
- Analyze and recommend alternatives and options for system solutions.
- Develop technical specifications for systems development, design, and implementation.

3.7 B.1 - Business Analyst – Level 3

The Business Analyst will be responsible for, but not limited to, the following tasks:

- Develop and document statements of requirements for considered alternatives.
- Perform business analyses of functional requirements to identify information, procedures, process and decision flows. Evaluate existing procedures and methods, identify and document items such as database content, structure, application subsystems.
- Develop data dictionary.



- Define, develop and document interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems including ERP systems.
- Identify candidate business processes for re-design, prototype potential solutions, provide trade-off information and suggest a recommended course of action. Identify modifications to the automated processes.
- Establish acceptance test criteria with client for systems including ERP, Analytics, Data Management and BI systems.
- Support and use the selected departmental methodologies.
- Support for PeopleSoft, SAP and Analytics and BI Systems.

3.8 B.14 - Technical Writer - Level 3

The Technical Writer will be responsible for, but not limited to, the following tasks:

- Document-help text, user manuals, technical documentation, web page content, etc.
- Review documentation standards and the existing project documentation.
- Determine documentation requirements and makes plans for meeting them.
- Gather information concerning the features and functions provided by the developers.
- Assess the audience for the documents/manuals which are required and prepare a statement of purpose and scope for each.
- Develop a table of content for each document/manual and write or edit the required content.
- Investigate the accuracy of the information collected by making direct use of the material being documented.
- Prepare or coordinate the preparation of any required illustrations and diagrams.
- Design the layout of the documents/manuals.
- Use word-processing, desk-top publishing and graphics software packages to produce camera-ready copy.

3.9 B.2 - Business Architect - Level 2

Responsibilities could include but are not limited to:

- Develop policies and rules that allow an organization to carry out its mandate and functional responsibilities, and that govern the organization's actual and planned capabilities in terms of computers, data, information, human resources, communication facilities, software and management responsibilities.
- Develop the specifications for where, how and why the various organizational components fit together as they do, and how they support the organization's mandate.
- Work with development team to create, implement and/or maintain IM, BI and analytics enterprise solutions.
- Develop and apply roadmaps for change in terms of data, information, information management; and business intelligence and analytics.

3.10 B.3 - Business Consultant - Level 2

Responsibilities could include but are not limited to:



- Analyze, evaluate, develop business processes (financial, operational, systems, etc.).
- Identify organizational and/or project business opportunities for improvement and streamlining of business processes.
- Identify and evaluate critical success parameters, factors and performance measurements.
- Assist other stakeholders in development and implementation of business improvement processes and programs.

3.11 B.5 - Business Process Reengineer Level 2

Responsibilities could include but are not limited to:

- Review existing work processes and organizational structure.
- Analyze business functional requirements to identify information, procedures and decision flows.
- Identify candidate processes for re-design; prototype potential solutions, provide trade-off information and suggest a recommended course of action. Identify the modifications to the automated processes.
- Provide expert advice in defining new requirements and opportunities for applying efficient and effective solutions; identify and provide preliminary costs of potential options.
- Provide expert advice in developing and integrating process and information models between processes to eliminate information and process redundancies.
- Identify and recommend new processes and organizational structures.
- Provide expert advice on and/or assist in implementing new processes and organizational changes.
- Document workflows.
- Use business, workflow and organizational modeling software tools.

3.12 C.16 - PIA Specialist - Level 3

The Privacy Specialist will be responsible for, but not limited to, the following tasks:

- Complete PIA reports in order to analyze, assess and mitigate any significant privacy risks associated with the existing or new information technology and information management systems.
- Prepare project cost estimates for completion of PIA's
- Review project documentation related to IT issues, technologies and architecture influencing privacy risks
- Report on compliance with policy, standards processes and procedures
- Develop and provide progress reports on the projects against project plans
- Provide development guidance and assist in the identification, implementation, and maintenance of organization's senior management to establish organization-wide privacy policies.
- Perform information privacy risk assessments and monitoring activities, as well as investigate privacy breaches that may occur.
- Develop, deliver, and participate in privacy training and orientation activities to all organizational staff and other stakeholders.



3.13 C.7 - IT Security Design Specialist - Level 3

The Security Specialist will be responsible for, but not limited to, the following tasks:

- Developing IT security policies, standards, guidelines and procedures.
- Reviewing existing security policies, standards, guidelines and procedures and providing advice as to their appropriateness and effectiveness.
- Conducting compliance audits of IT operations, application systems and infrastructure.
- Conducting security threat and risk assessments of IT facilities, IT infrastructure, application systems and communications.
- Conducting reviews of backup and recovery plans.
- Investigating security incidents and reporting cause and related weaknesses and recommending remedies.
- Designing the security framework and implementing the security components of IT infrastructure required to protect assets and to support application systems.
- Providing advice on the security aspects of application or infrastructure systems under development.
- Developing and delivering IT Security awareness and training programs.

3.14 I.1 - Data Conversion Specialist - Level 3

Responsibilities could include but are not limited to:

- Oversee all facilities of the conversion process.
- Complete mapping, interfaces, mock conversion work, enhancements, actual conversion, and verify completeness and accuracy of converted data.
- Establish a strong working relationship with all clients, interact effectively with all levels of client personnel, and provide conversion support.
- Analyze and coordinate data file conversions.
- Work with importing files from heterogeneous platforms.

3.15 I.3 - Database Analyst / IM Administrator - Level 2

The Database Administrator must work defining systems requirements and alternatives and may be required to supervise the activities of 1 or more Programmer/Analysts or programmers. Their responsibilities could include but are not limited to the following tasks:

- Develops, maintains and enforces database design.
- Plans, develops, tests and implements new database structures.
- Plans, develops, tests and implements database load and/or conversion strategies as required
- Identify requirements for improvements to existing databases by determining users' information and functional requirements and managing and monitoring the allocation of storage, processor and network resources.
- Develop and coordinate back-up, disaster recovery and virus protection procedures.
- Develop and implement security procedures for the database, including access and user account management.
- Advise programmers, analyst, and users about the efficient use of data.
- Maintain data dictionaries.



- Control and coordinate changes to the data, including the deletion of records, changes to the existing records, and additions to the database.
- Mediates and resolves conflicts among users' needs for data.
- Develop and implement procedures that will ensure the accuracy, completeness, and timeliness of data stored in the database.

3.16 I.4 - Data/IM Modeler – Level 2

Responsibilities could include but are not limited to:

- The Data Architect has both strategic and tactical responsibility for developing and maintaining the Architecture and Data Models for corporate and project specific initiatives. This responsibility includes the identification of data most valuable to the department, the integration of this data, and the development of core relating data models. The resulting data models will be based on data architecture and modeling design principles and tenets.
- Design, develop and maintain Logical Data Models.
- Analyze proposed changes to databases from the context of the Logical Data Model.
- Provide technical expertise in the use and optimization of data modeling techniques to team members.
- Provide technical assistance, guidance and direction in terms of data analysis and modeling to team members.
- Provide assistance to project team and business users relating to data issues and data analysis concepts.
- Participate in the development of data modeling and metadata policies and procedures.
- Participate in data analysis as a result of new/updated requirements.
- Apply approved changes to logical data models.
- Comply with corporate data architectures, strategies and frameworks, including enterprise data warehouse activities.
- Analyze and evaluate alternative data architecture solutions to meet business problems/requirements to be incorporated into the corporate data architecture.
- Review corporate architecture strategies and directions, data requirements, and business information needs and devise data structures to support them.
- Improve modeling efficiency through recommendations on how to better utilize current metadata repositories.
- Comply with corporate repository metadata directions.
- Provide input to refinement of data architectures.
- Participate in data architecture refinement.
- Define access strategies.
- Construct, monitor and report on work plans and schedules.

3.17 I.5 - IM Architect - Level 2

Responsibilities could include but are not limited to:

- Analyze existing capabilities and requirements, develop redesigned frameworks and recommend areas for improved capability and integration. Develop and document detailed statements of requirements.
- Evaluate existing procedures and methods, identify and document database content, structure, and application subsystems, and develop data dictionary.



- Define and document interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems.
- Prototype potential solutions provide tradeoff information and suggest recommended courses of action.
- Perform information modeling in support of BPR implementation.
- Perform cost/benefit analysis of implementing new processes and solutions.
- Provide advice in developing and integrating process and information models between business processes to eliminate information and process redundancies.
- Provide advice in defining new requirements and opportunities for applying efficient and effective solutions; identify and provide preliminary costs of potential options.

3.18 I.5 - IM Architect – Level 3

Responsibilities could include but not limited to:

- Provide specialized IM advice/services, guidance and support to senior management including the Director of IM, the CIO, all departmental Branch ADM and the Deputy Minister;
- Analyze existing department wide IM requirements and frameworks, procedures and methods , develop and/or redesign IM roadmap, products and services and recommend areas for improved IM capability, efficiency and integration;
- Advise on the development and implementation of IM policies, guidelines and directives, processes and tools to align with Departmental, Government of Canada acts and regulations and industry best practices
- Develop and deliver information management services, advice and awareness to departmental personnel at all levels
- Support integration of IM requirements into departmental business and information technology strategies and plans;
- Collaborate with program managers to address information life cycle requirements in the development and operation of processes, systems, standards and tools that support business information requirements
- Analyse newly introduced or changed legislation, policies and standards for IM impact
- Work with GC or departmental information/data standards to provide input to the design and maintenance of GCDOCS and supporting processes and procedures to ensure compliance with TBS IM policies, guidelines and directives
- Develop and implement key foundation resources and tools to support the corporate IM repository, function based file classification structure and related subfolders, quality control and monitoring best practices, training modules and performance measures reports in accordance with existing corporate and/or Government of Canada IM frameworks, methodologies, products and tools;
- Provide specialized IM advice/services, tools (templates and frameworks), guidance and support to departmental personnel at all levels.
- Lead consultations with the Library and Archives of Canada and Treasury Board Secretariat on behalf of the CIO to complete and maintain key IM lifecycle products and tools and to facilitate the identification of information resources of archival value (IRAV) and dispose of information resources of business value (IRBV).
- Evaluate existing procedures and methods, identify and document database content, structure, and application subsystems, and develop data dictionary.
- Prototype potential solutions, provide trade-off information and suggest recommended courses of action.
- Perform information modelling in support of Business Process Re-engineering implementation.



- Provide advice in defining new requirements and opportunities for applying efficient and effective solutions; identify and provide preliminary costs of potential options.
- Perform GCDOCS systems administrator activities including amending permissions, entering folders, creating short-cuts and collections and amending the file classification in the GCDOCS RM classification workspace.
- Develop and provide briefings and presentations to senior management and client business areas as required.

