



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

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

**11 Laurier St/11, rue Laurier  
Place du Portage, Phase III  
Core 0B2 / Noyau 0B2**

**Gatineau  
Quebec**

**K1A 0S5**

**Bid Fax: (819) 997-9776**

**REQUEST FOR PROPOSAL  
DEMANDE DE PROPOSITION**

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

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

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

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

**Comments - Commentaires**

<b>Title - Sujet</b> IMIT MANGEMENT & PROJEC SERVICES	
<b>Solicitation No. - N° de l'invitation</b> QA001-175431/A	<b>Date</b> 2017-05-10
<b>Client Reference No. - N° de référence du client</b> QA001-175431	
<b>GETS Reference No. - N° de référence de SEAG</b> PW-\$\$XS-003-31395	
<b>File No. - N° de dossier</b> 003xs.QA001-175431	<b>CCC No./N° CCC - FMS No./N° VME</b>
<b>Solicitation Closes - L'invitation prend fin</b> <b>at - à 02:00 PM</b> <b>on - le 2017-05-31</b>	
<b>Time Zone</b> <b>Fuseau horaire</b> Eastern Daylight Saving Time EDT	
<b>F.O.B. - F.A.B.</b> <b>Plant-Usine:</b> <input type="checkbox"/> <b>Destination:</b> <input type="checkbox"/> <b>Other-Autre:</b> <input type="checkbox"/>	
<b>Address Enquiries to: - Adresser toutes questions à:</b> Smith, Kenneth	<b>Buyer Id - Id de l'acheteur</b> 003xs
<b>Telephone No. - N° de téléphone</b> (819) 420-2211 ( )	<b>FAX No. - N° de FAX</b> (819) 956-8303
<b>Destination - of Goods, Services, and Construction:</b> <b>Destination - des biens, services et construction:</b> INFRASTRUCTURE CANADA FINANCE 180 KENT, 12TH FLOOR OTTAWA Ontario K1P0B6 Canada	

**Instructions: See Herein**

**Instructions: Voir aux présentes**

**Vendor/Firm Name and Address**

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

**Issuing Office - Bureau de distribution**

Business Operations Support Systems Division/Systèmes  
de soutien des activités opérationnelles

Portage III 12C1 - 42

11 Laurier Street/11, rue Laurier

Gatineau

Quebec

K1A 0S5

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

## **BID SOLICITATION**

### **FOR (A) CONTRACT(S) AGAINST A SUPPLY ARRANGEMENT FOR TASK-BASED IN INFORMATICS PROFESSIONAL SERVICES (TBIPS) RESOURCE CATEGORY - LEVEL 2 OR 3**

### **IM/IT MANAGEMENT AND PROJECT SERVICES FOR INFRASTRUCTURE CANADA (INFC)**

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QA001-175431/A  
Client Ref. No. - N° de réf. du client  
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CCC No./N° CCC - FMS No./N° VME

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**List of Annexes to the Resulting Contract:**

Annex A Statement of Work

- Appendix A to Annex A – Tasking Assessment Procedure
- Appendix B to Annex A – Task Authorization Form
- Appendix C to Annex A – Resource assessment Criteria and Response Table
- Appendix D to Annex A – Certifications at TA Stage

Annex B Basis of Payment

Annex C Security Requirements Check List

Annex D Insurance Requirements

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

-Attachment 3.1: Bid Submission Form

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

-Attachment 4.1: Bid Evaluation Criteria

-Attachment 4.2: Pricing Schedule

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

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

**BID SOLICITATION**

**FOR (A) CONTRACT(S) AGAINST A SUPPLY ARRANGEMENT FOR  
TASK-BASED IN INFORMATICS PROFESSIONAL SERVICES (TBIPS)  
RESOURCE CATEGORY - LEVEL 2 OR 3**

**IM/IT MANAGEMENT AND PROJECT SERVICES  
FOR  
INFRASTRUCTURE CANADA (INFC)**

**PART 1 - GENERAL INFORMATION**

**1.1 Introduction**

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

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

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

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

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

Part 5 Certifications: 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, Basis of Payment, Security Requirements Checklist, Insurance and any other annexes.

**1.2 Summary**

- (a) This bid solicitation is being issued to satisfy the requirement of *Infrastructure 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 up to one (1) contract in each of two (2) Workstreams, with each contract purchasing Work from only one Workstream. If the same Bidder is successful in both Workstreams, one (1) contract will be issued to that Bidder and it will include both Workstreams. Each contract will be for two (2) years plus three (3) one-year irrevocable options allowing Canada to extend the term of the contract.

- (c) There are security requirements associated with this requirement. For additional information, consult Part 6 - Security, Financial and Other Requirements, and Part 7 – Resulting Contract Clauses. For more information on personnel and organization security screening or security clauses, Bidders should refer to the, Industrial Security Program (ISP) of Public Services and Procurement Canada (<http://ssi-iss.tpsgc-pwgsc.gc.ca/index-eng.html>) website.
- (d) The requirement is subject to the provisions of the World Trade Organization Agreement on Government Procurement (WTO-AGP), the North American Free Trade Agreement (NAFTA), the Canada-Chile Free Trade Agreement (CCFTA), the Canada-Peru Free Trade Agreement (CPFTA), the Canada-Colombia Free Trade Agreement (CCoIFTA), and the Canada-Panama Free Trade Agreement (CPanFTA), and the Agreement on Internal Trade (AIT).
- (e) The Federal Contractor's Program (FCP) for employment equity applies to this procurement; see Part 5 – Certifications, Part 7 – Resulting Contract Clauses and the attachment titled “Federal Contractor's Program for Employment Equity – Certification.”
- (f) Only TBIPS SA Holders currently holding a TBIPS SA for Tier 2, in all the Workstreams and *Resource Categories* and in the National Capital Region under the EN578-055605 series of SAs are eligible to compete. The TBIPS SA EN578-055605 is incorporated by reference and forms part of this bid solicitation, as though expressly set out in it, subject to any express terms and conditions contained in this bid solicitation. The capitalized terms not defined in this bid solicitation have the meaning given to them in the TBIPS SA.
- (g) SA Holders that are invited to compete as a joint venture must submit a bid as that joint venture SA Holder, forming no other joint venture to bid. Any joint venture must be already qualified under the SA #EN578-055605 as that joint venture at the time of bid closing in order to submit a bid.
- (h) For each Workstream, the Resource Categories described below are required on an as and when requested basis in accordance with the TBIPS SA Annex “A”:

**WORKSTREAM 1**

<b>RESOURCE CATEGORY</b>	<b>LEVEL OF EXPERTISE</b>	<b>ESTIMATED NUMBER OF RESOURCES REQUIRED</b>
Organizational Development Consultant	LEVEL 3	As and When Requested on Task Authorization
Business Transformation Architect	LEVEL 3	As and When Requested on Task Authorization
Project Executive	LEVEL 3	As and When Requested on Task Authorization

**WORKSTREAM 2**

<b>RESOURCE CATEGORY</b>	<b>LEVEL OF EXPERTISE</b>	<b>ESTIMATED NUMBER OF RESOURCES REQUIRED</b>
Project Administrator	LEVEL 2	As and When Requested on Task Authorization
Project Administrator	LEVEL 3	As and When Requested on

RESOURCE CATEGORY	LEVEL OF EXPERTISE	ESTIMATED NUMBER OF RESOURCES REQUIRED
		Task Authorization
Project Manager	LEVEL 2	As and When Requested on Task Authorization
Project Manager	LEVEL 3	As and When Requested on Task Authorization
Business Analyst	LEVEL 2	As and When Requested on Task Authorization
Business Analyst	LEVEL 3	As and When Requested on Task Authorization
IM Architect	LEVEL 3	As and When Requested on Task Authorization
Technology Architect	LEVEL 3	As and When Requested on Task Authorization
Application/Software Architect	LEVEL 3	As and When Requested on Task Authorization
GIS Application Architect	LEVEL 3	As and When Requested on Task Authorization

### 1.3 Debriefings

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

### 1.4 Conflict of Interest

In accordance with 2003 (2016-04-04) Section 18 – Conflict of Interest – unfair advantage and Section 1.4 – Conflict of Interest arising from Solicitation No. QA001-164451/A, the following Contractors are precluded from bidding or participating in a bid for this solicitation:

1. CGI Information Systems and Management Consultants Inc.
2. Cheryl Morris
3. Protak Consulting Group Inc.

## PART 2 - BIDDER INSTRUCTIONS

### 2.1 Standard Instructions, Clauses and Conditions

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

### 2.2 Submission of Bids

- (a) Bids must be submitted only to the Public Services and Procurement Canada (PSPC) Bid Receiving Unit by the date, time and at the PSPC address indicated on page one of the bid solicitation.
- (b) Due to the nature of the bid solicitation, bids transmitted by facsimile or electronic mail to PSPC will not be accepted.

### 2.3 Enquiries - Bid Solicitation

- (a) All enquiries must be submitted in writing to the Contracting Authority no later than 10 calendar days before the bid closing date. Enquiries received after that time may not be answered.
- (b) Bidders should reference as accurately as possible the numbered item of the bid solicitation to which the enquiry relates. Care should be taken by Bidders to explain each question in sufficient detail in order to enable Canada to provide an accurate answer. Technical enquiries that are of a proprietary nature must be clearly marked "proprietary" at each relevant item. Items identified as "proprietary" will be treated as such except where Canada determines that the enquiry is not of a proprietary nature. Canada may edit the questions or may request that the Bidder do so, so that the proprietary nature of the question is eliminated, and the enquiry can be answered with copies

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

## 2.4 Former Public Servant

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

### (b) Definitions

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

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

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

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

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

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

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

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

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

**(d) Work Force Adjustment Directive**

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

If so, the Bidder must provide the following information:

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

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

**2.5 Applicable Laws**

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

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

**2.6 Improvement of Requirement During Solicitation Period**

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

## PART 3 - BID PREPARATION INSTRUCTIONS

### 3.1 Bid Preparation Instructions

- (a) **Copies of Bid:** Canada requests that Bidders provide their bid in separately bound sections as follows:
- (i) Section I: Technical Bid - 4 hard copies and 2 soft copies on USB;
  - (ii) Section II: Financial Bid - 1 hard copy and 1 soft copy on USB; and
  - (iii) Section III: Certifications not included in the Technical Bid 1 hard copy and 1 soft copy on USB.
- 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.
- (b) **Format for Bid:** Canada requests that Bidders follow the format instructions described below in the preparation of their bid:
- (i) use 8.5 x 11 inch (216 mm x 279 mm) paper;
  - (ii) use a numbering system that corresponds to the bid solicitation;
  - (iii) include a title page at the front of each volume of the bid that includes the title, date, bid solicitation number, bidder's name and address and contact information of its representative; and
  - (iv) include a table of contents.
- (c) **Canada's Policy on Green Procurement:** In April 2006, Canada issued a policy directing federal departments and agencies to take the necessary steps to incorporate environmental considerations into the procurement process. See the Policy on Green Procurement (<http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html>). To assist Canada in reaching its objectives, Bidders should:
- (i) use paper containing fibre certified as originating from a sustainably-managed forest and/or containing a minimum of 30% recycled content; and
  - (ii) use an environmentally-preferable format including black and white printing instead of colour printing, printing double sided/duplex, and using staples or clips instead of cerlox, duotangs or binders.
- (d) **Submission of Only One:**
- (i) A Bidder, including related entities, will be permitted to submit only one bid in response to this bid solicitation. If a Bidder or any related entities participate in more than one bid (participating means being part of the Bidder, not being a subcontractor), Canada will provide those Bidders with 2 working days to identify the single bid to be considered by Canada. Failure to meet this deadline will result in all the affected bids being non-responsive. A single bid may contain bids to be awarded a contract in one or more Workstreams. However, a bid may not contain a bid from the Bidder, including related entities to be awarded more than one contract in any given Workstream.
  - (ii) For the purposes of this Article, regardless of the jurisdiction where any of the entities concerned is incorporated or otherwise formed as a matter of law (whether that entity is a

natural person, corporation, partnership, etc), an entity will be considered to be **"related"** to a Bidder if:

- (A) they are the same legal entity (i.e., the same natural person, corporation, partnership, limited liability partnership, etc.);
  - (B) they are "related persons" or "affiliated persons" according to the Canada Income Tax Act;
  - (C) the entities have now or in the two years before bid closing had a fiduciary relationship with one another (either as a result of an agency arrangement or any other form of fiduciary relationship); or
  - (D) the entities otherwise do not deal with one another at arm's length, or each of them does not deal at arm's length with the same third party.
- (iii) Individual members of a joint venture cannot participate in another bid, either by submitting a bid alone or by participating in another joint venture.

(e) Joint Venture Experience:

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

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

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

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

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

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

- Contracts all signed by A;

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

That show in total 100 billable days.