3.19 P.1 - Change Management Consultant – Level 3

Responsibilities could include but are not limited to:

- Analysis and development of business “critical success factors”.
- Analysis and development of architecture requirements design, process development, process mapping and training.
- Responsible for leading other functional staff to define business strategy and processes in support of transformation and change management activities.
- Participate in change impact analysis and change management activities.
- Participate in organizational realignment (job re-design organizational re-structuring).
- Coordinate development of training and coordination with other stakeholders.
- Create presentations and present to various stakeholders, and facilitate meetings and discussions.

3.20 P.11 - Quality Assurance Specialist/Analyst - Level 2

The Quality Assurance Specialist/Analyst is responsible for providing assistance to people in a variety of roles pertaining to SSC internal IT systems including ERP and IM systems. Responsibilities could include but are not limited to the following tasks:

- Lead development of test plans, test scripts and test data.
- Participate in functional and technical design reviews, perform integration/functional and system testing, and verify test results.
- Identify and document software defects.
- Participate with other project resources to resolve defects.
- Perform regression testing of software applications.
- Develops quality assurance processes, procedures, metrics, forms and tools
- Develops software development standards
- Makes recommendations for improvement

3.21 P.12 - Risk Management Specialist - Level 2

Responsibilities could include but are not limited to:

- Conduct risk assessments.
- Identify project risks and overall project risks.
- Recommend alternative solutions, methodologies and strategies for risk mitigation and management.
- Produce risk management plans.
- Conduct risk assessments for troubled projects to quickly assess associated risks and recommend courses of action to minimize inherent risks.
- Assist in prioritization and assignments of risks.



- Assist in the development and/or implementation of Risk Management Plans.
- Manage the implementation of Risk Management Plans to identify, analyze, plan, track and control project risks on a continuous basis throughout the project life cycle.
- Coach, mentor and train project teams in risk mitigation techniques.

3.22 P.7 - Project Coordinator – Level 2

The Project Coordinator will be responsible for, but not limited to, the following tasks:

- Assist project management and data processing professionals, technical users and end users in project coordination and synchronization tasks.
- Provide administrative and technical support of a clerical nature as required to a project team.
- Assist in performing such tasks as maintaining project documentation and application/system libraries.
- Act as the first or single point of contact in a “hot-line” situation by accepting incoming calls, logging calls, attempting to resolve simple problems and following established procedures for more difficult problems.
- Track project change requests.
- Maintain and updates relevant project information in manual and/or electronic files; project information might include such things as project activity schedule, status reports, correspondence.
- Use computer tools, aids system control languages on PCs, minis or mainframes to perform work.
- Communicate with project management and data processing professionals, technical users and end users on administrative matters related to the project.

3.23 P.9 - Project Manager – Level 3

The Project Manager will be responsible for, but not limited to, the following tasks:

- Manage several Project Managers, each responsible for an element of the project and its associated project team.
- Manage the project during the development, implementation and operations startup by ensuring that resources are made available and that the project is developed and is fully operational within previously agreed time, cost and performance parameters.
- Formulate statements of problems; establishes procedures for the development and implementation of significant, new or modified project elements to solve these problems, and obtain approval thereof.
- Define and document the objectives for the project; determine budgetary requirements, the composition, roles and responsibilities and terms of reference for the project team.
- Report progress of the project on an ongoing basis and at scheduled points in the life cycle.
- Meets in conference with stakeholders and other project managers and states problems in a form capable of being solved.
- Prepare plans, charts, tables and diagrams to assist in analyzing or displaying problems; work with a variety of project management tools.
- Obtain project sign-off



4. DELIVERABLES

- 4.1 The actual requirements for resources will be identified on an “as-and-when-requested” basis through an approval Task Authorization (TA).
- 4.2 In addition to the services described in each resource category, while performing the Work each resource must provide to or a representative of a GC entity technical advice and the transfer of functional knowledge through the provision of written documents and individual and group training.
- 4.3 The Contractor must provide the deliverables (in draft, final or both forms) to the Technical Authority or their representative as specified in each TA. The scope and specific content of each deliverable will be submitted to the Technical Authority for review and to determine acceptance.
- 4.4 The final copies of the deliverables must incorporate the comments received and changes requested by the Technical Authority or their representative and will be delivered on or before the end date specified in each TA.
- 4.5 Each resource must submit a weekly status report to the Technical Authority conforming to the report format specified in each TA.

5. REGULAR MEETINGS

The Contractor’s Project Authority must meet with the Technical Authority or their representative on a monthly basis or as requested to discuss any issues associated with the provision of the required Informatics Professional Services. These meetings will be at no additional cost.

6. SERVICE LEVELS

6.1 Normal Working Hours

Normal working hours will be no earlier than 7:00 am to no later than 6:00 pm EST Monday through Friday (with the exception of statutory holidays as defined by the province of work). The Contractor will be expected to work 7.5 hours/day within normal working hours, unless arrangements are made ahead of time with the Technical Authority. The Technical Authority will authorize additional hours of work in advance at the same rate as normal office hours. The Contractor will normally work during regular business hours, on site, unless otherwise agreed upon by the Contractor and the Technical Authority. For the duration of the contract all personnel must be available to work outside normal office hours as required.

6.2 Outside Normal Working Hours and Call Back

The Contractor personnel might also be requested to:

- (a) work outside normal working hours or during week-ends to perform urgent tasks, fix production, pre-production, or proof-of-concept tasks and problems;
- (b) be available outside normal working hours on “stand-by”, with a pager and notebook computer provided by SSC; and
- (c) work shifts when participating in business recovery which may include the rebooting of an informatics system or similar work, in exercise format or for real.

6.3 Work location

The work will be performed on premises located within the National Capital Region (NCR) or other satellite locations of SSC. Over the duration of the Contract, the main location of business of various locations or Branches may change but will remain in the National Capital Region (NCR), and no costs will be paid by to the Contractor to compensate for any costs associated with such transition. There may be occasional meetings at other locations in the NCR or at other GC premises, but no significant travel will be required. All expense for travel within the NCR is to be paid by the Contractor.



**APPENDIX A TO ANNEX A
TASK AUTHORIZATION PROCEDURES
(Upon Contract Award)**

1. TA Request

- (a) Where a requirement for a specific task has been identified and a TA is to be provided to the Contractor in accordance with the allocation methodology described in the Contract Article titled “Task Authorization”, a TA Form, as attached at Appendix B to Annex B, will be prepared by the Technical Authority and sent to the Contractor.
- (b) A TA Form will contain the following information, if applicable:
 - (i) a task number;
 - (ii) the details of any financial coding to be used;
 - (iii) the date by which the Contractor’s response must be received by the Contract Authority;
 - (iv) a brief statement of work for the task identifying the resource category(ies), level and specialty required and describing the activities to be performed including any deliverables;
 - (v) the interval during which the task is to be carried out (beginning and end dates);
 - (vi) the number of person-days of effort required;
 - (vii) the specific work location; and
 - (viii) any other constraints that might affect the completion of the task.

2. TA Quotation

- (a) Once it receives the TA Form, the Contractor must submit a quotation to the Contract Authority, identifying its proposed resources and detailing the cost and time to complete the task(s). The quotation must be based on the rate(s) set out in the Contract. The Contractor will not be paid for providing the quotation or for providing other information required to prepare and issue the TA. The Contractor must provide any information requested by Canada in relation to the preparation of a TA within 5 working days of the request.
- (b) For each proposed resource the Contractor must supply:
 - (i) A resume and completed Appendix C to Annex A for the Category(ies) of Personnel and level(s) identified in the TA Form. The Contractor’s quotation must demonstrate that each proposed resource meets the mandatory 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 Contractor or employees of a subcontractor, or these individuals may be independent contractors to whom the Contractor would subcontract a portion of the Work.
 - (B) For educational requirements for a particular degree, designation or certificate, Canada will only consider educational programmes that were successfully completed by the resource by the time of bid closing. For post secondary education, Canada will only accept credentials from institutions recognized by the Department of Education of any Canadian province, or for those obtained in a foreign country, by either of the credential assessment organizations listed on the Website: <http://www.cicic.ca/>
 - (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’s governing body throughout the evaluation and Contract Period.



- (D) 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.
- (E) For any requirements that specify a particular time period (e.g., 2 years) of work experience, Canada will disregard any information about experience if the individual's resume does not include the relevant dates for the experience claimed (i.e., the start date and end date).
- (F) For work experience to be considered by Canada, the Contractor's response 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, only one project will be counted toward any requirements that relate to the individual's length of experience.

(ii) The following security information:

SECURITY INFORMATION	CONTRACTOR TO INSERT DATA
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	

(iii) Certifications at Appendix D to Annex A (as applicable).

- (c) The quotation must be submitted to the Contract Authority 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.

3. Resource Assessment

- (a) Each proposed resource will be assessed for compliance with the mandatory requirements identified in Appendix C to Annex B applicable to that Category of Personnel. Proposed resources that do not comply with each and every mandatory criteria will not be accepted.
- (b) Canada reserves the right to request references from the Contractor to conduct a reference check to verify the accuracy of the information provided. If references are requested, Canada will conduct the reference check in writing by e-mail (unless the contact at the reference is only available by telephone). A Contractor will not be responsive to a mandatory requirement unless the response is received to an e-mail reference check request 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 evaluated. The mandatory requirement will not be considered 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 the mandatory requirement be 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. TA Acceptance

- (a) Once the Contractor's quotation has been accepted by the Technical Authority, the TA Form will be signed by Canada and provided to the Contractor for signature. Whether or not to approve or issue a TA is entirely within Canada's discretion.
- (b) The TA Form must be appropriately signed by Canada prior to commencement of any work. The Contractor must not commence work until a fully signed TA Form has been received, and any work performed in its absence is done at the Contractor's own risk.



APPENDIX B TO ANNEX A

**EXAMPLE: Task Authorization Request and Acceptance Form
Sigma/P2P Task Authorization form will be accepted as well.**

TASK AUTHORIZATION (TA) FORM					
CONTRACTOR		CONTRACT NUMBER:			
COMMITMENT		FINANCIAL CODING:			
TASK NUMBER		ISSUE DATE:		RESPONSE REQUIRED BY:	
1. STATEMENT OF WORK (WORK ACTIVITIES AND DELIVERABLES):					
SEE ATTACHED FOR STATEMENT OF WORK AND CERTIFICATIONS REQUIRED.					
2. PERIOD OF SERVICES:		FROM (DATE):		TO (DATE):	
3. WORK LOCATION:					
4. TRAVEL REQUIREMENTS:					
5. LANGUAGE REQUIREMENTS:					
6. OTHER CONDITIONS/CONSTRAINTS:					
7. LEVEL OF SECURITY CLEARANCE REQUIRED FOR THE CONTRACTOR' PERSONNEL:					
RESOURCE CATEGORY	NAME OF PROPOS	PWGSC SECURITY FILE	PER DIEM RATE	ESTIMATED # OF DAYS	TOTAL COST
ESTIMATED COST					
GST					
TOTAL LABOUR COST					
ESTIMATED TRAVEL COST (IN ACCORDANCE WITH					
TOTAL ESTIMATED COST					
8. SIGNING AUTHORITIES:					
Name, Title and Signature of Individual Authorized to Sign on Behalf of Contractor		Contractor (signature)		Date:	
Name, Title and Signature of Individual Authorized to Sign on Behalf of SSC – PVR (Technical Authority)		SSC-PVR (signature)		Date:	
You are requested to sell to her Majesty The Queen in Right of Canada, in accordance with the terms and conditions set out herein, referred to herein, or attached hereto, the services listed herein and in any attached sheets at the price set out thereof.					



APPENDIX C TO ANNEX A

RESOURCE ASSESSMENT CRITERIA AND RESPONSE TEMPLATES

(TO BE USED WHEN THE CONTRACT IS AWARDED)

D1.0 Task Authorization (TA) Initiation

Where a requirement for a specific task has been identified a TA will be provided to the Contractor. The qualifications and experience of the proposed resources will be assessed against the requirements set out in the below tables to determine each proposed resources compliance with the criteria identified in Section D.2 of this Annex.

D1.1 Assessment

The qualifications and experience of the proposed resources will be assessed against the requirements set out in the appropriate category and level below.

D1.2 Acceptance

Once the TA Technical Authority has accepted the quotation, the TA will be signed by the Contracting Authority and provided to the Contractor for signature. All TA Forms will be signed by the Contracting authority final approval.

D2.0 RESOURCES ASSESSMENT CRITERIA AND RESPONSE TABLES

Table 1			
Category: A.1 Application Architect - Level 3			
No.	Description	Met / Not Met	Cross Reference to Proposal
M1	The bidder must demonstrate that the proposed resource meets the requirement of Application Architect - Level 3 in accordance with TBIPS SA.		
M2	The proposed resource must possess one of the following: A degree from a recognized university in a related business or technology discipline; OR A two-year diploma from a recognized college in a related business or technology discipline and a minimum of two (2) years of experience in a related business or technology discipline; OR A degree from a recognized university in any field and a minimum of five (5) years of experience in a related business or technology discipline.		
M3	The proposed resource must have a minimum of ten (10) years' experience working as an Application Architect as outlined in Annex 'A', Statement of Work - Section 3.0 – Role Descriptions.		



M4	The proposed resource must have 10 years of experience performing the design, development, support and maintenance of enterprise application(s) and data warehouse architecture(s).		
M5	The proposed resource must have 5 years of experience performing database architecture and data modeling.		
M6	The proposed resource must have 3 years of experience using ETL tools such as Oracle PL/SQL, SAS DI Studio and / or Cognos.		

Table 2			
Category: A.7 Programmer/Analyst - Level 2			
No.	Description	Met / Not Met	Cross Reference to Proposal
M6	The bidder must demonstrate that the proposed resource meets the requirement of Programmer/Analyst - Level 2 in accordance with TBIPS SA.		
M7	Education The proposed resource must possess one of the following: A degree from a recognized university in a related business or technology discipline; OR A two-year diploma from a recognized college in a related business or technology discipline and a minimum of two (2) years of experience in a related business or technology discipline; OR A degree from a recognized university in any field and a minimum of five (5) years of experience in a related business or technology discipline.		
M8	The proposed resource must have a minimum of five (5) years' experience working as a Programmer/Analyst as outlined in Annex 'A', Statement of Work - Section 3.0 – Role Descriptions.		
M9	The proposed resource must have a minimum of five (5) years' experience performing the design, development and execution of extract, transform and load (ETL) processes for enterprise data warehouse solutions.		

Table 3			
Category: A.8 System Analyst - Level 3			
No.	Description	Met / Not Met	Cross Reference to Proposal
M10	The bidder must demonstrate that the proposed resource meets the requirement of System Analyst - Level 3 in accordance with TBIPS SA.		
M11	The proposed resource must possess one of the following: A degree from a recognized university in a related business or technology discipline; OR A two-year diploma from a recognized college in a related business or technology discipline and a minimum of two (2) years of experience in a related business or		



	technology discipline; OR A degree from a recognized university in any field and a minimum of five (5) years of experience in a related business or technology discipline.		
M12	The proposed resource must have a minimum of ten (10) years' experience working as a System Analyst as outlined in Annex 'A', Statement of Work - Section 3.0 – Role Descriptions.		

Table 4 Category: A.12 Web Architect - Level 3			
No.	Description	Met / Not Met	Cross Reference to Proposal
M13	The bidder must demonstrate that the proposed resource meets the requirement of Web Architect - Level 3 in accordance with TBIPS SA.		
M14	M1. Education The proposed resource must possess one of the following: A degree from a recognized university in a related business or technology discipline; OR A two-year diploma from a recognized college in a related business or technology discipline and a minimum of two (2) years of experience in a related business or technology discipline; OR A degree from a recognized university in any field and a minimum of five (5) years of experience in a related business or technology discipline.		
M15	M2. Experience The proposed resource must have a minimum of ten (10) years' experience working as a Web Architect as outlined in Annex 'A', Statement of Work - Section 3.0 – Role Descriptions.		

Table 5 Category: A.13 Web Designer - Level 3			
No.	Description	Met / Not Met	Cross Reference to Proposal
M16	The bidder must demonstrate that the proposed resource meets the requirement of Web Designer - Level 3 in accordance with TBIPS SA.		
M17	The proposed resource must possess one of the following: A degree from a recognized university in a related business or technology discipline; OR A two-year diploma from a recognized college in a related business or technology discipline and a minimum of two (2) years of experience in a related business or technology discipline; OR A degree from a recognized university in any field and a		



	minimum of five (5) years of experience in a related business or technology discipline.		
M18	The proposed resource must have a minimum of ten (10) years' experience working as a Web Designer as outlined in Annex 'A', Statement of Work - Section 3.0 – Role Descriptions.		

Table 6			
Category: A.14 Web Developer - Level 3			
No.	Description	Met / Not Met	Cross Reference to Proposal
M19	The bidder must demonstrate that the proposed resource meets the requirement of Web Developer - Level 3 in accordance with TBIPS SA.		
M20	The proposed resource must possess one of the following: A degree from a recognized university in a related business or technology discipline; OR A two-year diploma from a recognized college in a related business or technology discipline and a minimum of two (2) years of experience in a related business or technology discipline; OR A degree from a recognized university in any field and a minimum of five (5) years of experience in a related business or technology discipline.		
M21	The proposed resource must have a minimum of ten (10) years' experience working as a Web Developer as outlined in Annex 'A', Statement of Work - Section 3.0 – Role Descriptions.		

Table 7			
Category: B.1 Business Analyst - Level 3			
No.	Description	Met / Not Met	Cross Reference to Proposal
M22	The bidder must demonstrate that the proposed resource meets the requirement of Business Analyst - Level 3 in accordance with TBIPS SA.		
M23	The proposed resource must possess one of the following: A degree from a recognized university in a related business or technology discipline; OR A two-year diploma from a recognized college in a related business or technology discipline and a minimum of two (2) years of experience in a related business or technology discipline; OR A degree from a recognized university in any field and a minimum of five (5) years of experience in a related business or technology discipline.		



M24	The proposed resource must have a minimum of ten (10) years' experience working as a Business Analyst as outlined in Annex 'A', Statement of Work - Section 3.0 – Role Descriptions.		
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Table 8			
Category: B.2 Business Architect – Level 2			
No.	Description	Met / Not Met	Cross Reference to Proposal
M25	The bidder must demonstrate that the proposed resource meets the requirement of Business Analyst - Level 3 in accordance with TBIPS SA.		
M26	The proposed resource must possess one of the following: A degree from a recognized university in a related business or technology discipline – including Engineering, Computer Science, Commerce and/or Public Administration OR A two-year diploma from a recognized college in a related business or technology discipline and a minimum of two (2) years of experience in a related business or technology discipline; OR A degree from a recognized university in any field and a minimum of five (5) years of experience in a related business or technology discipline.		
M27	The proposed resource must have a minimum of five (5) years' experience working as a Business Architect as outlined in Annex 'A', Statement of Work - Section 3.0 – Role Descriptions.		

Table 9			
Category: B.3 Business Consultant – Level 2			
No.	Description	Met / Not Met	Cross Reference to Proposal
M28	The bidder must demonstrate that the proposed resource meets the requirement of Business Consultant – Level 2 in accordance with TBIPS SA.		
M29	The proposed resource must possess one of the following: A degree from a recognized university in a related business or technology discipline; OR A two-year diploma from a recognized college in a related business or technology discipline and a minimum of two (2) years of experience in a related business or technology discipline; OR A degree from a recognized university in any field and a minimum of five (5) years of experience in a related business or technology discipline.		



M30	The proposed resource must have a minimum of five (5) years' experience working as a Business Consultant as outlined in Annex 'A', Statement of Work - Section 3.0 – Role Descriptions.		
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Table 10			
Category: B.5 Business Process Re-engineering (BPR) Consultant – Level 2			
No.	Description	Met / Not Met	Cross Reference to Proposal
M31	The bidder must demonstrate that the proposed resource meets the requirement of Business Process Re-engineering (BPR) Consultant – Level 2 in accordance with TBIPS SA.		
M32	The proposed resource must possess one of the following: A degree from a recognized university in a related business or technology discipline; OR A two-year diploma from a recognized college in a related business or technology discipline and a minimum of two (2) years of experience in a related business or technology discipline; OR A degree from a recognized university in any field and a minimum of five (5) years of experience in a related business or technology discipline.		
M33	The proposed resource must have a minimum of five (5) years' experience working as a BPR as outlined in Annex 'A', Statement of Work - Section 3.0 – Role Descriptions.		

Table 11			
Category: B.14 Technical Writer - Level 3			
No.	Description	Met / Not Met	Cross Reference to Proposal
M34	The bidder must demonstrate that the proposed resource meets the requirement of Technical Writer - Level 3 in accordance with TBIPS SA.		
M35	The proposed resource must possess one of the following: A degree from a recognized university in a related business or technology discipline; OR A two-year diploma from a recognized college in a related business or technology discipline and a minimum of two (2) years of experience in a related business or technology discipline; OR A degree from a recognized university in any field and a minimum of five (5) years of experience in a related business or technology discipline.		
M36	The proposed resource must have a minimum of ten (10) years' experience working as a Technical Writer as outlined in Annex 'A', Statement of Work - Section 3.0 – Role Descriptions.		