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

### 3.2 Section I: Technical Bid

(a) The technical bid consists of the following:

- (i) **Bid Submission Form:** Bidders are requested to include the Bid Submission Form - Attachment "3.1" with their bids. It provides a common form in which bidders can provide information required for evaluation and contract award, such as a contact name and the Bidder's Procurement Business Number, etc. Using the form to provide this information is not mandatory, but it is recommended. If Canada determines that the information required by the Bid Submission Form is incomplete or requires correction, Canada will provide the Bidder with an opportunity to do so.
- (ii) **Substantiation of Technical Compliance:** The technical bid must substantiate the compliance with the specific articles of Attachment "4.1", which is the requested format for providing the substantiation. The substantiation must not simply be a repetition of the requirement(s), but must explain and demonstrate how the Bidder will meet the requirements and carry out the required Work. Simply stating that the Bidder or its proposed solution or resources comply is not sufficient. Where Canada determines that the substantiation is not complete, the Bidder will be considered non-responsive and disqualified. The substantiation may refer to additional documentation submitted with the bid - this information can be referenced in the "Bidder's Response" column of Attachment "4.1", where Bidders are requested to indicate where in the bid the reference material can be found, including the title of the document, and the page and paragraph numbers; where the reference is not sufficiently precise, Canada may request that the Bidder direct Canada to the appropriate location in the documentation.
- (iii) **For Identified Resources:** The same individual must not be identified for more than one Resource Category or more than one Workstream. The Technical bid must demonstrate that each identified individual meets the qualification requirements described (including any educational requirements, work experience requirements, and professional designation or membership requirements). With respect to the identified resources:
- (A) Identified 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, PSPC will only consider educational programs that were successfully completed by the resource by the time of bid closing. If the degree, designation or certification was issued by an educational institution outside of Canada, the Bidder must provide a copy of the results of the academic credential assessment and qualification recognition service issued by an agency or organization recognized by the Canadian Information Centre for International Credentials (CICIC).
- (C) For requirements relating to professional designation or membership, the resource must have the required designation or membership by the time of bid closing and must continue, where applicable, to be a member in good standing of

the profession or membership throughout the evaluation period and Contract Period. Where the designation or membership must be demonstrated through a certification, diploma or degree, such document must be current, valid and issued by the entity specified in this solicitation. If the entity is not specified, the issuer must have been an accredited or otherwise recognized body, institution or entity at the time the document was issued. If the degree, diploma or certification was issued by an educational institution outside of Canada, the Bidder must provide a copy of the results of the academic credential assessment and qualification recognition service issued by an agency or organization recognized by the Canadian Information Centre for International Credentials (CICIC).

- (D) For work experience, PSPC 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, PSPC will disregard any information about experience if the technical bid does not include the relevant dates (month and year) for the experience claimed (i.e., the start date and end date). Canada will evaluate only the duration that the resource actually worked on a project or projects (from his or her start date to end date), instead of the overall start and end date of a project or a combination of projects in which a resource has participated.
- (F) For work experience to be considered by Canada, the technical bid must not simply indicate the title of the individual's position, but must demonstrate that the resource has the required work experience by explaining the responsibilities and work performed by the individual while in that position. In situations in which a identified resource worked at the same time on more than one project, the duration of any overlapping time period will be counted only once toward any requirements that relate to the individual's length of experience.

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

**Definitions:**

Customer Reference Contract describes a contract that the Bidder held to deliver services to a customer and is used to demonstrate the Bidder's experience.

Customer Reference Project describes a customer project that the proposed resource worked on and is used to demonstrate the resource's experience.

- (A) The Bidder must provide customer references (either Customer Reference Projects or Customer Reference Contracts as described in Attachment "4.1"). The customer reference must each confirm, if requested by PSPC, the facts identified in the Bidder's bid, as required by Attachment "4.1".
- (B) The form of question to be used to request confirmation from customer references is as follows:

Sample Question to Customer Reference:

"Has the Bidder provided your organization within eight years from April 6, 2017, IM/IT professional services, over a minimum period of twelve months and with a minimum billed value of \$2M over a cumulative period of three years or less?"

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

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

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

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

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

- (v) **Corporate Profile:** The Bidder is requested to provide a corporate profile, which should include an overview of the Bidder and any subcontractors, and/or authorized agents of the Bidder that would be involved in the performance of the Work on the Bidder's behalf. The Bidder is requested to provide a brief description of its size, corporate structure, years in business, business activities, major customers, number of employees and their geographic presence. This information is requested for information purposes only and will not be evaluated.

### 3.3 Section II: Financial Bid

- (a) **Pricing:** Bidders must submit their financial bid in accordance with Attachment 4.2 - Pricing Schedule of this bid solicitation. The total amount of Applicable Taxes must be shown separately, if applicable. Unless otherwise indicated, bidders must include a single, firm, all-inclusive per diem rate quoted in Canadian dollars in each cell requiring an entry in the pricing tables.
- (b) **Variation in Resource Rates By Time Period:** For any given resource category, where the financial tables provided by Canada allow different firm rates to be charged for a resource category during different time periods:
- (i) the rate bid must not increase by more than 5% from one time period to the next, and
  - (ii) the rate bid for the same resource category during any subsequent time period must not be lower than the rate bid for the time period that includes the first month of the Initial Contract Period.
- (c) **All Costs to be Included:** The financial bid must include all costs for the requirement described in the bid solicitation for the entire Contract Period, including any option periods. The identification of all necessary equipment, software, peripherals, cabling and components required to meet the requirements of the bid solicitation and the associated costs of these items is the sole responsibility of the Bidder.
- (d) **Blank Prices:** Bidders are requested to insert "\$0.00" for any item for which it does not intend to charge or for items that are already included in other prices set out in the tables. If the Bidder leaves any price blank, Canada will treat the price as "\$0.00" for evaluation purposes and may request that the Bidder confirm that the price is, in fact, \$0.00. No bidder will be permitted to add or change a price as part of this confirmation. Any bidder who does not confirm that the price for a blank item is \$0.00 will be declared non-responsive.

### 3.4 Section III: Certifications

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

## PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

### 4.1 Evaluation Procedures

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

### 4.2 Technical Evaluation

A separate technical evaluation will be conducted for each Workstream.

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

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

Only a certain number of resources per Resource Category will be identified and evaluated as part of this bid solicitation as identified in Attachment 4.1. As and when requested resources will only be assessed after contract award once specific tasks are requested of the Contractor. After contract award, the Task Authorization process will be in accordance with Part 7 – Resulting Contract Clauses, the Article titled “Task Authorization”. When a Task Authorization Form (TA Form) is issued, the Contractor will be requested to propose a resource to satisfy the specific requirement based on the TA Form’s Statement of Work. The proposed resource(s) will then be assessed against the criteria identified in the Contract’s Statement of Work in accordance with Appendix “C” of Annex “A”.

(d) **Reference Checks:**

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

**4.3 Financial Evaluation**

**NOTE:** Each Work Stream will be evaluated separately in accordance with the method(s) described below.

- (a) There are two possible financial evaluation methods for this requirement. The first method will be used if three or more bids are determined to be responsive (see (b) Financial Evaluation – Method A below).

The second method will be used if fewer than three bids are determined to be responsive (see (c) Financial Evaluation – Method B below).

(b) **Financial Evaluation - Method A:** The following financial evaluation method will be used if three or more bids are determined responsive:

(i) **STEP 1 - ESTABLISHING THE LOWER AND UPPER MEDIAN BAND LIMITS FOR EACH PERIOD AND EACH RESOURCE CATEGORY:** The Contracting Authority will establish, for each period and each Resource Category, the median band limits based on the firm per diem rates provided by the technically responsive bids. For each such period and each Resource Category the median will be calculated using the median function in Microsoft Excel and will represent a range that encompasses any rate to a value of minus (-) 20% of the median, and an upper median rate to a value of plus (+) 20% of the median. When an even number of technically responsive bids have been determined, an average of the middle two rates will be used to calculate the median band limits and for an odd number of technically responsive bids, the middle rate will be used.

(ii) **STEP 2 - POINTS ALLOCATION:** For each period and each Resource Category points will be allocated as follows:

(A) A Bidder's proposed firm per diem rate that is either lower than the established lower median band limit or higher than the established upper median band limit for that period and Resource Category will be allocated 0 points.

(B) A Bidder's proposed firm per diem rate falling within the upper and lower median band limits, for that period and Resource Category, will be allocated points using the following calculation, which will be rounded to two decimal places:

$$\frac{\text{Lowest proposed firm per diem rate within the median band limits}}{\text{Bidder's proposed firm per diem rate within the median band limits}} \times \text{Maximum Points Assigned at Tables 1 \& 2 below}$$

(C) A Bidder's proposed firm per diem rate falling within the established median band limits which is the lowest proposed firm per diem rate will be allocated the applicable maximum points assigned at Table 1 and Table 2 below.

Table 1 Maximum Points Assigned – Workstream 1: IM/IT Management Services							
Ref	TBIPS Category	Level	Initial Period (2 yrs)	Option #1 (1 yr)	Option #2 (1 yr)	Option #3 (1 yr)	Total Points
1	Organizational Development Consultant	Level 3	10	10	10	10	40
2	Business Transformation Architect	Level 3	10	10	10	10	40
3	Project Executive	Level 3	10	10	10	10	40
<b>Total Points</b>			<b>30</b>	<b>30</b>	<b>30</b>	<b>30</b>	<b>120</b>

Table 2 Maximum Points Assigned – Workstream 2: IM/IT Project Services							
Ref	TBIPS Category	Level	Initial Period (2 yrs)	Option #1 (1 yr)	Option #2 (1 yr)	Option #3 (1 yr)	Total Points
1	Project Administrator	Level 2	10	10	10	10	40
2	Project Administrator	Level 3	10	10	10	10	40
3	Project Manager	Level 2	10	10	10	10	40
4	Project Manager	Level 3	10	10	10	10	40
5	Business Analyst	Level 2	10	10	10	10	40
6	Business Analyst	Level 3	10	10	10	10	40
7	IM Architect	Level 3	10	10	10	10	40
8	Technology Architect	Level 3	10	10	10	10	40
9	Application / Software Architect	Level 3	10	10	10	10	40
10	GIS Application Architect	Level 3	10	10	10	10	40
<b>Total Points</b>			<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>400</b>

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

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

TABLE 3 - EXAMPLE OF A FINANCIAL EVALUATION USING METHOD A:							
Resource Category	Max. Points	Bidder 1		Bidder 2		Bidder 3	
		Year 1	Year 2	Year 1	Year 2	Year 1	Year 2
Programmer	150 (75 pts. per year)	\$400.00	\$400.00	\$420.00	\$441.00	\$450.00	\$450.00
Business Analyst	100 (50 pts. per year)	\$600.00	\$600.00	\$600.00	\$620.00	\$650.00	\$680.00
Project Manager	50 (25 pts. per year)	\$555.00	\$580.00	\$750.00	\$787.00	\$700.00	\$735.00
<b>TOTAL</b>	300						
<b>STEP 1 - Establishing the lower and upper median band limits for each year and each resource category</b>							
(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 \$504.00.						
(Median 2)	For the Programmer Resource Category, the year 2 median would be \$441.00. The lower median band limit would be \$352.80 and higher median band limit would be \$529.20						
(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 \$720.00.						

(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 \$744.00.
(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 \$840.00.
(Median 6)	For the Project Manager Resource Category, the year 2 median would be \$735.00. The lower median band limit would be \$588.00 and higher median band limit would be \$882.00
<b>STEP 2 - Points Allocation:</b>	
<b>Bidder 1:</b>	
Programmer Year 1 =	75 points (lowest rate within the lower and upper median band limits)
Programmer Year 2 =	75 points (lowest rate within the lower and upper median band limits)
Business Analyst Year 1 =	50 points (lowest rate within the lower and upper median band limits)
Business Analyst Year 2 =	50 points (lowest rate within the lower and upper median band limits)
Project Manager Year 1 =	0 points (outside the lower and higher median band limits)
Project Manager Year 2 =	0 points (outside the lower and higher median band limits)
<b>Bidder 2:</b>	
Programmer Year 1 =	71.43 points (based on the following calculation = (Lowest rate of \$400.00 / Bidder's proposed rate of \$420.00) Multiplied by 75 pts)
Programmer Year 2 =	68.03 points (based on the following calculation = (Lowest rate of \$400.00 / Bidder's proposed rate of \$441.00) Multiplied by 75 pts)
Business Analyst Year 1 =	50 points (lowest price within the lower and upper median band limits)
Business Analyst Year 2 =	48.39 points (based on the following calculation = (Lowest rate of \$600.00 / Bidder's proposed rate of \$620.00) Multiplied by 50 pts)
Project Manager Year 1 =	23.33 points (based on the following calculation = (Lowest rate of \$700.00 / Bidder's proposed rate of \$750.00) Multiplied by 25 pts)
Project Manager Year 2 =	23.35 points (based on the following calculation = (Lowest rate of \$735.00 / Bidder's proposed rate of \$787.00) Multiplied by 25 pts)
<b>Bidder 3:</b>	
Programmer Year 1 =	66.67 points (based on the following calculation = (Lowest rate of \$400.00 / Bidder's proposed rate of \$450.00) Multiplied by 75 pts)
Programmer Year 2 =	66.67 points (based on the following calculation = (Lowest rate of \$400.00 / Bidder's proposed rate of \$450.00) Multiplied by 75 pts)
Business Analyst Year 1 =	46.15 points (based on the following calculation = (Lowest rate of \$600.00 / Bidder's proposed rate of \$650.00) Multiplied by 75 pts)
Business Analyst Year 2 =	44.12 points (based on the following calculation = (Lowest rate of \$600.00 / Bidder's proposed rate of \$680.00) Multiplied by 50 pts)
Project Manager Year 1 =	25 points (lowest price within the lower and upper median band limits)
Project Manager Year 2 =	25 points (lowest price within the lower and upper median band limits)
<b>STEP 3 - Financial Score:</b>	
<b>Bidder 1:</b>	75 + 75 + 50 + 50 + 0 + 0 = Total Financial Score of 250.0 points out of a possible 300 points
<b>Bidder 2:</b>	71.43 + 68.03 + 50 + 48.39 + 23.33 + 23.35 = Total Financial Score of 284.53 points out of a possible 300 points
<b>Bidder 3:</b>	66.67 + 66.67 + 46.15 + 44.12 + 25 + 25 = Total Financial Score of 273.61 points out of a possible 300 points

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

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

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

$$\frac{\text{Lowest proposed firm per diem rate}}{\text{Bidder's proposed firm per diem rate}} \times \text{Maximum Points Assigned at Tables 4 \& 5 below}$$

The Bidder with the lowest proposed firm per diem rate will be allocated the applicable maximum points assigned at Table 4 and Table 5 below.

Table 4 Maximum Points Assigned – Workstream 1: IM/IT Management Services							
Ref	TBIPS Category	Level	Initial Period (2 yrs)	Option #1 (1 yr)	Option #2 (1 yr)	Option #3 (1 yr)	Total Points
1	Organizational Development Consultant	Level 3	10	10	10	10	40
2	Business Transformation Architect	Level 3	10	10	10	10	40
3	Project Executive	Level 3	10	10	10	10	40
<b>Total Points</b>			<b>30</b>	<b>30</b>	<b>30</b>	<b>30</b>	<b>120</b>

Table 5 Maximum Points Assigned – Workstream 2: IM/IT Project Services							
Ref	TBIPS Category	Level	Initial Period (2 yrs)	Option #1 (1 yr)	Option #2 (1 yr)	Option #3 (1 yr)	Total Points
1	Project Administrator	Level 2	10	10	10	10	40
2	Project Administrator	Level 3	10	10	10	10	40
3	Project Manager	Level 2	10	10	10	10	40
4	Project Manager	Level 3	10	10	10	10	40
5	Business Analyst	Level 2	10	10	10	10	40
6	Business Analyst	Level 3	10	10	10	10	40
7	IM Architect	Level 3	10	10	10	10	40
8	Technology Architect	Level 3	10	10	10	10	40
9	Application / Software Architect	Level 3	10	10	10	10	40
10	GIS Application Architect	Level 3	10	10	10	10	40
<b>Total Points</b>			<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>400</b>

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

(iii) **EXAMPLE OF A FINANCIAL EVALUATION USING METHOD B**

TABLE 6 - EXAMPLE OF A FINANCIAL EVALUATION USING METHOD B:							
Resource Category	Max. Points	Bidder 1		Bidder 2			
		Year 1	Year 2	Year 1	Year 2		
Programmer	150 (75 pts. per year)	\$400.00	\$400.00	\$420.00	\$450.00		
Business Analyst	100 (50 pts. per year)	\$600.00	\$600.00	\$600.00	\$620.00		
Project Manager	50 (25 pts. per year)	\$555.00	\$900.00	\$750.00	\$800.00		
<b>TOTAL</b>	300						
<b>STEP 1 - Points Allocation:</b>							
<b>Bidder 1:</b>							
Programmer Year 1 = 75 points (lowest rate)							
Programmer Year 2 = 75 points (lowest rate)							
Business Analyst Year 1 = 50 points (lowest rate)							
Business Analyst Year 2 = 50 points (lowest rate)							
Project Manager Year 1 = 25 points (lowest rate)							
Project Manager Year 2 = 22.22 points (based on the following calculation = (Lowest rate of \$800.00 / Bidder's proposed rate of \$900.00) Multiplied by 25 pts)							
<b>Bidder 2:</b>							
Programmer Year 1 = 71.43 points (based on the following calculation = (Lowest rate of \$400.00 / Bidder's proposed rate of \$420.00) Multiplied by 75 pts)							
Programmer Year 2 = 66.67 points (based on the following calculation = (Lowest rate of \$400.00 / Bidder's proposed rate of \$450.00) Multiplied by 75 pts)							
Business Analyst Year 1 = 50 points (lowest rate)							
Business Analyst Year 2 = 48.39 points (based on the following calculation = (Lowest rate of \$600.00 / Bidder's proposed rate of \$620.00) Multiplied by 50 pts)							
Project Manager Year 1 = 18.5points (based on the following calculation = (Lowest rate of \$555.00 / Bidder's proposed rate of \$750.00) Multiplied by 25 pts)							
Project Manager Year 2 = 25 points (lowest rate)							
<b>STEP 3 - Financial Score:</b>							
<b>Bidder 1:</b>	75 + 75 + 50 + 50 + 25 + 22.22 = Total Financial Score of 297.22 points out of a possible 300 points						
<b>Bidder 2:</b>	71.43 + 67.67 + 50 + 48.39 + 18.5 + 25 = Total Financial Score of 280.99 points out of a possible 300 points						

#### 4.4 Basis of Selection

##### Selection Process for each Work Stream:

- (a) A bid must comply with the requirements of the bid solicitation, meet all mandatory evaluation criteria and obtain the Minimum Points Required, as referenced in Attachment "4.1", for the point rated criteria identified in this bid solicitation to be declared responsive.
- (b) For each Workstream, the responsive bid that obtains the highest Total Bidder Score will be recommended for award of a contract in that Workstream. If the same Bidder has the highest Total Bidder Score in both Workstreams, it will be awarded one contract which will include both Workstreams. For any given Bidder, the greatest possible Total Technical Score is 70 while the greatest possible Total Financial Score is 30.

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

$$\frac{\text{Technical Score}}{\text{Maximum Technical Points (as applicable by Work Stream)}} \times 70 = \text{Total Technical Score}$$

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

$$\frac{\text{Financial Score}}{\text{Maximum Financial Score (as applicable by Work Stream)}} \times 30 = \text{Total Financial Score}$$

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

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

- (c) As described in (b) above, one or two contracts may be awarded in total as a result of this bid solicitation.
- (d) 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.
- (e) If more than one Bidder is ranked first because of identical overall scores, then the Bidder with the higher Technical Score will become the top-ranked bidder.

## **PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION**

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

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

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

### **5.1 Certifications Required with Bid**

Bidders must submit the following duly completed certification(s) as part of their bid.

#### **a) Declaration of Convicted Offences**

As applicable, pursuant to subsection Declaration of Convicted Offences of section 01 of the Standard Instructions, the Bidder must provide with its bid, a completed Declaration Form, to be given further consideration in the procurement process.

### **5.2 Certifications Precedent to Contract Award and Additional Information**

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

#### **a) Integrity Provisions - List of Names**

Bidders who are incorporated, including those bidding as a joint venture, must provide a complete list of names of all individuals who are currently directors of the Bidder.

Bidders bidding as sole proprietorship, as well as those bidding as a joint venture, must provide the names of the owner(s).

Bidders bidding as societies, firms or partnerships do not need to provide lists of names.

#### **b) Federal Contractors Program for Employment Equity - Bid Certification**

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

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

Solicitation No. - N° de l'invitation  
QA001-175431/A  
Client Ref. No. - N° de réf. du client  
20175431

Amd. No. - N° de la modif.  
File No. - N° du dossier  
003xsQA001-175431

Buyer ID - Id de l'acheteur  
003xs  
CCC No./N° CCC - FMS No./N° VME

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

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

### **5.3 Additional Certifications Precedent to Contract Award**

#### **a) Submission of Only One Bid**

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

## **PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS**

### **6.1 Security Requirement - *mandatory at contract award***

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

### **6.2 Financial Capability**

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

## PART 7 - RESULTING CONTRACT CLAUSES

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

### 7.1 Requirement

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

### 7.2 Task Authorization

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

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

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

The data must be submitted to the Contracting Authority no later than 10 calendar days after the end of the reporting period.

- (iii) Each report must contain the following information for each validly issued TA (as amended):
  - (A) the Task Authorization number and the Task Authorization Revision number(s), if applicable;
  - (B) a title or a brief description of each authorized task;
  - (C) the name, Resource category and level of each resource involved in performing the TA, as applicable;
  - (D) the total estimated cost specified in the validly issued TA of each task, exclusive of Applicable Taxes;
  - (E) the total amount, exclusive of Applicable Taxes, expended to date against each authorized task;
  - (F) the start and completion date for each authorized task; and
  - (G) the active status of each authorized task, as applicable (e.g., indicate whether work is in progress or if Canada has cancelled or suspended the TA, etc.).
- (iv) Each report must also contain the following cumulative information for all the validly issued TA's (as amended):
  - (A) the amount, exclusive of Applicable Taxes, specified in the Contract (as last amended, as applicable) as Canada's total liability to the Contractor for all validly issued TA's; and
  - (B) the total amount, exclusive of Applicable Taxes, expended to date against all validly issued TA's.
- (g) **Consolidation of TA's for Administrative Purposes:** The Contract may be amended from time to time to reflect all validly issued Task Authorizations to date, to document the Work performed under those TA's for administrative purposes.

### 7.3 Minimum Work Guarantee

- (a) In this clause,
  - (i) **"Maximum Contract Value"** means the amount specified in the **"Limitation of Expenditure"** clause set out in the Contract (excluding Applicable Taxes); and
  - (ii) **"Minimum Contract Value"** means 5% of the Maximum Contract Value on the date the contract is first issued.
- (b) Canada's obligation under the Contract is to request Work in the amount of the Minimum Contract Value or, at Canada's option, to pay the Contractor at the end of the Contract in accordance with sub-article (c), subject to sub-article (d). In consideration of such obligation, the Contractor agrees to stand in readiness throughout the Contract Period to perform the Work described in the Contract. Canada's maximum liability for work performed under the Contract must not exceed the Maximum Contract Value, unless an increase is authorized in writing by the Contracting Authority.

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

#### 7.4 Standard Clauses and Conditions

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

(a) **General Conditions:**

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

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

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

(b) **Supplemental General Conditions:**

The following Supplemental General Conditions:

- (i) 4006 (2010-08-16), Supplemental General Conditions - Contractor to Own Intellectual Property Rights in Foreground Information;

#### 7.5 Security Requirement

The following security requirements (SRCL #19 and related clauses provided by ISP) as set out under Annex "B" to the Supply Arrangement, applies to and forms part of the Contract.

- 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 Services and Procurement Canada (PSPC).

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/PSPC.
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/PSPC.
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).

## 7.6 Contract Period

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

## 7.7 Authorities

### (a) Contracting Authority

The Contracting Authority for the Contract is:

Name: Kenneth Smith  
Title: Supply Team Leader  
Public Services and Procurement Canada  
Acquisitions Branch  
Directorate: Services and Technology Acquisition Management Sector  
Address: 11 Laurier St., Gatineau, Québec  
Telephone: (819) 420-2211  
E-mail address: [kenneth.smith@tpsgc-pwgsc.gc.ca](mailto:kenneth.smith@tpsgc-pwgsc.gc.ca)

The Contracting Authority is responsible for the management of the Contract and any changes to the Contract must be authorized in writing by the Contracting Authority. The Contractor must not

perform work in excess of or outside the scope of the Contract based on verbal or written requests or instructions from anybody other than the Contracting Authority.

**(b) Technical Authority**

The Technical Authority for the Contract is:

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

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

**(c) Contractor's Representative**

Representatives at the Contractor's management level who can be contacted concerning technical or administrative issues under the contract:

	Administrative	Technical
Name		
Title		
Telephone No.		
Cellphone No.		
E-mail Address		

**7.8 Proactive Disclosure of Contracts with Former Public Servants**

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

**7.9 Payment**

**(a) Basis of Payment**

In consideration of the Contractor satisfactorily completing all of its obligations under the authorized Task Authorization (TA), the Contractor will be paid in accordance with the basis of Payment, in Annex B, as specified in the TA.

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

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

Time charged and the accuracy of the Contractor's time recording system are subject to verification by Canada, before or after payment is made to the Contractor. If verification is done after payment, the Contract must repay any overpayment, at Canada's request.
- (f) **Payment Credits**
  - (i) **Failure to Provide Resource:**
    - (A) If the Contractor does not provide a required professional services resource that has all the required qualifications within the time prescribed by the Contract, the Contractor must credit to Canada an amount equal to the per diem rate (based on

a 7.5-hour workday) of the required resource for each day (or partial day) of delay in providing the resource, up to a maximum of 10 days.