Table 12			
Category: C.7 IT Security Design Specialist - Level 3			
No.	Description	Met / Not Met	Cross Reference to Proposal
M37	The bidder must demonstrate that the proposed resource meets the requirement of IT Security Design Specialist - Level 3 in accordance with TBIPS SA.		
M38	The proposed resource must possess one of the following: A degree from a recognized university in a related business or technology discipline; OR A two-year diploma from a recognized college in a related business or technology discipline and a minimum of two (2) years of experience in a related business or technology discipline; OR A degree from a recognized university in any field and a minimum of five (5) years of experience in a related business or technology discipline.		
M39	The proposed resource must have a minimum of ten (10) years' experience working as a Security Specialist as outlined in Annex 'A', Statement of Work - Section 3.0 – Role Descriptions.		

Table 13			
Category: C.16 PIA Specialist - Level 3			
No.	Description	Met / Not Met	Cross Reference to Proposal
M40	The bidder must demonstrate that the proposed resource meets the requirement of PIA Specialist - Level 3 in accordance with TBIPS SA.		
M41	The proposed resource must possess one of the following: A degree from a recognized university in a related business or technology discipline; OR A two-year diploma from a recognized college in a related business or technology discipline and a minimum of two (2) years of experience in a related business or technology discipline; OR A degree from a recognized university in any field and a minimum of five (5) years of experience in a related business or technology discipline.		
M42	The proposed resource must have a minimum of ten (10) years' experience working as a Privacy Specialist as outlined in Annex 'A', Statement of Work - Section 3.0 – Role Descriptions.		



Table 14			
Category: I.1 Data Conversion Specialist – Level 3			
No.	Description	Met / Not Met	Cross Reference to Proposal
M43	The bidder must demonstrate that the proposed resource meets the requirement of Data Conversion Specialist – Level 3 in accordance with TBIPS SA.		
M44	The proposed resource must possess one of the following: A degree from a recognized university in a related business or technology discipline; OR A two-year diploma from a recognized college in a related business or technology discipline and a minimum of two (2) years of experience in a related business or technology discipline; OR A degree from a recognized university in any field and a minimum of five (5) years of experience in a related business or technology discipline.		
M45	The proposed resource must have a minimum of ten (10) years' experience working as a Data Conversion Specialist as outlined in Annex 'A', Statement of Work - Section 3.0 – Role Descriptions.		

Table 15			
Category: I.3 Database Analyst / IM Administrator – Level 2			
No.	Description	Met / Not Met	Cross Reference to Proposal
M46	The bidder must demonstrate that the proposed resource meets the requirement of Database Analyst / IM Administrator – Level 2 in accordance with TBIPS SA.		
M47	The proposed resource must possess one of the following: A degree from a recognized university in a related business or technology discipline; OR A two-year diploma from a recognized college in a related business or technology discipline and a minimum of two (2) years of experience in a related business or technology discipline; OR A degree from a recognized university in any field and a minimum of five (5) years of experience in a related business or technology discipline.		
M48	The proposed resource must have a minimum of five (5) years' experience working as a Database Administrator as outlined in Annex 'A', Statement of Work - Section 3.0 – Role Descriptions.		



Table 16			
Category: I.4 Data/IM Modeller – Level 2			
No.	Description	Met / Not Met	Cross Reference to Proposal
M49	The bidder must demonstrate that the proposed resource meets the requirement of Data/IM Modeller – Level 2 in accordance with TBIPS SA.		
M50	The proposed resource must possess one of the following: A degree from a recognized university in a related business or technology discipline; OR A two-year diploma from a recognized college in a related business or technology discipline and a minimum of two (2) years of experience in a related business or technology discipline; OR A degree from a recognized university in any field and a minimum of five (5) years of experience in a related business or technology discipline.		
M51	The proposed resource must have a minimum of five (5) years' experience working as a Database Modeller as outlined in Annex 'A', Statement of Work - Section 3.0 – Role Descriptions.		

Table 17			
Category: I.5 IM Architect – Level 2			
No.	Description	Met / Not Met	Cross Reference to Proposal
M52	The bidder must demonstrate that the proposed resource meets the requirement of IM Architect – Level 2 in accordance with TBIPS SA.		
M53	The proposed resource must possess one of the following: A degree from a recognized university in a related business or technology discipline; OR A two-year diploma from a recognized college in a related business or technology discipline and a minimum of two (2) years of experience in a related business or technology discipline; OR A degree from a recognized university in any field and a minimum of five (5) years of experience in a related business or technology discipline.		
M54	The proposed resource must have a minimum of five (5) years' experience working as an IM Architect as outlined in Annex 'A', Statement of Work - Section 3.0 – Role Descriptions.		



Table 18			
Category: I.5 IM Architect – Level 3 # 1			
No.	Description	Met / Not Met	Cross Reference to Proposal
M55	The bidder must demonstrate that the proposed resource meets the requirement of IM Architect – Level 3 in accordance with TBIPS SA.		
M56	The proposed resource must possess one of the following: A degree from a recognized university in a related business or technology discipline; OR A two-year diploma from a recognized college in a related business or technology discipline and a minimum of two (2) years of experience in a related business or technology discipline; OR A degree from a recognized university in any field and a minimum of five (5) years of experience in a related business or technology discipline. OR Minimum of 15 years' experience as a Senior Advisor in Information Management advising on the design, implementation and maintenance of Records Management and Information Management (RM&IM) technologies and supporting taxonomies and policy instruments in accordance with GoC RM&IM policies, directives and standards;		
M57	The proposed resource must have a minimum of 15 years of professional work experience in providing strategic Records Management and Information Management (RM&IM) advice to senior management up to and including Deputy Minister(s) on the design, implementation and maintenance of Records Management and Information Management technologies, supporting taxonomies and policy instruments in accordance with GoC RM&IM policies, directives and standards.		



Table 19			
Category: Category: I.5 IM Architect – Level 3 # 2			
No.	Description	Met / Not Met	Cross Reference to Proposal
M58	The bidder must demonstrate that the proposed resource meets the requirement of IM Architect – Level 3 in accordance with TBIPS SA.		
M59	The proposed resource must possess one of the following: A degree from a recognized university in a related business or technology discipline; OR A two-year diploma from a recognized college in a related business or technology discipline and a minimum of two (2) years of experience in a related business or technology discipline; OR A degree from a recognized university in any field and a minimum of five (5) years of experience in a related business or technology discipline. OR Minimum of 15 years' experience as a Senior Advisor in Information Management advising on the design, implementation and maintenance of Records Management and Information Management (RM&IM) technologies and supporting taxonomies and policy instruments in accordance with GoC RM&IM policies, directives and standards;		
M60	The proposed resource must have 10 years of experience developing data warehouse and /or business intelligence enterprise solutions using one or more of the following technologies: SAS, Tableau, Informatica, Cognos, or Oracle.		
M61	The proposed resource must have 5 years of experience developing and implementing data governance programs and / or organizational data stewardship for enterprise solutions.		
M62	The proposed resource must have 10 years of experience performing the design, development, and implementation of information, business intelligence and data warehousing architecture for enterprise solutions.		

Table 20			
Category: P.1 Change Management Consultant - Level 3			
No.	Description	Met / Not Met	Cross Reference to Proposal
M63	The bidder must demonstrate that the proposed resource meets the requirement of Change Management Consultant - Level 3 in accordance with TBIPS SA.		
M64	The proposed resource must possess one of the following: A degree from a recognized university in a related		



	business or technology discipline; OR A two-year diploma from a recognized college in a related business or technology discipline and a minimum of two (2) years of experience in a related business or technology discipline; OR A degree from a recognized university in any field and a minimum of five (5) years of experience in a related business or technology discipline.		
M65	The proposed resource must have a minimum of ten (10) years' experience working as a Change Management Consultant as outlined in Annex 'A', Statement of Work - Section 3.0 – Role Descriptions.		

Table 21 Category: P.7 Project Coordinator - Level 2			
No.	Description	Met / Not Met	Cross Reference to Proposal
M66	The bidder must demonstrate that the proposed resource meets the requirement of Project Coordinator - Level 2 in accordance with TBIPS SA.		
M67	The proposed resource must possess one of the following: A degree from a recognized university in a related business or technology discipline; OR A two-year diploma from a recognized college in a related business or technology discipline and a minimum of two (2) years of experience in a related business or technology discipline; OR A degree from a recognized university in any field and a minimum of five (5) years of experience in a related business or technology discipline.		
M68	The proposed resource must have a minimum of five (5) years' experience working as a Project Coordinator as outlined in Annex 'A', Statement of Work - Section 3.0 – Role Descriptions.		

Table 22 Category: P.9 Project Manager - Level 3			
No.	Description	Met / Not Met	Cross Reference to Proposal
M69	The bidder must demonstrate that the proposed resource meets the requirement of Project Manager - Level 3 in accordance with TBIPS SA.		
M70	The proposed resource must possess one of the following: A degree from a recognized university in a related business or technology discipline; OR A two-year diploma from a recognized college in a		



	related business or technology discipline and a minimum of two (2) years of experience in a related business or technology discipline; OR A degree from a recognized university in any field and a minimum of five (5) years of experience in a related business or technology discipline.		
M71	The Project Manager must have a minimum of ten (10) years' experience working as a Project Manager as outlined in Annex 'A', Statement of Work - Section 3.0 – Role Descriptions.		

Table 23 Category: P.11 Quality Assurance Specialist/Analyst – Level 2			
No.	Description	Met / Not Met	Cross Reference to Proposal
M72	The bidder must demonstrate that the proposed resource meets the requirement of Quality Assurance Specialist/Analyst – Level 2 in accordance with TBIPS SA.		
M73	The proposed resource must possess one of the following: A degree from a recognized university in a related business or technology discipline; OR A two-year diploma from a recognized college in a related business or technology discipline and a minimum of two (2) years of experience in a related business or technology discipline; OR A degree from a recognized university in any field and a minimum of five (5) years of experience in a related business or technology discipline.		
M74	The proposed resource must have a minimum of five (5) years' experience working as a Quality Assurance Specialist/Analyst as outlined in Annex 'A', Statement of Work - Section 3.0 – Role Descriptions.		

Table 24 Category: P.12 Risk Management Specialist – Level 2			
No.	Description	Met / Not Met	Cross Reference to Proposal
M75	The bidder must demonstrate that the proposed resource meets the requirement of Risk Management Specialist – Level 2 in accordance with TBIPS SA.		
M76	The proposed resource must possess one of the following: A degree from a recognized university in a related business or technology discipline; OR A two-year diploma from a recognized college in a related business or technology discipline and a minimum of two (2) years of experience in a related business or		



	technology discipline; OR A degree from a recognized university in any field and a minimum of five (5) years of experience in a related business or technology discipline.		
M77	The proposed resource must have a minimum of five (5) years' experience working as a Risk Management Services as outlined in Annex 'A', Statement of Work - Section 3.0 – Role Descriptions.		