- (B) **Corrective Measures:** If credits are payable under this Article for two consecutive months or for three months in any 12-month period, the Contractor must submit a written action plan describing measures it will implement or actions it will undertake to eliminate the recurrence of the problem. The Contractor will have five working days to deliver the action plan to the Client and the Contracting Authority and 20 working days to rectify the underlying problem.
- (C) **Termination for Failure to Meet Availability Level:** In addition to any other rights it has under the Contract, Canada may terminate the Contract for default in accordance with the General Conditions by giving the Contractor three months' written notice of its intent, if any of the following apply:
- (1) the total amount of credits for a given monthly billing cycle reach a level of 10% of the total billing for that month; or
  - (2) the corrective measures required of the Contractor described above are not met.

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

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

- (i) Where the Contractor, its employees, subcontractors, or agents are providing services on government premises under the Contract and those premises are inaccessible because of the evacuation or closure of government offices, and as a result no work is performed, Canada is not responsible for paying the Contractor for work that otherwise would have been performed if there had been no evacuation or closure.
- (ii) If, as a result of any strike or lock-out, the Contractor or its employees, subcontractors or agents cannot obtain access to government premises and, as a result, no work is performed, Canada is not responsible for paying the Contractor for work that otherwise would have been performed if the Contractor had been able to gain access to the premises

#### **7.10 Invoicing Instructions**

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

#### **7.11 Certifications**

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

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

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

#### **7.13 Applicable Laws**

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

#### **7.14 Priority of Documents**

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

- (a) these Articles of Agreement, including any individual SACC clauses incorporated by reference in these Articles of Agreement;
- (b) Supplemental General Conditions, in the following order:

- (i) 4006 (2010-08-16), Supplemental General Conditions - Contractor to Own Intellectual Property Rights in Foreground Information;
- (c) General Conditions 2035 (2016-04-04), Higher Complexity - Services;
- (d) Annex A, Statement of Work - Annex A including its Appendices as follows:
  - (i) Appendix A to Annex A - Tasking Assessment Procedure;
  - (ii) Appendix B to Annex A - Task Authorization (TA) Form;
  - (iii) Appendix C to Annex A - Resource Assessment Criteria and Response Table;
  - (iv) Appendix D to Annex A - Certifications at the TA stage;
- (e) Annex B, Basis of Payment;
- (f) Annex C, Security Requirements Check List;
- (g) the validly issued Task Authorizations and any required certifications (including all of their annexes, if any); and
- (h) the Contractor's bid dated \_\_\_\_\_ *(insert date of bid)* *(if the bid was clarified or amended, insert the time of contract award)*, as clarified on \_\_\_\_\_ "or" as amended \_\_\_\_\_ *(insert date(s) of clarification(s) or amendment(s) if applicable.)*

#### **7.15 Foreign Nationals (Canadian Contractor)**

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

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

#### **7.16 Foreign Nationals (Foreign Contractor)**

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

#### **7.17 Insurance Requirements**

##### **(a) Compliance with Insurance Requirements**

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

if requested by the Contracting Authority, forward to Canada a certified true copy of all applicable insurance policies.

(b) **Commercial General Liability Insurance**

- (i) The Contractor must obtain Commercial General Liability Insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature, but for not less than \$2,000,000 per accident or occurrence and in the annual aggregate.
- (ii) The Commercial General Liability policy must include the following:
  - (A) Additional Insured: Canada is added as an additional insured, but only with respect to liability arising out of the Contractor's performance of the Contract. The interest of Canada should read as follows: Canada, as represented by Public Services and Procurement Canada.
  - (B) Bodily Injury and Property Damage to third parties arising out of the operations of the Contractor.
  - (C) Products and Completed Operations: Coverage for bodily injury or property damage arising out of goods or products manufactured, sold, handled, or distributed by the Contractor and/or arising out of operations that have been completed by the Contractor.
  - (D) Personal Injury: While not limited to, the coverage must include Violation of Privacy, Libel and Slander, False Arrest, Detention or Imprisonment and Defamation of Character.
  - (E) Cross Liability/Separation of Insureds: Without increasing the limit of liability, the policy must protect all insured parties to the full extent of coverage provided. Further, the policy must apply to each Insured in the same manner and to the same extent as if a separate policy had been issued to each.
  - (F) Blanket Contractual Liability: The policy must, on a blanket basis or by specific reference to the Contract, extend to assumed liabilities with respect to contractual provisions.
  - (G) Employees and, if applicable, Volunteers must be included as Additional Insured.
  - (H) Employers' Liability (or confirmation that all employees are covered by Worker's compensation (WSIB) or similar program)
  - (I) Broad Form Property Damage including Completed Operations: Expands the Property Damage coverage to include certain losses that would otherwise be excluded by the standard care, custody or control exclusion found in a standard policy.
  - (J) Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of policy cancellation.
  - (K) If the policy is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.
  - (L) Owners' or Contractors' Protective Liability: Covers the damages that the Contractor becomes legally obligated to pay arising out of the operations of a subcontractor.
  - (M) Advertising Injury: While not limited to, the endorsement must include coverage for piracy or misappropriation of ideas, or infringement of copyright, trademark, title or slogan.

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

- (i) The Contractor must obtain Errors and Omissions Liability (a.k.a. Professional Liability) insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature but for not less than \$1,000,000 per loss and in the annual aggregate, inclusive of defence costs.
- (ii) If the Professional Liability insurance is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.
- (iii) The following endorsement must be included:  
  
Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of cancellation.

#### **7.18 Limitation of Liability - Information Management/Information Technology**

- (a) This section applies despite any other provision of the Contract and replaces the section of the general conditions entitled "Liability". Any reference in this section to damages caused by the Contractor also includes damages caused by its employees, as well as its subcontractors, agents, and representatives, and any of their employees. This section applies regardless of whether the claim is based in contract, tort, or another cause of action. The Contractor is not liable to Canada with respect to the performance of or failure to perform the Contract, except as described in this section and in any section of the Contract pre-establishing any liquidated damages. The Contractor is only liable for indirect, special or consequential damages to the extent described in this Article, even if it has been made aware of the potential for those damages.
- (b) **First Party Liability:**
  - (i) The Contractor is fully liable for all damages to Canada, including indirect, special or consequential damages, caused by the Contractor's performance or failure to perform the Contract that relate to:
    - (A) any infringement of intellectual property rights to the extent the Contractor breaches the section of the General Conditions entitled "Intellectual Property Infringement and Royalties";
    - (B) physical injury, including death.
  - (ii) The Contractor is liable for all direct damages caused by the Contractor's performance or failure to perform the Contract affecting real or tangible personal property owned, possessed, or occupied by Canada.
  - (iii) Each of the Parties is liable for all direct damages resulting from any breach of confidentiality under the Contract. Each of the Parties is also liable for all indirect, special or consequential damages in respect of any unauthorized disclosure of the other Party's trade secrets (or trade secrets of a third party provided by one Party to another under the Contract) relating to information technology.
  - (iv) The Contractor is liable for all direct damages relating to any encumbrance or claim relating to any portion of the Work for which Canada has made any payment. This does not apply to encumbrances or claims relating to intellectual property rights, which are addressed under (i)(A) above.
  - (v) The Contractor is also liable for any other direct damages to Canada caused by the Contractor's performance or failure to perform the Contract that relate to:
    - (A) any breach of the warranty obligations under the Contract, up to the total amount paid by Canada (including any applicable taxes) for the goods and services affected by the breach of warranty; and

- (B) Any other direct damages, including all identifiable direct costs to Canada associated with re-procuring the Work from another party if the Contract is terminated either in whole or in part for default, up to an aggregate maximum for this subparagraph (B) of the greater of .75 times the total estimated cost (meaning the dollar amount shown on the first page of the Contract in the cell titled "Total Estimated Cost" or shown on each call-up, purchase order or other document used to order goods or services under this instrument), or \$1,000,000.00.

In any case, the total liability of the Contractor under subparagraph (v) will not exceed the total estimated cost (as defined above) for the Contract or \$1,000,000.00, whichever is more.

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

(c) **Third Party Claims:**

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

**7.19 Joint Venture Contractor**

- (a) The Contractor confirms that the name of the joint venture is [REDACTED] and that it is comprised of the following members: *[list all the joint venture members named in the Contractor's original bid]*.
- (b) With respect to the relationship among the members of the joint venture Contractor, each member agrees, represents and warrants (as applicable) that:
- (i) [REDACTED] has been appointed as the "representative member" of the joint venture Contractor and has fully authority to act as agent for each member regarding all matters relating to the Contract;
- (ii) by giving notice to the representative member, Canada will be considered to have given notice to all the members of the joint venture Contractor; and

- (iii) all payments made by Canada to the representative member will act as a release by all the members.
- (c) All the members agree that Canada may terminate the Contract in its discretion if there is a dispute among the members that, in Canada's opinion, affects the performance of the Work in any way.
- (d) All the members are jointly and severally or solidarily liable for the performance of the entire Contract.
- (e) The Contractor acknowledges that any change in the membership of the joint venture (i.e., a change in the number of members or the substitution of another legal entity for an existing member) constitutes an assignment and is subject to the assignment provisions of the General Conditions.
- (f) The Contractor acknowledges that all security and controlled goods requirements in the Contract, if any, apply to each member of the joint venture Contractor.

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

#### **7.20 Professional Services - General**

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

##### **Replacement of Specific Individuals**

- (i) If the Contractor is unable to provide the services of any specific individual identified in the TA to perform the services, the Contractor must within five working days of having this knowledge, the individual's departure or failure to commence Work (or, if Canada has requested the replacement, within ten working days of Canada's notice of the requirement for a replacement) provide to the Contracting Authority:
  - (A) the name, qualifications and experience of a proposed replacement immediately available for Work; and
  - (B) security information on the proposed replacement as specified by Canada, if applicable.

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

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

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

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

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

#### **7.21 Safeguarding Electronic Media**

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

#### **7.22 Representations and Warranties**

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

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

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

#### **7.24 Government Property**

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

- (a) Equipment and facilities as stipulated in section 2.6, Location of Work, of Annex "A", Statement of Work.

#### **7.25 Transition Services at End of Contract Period**

The Contractor agrees to execute the transition tasks identified within the Statement of Work, in the period leading up to the end of the Contract Period, and it will make all reasonable efforts to assist Canada in the transition from the Contractor to a new contract with another supplier.

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

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

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

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## **ANNEX A**

### **STATEMENT OF WORK**

#### **1. BACKGROUND**

##### **1.1 Infrastructure Canada**

Infrastructure Canada (INFC) works closely with all levels of government and other partners to enable investments in social, green and other core public infrastructure as well as infrastructure that helps increase trade and grow the economy. INFC provides long-term predictable support to help Canadians benefit from world-class, modern public infrastructure. The Department achieves this by making investments, building partnerships, developing policies, delivering programs, and fostering knowledge about public infrastructure in Canada.

Since it was established in 2002, the Department has been an important funding partner, working with provinces, territories, municipalities, the private sector and non-profit organizations, along with other federal departments and agencies, to help build and revitalize infrastructure that supports modern, inclusive and diverse communities – and a strong Canada.

Going forward, the Government of Canada's new 10-year infrastructure plan will deliver significant new funding to provinces, territories, and municipalities. The plan, which is being developed in collaboration with all levels of government, will ensure both immediate increased investments in infrastructure and long-term predictable funding to address the priorities of Canadians. Taking into account existing infrastructure programs, new investments made in Budget 2016 and the additional investments contained in the 2016 Fall Economic Statement, the government will make a total investment in Canada's communities of more than \$180 billion over 12 years.

Infrastructure Canada is also the project authority charged with delivering the New Champlain Bridge Corridor project located in Montreal, Quebec, a major Canada-United States trade corridor. This responsibility includes overseeing the Jacques Cartier and Champlain Bridges Incorporated, a Crown corporation whose mandate is to ensure a safe drive for users on its structures located in the Greater Montreal area.

In addition, the Department oversees the Windsor-Detroit Bridge Authority, a Crown corporation responsible for the procurement, construction and operation of the Gordie Howe International Bridge (GHIB) project, a new border crossing between Windsor, Ontario and Detroit, Michigan — Canada's most important trade corridor.

All of INFC's programs result in the construction and enhancement of public infrastructure, contributing to the Department's Strategic Outcome of Public Infrastructure for a more prosperous Canada. For further information, please visit [www.infrastructure.gc.ca](http://www.infrastructure.gc.ca).

##### **1.2 Information Management and Information Technology Directorate**

INFC's Information Management and Information Technology (IM/IT) directorate is a small team responsible for ensuring all services related to the support of departmental programs as well as activities and systems in support of corporate services are documented, developed, delivered and managed according to Government of Canada best practices. This includes accompanying services for our clients in their day-to-day duties.

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Given the Department's focus on delivering funding for thousands of infrastructure projects across the country, it is critical to have effective IM/IT systems in place to support the review, approval, tracking and reporting on federal infrastructure investments as well as to store information assets appropriately. In addition, the Government of Canada is advancing an ambitious agenda for the modernization of information technology. The Department is committed to supporting this agenda

A key component of the Department's overall IM/IT investment plan relate to the maintenance and enhancements of the Program Information Management System (PIMS), a single system that supports the delivery of all infrastructure programs. In conjunction with an Integrated Data Warehouse and Cognos/BI reporting capability, INFC has the systems in place to support program delivery for current and future programs.

Migration of INFC's hosted program delivery and reporting applications from a private sector turnkey hosted and supported data centres to Shared Services Canada (SSC) Government Operations Portfolio (GOP) was completed in March 2015. INFC IM/IT continues to build on business transformation efforts required to augment/transform INFC's previous service delivery model and IT capabilities to an in-house delivery model for Operations/Service Management and Application Services. This includes adjusting INFC's existing organization, processes, tools and workforce to accommodate the delivery of these services in-house.

IM/IT recently completed a review of its current professional services contracts and its anticipated requirements for contract resources over the next two-five years. As a result of this exercise INFC has identified the need to establish contract arrangements for the provision of resources in three distinct areas of requirement: Application Development and Data Management; IMIT Management and Project Services; and Cyber Protection Services.

This SOW relates to the requirement for IM/IT Management and Project Services.

## 2. Requirement

### 2.1 Summary of Services

The IM/IT Directorate of Infrastructure Canada (INFC) requires informatics professional services, primarily in the National Capital Region (NCR), to work together with existing INFC staff on an "as and when requested" basis to support the strategic planning and oversight of key IM/IT projects and transformation initiatives in support of INFC business stakeholders.

INFC may request resources, using the Task Authorization (TA) process described in Appendix A to Annex A in any of the categories and levels identified in the table that follows. A number of separate TAs may be underway at any particular time with the resources working on unrelated requirements.

INFC's requirements are aligned by two workstreams.

### 2.2 Workstream 1: IM/IT Management Services

TBIPS Resource Category	Level
Organizational Development Consultant	Level 3
Business Transformation Architect	Level 3
Project Executive	Level 3

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### 2.3 Workstream 2: IM/IT Project Services

TBIPS Resource Category	Level
Project Administrator	Level 2
Project Administrator	Level 3
Project Manager	Level 2
Project Manager	Level 3
Business Analyst	Level 2
Business Analyst	Level 3
IM Architect	Level 3
Technology Architect	Level 3
Application / Software Architect	Level 3
GIS Application Architect	Level 3

### 2.4 Deliverables

Contractor resources will be required, on an as and requested basis, to undertake tasks and activities in support of INFC in the strategic planning and designing of IM/IT initiatives. Each TA will identify the required resource category, the number of resources required, the applicable resource assessment criteria, and the required tasks, activities and deliverables to be completed by the individual resource. Refer to section 3 for resource tasks and activities.

### 2.5 Resource Qualifications

The Contractor must demonstrate to the satisfaction of the Technical Authority that any resource proposed in response to a Task Authorization (TA) meets the requirements set-out in the individual TA in accordance with the TA process set-out in Appendices A, B, C and D to Annex A – SOW.

### 2.6 Location of Work

- a) The work may be conducted on-site at INFC premises or off-site at the Contractor's location as stipulated in the TA.
- b) Although the requirements are anticipated to be primarily in the National Capital Region (NCR), there may be limited requirements for resources to work on an ongoing basis on-site at INFC in other Canadian locations to support specific INFC projects. In such instances, Canada will not reimburse the Contractor for any travel and living expenses associated with resources that must commute between their place of residence and the INFC office location (stipulated in the TA) or for any expenses associated with commuting within the specific municipality (e.g. NCR).
- c) When the TA designates the location of work as on-site, INFC will provide the necessary equipment and facilities. When the TA designates the location of work as off-site, the Contractor must provide all equipment and facilities necessary to perform the work.
- d) INFC shall provide, subject to normal security requirements, and only to the specified Contractor personnel, access to identified data bases or applications resident on INFC computers or networks for the sole purpose of executing the tasks associated with this contract. INFC, at its sole discretion, will identify the nature and characteristics of such access.

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- e) Travel could be required. If the TA stipulates that travel outside the NCR is required to support the delivery of the work under the TA, travel must be pre-authorized and will be reimbursed in accordance with Treasury Board guidelines.

## **2.7 Language Requirements**

- a) All deliverables must be submitted in the English language.
- b) There will be some requirements, in specific categories, for bilingual resources. Bilingual requirements will be identified in the TA as applicable.

## **2.8 Contract Management and Reporting**

- a) The Contractor must, at no additional cost to Canada, designate an individual as its representative and single point of contact responsible for the management of the contract and its business relationship with Canada.
- b) The Contractor's representative will be required to attend Administrative Review meetings with the Contracting Authority and Technical Authority to review the status of the contract including status of TAs, outstanding billings, planned holidays/scheduling of Contractor resources, etc. These Administrative Review meetings will be held, face-to-face in the NCR, monthly or other frequency as requested by Canada.
- c) The Contractor resources must prepare and provide to the Technical Authority (in support of the invoice), monthly progress reports in a format acceptable to the Technical Authority. At a minimum, each progress report must document the following information:
- a. A copy of the Contractor's monthly timesheet;
  - b. A report of the status of each task including percentage of work completed and whether individual tasks can be accomplished in accordance with the schedule;
  - c. Tasks finalized to date;
  - d. Problems encountered (including details) if tasks are not progressing in accordance with the schedule; and
  - e. Potential issues which are likely to cause problems related to the work required

## **2.10 Knowledge Transfer**

At the conclusion of the contract, Contractor resources may be required at the discretion of INFC to transfer knowledge to INFC personnel or a subsequent contractor (if applicable). Knowledge transfer at the conclusion of the contract will be limited to a maximum of 15 days of effort at the applicable Per Diem rates specified in the Basis of Payment. A separate TA, identifying the required tasks, activities and deliverables, will be prepared for transition-out activities.

## **2.11 Transition-out Services**

At the conclusion of the contract, Contractor resources may be required at the discretion of INFC to transition day-to-day activities to INFC personnel or a subsequent contractor (if applicable). Transition-out activities at the conclusion of the contract will be limited to a maximum of 15 days of effort at the

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applicable Per Diem rates specified in the Basis of Payment. A separate TA, identifying the required tasks, activities and deliverables, will be prepared for transition-out activities.

### **3. Resource Tasks and Activities**

#### **Workstream 1: IM/IT Management Services**

##### **3.1 Organizational Development Consultant, Level 3**

The Organizational Development Consultant, Level 3 will be responsible for, but not limited to, the following tasks:

- 1) Enable, facilitate, and mediate the evolution of the various organizational or departmental structures toward the organization's desired outcome or structure.
- 2) Assist with organizational needs assessment and strategic planning to ensure development of human capital to meet business objectives and goals.
- 3) Provide advice, support and consultation to senior staff, business unit requests, and front line management to achieve strategic initiatives and goals.
- 4) Research, design, implement and maintain employee development programs including leadership development and other management development programs.
- 5) Develop and implement processes to measure the effectiveness of development and learning efforts to ensure performance improvements are focused on measurable and attainable results.
- 6) Serve as an expert resource by collaborating with HR and business unit executives to ensure clear standards and metrics linked to talent reviews and employee development plans.
- 7) Develop strategic partnerships with other internal project managers to identify and consult on change management initiatives to support strategic projects requiring organizational culture change.
- 8) Proactively address and respond to Organizational Development issues by bringing key stakeholders together to assess root causes and performance gaps and recommend appropriate interventions.
- 9) Practice continuous improvement processes and procedures, eliminating non-value added activities.
- 10) Conduct focus groups and/or process improvement sessions as needed.
- 11) Implement and manage the organization's training to ensure cost effective employee development activities that support the organization's strategic initiatives.
- 12) Manage and facilitate organizational initiatives and projects as requested.

##### **3.2 Business Transformation Architect, Level 3**

The Business Transformation Architect (BTA), Level 3 will be responsible for, but not limited to, the following tasks:

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

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### **3.3 Project Executive, Level 3**

The Project Executive, Level 3 will be responsible for, but not limited to, the following tasks:

- 1) Develop project objectives and strategies for IM/IT transformation initiatives in support of business stakeholders;
- 2) Develop project planning and approval documents such as business cases, project charters, and TB submissions;
- 3) Develop and deliver communications at executive levels to create awareness and support with the organization for the project / initiative;
- 4) Obtain project sign-off;
- 5) Provide leadership and oversight of strategic IM/IT projects and change initiatives;
- 6) Meet with other organizational executives to ensure all stakeholders are committed and moving forward on project and organizational goals;
- 7) Develop, initiate, monitor and report on risk management procedures to ensure all risks have mitigations, and residual risks are acceptable to senior stakeholders; and
- 8) Resolve issues related to the project.

### **Workstream 2: IM/IT Project Services**

#### **3.4 Project Administrator, Level 2**

The Project Administrator, Level 2 will be responsible for, but not limited to, the following tasks:

- 1) Provide administrative support to a team of IM/IT resources;
- 2) Document IM/IT project information in manual and/or electronic files, project information might include such things as project activity schedule, status reports, and correspondence;
- 3) Use the Microsoft Office suite;
- 4) Organize and schedule meetings, documenting meeting minutes, records of decision, etc.;
- 5) Create financial approval documents, track expenses, and maintain a budget document; and
- 6) Provide procurement administrative support including drafting TA amendments, maintaining contract management files, processing invoices, etc.

#### **3.5 Project Administrator, Level 3**

The Project Administrator, Level 3 will be responsible for, but not limited to, the following tasks:

- 1) Assist project management and IM/IT professionals, technical users and end users in simple routine tasks;
- 2) Provide administrative and technical support of a clerical nature as required to projects;
- 3) Use the Microsoft Office suite, including MS Project, to create and update documents;
- 4) Assist in performing such tasks as maintaining project documentation and application/system libraries;
- 5) Act as the first 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;
- 6) Track project change requests; and
- 7) Maintain and update relevant project information in manual and/or electronic files; project information might include such things as project activity schedule, status reports, correspondence.

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### **3.6 Project Manager, Level 2**

The Project Manager, Level 2 will be responsible for, but not limited to, the following tasks:

- 1) Provide subject matter expertise in the areas of Risk Management, Integration Management, Change Management, Planning and Scheduling, Quality Management, and Earned Value Management;
- 2) Manage the project during planning, monitoring, execution and closing phases;
- 3) Create clear and attainable project objectives, building the project requirements, and managing project management constraints including cost, time, scope, and quality;
- 4) Identify resource needs and work with the Technical Authority to assign individual responsibilities;
- 5) Create and execute project work plans and timelines and revise as appropriate to meet changing needs and requirements;
- 6) Manage day-to-day operational aspects of a project and scope, which includes reviewing deliverables prepared by team before presenting to stakeholders and resolve or escalate issues in a timely fashion;
- 7) Communicate effectively relevant project information to team and stakeholders;
- 8) Communicate project changes and updates to appropriate team members;
- 9) Organise and facilitate team and stakeholder meetings to review work;
- 10) Prepare regular status reports and distribute as necessary;
- 11) Ensure documents are complete, current, and stored appropriately; and
- 12) Provide documentation as required to support approval processes.

### **3.7 Project Manager, Level 3**

The Project Manager, Level 3 will be responsible for, but not limited to, the following tasks:

- 1) Provide subject matter expertise in the areas of Risk Management, Integration Management, Change Management, Planning and Scheduling, Quality Management, and Earned Value Management;
- 2) Manage the project during the planning, executing, monitoring and closing phases;
- 3) Create clear and attainable project objectives, building the project requirements, and managing project management constraints including cost, time, scope, and quality;
- 4) Identify resource needs and work with the Technical Authority to assign individual responsibilities;
- 5) Create and execute project work plans and timelines and revise as appropriate to meet changing needs and requirements;
- 6) Manage day-to-day operational aspects of a project and scope, which includes reviewing deliverables prepared by team before presenting to stakeholders and resolve or escalate issues in a timely fashion;
- 7) Communicate effectively relevant project information to team and stakeholders;
- 8) Document, evaluate impact of, seek approval for and communicate project changes and updates to appropriate team members;
- 9) Organize and facilitate team and stakeholder meetings to review work;
- 10) Prepare regular status reports and distribute as necessary;
- 11) Ensure documents are complete, current, and stored appropriately; and
- 12) Provide documentation as required to support approval processes.

### **3.8 Business Analyst, Level 2**

The Business Analyst (BA), Level 2 will be responsible for, but not limited to, the following tasks:

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- 1) Determine operational objectives by studying business functions; gathering information; evaluating output requirements and formats;
- 2) Perform business analyses of functional requirements to identify information, procedures, and decision flows;
- 3) Ensure all documentation accurately reflect the current status of changes and outstanding issues so that business requirements reflect application features and functions;
- 4) Evaluate existing procedures and methods, identify and document items such as database content, structure, application subsystems;
- 5) Recommend controls by identifying problems and writing improved procedures;
- 6) Establish acceptance test criteria with client;
- 7) Provide references for users by writing and maintaining user documentation; providing help desk support; and training users; and
- 8) Prepare reports by collecting, analyzing, and summarizing information and trends.