Rated Criteria

Table 25			
Category: A.1 Application Architect – Level 3			
No.	Rated Evaluation Criteria	Points	Referenced Section/Page in Bidder's Proposal
R1	The proposed resource should have demonstrated work experience developing application architectures using Microsoft (MS) .NET frameworks. 37 – 48 months = 3 points 49 – 60 months = 6 points 61 – 72 months = 9 points 73 – 84 months = 12 points 85+ months = 15 points		
R2	The proposed resource should have demonstrated work experience with the design, development and implementation of Service Oriented Architectures (SOA). 13 – 24 months = 3 points 25 – 36 months = 6 points 37 – 48 months = 9 points 49 – 60 months = 12 points 61+ months = 15 points		
R3	The proposed resource should have demonstrated work utilizing software development life cycle methodologies such as Agile Scrum, RAD, Waterfall, RUP, etc. Project descriptions, including roles and activities performed by the resource, must be included. 37 – 48 months = 3 points 49 – 60 months = 6 points 61 – 72 months = 9 points 73 – 84 months = 12 points 85+ months = 15 points		
R4	The proposed resource should have experience designing, developing, supporting and maintaining data warehouses. 37 – 48 months = 3 points 49 – 60 months = 6 points 61 – 72 months = 9 points 73 – 84 months = 12 points 85+ months = 15 points		



R5	The proposed resource should have experience designing, developing, and maintaining database architectures, data standards, data processes, data marts, data models, and data dictionaries. 37 – 48 months = 3 points 49 – 60 months = 6 points 61 – 72 months = 9 points 73 – 84 months = 12 points 85+ months = 15 points		
R6	The proposed resource should have experience performing architecture of data integration solutions for Enterprise Applications with Data Warehouses. 37 – 48 months = 3 points 49 – 60 months = 6 points 61 – 72 months = 9 points 73 – 84 months = 12 points 85+ months = 15 points		
R7	The proposed resource should have experience contributing to the development of the Open Government Policy and Implementation Plan. 37 – 48 months = 3 points 49 – 60 months = 6 points 61 – 72 months = 9 points 73 – 84 months = 12 points 85+ months = 15 points		
	Maximum Points = 105 Minimum Points = 70		

Table 26			
Category: A.7 Programmer/Analyst – Level 2			
No.	Rated Evaluation Criteria	Points	Referenced Section/Page in Bidder's Proposal
R8	The proposed resource should have demonstrated work experience with systems development methodologies such as: <ul style="list-style-type: none"> • Joint Applications Development (JAD) • Rapid Application Development (RAD) • Object-Orient Programming • System Development Lifecycle Management (SDLC) 24 – 36 months = 9 points 37 – 60 months = 12 points 61+ months = 15 points		



R9	The proposed resource should have demonstrated work experience performing the design, development and execution of extract, transform and load (ETL) processes for enterprise data warehouse solutions. 24 – 36 months = 9 points 37 – 60 months = 12 points 61+ months = 15 points		
R10	The proposed resource should have demonstrated work experience performing the design, development and maintenance of extract, transform and load (ETL) processes for ERP (HR, Finance and CRM) solutions. 24 – 36 months = 5 points 37 – 60 months = 8 points 61+ months = 12 points		
R11	The proposed resource should have demonstrated work experience contributing to the development of the Open Government Policy and Implementation Plan. 24 – 36 months = 5 points 37 – 60 months = 8 points 61+ months = 12 points		
	Maximum points = 54 Minimum points = 38		

Table 27
Category: A.8 System Analyst – Level 3

No.	Rated Evaluation Criteria	Points	Referenced Section/Page in Bidder's Proposal
R12	The proposed resource should have demonstrated work experience analyzing requirements and aligning and validating them to architectures and models. 24 – 36 months = 8 points 37 – 48 months = 12 points 49 – 60 months = 15 points 61+ months = 20 points		
R13	The proposed resource should have demonstrated work experience mapping process and developing models. 24 – 36 months = 8 points 37 – 48 months = 12 points 49 – 60 months = 15 points 61+ months = 20 points		
R14	The proposed resource should have demonstrated work experience as a system analyst within the Canadian Federal Government. 24 – 36 months = 8 points 37 – 48 months = 12 points 49 – 60 months = 15 points 61+ months = 20 points		



R15	Proposed resource should have a valid ITIL Certification. 5 points		
	Maximum Points = 65 Minimum Points = 40		

Table 28 Category: A.12 Web Architect – Level 3			
No.	Rated Evaluation Criteria	Points	Referenced Section/Page in Bidder's Proposal
R16	The proposed resource should have demonstrated work experience developing application architectures using Microsoft (MS) .NET frameworks. 37 – 48 months = 3 points 49 – 60 months = 6 points 61 – 72 months = 9 points 73 – 84 months = 12 points 85+ months = 15 points		
R17	The proposed resource should have demonstrated work experience performing impact analysis against business requirements for new or existing multi-tiered architectures. 37 – 48 months = 2 points 49 – 60 months = 4 points 61 – 72 months = 6 points 73 – 84 months = 8 points 85+ months = 10 points		
R18	The proposed resource should have demonstrated work experience utilizing software development life cycle methodologies such as Agile Scrum, RAD, Waterfall, RUP, etc. Project descriptions, including roles and activities performed by the resource, must be included. 37 – 48 months = 2 points 49 – 60 months = 4 points 61 – 72 months = 6 points 73 – 84 months = 8 points 85+ months = 10 points		
R19	The proposed resource should have demonstrated work experience designing application architectures compliant with Government of Canada – Treasury Board CLF2 (Common Look and Feel) standards. 12 – 18 months = 1 point 19 – 24 months = 2 points 25 – 30 months = 3 points 31 – 36 months = 4 points 37+ months = 5 points		
	Maximum Points = 40 Minimum Points = 28		



Table 29			
Category: A.13 Web Designer – Level 3			
No.	Rated Evaluation Criteria	Points	Referenced Section/Page in Bidder's Proposal
R20	<p>The proposed resource should have demonstrated work experience developing multi-tiered applications using the .NET Framework.</p> <p>25 – 48 months = 5 points 49 – 96 months = 10 points 97+ months = 15 points</p>		
R21	<p>The proposed resource should have demonstrated work experience with systems development methodologies such as:</p> <p>Joint Applications Development (JAD) Rapid Application Development (RAD) Object-Orient Programming System Development Lifecycle Management (SDLC)</p> <p>37 – 48 months = 5 points 49+ months = 10 points</p>		
R22	<p>Proposed resource should have a valid MCSD (Microsoft Certified Solution Developer) Certification</p> <p>5 points</p>		
	<p>Maximum Points = 40 Minimum Points = 25</p>		

Table 30			
Category: A.14 Web Developer – Level 3			
No.	Rated Evaluation Criteria	Points	Referenced Section/Page in Bidder's Proposal
R23	<p>The proposed resource should have demonstrated work experience developing multi-tiered applications using the .NET Framework.</p> <p>25 – 48 months = 5 points 49 – 96 months = 10 points 97+ months = 15 points</p>		
R24	<p>The proposed resource should have demonstrated work experience with the following technologies/environments:</p> <ol style="list-style-type: none"> 1) Visual Studio. Net 2) C# 3) Oracle 9+ databases <p>A maximum of 30 points will be assigned for demonstration of experience with one or more of the listed specialties.</p> <p>Specialty #1 (15 total) 3 points will be assigned for each year of experience working with the specialty</p>		



	<p>Specialty #2 (10 total) 2 points will be assigned for each year of experience working with the speciality</p> <p>Specialty #3 (5 total) 1 point will be assigned for each full year of experience working with the speciality</p>		
R25	<p>The proposed resource should have Professional Certifications: 1) MCSD (Microsoft Certified Solution Developer) 2) MCAD (Microsoft Certified Application Developer)</p> <p>5 points will be assigned for each certification, Maximum 10 points</p>		
	<p>Maximum Points = 45 Minimum Points = 35</p>		

Table 31
Category: B.1 Business Analyst – Level 3

No.	Rated Evaluation Criteria	Points	Referenced Section/Page in Bidder's Proposal
R26	<p>The proposed resource should have one year of experience working with any of the following specialties:</p> <p>1) BPWin 2) Oracle CASE 3) Rational Rose 4) RUP</p> <p>A maximum of 30 points will be assigned for demonstration of experience with one or more of the listed specialties.</p> <p>Specialty #1 (15 Total) 3 points will be assigned for each year of experience working with the speciality</p> <p>Specialty #2 (10 Total) 2 points will be assigned for each year of experience working with the speciality</p> <p>Specialty #3 (5 Total) 1 point will be assigned for each year of experience working with the speciality</p> <p>Specialty #4 (5 Total) 1 point will be assigned for each year of experience working with the speciality</p>		
	<p>Maximum Points = 30 Minimum Points = 20</p>		



Table 32			
Category: B.2 Business Architect- Level 2			
No.	Rated Evaluation Criteria	Points	Referenced Section/Page in Bidder's Proposal
R27	<p>The proposed resource should have demonstrated work experience using project descriptions that the proposed resource has completed at least 5 years of management experience within information technology and information management organizations. Experience described must demonstrate working at a decision making level for the development and management of either information technology, data management, information management or any combination of the above.</p> <p>61 – 72 months = 10 points 73 – 96 months = 15 points 97+ months = 20 points</p>		
R28	<p>The proposed resource should have demonstrated work experience establishing service level agreements and IT costing for a Federal Government organization similar in size and complexity to Shared Services Canada (over 8,000 FTE's and over 100 locations).</p> <p>Experience with one Federal Government Organization = 10 points Experience with two Federal Government Organizations = 20 points</p>		
R29	<p>The proposed resource should have demonstrated work experience performing and establishing:</p> <ul style="list-style-type: none"> • Data integration • Data cleansing • Advanced use of Excel, including creation of macros in Visual Basic <p>61 – 72 months = 10 points 73 – 96 months = 15 points 97+ months = 20 points</p>		
R30	<p>The proposed resource should have demonstrated work experience performing and establishing:</p> <ul style="list-style-type: none"> • Database administration • Data modelling • Data rules and standards • Naming conventions <p>Database administration = 5 points Data modelling = 5 points Data rules and standard = 5 points Naming conventions = 5 points</p>		



R31	The proposed resource should have the below Certifications: 1) PMP 2) ITIL 10 points per certification, maximum 20 points		
R32	The proposed resource should have demonstrated work experience contributing to the development of the Open Government Policy and Implementation Plan. 13 – 24 months = 2 points 25 – 636 months = 5 points 37+ months = 10 points		
	Maximum = 110 Minimum = 65		

Table 33
Category: B.3 Business Consultant – Level 2

No.	Rated Evaluation Criteria	Points	Referenced Section/Page in Bidder's Proposal
R33	The proposed resource should have demonstrated work experience developing approved Business Process requirements document(s). Approval must be from Business Process Owners and designated Stakeholders. 13 – 24 months = 5 points 25 – 60 months = 10 points 61 – 96 months = 15 points 97+ months = 20 points		
R34	The proposed resource should have work experience in business consultant expertise on large transformation initiatives where the value is more than five (\$5) million dollars. 13 – 24 months = 5 points 25 – 48 months = 10 points 49+ months = 15 points		
R35	The proposed resource should have PMP certification: 10 points		
	Maximum Points = 45 Minimum Points = 30		



Table 34			
Category: B.5 Business Process Reengineering – Level 2			
No.	Rated Evaluation Criteria	Points	Referenced Section/Page in Bidder's Proposal
R36	<p>The proposed resource should have demonstrated work experience providing process and workflow modeling services to a Government of Canada Federal Department or Agency.</p> <p>13 – 24 months = 5 points 25 – 60 months = 10 points 61 – 84 months = 15 points 85+ months = 20 points</p>		
R37	<p>The proposed resource should have demonstrated work experience working in an organization with established Business Process Modeling (BPM) disciplines.</p> <p>13 – 36 months = 10 points 25 – 60 months = 15 points 61 – 84 months = 25 points</p>		
	<p>Maximum Points = 45 Minimum Points = 30</p>		

Table 35			
Category: B.14 Technical Writer – Level 3			
No.	Rated Evaluation Criteria	Points	Referenced Section/Page in Bidder's Proposal
R38	<p>The proposed resource should have at least one (1) year of experience working with any of the following specialties:</p> <p>1) Knowledge of network/telecommunications internationally accepted (ITU-T) terminology. 2) Knowledge of IEEE Std 610.12- 1990, (IEEE Standard Glossary of Software Engineering Terminology). 3) Robohelp</p> <p>A maximum of 30 points will be assigned for demonstration of experience with one or more of the listed specialties.</p> <p>Specialty #1 (15 Total) 3 points will be assigned for each year of experience working with the speciality.</p> <p>Specialty #2 (10 Total) 2 points will be assigned for each year of experience working with the speciality.</p> <p>Specialty #3 (5 Total) 1 point will be assigned for each year of experience working with the speciality.</p>		



R39	The proposed resource should be an STC member.		
	Maximum 5 points		
	Maximum Points = 35 Minimum Points = 23		

Table 36			
Category: C.7 IT Security Design Specialist – Level 3			
No.	Rated Evaluation Criteria	Points	Referenced Section/Page in Bidder's Proposal
R40	<p>The proposed resource should have demonstrated work experience with the following Government of Canada Methods and Standards:</p> <ul style="list-style-type: none"> • CSE IT Security Zones Baseline Security Requirements (ITSG-22 and ITSG-38) • Government of Canada (GC) Policy on the Management of Government Information • GC Harmonized Threat and Risk Assessment Methodology • ISO 17799, 20000 • NIST Guides <ul style="list-style-type: none"> ▪ 800-37 ▪ 800-115 ▪ 800-113 ▪ 800-64 ▪ 800-53 <p>5 points will be assigned for each method/standard/policy/guide demonstrated Max 25 points.</p>		
R41	<p>The proposed resource should have the below certifications:</p> <ul style="list-style-type: none"> • ISACA Certified Information Security Manager (CISM) • Certified Information Systems Security Professional (CISSP) <p>10 points will be assigned for each certification, maximum 20 points</p>		
	Maximum Points = 45 Minimum Points = 30		



Table 37			
Category: C.16 PIA Specialist – Level 3			
No.	Rated Evaluation Criteria	Points	Referenced Section/Page in Bidder's Proposal
R42	The proposed resource should have demonstrated knowledge and experience with Treasury Board of Canada Privacy Impact Assessment Policy. 10 points for clear demonstration of knowledge and experience		
R43	The proposed resource should have CIPP/C certification: 20 points		
	Maximum Points = 30 Minimum Points = 10		

Table 38			
Category: I.1 Data Conversion Specialist – Level 3			
No.	Rated Evaluation Criteria	Points	Referenced Section/Page in Bidder's Proposal
R44	The proposed resource should have demonstrated work experience gathering data from multiple sources and consolidating the data into a single repository. *Multiple sources means two or more data sources; 61 – 72 months = 5 points 73 – 84 months = 10 points 85 – 96 months = 15 points 97 – 108 months = 20 points 109+ months = 25 points		
R45	The proposed resource should have demonstrated work experience implementing a repeatable data conversion approach that results in consistent data output: 61 – 72 months = 5 points 73 – 84 months = 10 points 85 – 96 months = 15 points 97+ months = 20 points		
	Maximum Points = 45 Minimum Points = 30		



Table 39			
Category: I.3 Database Administrator – Level 2			
No.	Rated Evaluation Criteria	Points	Referenced Section/Page in Bidder’s Proposal
R46	The proposed resource should have demonstrated work experience as a DBA developing and defining new database structures, database conversion strategies, and database conversion specifications for Federal government departments/agencies/organizations. Five (5) points for each project in a Federal Government department/agency/organization, maximum 25 points		
R47	The proposed resource should have demonstrated work experience controlling and coordinating changes to the database, including the deletion of records, changes to the existing records, and additions to the database. 3 projects = 5 points 4 projects = 10 points 5+ projects = 20 points		
	Maximum Points = 45 Minimum Points = 30		

Table 40			
Category: I.4 Data/IM Modeller – Level 2			
No.	Rated Evaluation Criteria	Points	Referenced Section/Page in Bidder’s Proposal
R48	The proposed resource should have demonstrated work experience participating in the development of data modeling and metadata policies/ methodologies/standards. 61 – 72 months = 5 points 73 – 84 months = 10 points 85 – 96 months = 15 points 97 – 108 months = 20 points 109+ months = 25 points		
R49	The proposed resource should have demonstrated work experience designing, developing and maintaining logical and physical data models and data dictionaries. 3 projects = 5 points 4 projects = 10 points 5+ projects = 20 points		
	Maximum Points = 45 Minimum Points = 30		



Table 41 Category: I.5 IM Architect - Level 2			
No.	Rated Evaluation Criteria	Points	Referenced Section/Page in Bidder's Proposal
R50	<p>The proposed resource should have demonstrated work experience as an Information architect designing and constructing information architectures that enable well-integrated transactional, collaborative and analytical applications.</p> <p>61 – 72 months = 5 points 73 – 94 months = 10 points 85 – 96 months = 15 points 97 – 108 months = 20 points 109+ months = 25 points</p>		
R51	<p>The proposed resource should have demonstrated work experience designing, developing and implementing data warehouse/datamart frameworks and architectures.</p> <p>37 – 48 months = 5 points 49 – 60 months = 10 points 61 – 72 months = 15 points 73+ months = 20 points</p>		
	<p>Maximum Points = 45 Minimum Points = 30</p>		

Table 42 Category: I.5 IM Architect – Level 3 # 1			
No.	Rated Evaluation Criteria	Points	Referenced Section/Page in Bidder's Proposal
R52	<p>The proposed resource should have demonstrated work experience in the development and implementation of Function Based Classification Structure and File Plan.</p> <p>37 – 48 months = 3 points 49 – 60 months = 6 points 61 – 72 months = 9 points 73 – 84 months = 12 points 85+ months = 15 points</p>		
R53	<p>The proposed resource should have demonstrated work experience developing or implementing or supporting Retention and Disposition in a government of Canada department.</p> <p>37 – 48 months = 3 points 49 – 60 months = 6 points 61 – 72 months = 9 points 73 – 84 months = 12 points 85+ months = 15 points</p>		
	<p>Maximum Points = 30 Minimum Points = 21</p>		



Table 43
Category: I.5 IM Architect – Level 3 # 2

No.	Rated Evaluation Criteria	Points	Referenced Section/Page in Bidder's Proposal
R54	<p>The proposed resource should have demonstrated work experience in the development and implementation of Function Based Classification Structure and File Plan.</p> <p>37 – 48 months = 3 points 49 – 60 months = 6 points 61 – 72 months = 9 points 73 – 84 months = 12 points 85+ months = 15 points</p>		
R55	<p>The proposed resource should have demonstrated work experience developing or implementing or supporting Retention and Disposition in a government of Canada department.</p> <p>37 – 48 months = 3 points 49 – 60 months = 6 points 61 – 72 months = 9 points 73 – 84 months = 12 points 85+ months = 15 points</p>		
R56	<p>The proposed resource should have demonstrated work experience designing, developing and implementing ETL architectures.</p> <p>37 – 48 months = 3 points 49 – 60 months = 6 points 61 – 72 months = 9 points 73 – 84 months = 12 points 85+ months = 15 points</p>		
R57	<p>The proposed resource should have demonstrated work experience designing developing and implementing data governance programs and organizational data stewardship for enterprise solutions.</p> <p>61 – 84 months = 5 points 85 – 120 months = 10 points 120+ months = 15 points</p>		
R58	<p>The proposed resource should have demonstrated work experience developing and implementing data warehouse solutions using SAS, SPSS, Oracle or SQL, or other major database solutions.</p> <p>61 – 84 months = 5 points 85 – 120 months = 10 points 120+ months = 15 points</p>		



R59	The proposed resource should have demonstrated work experience contributing to the development of the Open Government Policy and Implementation Plan. 25 – 48 months = 5 points 49 – 60 months = 7 points 60+ months = 9 points		
	Maximum Points = 84 Minimum Points = 55		

Table 44			
Category: P.1 Change Management Consultant – Level 3			
No.	Rated Evaluation Criteria	Points	Referenced Section/Page in Bidder’s Proposal
R60	The proposed resource should have demonstrated work experience in providing professional services as a Change Management Consultant in IM/IT-enabled business projects within departments, organizations and/or agencies of the Government of Canada (GOC). 61 – 72 months = 5 points 73 – 94 months = 10 points 85+ months = 15 points		
R61	The proposed resource should have demonstrated work experience in developing and delivering presentations to stakeholders including senior officials (Director level and up) and working groups over the last five years. 3 projects = 5 points 4 projects = 10 points 5+ projects = 20 points		
	Maximum points = 40 Minimum Points = 25		