### **3.9 Business Analyst, Level 3**

The Business Analyst (BA), Level 3 will be responsible for, but not limited to, the following tasks:

- 1) Lead a team of Business Analysts, provide guidance and advice and assign tasks;
- 2) Determine operational objectives by studying business functions; gathering information; evaluating output requirements and formats;
- 3) Perform business analyses of functional requirements to identify information, procedures, and decision flows;
- 4) Ensure all documentation accurately reflect the current status of changes and outstanding issues so that business requirements reflect application features and functions;
- 5) Evaluate existing procedures and methods, identify and document items such as database content, structure, application subsystems;
- 6) Recommend controls by identifying problems and writing improved procedures;
- 7) Establish acceptance test criteria with client;
- 8) Provide references for users by writing and maintaining user documentation; providing help desk support; and training users; and
- 9) Prepare reports by collecting, analyzing, and summarizing information and trends.

### **3.10 IM Architect, Level 3**

The IM Architect, Level 3 will be responsible for, but not limited to, the following tasks:

- 1) Analyse existing capabilities and requirements, develop redesigned frameworks and recommend areas for improved capability and integration. Develop and document detailed statements of requirements;
- 2) Evaluate existing procedures and methods, identify and document database content, structure, and application subsystems, and develop data dictionary;
- 3) Define and document interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems;
- 4) Prototype potential solutions, provide tradeoff information and suggest recommended courses of action;
- 5) Perform information modelling in support of BPR implementation;
- 6) Perform cost/benefit analysis of implementing new processes and solutions;
- 7) Provide advice in developing and integrating process and information models between business processes to eliminate information and process redundancies; and

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- 8) Provide advice in defining new requirements and opportunities for applying efficient and effective solutions; identify and provide preliminary costs of potential options.

### **3.11 Technology Architect, Level 3**

The Technology Architect, Level 3 will be responsible for, but not limited to, the following tasks:

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

### **3.12 Application / Software Architect, Level 3**

The Application / Software Architect, Level 3 will be responsible for, but not limited to, the following tasks:

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

### **3.13 GIS Application Architect, Level 3**

The GIS Application Architect, Level 3 will be responsible for, but not limited to, the following tasks:

- 1) Evaluate the enterprise's business/GIS architecture; determine its consistency and integration with the organization's business/GIS strategies, assess the degree of its alignment with Government of Canada's Federal Geospatial Platform (FGP);

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- 2) Provide Geomatics Architectural expertise to transition current Geo application to ESRI platform delivered through Government of Canada's Federal Geospatial Platform (FGP);
- 3) Assess the feasibility of migrating from the current state to the target business architecture and enabling technologies and identify the risks associated with migrating to the target business architecture and technologies and make recommendations for risk mitigation;
- 4) Identify business and technology trends that create opportunities for business improvement, advise business and Information and Communication Technology( ICT) Senior Executives on GIS trends and emerging technologies and the impact on the organization's and government ICT architectures and business strategies;
- 5) Model "What if" scenarios and recommend appropriate changes to the existing architecture and department geographical infrastructure, and recommend alternative solutions, methodologies and strategies;
- 6) Produce an architectural evolution plan, recommend prioritization of architecture evolution initiatives, and develop and/or implement an architecture evolution plan; and
- 7) Coach, mentor and train the organization to perform any of the above.

## **APPENDIX A TO ANNEX A**

### **TASKING ASSESSMENT PROCEDURE**

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

situations in which a proposed resource worked at the same time on more than one project, the duration of any overlapping time period will be counted only once toward any requirements that relate to the individual's length of experience.

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

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**Appendix B to Annex A**

Request for estimate - Technical Authority:	
Director _____	Date: YYYY-MM-DD _____

**Task Authorization Form  
 IM/IT Management and Project Services  
 PWGSC Contract # QA001-175431/001/XS**

<b>TASK AUTHORIZATION (TA) NUMBER:</b> * Please include this number on all invoices		<b>AMENDMENT NUMBER:</b>	
<b>TA Originator NAME:</b>		<b>Responsibility Code:</b>	
<b>CONTRACTOR'S NAME:</b>			
<b>TO THE CONTRACTOR:</b> <i>Subject to the receipt of the appropriate AUTHORIZING SIGNATURES below, you are hereby requested to supply the following services in accordance with the terms of the referenced contract. Invoices shall be prepared in accordance with the instructions set out in the contract.</i>			
<b>TASK TITLE</b>			
<b>LOG NO.</b>	N/A	<b>RELEASE NO.</b>	
<b>TASK TYPE (ENHANCEMENT/TABLE UPDATE...)</b>		<b>DATE REQUIRED</b>	
<b>SHARED COST TO INFC/CLIENT</b>		<b>PEER REVIEW COMPLETED</b>	
<b>PERIOD OF PERFORMANCE</b>	<b>From:</b>	<b>To:</b>	
<b>BACKGROUND</b>			
<b>DESCRIPTION OF WORK/REQUIREMENT:</b>			

<b>RESOURCES (PER DIEM)</b> <i>Résumés of the resources must be provided for INFC and PWGSC review with this document.</i>				
<b>Name</b>	<b>Category</b>	<b>Classification</b>	<b>Start date</b>	<b>End date</b>
<b>COST BREAKDOWN:</b> <i>Upon completion of this Task Authorization (TA), the Contractor shall prepare and submit to the INFC Authority and to the PWGSC Contracting Authority the details of level of effort to perform this TA.</i>				

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Resource/Project	No. of days	Per diem or Fixed Price	Sub-Total	Travel & Living Expenses	Cost of the Resource/Project
<b>SUBTOTAL:</b>					
<b>AMOUNT OF THE AMENDMENT (If Applicable):</b>					
<b>AMOUNT OF THE TA (INCLUDING ALL AMENDMENTS):</b>					
<b>GST:</b>					
<b>HST (as of 2010-07-01):</b>					
<b>TOTAL AMOUNT OF THE TA (including GST and HST):</b>					
<b>FINANCIAL CODING:</b>					
<b>BASIS OF PAYMENT</b>		In accordance with the contract, article XX.			
<b>METHOD OF PAYMENT</b>		In accordance with the contract, article XX.			
<b>AUTHORIZING SIGNATURES:</b>		<i>The Contractor must obtain all of the required signatures prior to the commencement of work.</i>			
<b>CLIENT/PROJECT AUTHORITY (INFC)</b>			<b>Date:</b>		
<b>CONTRACTING AUTHORITY (PWGSC)</b>			<b>Date:</b>		

**INFC Internal**

Recommend Approval: \_\_\_\_\_ Date \_\_\_\_\_  
 (Director) RC 106232 YY-MM-DD  
 OR  
 (Director) RC 106233 and 106234, (CIO) RC 106231 and RC 106238  
 Workplan #: \_\_\_\_\_

## **APPENDIX C to ANNEX A Resource Assessment Criteria and Response Table**

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## Definitions

The following definitions apply to the evaluation criteria that follows.

- 1) Application Development is defined as the development of new application, a release of an existing application or a new sub-component/ module of an overall application solution.
- 2) Software Development Life Cycle (SDLC) refers to the methodology/process being followed in software development projects. Methodologies include the traditional waterfall process, which is very systematic, to the agile method, which is based on early delivery and quick continuous improvement.
- 3) Java refers to applications developed on the Java/J2EE 2 Platform, Enterprise Edition (J2EE) platform, version 1.3 or more recent.
- 4) .NET refers to applications developed on the Microsoft.NET Framework.
- 5) Customer Reference Contract describes a contract that the Bidder held to deliver services to a customer and is used to demonstrate to demonstrate the Bidder's experience.
- 6) Customer Reference Project describes a customer project that the proposed resource worked on and is used to demonstrate the resource's experience.
- 7) Microsoft Corporation (MS).
- 8) Business Intelligence (BI) tools are a type of application software that includes data management tools, data discovery applications and reporting tools (including dashboards and visualization software).
- 9) Information Management (IM).
- 10) Information Technology (IT).

## Instructions

The following information and instructions relate to the submission and evaluation of the mandatory assessment criteria contained in this document.

- i. The Contractor should fully complete the Resource Assessment Criteria (i.e. tables) that follow. Résumés are not required for the proposed resources.
- ii. There will be some requirements, in specific categories, for bilingual resources. Bilingual requirements will be identified in the TA as applicable.
- iii. It should be noted that cutting and pasting wording from the requirement and/or simply citing the experience does not constitute demonstration of the requirement. The Contractor must substantiate all claims of experience by providing a description of the resource's role on the cited Customer Reference Project including context or other pertinent information which validates the candidate's experience (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.). If the Contractor's response does not fully demonstrate that the requirement is met by the cited, then the experience will not be considered.
- iv. Where the criteria specifies experience within a specific timeframe (e.g. within ten years) it is the period of time preceding the issuance date of the specific Task Authorization.
- v. For any customer reference project provided in response to the Resource Assessment Criteria to be considered, the proposed named resource must have worked on the Customer Reference Project for the minimum duration stipulated (i.e. Level 2 = 4 months, Level 3 = 6 months).
- vi. The Contractor is requested to include complete customer contact information for each Customer Reference Project (used to demonstrate experience) including name, title, and telephone number or e-mail address. Canada reserves the right to request customer contact information for the purposes of verification.
- vii. If more than the requested number of Customer Reference Projects are provided (e.g. maximum 3 Customer Reference Projects), Canada will only evaluate the maximum number stipulated in the order in which they are set out in the Contractor's response.
- viii. Canada reserves the right to verify any information provided in the Contractor's response to the Resource Assessment Criteria; the applicable customer reference will be asked to verify the information provided.

## Mandatory Assessment Criteria (As and when requested Resources)

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

### Workstream 1 IM/IT Management Services

#### 1. Organizational Development Consultant (Level 3)

Resource Assessment Criteria		
Resource Category	1. Organizational Development Consultant, Level 3	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate (in column 'C') that the proposed resource meets the mandatory requirements stipulated in column 'B':		
'A'	'B'	'C'
Criteria	Mandatory Requirement	Contractor's Response
M-1.1	<p>The proposed resource must have experience in the proposed resource category including:</p> <ul style="list-style-type: none"> <li>a) a minimum of ten years of cumulative experience, within the twelve years preceding the closing date of this solicitation, working as an Organizational Development Consultant (as defined in section 3.1 of Annex A, SOW); and</li> <li>b) that within that body of experience, the resource has experience performing at least eight (out of twelve) tasks listed for a minimum of six cumulative months of experience per task:               <ul style="list-style-type: none"> <li>1) Enable, facilitate, and mediate the evolution of the various organizational or departmental structures toward the organization's or department's desired outcome or structure;</li> <li>2) Assist with organizational needs assessment and strategic planning to ensure development of human capital to meet business objectives and goals;</li> <li>3) Provide advice, support and consultation to senior staff, business unit requests, and front line management to achieve strategic initiatives and goals;</li> <li>4) Research, design, implement and maintain employee development programs including leadership development and other management development programs;</li> <li>5) Develop and implement processes to measure the</li> </ul> </li> </ul>	

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<b>Resource Assessment Criteria</b>		
<b>Resource Category</b>	1. Organizational Development Consultant, Level 3	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate (in column 'C') that the proposed resource meets the mandatory requirements stipulated in column 'B':		
<b>'A'</b>	<b>'B'</b>	<b>'C'</b>
<b>Criteria</b>	<b>Mandatory Requirement</b>	<b>Contractor's Response</b>
	<p>effectiveness of development and learning efforts to ensure performance improvements are focused on measurable and attainable results;</p> <p>6) Serve as an expert resource by collaborating with HR and business unit executives to ensure clear standards and metrics linked to talent reviews and employee development plans;</p> <p>7) Develop strategic partnerships with other internal project managers to identify and consult on change management initiatives to support strategic projects requiring organizational culture change;</p> <p>8) Proactively address and respond to Organizational Development issues by bringing key stakeholders together to assess root causes and performance gaps and recommend appropriate interventions;</p> <p>9) Practice continuous improvement processes and procedures, eliminating non-value added activities.</p> <p>10) Conduct focus groups and/or process improvement sessions as needed;</p> <p>11) Implement and manage the organization's training to ensure cost effective employee development activities that support the organization's strategic initiatives; and</p> <p>12) Manage and facilitate organizational initiatives and projects as requested.</p> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	
M-1.2	<p>The resource must have experience on a minimum of two Customer Reference Projects where the resource provided guidance and advice related to strategic IM/IT transformation initiatives in support of business stakeholders.</p> <p>To be considered, the resource must have worked on the Customer Reference Project for a minimum duration of six months.</p>	
M-1.3	<p>The Contractor must demonstrate that it has previously contracted the proposed resource for a minimum period of six months within the last two years by providing the following Customer Reference Project information:</p> <p>a) Customer organization name;</p> <p>b) Customer Contact Information;</p> <p>c) Role of the resource (resource category) under the</p>	

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<b>Resource Assessment Criteria</b>		
<b>Resource Category</b>	1. Organizational Development Consultant, Level 3	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate (in column 'C') that the proposed resource meets the mandatory requirements stipulated in column 'B':		
<b>'A'</b>	<b>'B'</b>	<b>'C'</b>
<b>Criteria</b>	<b>Mandatory Requirement</b>	<b>Contractor's Response</b>
	contract; and d) Start and end dates of the proposed resource on the Customer Reference Project.	