Table 45			
Category: P.7 Project Coordinator – Level 2			
No.	Rated Evaluation Criteria	Points	Referenced Section/Page in Bidder’s Proposal
R62	The proposed resource should demonstrate clearly, through detailed project descriptions, experience within the last ten (10) years from the time of bid closing, in the role of Project Coordinator with each of the following: a) Assisting project managers and team members in project coordination and synchronization tasks; b) Maintaining and updating relevant project information in a manual and/or electronic format, application and system libraries; c) Tracking project changes requests; d) Communicating with project managers and other team members on administrative matters related to the project;		



	g) Coordinating activities among other project managers. 61 – 72 months = 5 points 73 – 94 months = 10 points 85+ months = 15 points		
	Maximum Points = 15 Minimum points = 5		

Table 46 Category: P.9 Project Manager – Level 3			
No.	Rated Evaluation Criteria	Points	Referenced Section/Page in Bidder's Proposal
R63	The proposed resource should have demonstrated work experience managing technology projects. 121 – 132 months = 5 points 133 – 180 months = 10 points 181+ months = 15 points		
R64	The proposed resource should have demonstrated work experience developing briefing notes and presentations for executives. 2 projects = 5 points 3 – 4 projects = 10 points 5+ projects = 15 points		
R65	The proposed resource should have demonstrated work experience developing project budgets. 2 projects = 5 points 3 – 4 projects = 10 points 5+ projects = 15 points		
R66	The proposed resource should have PMP certification: 15 points		
	Maximum Points = 60 Minimum Points = 40		



Table 47			
Category: P.11 Quality Assurance Specialist/Analyst – Level 2			
No.	Rated Evaluation Criteria	Points	Referenced Section/Page in Bidder's Proposal
R67	<p>The proposed resource should have demonstrated work experience as a Quality Assurance Consultant in an IT environment participating in functional and technical design reviews to identify and document software defects.</p> <p>61 – 72 months = 5 points 73 – 94 months = 10 points 85 – 96 months = 15 points 97 – 108 months = 20 points 109+ months = 25 points</p>		
R68	<p>The proposed resource should have demonstrated work experience as a Quality Assurance Specialist/Analyst leading the development of test plans, test scripts and test data.</p> <p>13 – 24 months = 2 points 25 – 36 months = 4 points 37 – 48 months = 6 points 49 – 60 months = 8 points 61 – 72 months = 10 points 73 – 84 months = 12 points 85 – 96 months = 14 points 97 – 108 months = 16 points 109 – 120 months = 18 points 121+ months = 20 points</p>		
	<p>Maximum Points = 45 Minimum Points = 30</p>		

Table 48			
Category: P.12 Risk Management Specialist – Level 2			
No.	Rated Evaluation Criteria	Points	Referenced Section/Page in Bidder's Proposal
R69	<p>The proposed resource should have demonstrated work experience with risk management in a Government of Canada environment.</p> <p>25 – 36 months = 5 points 37 – 48 months = 10 points 49 – 60 months = 15 points 61 – 72 months = 20 points 73+ months = 25 points</p>		



R70	The proposed resource should have demonstrated work experience with Treasury Board of Canada Secretariat risk management policies in a minimum of three (3) projects. 3 projects = 5 points 4 projects = 10 points 5+ projects = 20 points		
	Maximum Points = 45 Minimum Points = 30		



APPENDIX D TO ANNEX A
CERTIFICATIONS AT THE TASK AUTHORIZATION STAGE

1. Education and Experience

The Contractor certifies that all the information provided in the resume(s) and supporting material submitted, 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 the individual(s) proposed is capable of performing the Work described in the Contract. Canada reserves the right to verify any information provided in this regard, and untrue statements may result in the TA response being declared non-responsive or another action the Minister may consider appropriate.

Print name of authorized individual & sign above

Date

2. Status of Personnel

If the Contractor has proposed any individual in fulfillment of this Contract who is not an employee of the Contractor, the Contractor hereby certifies that it has written permission from such person (or the employer of such person) to propose the services of such person in relation to the work performed in fulfillment of this Contract and to submit such person's resume to Canada. The Contractor must, upon request from the Contracting Authority, provide a written confirmation, signed by the individual, of the permission given to the Contractor.

Print name of authorized individual & sign above

Date

3. Availability of Personnel

The Contractor certifies that, should it be authorized to provide the services under any TA resulting from this Contract, the resource(s) proposed in the TA response will be available to commence performance of the Work within a reasonable time from the date of acceptance of the 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

4. Certification of Language

The Contractor certifies that the proposed resource(s) in response to this TA is/are fluent in English. The individual(s) proposed is/are able to communicate orally and in writing without any assistance and with minimal errors in English.

Print name of authorized individual & sign above

Date



**ANNEX B
BASIS OF PAYMENT**

The Contractor will be paid in accordance with the following Basis of Payment for work performed under the Contract.

Note to Suppliers: A Firm Per Diem Rate for each resource category/level must be included with all bid submissions against the TBIPS, including Firm/Fixed Price bids.

1. PROFESSIONAL SERVICES

The Contractor will be paid the following firm all-inclusive per diem rates for work performed under this Contract, in accordance with Annex "A", during the Contract period. Goods and Services Tax (GST) or Harmonized Sales Tax (HST) extra.



FOR THE INITIAL CONTRACT PERIOD (2 YEARS)			
TBIPS ID	CATEGORY OF PERSONNEL	LEVEL	FIRM PER DIEM RATE
TECHNOLOGY SERVICES CLASS			
A.1	Application Architect	3	\$
A.7	Programmer/Analyst	2	\$
A.8	System Analyst	3	\$
A.12	Web Architect	3	\$
A.13	A.13 Web Designer	3	\$
A.14	A.14 Web Developer	3	\$
IM/IT SERVICES CLASS			
I.1	Data Conversion Specialist	3	\$
I.3	Database Analyst / IM Administrator	2	\$
I.4	Data/IM Modeller	2	\$
I.5	IM Architect	2	\$
I.5	IM Architect	3	\$
I.5	IM Architect	3	\$
BUSINESS SERVICES CLASS			
B.1	Business Analyst	3	\$
B.2	Business Architect	2	\$
B.3	Business Consultant	2	\$
B.5	Business Process Re-engineering (BPR) Consultant	2	\$
B.14	Technical Writer	3	\$
PROJECT MANAGEMENT SERVICES CLASS			
P.1	Change Management Consultant	3	
P.7	Project Coordinator	2	
P.9	Project Manager	3	
P.11	Quality Assurance Specialist / Analyst	2	
P.12	Risk Management Specialist	2	
CYBER PROTECTION SERVICES CLASS			
C.7	IT Security Design Specialist	3	
C.16	PIA Specialist	3	



FOR OPTION PERIOD # 1 (1 YEAR)			
TBIPS ID	CATEGORY OF PERSONNEL	LEVEL	FIRM PER DIEM RATE
TECHNOLOGY SERVICES CLASS			
A.1	Application Architect	3	\$
A.7	Programmer/Analyst	2	\$
A.8	System Analyst	3	\$
A.12	Web Architect	3	\$
A.13	A.13 Web Designer	3	\$
A.14	A.14 Web Developer	3	\$
IM/IT SERVICES CLASS			
I.1	Data Conversion Specialist	3	\$
I.3	Database Analyst / IM Administrator	2	\$
I.4	Data/IM Modeller	2	\$
I.5	IM Architect	2	\$
I.5	IM Architect	3	\$
I.5	IM Architect	3	\$
BUSINESS SERVICES CLASS			
B.1	Business Analyst	3	\$
B.2	Business Architect	2	\$
B.3	Business Consultant	2	\$
B.5	Business Process Re-engineering (BPR) Consultant	2	\$
B.14	Technical Writer	3	\$
PROJECT MANAGEMENT SERVICES CLASS			
P.1	Change Management Consultant	3	
P.7	Project Coordinator	2	
P.9	Project Manager	3	
P.11	Quality Assurance Specialist / Analyst	2	
P.12	Risk Management Specialist	2	
CYBER PROTECTION SERVICES CLASS			
C.7	IT Security Design Specialist	3	
C.16	PIA Specialist	3	



FOR OPTION PERIOD #2 (ONE YEAR)			
TBIPS ID	CATEGORY OF PERSONNEL	LEVEL	FIRM PER DIEM RATE
TECHNOLOGY SERVICES CLASS			
A.1	Application Architect	3	\$
A.7	Programmer/Analyst	2	\$
A.8	System Analyst	3	\$
A.12	Web Architect	3	\$
A.13	A.13 Web Designer	3	\$
A.14	A.14 Web Developer	3	\$
IM/IT SERVICES CLASS			
I.1	Data Conversion Specialist	3	\$
I.3	Database Analyst / IM Administrator	2	\$
I.4	Data/IM Modeller	2	\$
I.5	IM Architect	2	\$
I.5	IM Architect	3	\$
I.5	IM Architect	3	\$
BUSINESS SERVICES CLASS			
B.1	Business Analyst	3	\$
B.2	Business Architect	2	\$
B.3	Business Consultant	2	\$
B.5	Business Process Re-engineering (BPR) Consultant	2	\$
B.14	Technical Writer	3	\$
PROJECT MANAGEMENT SERVICES CLASS			
P.1	Change Management Consultant	3	
P.7	Project Coordinator	2	
P.9	Project Manager	3	
P.11	Quality Assurance Specialist / Analyst	2	
P.12	Risk Management Specialist	2	
CYBER PROTECTION SERVICES CLASS			
C.7	IT Security Design Specialist	3	
C.16	PIA Specialist	3	



ANNEX C
SECURITY REQUIREMENTS CHECK LIST



Government of Canada
Gouvernement du Canada

Contract Number / Numéro du contrat Common PS SRCL#19
Security Classification / Classification de sécurité UNCLASSIFIED

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

PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE	
1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine	Public Works and Government Services Canada
2. Branch or Directorate / Direction générale ou Direction Acquisitions Branch	
3. a) Subcontract Number / Numéro du contrat de sous-traitance	3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant
4. Brief Description of Work / Brève description du travail Professional Services - Standing Offers and Supply Arrangements	
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 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 Non <input type="checkbox"/> Oui	
6. Indicate the type of access required / Indiquer le type d'accès requis	
6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? (Specify the level of access using the chart in Question 7. c.) (Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c.) <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes 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 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 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"/>
Not releasable / À ne pas diffuser <input type="checkbox"/>	Restricted to: / Limité à: <input type="checkbox"/>
Restricted to: / Limité à: <input type="checkbox"/>	Specify country(ies): / Préciser le(s) pays: <input type="checkbox"/>
7. c) Level of Information / Niveau d'information	
PROTECTED A / PROTÉGÉ A <input checked="" type="checkbox"/>	NATO UNCLASSIFIED / NATO NON CLASSIFIÉ <input type="checkbox"/>
PROTECTED B / PROTÉGÉ B <input checked="" type="checkbox"/>	NATO RESTRICTED / NATO DIFFUSION RESTREINTE <input type="checkbox"/>
PROTECTED C / PROTÉGÉ C <input checked="" type="checkbox"/>	NATO CONFIDENTIAL / NATO CONFIDENTIEL <input type="checkbox"/>
CONFIDENTIAL / CONFIDENTIEL <input checked="" type="checkbox"/>	NATO SECRET / NATO SECRET <input type="checkbox"/>
SECRET / SECRET <input checked="" type="checkbox"/>	COSMIC TOP SECRET / COSMIC TRÈS SECRET <input type="checkbox"/>
TOP SECRET / TRÈS SECRET <input type="checkbox"/>	PROTECTED A / PROTÉGÉ A <input type="checkbox"/>
TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>	PROTECTED B / PROTÉGÉ B <input type="checkbox"/>
	PROTECTED C / PROTÉGÉ C <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"/>

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité UNCLASSIFIED
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PART A - (continued) / PARTIE A (suite)

8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS? No Yes
Non Oui

If Yes, indicate the level of sensitivity:
Dans l'affirmative, indiquer le niveau de sensibilité :

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

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

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

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

- | | | | |
|---|--|--|--|
| <input checked="" type="checkbox"/> RELIABILITY STATUS
COTE DE FIABILITÉ | <input checked="" type="checkbox"/> CONFIDENTIAL
CONFIDENTIEL | <input checked="" type="checkbox"/> SECRET
SECRET | <input type="checkbox"/> TOP SECRET
TRÈS SECRET |
| <input type="checkbox"/> TOP SECRET - SIGINT
TRÈS SECRET - SIGINT | <input type="checkbox"/> NATO CONFIDENTIAL
NATO CONFIDENTIEL | <input type="checkbox"/> NATO SECRET
NATO SECRET | <input type="checkbox"/> COSMIC TOP SECRET
COSMIC TRÈS SECRET |
| <input type="checkbox"/> SITE ACCESS
ACCÈS AUX EMPLACEMENTS | | | |

Special comments:
Commentaires spéciaux :

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

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

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

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

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

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

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

PRODUCTION

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

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

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

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

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité UNCLASSIFIED
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Contract Number / Numéro du contrat
Common PS SRCL#19
Security Classification / Classification de sécurité UNCLASSIFIED

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

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

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

SUMMARY CHART / TABLEAU RÉCAPITULATIF

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

12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED?
La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE? No / Non Yes / Oui
- If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification".
Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire.
12. b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED?
La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE? No / Non Yes / Oui
- If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification" and indicate with attachments (e.g. SECRET with Attachments).
Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire et indiquez qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).



Contract Number / Numéro du contrat Common PS SRCL#19
Security Classification / Classification de sécurité UNCLASSIFIED

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

PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE		
1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine Public Works and Government Services Canada	2. Branch or Directorate / Direction générale ou Direction Acquisitions Branch	
3. a) Subcontract Number / Numéro-du contrat de sous-traitance	3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant	
4. Brief Description of Work / Brève description du travail Professional Services - Standing Offers and Supply Arrangements		
5. a) Will the supplier require access to Controlled Goods? Le fournisseur aura-t-il accès à des marchandises contrôlées?	<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui	
5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques?	<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui	
6. Indicate the type of access required / Indiquer le type d'accès requis		
6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? (Specify the level of access using the chart in Question 7. c) (Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c)	<input type="checkbox"/> No / Non <input checked="" type="checkbox"/> Yes / Oui	
6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé.	<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui	
6. c) Is this a commercial courier or delivery requirement with no overnight storage? S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit?	<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui	
7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès		
Canada <input checked="" type="checkbox"/>	NATO / OTAN <input type="checkbox"/>	
Foreign / Étranger <input type="checkbox"/>		
7. b) Release restrictions / Restrictions relatives à la diffusion		
No release restrictions / Aucune restriction relative à la diffusion <input checked="" type="checkbox"/>	All NATO countries / Tous les pays de l'OTAN <input type="checkbox"/>	
Not releasable / À ne pas diffuser <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:	
7. c) Level of Information / Niveau d'information		
PROTECTED A / PROTÉGÉ A <input checked="" type="checkbox"/>	NATO UNCLASSIFIED <input type="checkbox"/>	PROTECTED A / PROTÉGÉ A <input type="checkbox"/>
PROTECTED B / PROTÉGÉ B <input checked="" type="checkbox"/>	NATO NON CLASSIFIÉ <input type="checkbox"/>	PROTECTED B / PROTÉGÉ B <input type="checkbox"/>
PROTECTED C / PROTÉGÉ C <input checked="" type="checkbox"/>	NATO RESTRICTED <input type="checkbox"/>	PROTECTED C / PROTÉGÉ C <input type="checkbox"/>
CONFIDENTIAL / CONFIDENTIEL <input checked="" type="checkbox"/>	NATO DIFFUSION RESTREINTE <input type="checkbox"/>	CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>
SECRET / SECRET <input checked="" type="checkbox"/>	NATO CONFIDENTIAL <input type="checkbox"/>	SECRET / SECRET <input type="checkbox"/>
TOP SECRET / TRÈS SECRET <input type="checkbox"/>	NATO SECRET <input type="checkbox"/>	TOP SECRET / TRÈS SECRET <input type="checkbox"/>
TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>	NATO TOP SECRET <input type="checkbox"/>	TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>
	COSMIC TOP SECRET / COSMIC TRÈS SECRET <input type="checkbox"/>	

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité
UNCLASSIFIED





Contract Number / Numéro du contrat Common PS SRCL#19
Security Classification / Classification de sécurité UNCLASSIFIED

PART A (continued) / PARTIE A (suite)

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

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

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

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

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

<input checked="" type="checkbox"/> RELIABILITY STATUS COTE DE FIABILITÉ	<input checked="" type="checkbox"/> CONFIDENTIAL CONFIDENTIEL	<input checked="" type="checkbox"/> SECRET SECRET	<input type="checkbox"/> TOP SECRET TRÈS SECRET
<input type="checkbox"/> TOP SECRET - SIGINT TRÈS SECRET - SIGINT	<input type="checkbox"/> NATO CONFIDENTIAL NATO CONFIDENTIEL	<input type="checkbox"/> NATO SECRET NATO SECRET	<input type="checkbox"/> COSMIC TOP SECRET COSMIC TRÈS SECRET
<input type="checkbox"/> SITE ACCESS ACCÈS AUX EMPLACEMENTS			

Special comments:
Commentaires spéciaux :

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

10. b) May unscreened personnel be used for portions of the work?
Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail? No / Non Yes / Oui
If Yes, will unscreened personnel be escorted?
Dans l'affirmative, le personnel en question sera-t-il escorté? No / Non Yes / Oui

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

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

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

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

PRODUCTION

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

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

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

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



Contract Number / Numéro du contrat
Common PS SRCL#19
Security Classification / Classification de sécurité UNCLASSIFIED

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

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

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

SUMMARY CHART / TABLEAU RÉCAPITULATIF

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

12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED?
La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE? No / Non Yes / Oui
- If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification".
Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire.
12. b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED?
La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE? No / Non Yes / Oui
- If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification" and indicate with attachments (e.g. SECRET with Attachments).
Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire et indiquez qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).



Government of Canada / Gouvernement du Canada

Contract Number / Numéro du contrat Common PS SRCL#18
Security Classification / Classification de sécurité UNCLASSIFIED

PART D - AUTHORIZATION / PARTIE D - AUTORISATION			
13. Organization Project Authority / Chargé de projet de l'organisme			
Name (print) - Nom (en lettres moulées) Centralized Professional Services System, CPSS		Title - Titre Professional Services - Methods of Supply	Signature <i>Reuben Loman</i>
Telephone No. - N° de téléphone 000-000-0000	Facsimile No. - N° de télécopieur 000-000-0000	E-mail address - Adresse courriel SSPC.CPSS@psgo-pwgsc.gc.ca	Date 2012/03/13
14. Organization Security Authority / Responsable de la sécurité de l'organisme			
Name (print) - Nom (en lettres moulées) Charron, Anrick		Title - Titre SO	Signature <i>Anrick Charron</i>
Telephone No. - N° de téléphone 819-955-0815	Facsimile No. - N° de télécopieur 819-934-1449	E-mail address - Adresse courriel anrick.charron@psgo-pwgsc.gc.ca	Date March 20, 2012
15. Are there additional instructions (e.g. Security Guide, Security Classification Guide) attached? <input type="checkbox"/> No <input type="checkbox"/> Yes Des instructions supplémentaires (p. ex. Guide de sécurité, Guide de classification de la sécurité) sont-elles jointes? <input type="checkbox"/> Non <input type="checkbox"/> Oui			
16. Procurement Officer / Agent d'approvisionnement			
Name (print) - Nom (en lettres moulées) Megan Lamont, Team Leader Megan.Lamont@canada.ca		Signature <i>Megan Lamont</i>	Date MARCH 14, 2012
Telephone No. - N° de téléphone	Facsimile No.	E-mail address - Adresse courriel T(613) 219-7204 F (613) 960-6026	Date
17. Contracting Security Authority / Autorité contractante en matière de sécurité			
Name (print) - Nom (en lettres moulées)		Title - Titre	Signature <i>Jacques Saumur</i>
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date 28-MARCH-2012

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



**ANNEX D
INTEGRITY CHECK**

Adresse de courriel /E-mail Address:	
Ministère/Department: Shared Services Canada	
Dénomination sociale complète du fournisseur / Complete Legal Name of Supplier	
Adresse du fournisseur / Supplier Address	
NEA du fournisseur / Supplier PBN	
Numéro de la demande de soumissions (ou numéro du contrat proposé) Solicitation Number (or proposed Contract Number) 10051854	
Membres du conseil d'administration (Utilisez le format - Prénom Nom) Board of Directors (Use format - first name last name)	
1. Membre / Director	Cliquez ici pour entrer du texte. / Click here to enter text.
2. Membre / Director	Cliquez ici pour entrer du texte. / Click here to enter text.
3. Membre / Director	Cliquez ici pour entrer du texte. / Click here to enter text.
4. Membre / Director	Cliquez ici pour entrer du texte. / Click here to enter text.
5. Membre / Director	Cliquez ici pour entrer du texte. / Click here to enter text.
6. Membre / Director	Cliquez ici pour entrer du texte. / Click here to enter text.
7. Membre / Director	Cliquez ici pour entrer du texte. / Click here to enter text.
8. Membre / Director	Cliquez ici pour entrer du texte. / Click here to enter text.
9. Membre / Director	Cliquez ici pour entrer du texte. / Click here to enter text.
10. Membre / Director	Cliquez ici pour entrer du texte. / Click here to enter text.
Autres Membres/ Additional Directors: Cliquez ici pour entrer du texte. / Click here to enter text.	