**2. Business Transformation Architect (Level 3)**

<b>Resource Assessment Criteria</b>		
<b>Resource Category</b>	2. Business Transformation Architect, Level 3	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate (in column 'C') that the proposed resource meets the mandatory requirements stipulated in column 'B':		
<b>'A'</b>	<b>'B'</b>	<b>'C'</b>
<b>Criteria</b>	<b>Mandatory Requirement</b>	<b>Contractor's Response</b>
M-2.1	<p>The proposed resource must have experience in the proposed resource category including:</p> <ul style="list-style-type: none"> <li>a) a minimum of ten years of cumulative experience, within the twelve years preceding the closing date of this solicitation, working as a Business Transformation Architect (as defined in section 3.2 of Annex A, SOW); and</li> <li>b) that within that body of experience, the resource has experience performing each of the seven tasks listed for a minimum of six cumulative months of experience per task:               <ul style="list-style-type: none"> <li>1) Analysis and development of business "critical success factors".</li> <li>2) Analysis and development of architecture requirements design, process development, process mapping and training.</li> <li>3) Responsible for leading other functional staff to define business strategy and processes in support of transformation and change management activities.</li> <li>4) Participate in change impact analysis and change management activities.</li> <li>5) Participate in organizational realignment (job re-design organizational re-structuring).</li> <li>6) Coordinate development of training and coordination with other stakeholders.</li> <li>7) Create presentations and present to various stakeholders, and facilitate meetings and discussions.</li> </ul> </li> </ul> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	
M-2.2	<p>The resource must have a minimum of five years of experience, within the twelve years preceding the closing date of this solicitation, conducting reviews of existing systems and business processes to identify strategies and processes in support of IM/IT and business transformation activities.</p>	
M-2.3	<p>The Contractor must demonstrate that it has previously contracted the proposed resource for a minimum period of six</p>	

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<b>Resource Assessment Criteria</b>		
<b>Resource Category</b>	2. Business Transformation Architect, Level 3	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate (in column 'C') that the proposed resource meets the mandatory requirements stipulated in column 'B':		
<b>'A'</b>	<b>'B'</b>	<b>'C'</b>
<b>Criteria</b>	<b>Mandatory Requirement</b>	<b>Contractor's Response</b>
	months within the last two years by providing the following Customer Reference Project information: <ul style="list-style-type: none"> <li>a) Customer organization name;</li> <li>b) Customer Contact Information;</li> <li>c) Role of the resource (resource category) under the contract; and</li> <li>d) Start and end dates of the proposed resource on the Customer Reference Project.</li> </ul>	

**3. Project Executive (Level 3)**

<b>Resource Assessment Criteria</b>		
<b>Resource Category</b>	3. Project Executive, Level 3	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate (in column 'C') that the proposed resource meets the mandatory requirements stipulated in column 'B':		
<b>'A'</b>	<b>'B'</b>	<b>'C'</b>
<b>Criteria</b>	<b>Mandatory Requirement</b>	<b>Contractor's Response</b>
M-3.1	<p>The proposed resource must have experience in the proposed resource category including:</p> <ul style="list-style-type: none"> <li>a) a minimum of ten years of cumulative experience, within the twelve years preceding the closing date of this solicitation, working as a Project Executive (as defined in section 3.3 of Annex A, SOW); and</li> <li>b) that within that body of experience, the resource has experience performing at least six (out of eight) tasks listed for a minimum of six cumulative months of experience per task unless otherwise specified:               <ul style="list-style-type: none"> <li>1) Develop project objectives and strategies for IM/IT transformation initiatives in support of business stakeholders;</li> <li>2) Develop project planning and approval documents such as business cases, project charters, and TB submissions;</li> <li>3) Develop and deliver communications at executive levels to create awareness and support with the organization for the project / initiative;</li> <li>4) Obtain project sign-off;</li> <li>5) Provide leadership and oversight of strategic IM/IT projects and change initiatives;</li> <li>6) Meet with other organizational executives to ensure all stakeholders are committed and moving forward on project and organizational goals;</li> <li>7) Develop, initiate, monitor and report on risk management procedures to ensure all risks have mitigations, and residual risks are acceptable to senior stakeholders; and</li> <li>8) Resolve issues related to the project.</li> </ul> </li> </ul> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	
M-3.2	<p>The resource must have experience as a Project Executive on a minimum of two Customer Reference Projects where the resource developed the business case or project charter for an IM/IT transformation project, with a budget of at least \$5M</p>	

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<b>Resource Assessment Criteria</b>		
<b>Resource Category</b>	3. Project Executive, Level 3	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate (in column 'C') that the proposed resource meets the mandatory requirements stipulated in column 'B':		
<b>'A'</b>	<b>'B'</b>	<b>'C'</b>
<b>Criteria</b>	<b>Mandatory Requirement</b>	<b>Contractor's Response</b>
	that was approved.  To be considered, the resource must have worked on the Customer Reference Project for a minimum duration of six months.	
M-3.3	The Contractor must demonstrate that it has previously contracted the proposed resource for a minimum period of six months within the last two years by providing the following Customer Reference Project information:  a) Customer organization name; b) Customer Contact Information; c) Role of the resource (resource category) under the contract; and d) Start and end dates of the proposed resource on the Customer Reference Project.	

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**Workstream 2 IM/IT Project Services**

**4. Project Administrator (Level 2)**

<b>Resource Assessment Criteria</b>		
<b>Resource Category</b>	4. Project Administrator, Level 2	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate (in column 'C') that the proposed resource meets the mandatory requirements stipulated in column 'B':		
'A'	'B'	'C'
Criteria	Mandatory Requirement	Contractor's Response
M-4.1	<p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) a minimum of five years of cumulative experience, within the eight years preceding the closing date of this solicitation, working as a Project Administrator (as defined in section 3.4 of Annex A, SOW); and</p> <p>b) that within that body of experience, the resource has experience performing at least four (out of six) tasks listed for a minimum of four cumulative months of experience per task:</p> <ol style="list-style-type: none"> <li>1) Provide administrative support to a team of IM/IT resources;</li> <li>2) Document IM/IT project information in manual and/or electronic files, project information might include such things as project activity schedule, status reports, and correspondence;</li> <li>3) Use the Microsoft Office suite;</li> <li>4) Organize and schedule meetings, documenting meeting minutes, records of decision, etc.;</li> <li>5) Create financial approval documents, track expenses, and maintain a budget document; and</li> <li>6) Provide procurement administrative support including drafting TA amendments, maintaining contract management files, processing invoices, etc.</li> </ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	
M-4.2	<p>The proposed The resource must have a minimum of two years of experience, within the last three years, as a Project Administrator using the Microsoft Office suite.</p>	

**5. Project Administrator (Level 3)**

<b>Resource Assessment Criteria</b>		
<b>Resource Category</b>	5. Project Administrator, Level 3	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate (in column 'C') that the proposed resource meets the mandatory requirements stipulated in column 'B':		
<b>'A'</b>	<b>'B'</b>	<b>'C'</b>
<b>Criteria</b>	<b>Mandatory Requirement</b>	<b>Contractor's Response</b>
M-5.1	<p>The proposed resource must have experience in the proposed resource category including:</p> <ul style="list-style-type: none"> <li>a) a minimum of ten years of cumulative experience, within the twelve years preceding the closing date of this solicitation, working as a Project Administrator (as defined in section 3.5 of Annex A, SOW); and</li> <li>b) that within that body of experience, the resource has experience performing at least five (out of seven) tasks listed for a minimum of four cumulative months of experience per task:               <ul style="list-style-type: none"> <li>1) Assist project management and IM/IT professionals, technical users and end users in simple routine tasks;</li> <li>2) Provide administrative and technical support of a clerical nature as required to projects;</li> <li>3) Use the Microsoft Office suite, including MS Project, to create and update documents;</li> <li>4) Assist in performing such tasks as maintaining project documentation and application/system libraries;</li> <li>5) Act as the first 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;</li> <li>6) Track project change requests; and</li> <li>7) Maintain and update relevant project information in manual and/or electronic files; project information might include such things as project activity schedule, status reports, correspondence.</li> </ul> </li> </ul> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	
M-5.2	<p>The proposed The resource must have a minimum of two years of experience, within the last three years, as a Project Administrator using the Microsoft Office suite.</p>	

**6. Project Manager (Level 2)**

<b>Resource Assessment Criteria</b>		
<b>Resource Category</b>	6. Project Manager, Level 2	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate (in column 'C') that the proposed resource meets the mandatory requirements stipulated in column 'B':		
<b>'A'</b>	<b>'B'</b>	<b>'C'</b>
<b>Criteria</b>	<b>Mandatory Requirement</b>	<b>Contractor's Response</b>
M-6.1	<p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) a minimum of five years of cumulative experience, within the eight years preceding the closing date of this solicitation, working as a Project Manager (as defined in section 3.6 of Annex A, SOW); and</p> <p>b) that within that body of experience, the resource has experience performing at least eight (out of twelve) tasks listed for a minimum of four cumulative months of experience per task:</p> <ol style="list-style-type: none"> <li>1) Provide subject matter expertise in the areas of Risk Management, Integration Management, Change Management, Planning and Scheduling, Quality Management, and Earned Value Management;</li> <li>2) Manage the project during planning, monitoring, execution and closing phases;</li> <li>3) Create clear and attainable project objectives, building the project requirements, and managing project management constraints including cost, time, scope, and quality;</li> <li>4) Identify resource needs and work with the Technical Authority to assign individual responsibilities;</li> <li>5) Create and execute project work plans and timelines and revise as appropriate to meet changing needs and requirements;</li> <li>6) Manage day-to-day operational aspects of a project and scope, which includes reviewing deliverables prepared by team before presenting to stakeholders and resolve or escalate issues in a timely fashion;</li> <li>7) Communicate effectively relevant project information to team and stakeholders;</li> <li>8) Communicate project changes and updates to appropriate team members;</li> <li>9) Organise and facilitate team and stakeholder meetings to review work;</li> <li>10) Prepare regular status reports and distribute as necessary;</li> </ol>	

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<b>Resource Assessment Criteria</b>		
<b>Resource Category</b>	6. Project Manager, Level 2	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate (in column 'C') that the proposed resource meets the mandatory requirements stipulated in column 'B':		
<b>'A'</b>	<b>'B'</b>	<b>'C'</b>
<b>Criteria</b>	<b>Mandatory Requirement</b>	<b>Contractor's Response</b>
	11) Ensure documents are complete, current, and stored appropriately; and 12) Provide documentation as required to support approval processes.  The required experience can be demonstrated over one or more Customer Reference Projects.	
M-6.2	The Contractor must demonstrate that it has previously contracted the proposed resource for a minimum period of six months within the last two years by providing the following Customer Reference Project information:  a) Customer organization name; b) Customer Contact Information; c) Role of the resource (resource category) under the contract; and d) Start and end dates of the proposed resource on the Customer Reference Project.	

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**7. Project Manager (Level 3)**

Resource Assessment Criteria		
Resource Category	7. Project Manager, Level 3	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate (in column 'C') that the proposed resource meets the mandatory requirements stipulated in column 'B':		
'A'	'B'	'C'
Criteria	Mandatory Requirement	Contractor's Response
M-7.1	<p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) a minimum of ten years of cumulative experience, within the twelve years preceding the closing date of this solicitation, working as a Project Manager (as defined in section 3.7 of Annex A, SOW); and</p> <p>b) that within that body of experience, the resource has experience performing at least nine (out of twelve ) tasks listed for a minimum of four cumulative months of experience per task:</p> <ol style="list-style-type: none"> <li>1) Provide subject matter expertise in the areas of Risk Management, Integration Management, Change Management, Planning and Scheduling, Quality Management, and Earned Value Management;</li> <li>2) Manage the project during the planning, executing, monitoring and closing phases;</li> <li>3) Create clear and attainable project objectives, building the project requirements, and managing project management constraints including cost, time, scope, and quality;</li> <li>4) Identify resource needs and work with the Technical Authority to assign individual responsibilities;</li> <li>5) Create and execute project work plans and timelines and revise as appropriate to meet changing needs and requirements;</li> <li>6) Manage day-to-day operational aspects of a project and scope, which includes reviewing deliverables prepared by team before presenting to stakeholders and resolve or escalate issues in a timely fashion;</li> <li>7) Communicate effectively relevant project information to team and stakeholders;</li> <li>8) Document, evaluate impact of, seek approval for and communicate project changes and updates to appropriate team members;</li> <li>9) Organize and facilitate team and stakeholder meetings to review work;</li> </ol>	

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Resource Assessment Criteria		
<b>Resource Category</b>	7. Project Manager, Level 3	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate (in column 'C') that the proposed resource meets the mandatory requirements stipulated in column 'B':		
'A'	'B'	'C'
Criteria	Mandatory Requirement	Contractor's Response
	10) Prepare regular status reports and distribute as necessary; 11) Ensure documents are complete, current, and stored appropriately; and 12) Provide documentation as required to support approval processes.  The required experience can be demonstrated over one or more Customer Reference Projects.	
M-7.2	The resource must have experience on a minimum of two Customer Reference Projects, within the eight years preceding the closing date of this solicitation, developing and delivering oral presentations to brief client management / executive on the status of an IM/IT project.  To be considered, the resource must have worked on the Customer Reference Project for a minimum duration of six months.	
M-7.3	The Contractor must demonstrate that it has previously contracted the proposed resource for a minimum period of six months within the last two years by providing the following Customer Reference Project information:  a) Customer organization name; b) Customer Contact Information; c) Role of the resource (resource category) under the contract; and d) Start and end dates of the proposed resource on the Customer Reference Project.	

**8. Business Analyst, Level 2**

Resource Assessment Criteria		
<b>Resource Category</b>		8. Business Analyst, Level 2
<b>Name of Proposed Resource:</b>		<insert name>
The Contractor must demonstrate (in column 'C') that the proposed resource meets the mandatory requirements stipulated in column 'B'::		
'A'	'B'	'C'
Criteria	Mandatory Requirement	Contractor's Response
M-8.1	<p>The proposed resource must have experience in the proposed resource category including:</p> <ul style="list-style-type: none"> <li>a) a minimum of five years of cumulative experience, within the eight years preceding the closing date of this solicitation, working as a Business Analyst (as defined in section 3.8 of Annex A, SOW); and</li> <li>b) that within that body of experience, the resource has experience performing at least five (out of eight) tasks listed for a minimum of four cumulative months of experience per task:               <ul style="list-style-type: none"> <li>1) Determine operational objectives by studying business functions; gathering information; evaluating output requirements and formats;</li> <li>2) Perform business analyses of functional requirements to identify information, procedures, and decision flows;</li> <li>3) Ensure all documentation accurately reflect the current status of changes and outstanding issues so that business requirements reflect application features and functions;</li> <li>4) Evaluate existing procedures and methods, identify and document items such as database content, structure, application subsystems;</li> <li>5) Recommend controls by identifying problems and writing improved procedures;</li> <li>6) Establish acceptance test criteria with client;</li> <li>7) Provide references for users by writing and maintaining user documentation; providing help desk support; and training users; or</li> <li>8) Prepare reports by collecting, analyzing, and summarizing information and trends.</li> </ul> </li> </ul> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	
M-8.2	The resource must have a minimum of three years of experience, within the five years preceding the closing date of this solicitation, developing and documenting statements of	

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<b>Resource Assessment Criteria</b>		
<b>Resource Category</b>	8. Business Analyst, Level 2	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate (in column 'C') that the proposed resource meets the mandatory requirements stipulated in column 'B'::		
<b>'A'</b>	<b>'B'</b>	<b>'C'</b>
<b>Criteria</b>	<b>Mandatory Requirement</b>	<b>Contractor's Response</b>
	<p>requirements and performing business analysis of functional requirements to identify information, procedure and decision flows for application development, application delivery or information management projects.</p> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	
M-8.3	<p>The resource must have experience on a minimum of two Customer Reference Projects, within the five years preceding the closing date of this solicitation, facilitating Joint Application Development sessions with Business and IT Stakeholders to identify and develop system requirements.</p> <p>To be considered, the resource must have worked on the Customer Reference Project for a minimum duration of four months.</p>	
M-8.4	<p>The resource must have experience on a minimum of two Customer Reference Projects, within the five years preceding the closing date of this solicitation, translating functional AND non-functional business requirements into deliverables which include activity mapping, use cases, Business Requirements Documents, and process flow diagrams.</p> <p>To be considered, the resource must have worked on the Customer Reference Project for a minimum duration of four months.</p>	
M-8.5	<p>The Contractor must demonstrate that it has previously contracted the proposed resource for a minimum period of six months within the last two years by providing the following Customer Reference Project information:</p> <ul style="list-style-type: none"> <li>a) Customer organization name;</li> <li>b) Customer Contact Information;</li> <li>c) Role of the resource (resource category) under the contract; and</li> <li>d) Start and end dates of the proposed resource on the Customer Reference Project.</li> </ul>	

**9. Business Analyst, Level 3**

<b>Resource Category</b>		9. Business Analyst, Level 3
<b>Name of Proposed Resource:</b>		<insert name>
The Contractor must demonstrate (in column 'C') that the proposed resource meets the mandatory requirements stipulated in column 'B':		
<b>'A'</b>	<b>'B'</b>	<b>'C'</b>
<b>Criteria</b>	<b>Mandatory Requirement</b>	<b>Contractor's Response</b>
M-9.1	<p>The proposed resource must have experience in the proposed resource category including:</p> <ul style="list-style-type: none"> <li>a) a minimum of ten years of cumulative experience, within the twelve years preceding the closing date of this solicitation, working as a Business Analyst (as defined in section 3.9 of Annex A, SOW); and</li> <li>b) that within that body of experience, the resource has experience performing at least six (out of nine) tasks listed for a minimum of six cumulative months of experience per task:           <ul style="list-style-type: none"> <li>1) Lead a team of Business Analysts, provide guidance and advice and assign tasks;</li> <li>2) Determine operational objectives by studying business functions; gathering information; evaluating output requirements and formats;</li> <li>3) Perform business analyses of functional requirements to identify information, procedures, and decision flows;</li> <li>4) Ensure all documentation accurately reflect the current status of changes and outstanding issues so that business requirements reflect application features and functions;</li> <li>5) Evaluate existing procedures and methods, identify and document items such as database content, structure, application subsystems;</li> <li>6) Recommend controls by identifying problems and writing improved procedures;</li> <li>7) Establish acceptance test criteria with client;</li> <li>8) Provide references for users by writing and maintaining user documentation; providing help desk support; and training users; or</li> <li>9) Prepare reports by collecting, analyzing, and summarizing information and trends.</li> </ul> </li> </ul> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	
M-9.2	The resource must have a minimum of five years of experience, within the eight years preceding the closing date	

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<b>Resource Category</b>		9. Business Analyst, Level 3
<b>Name of Proposed Resource:</b>		<insert name>
The Contractor must demonstrate (in column 'C') that the proposed resource meets the mandatory requirements stipulated in column 'B':		
<b>'A'</b>	<b>'B'</b>	<b>'C'</b>
<b>Criteria</b>	<b>Mandatory Requirement</b>	<b>Contractor's Response</b>
	<p>of this solicitation, developing and documenting statements of requirements and performing business analysis of functional requirements to identify information, procedure and decision flows for application development, application delivery or information management projects.</p> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	
M-9.3	<p>The resource must have experience on a minimum of three Customer Reference Projects, within the eight years preceding the closing date of this solicitation, facilitating Joint Application Development sessions with Business and IT Stakeholders to identify and develop system requirements.</p> <p>To be considered, the resource must have worked on each of the Customer Reference Projects for a minimum duration of six months.</p>	
M-9.4	<p>The resource must have experience on a minimum of three Customer Reference Projects, within the eight years preceding the closing date of this solicitation, translating functional AND non-functional business requirements into deliverables which include activity mapping, use cases, Business Requirements Documents, and process flow diagrams.</p> <p>To be considered, the resource must have worked on each of the Customer Reference Projects for a minimum duration of six months.</p>	
M-9.5	<p>The Contractor must demonstrate that it has previously contracted the proposed resource for a minimum period of six months within the last two years by providing the following Customer Reference Project information:</p> <ul style="list-style-type: none"> <li>a) Customer organization name;</li> <li>b) Customer Contact Information;</li> <li>c) Role of the resource (resource category) under the contract; and</li> <li>d) Start and end dates of the proposed resource on the Customer Reference Project.</li> </ul>	

**10. IM Architect (Level 3)**

<b>Resource Assessment Criteria</b>		
<b>Resource Category</b>	10. IM Architect, Level 3	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate (in column 'C') that the proposed resource meets the mandatory requirements stipulated in column 'B':		
<b>'A'</b>	<b>'B'</b>	<b>'C'</b>
<b>Criteria</b>	<b>Mandatory Requirement</b>	<b>Contractor's Response</b>
M-10.1	<p>The proposed resource must have experience in the proposed resource category including:</p> <ul style="list-style-type: none"> <li>a) a minimum of ten years of cumulative experience, within the twelve years preceding the closing date of this solicitation, working as an IM Architect as defined in section 3.10 of Annex A, SOW); and</li> <li>b) that within that body of experience, the resource has experience performing each of the eight tasks listed for a minimum of six cumulative months of experience per task:               <ul style="list-style-type: none"> <li>1) Analyse existing capabilities and requirements, develop redesigned frameworks and recommend areas for improved capability and integration. Develop and document detailed statements of requirements.</li> <li>2) Evaluate existing procedures and methods, identify and document database content, structure, and application subsystems, and develop data dictionary.</li> <li>3) Define and document interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems.</li> <li>4) Prototype potential solutions, provide trade off information and suggest recommended courses of action.</li> <li>5) Perform information modelling in support of BPR implementation.</li> <li>6) Perform cost/benefit analysis of implementing new processes and solutions.</li> <li>7) Provide advice in developing and integrating process and information models between business processes to eliminate information and process redundancies.</li> <li>8) Provide advice in defining new requirements and opportunities for applying efficient and effective solutions; identify and provide preliminary costs of potential options.</li> </ul> </li> </ul> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	
M-10.2	The resource must have a minimum of five years of	

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<b>Resource Assessment Criteria</b>		
<b>Resource Category</b>	10. IM Architect, Level 3	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate (in column 'C') that the proposed resource meets the mandatory requirements stipulated in column 'B':		
<b>'A'</b>	<b>'B'</b>	<b>'C'</b>
<b>Criteria</b>	<b>Mandatory Requirement</b>	<b>Contractor's Response</b>
	experience, within the twelve years preceding the closing date of this solicitation, developing strategies and plans and /or providing recommendations related to information management for an organization with at least 1,000 end users.	
M-10.3	<p>The Contractor must demonstrate that it has previously contracted the proposed resource for a minimum period of six months within the last two years by providing the following Customer Reference Project information:</p> <ul style="list-style-type: none"> <li>a) Customer organization name;</li> <li>b) Customer Contact Information;</li> <li>c) Role of the resource (resource category) under the contract; and</li> <li>d) Start and end dates of the proposed resource on the Customer Reference Project.</li> </ul>	

**11. Technology Architect (Level 3)**

Resource Assessment Criteria		
Resource Category	11. Technology Architect, Level 3	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate (in column 'C') that the proposed resource meets the mandatory requirements stipulated in column 'B':		
'A'	'B'	'C'
Criteria	Mandatory Requirement	Contractor's Response
M-11.1	<p>The proposed resource must have experience in the proposed resource category including:</p> <ul style="list-style-type: none"> <li>a) a minimum of ten years of cumulative experience, within the twelve years preceding the closing date of this solicitation, working as a Technology Architect (as defined in section 3.11 of Annex A, SOW); and</li> <li>b) that within that body of experience, the resource has experience performing each of the nine tasks listed for a minimum of six cumulative months of experience per task:               <ul style="list-style-type: none"> <li>1) Develop technical architectures, frameworks and strategies, either for an organization or for a major application area, to meet the business and application requirements.</li> <li>2) Identify the policies and requirements that drive out a particular solution.</li> <li>3) Analyze and evaluate alternative technology solutions to meet business problems.</li> <li>4) Ensures the integration of all aspects of technology solutions.</li> <li>5) Monitor industry trends to ensure that solutions fit with government and industry directions for technology.</li> <li>6) Provide information, direction and support for emerging technologies.</li> <li>7) Perform impact analysis of technology changes.</li> <li>8) Provide support to applications and/or technical support teams in the proper application of existing infrastructure.</li> <li>9) Review application and program design or technical infrastructure design to ensure adherence to standards and to recommend performance improvements.</li> </ul> </li> </ul> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	
M-11.2	The resource must have a minimum of five years of experience, within the twelve years preceding the closing date of this solicitation, developing technical architectures,	

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<b>Resource Assessment Criteria</b>		
<b>Resource Category</b>	11. Technology Architect, Level 3	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate (in column 'C') that the proposed resource meets the mandatory requirements stipulated in column 'B':		
<b>'A'</b>	<b>'B'</b>	<b>'C'</b>
<b>Criteria</b>	<b>Mandatory Requirement</b>	<b>Contractor's Response</b>
	frameworks and strategies to meet the business and application requirements for a Business Intelligence Application enhanced project.	
M-11.3	<p>The Contractor must demonstrate that it has previously contracted the proposed resource for a minimum period of six months within the last two years by providing the following Customer Reference Project information:</p> <ul style="list-style-type: none"> <li>a) Customer organization name;</li> <li>b) Customer Contact Information;</li> <li>c) Role of the resource (resource category) under the contract; and</li> <li>d) Start and end dates of the proposed resource on the Customer Reference Project.</li> </ul>	

**12. Application / Software Architect (Level 3)**

Resource Assessment Criteria		
Resource Category	12. Application / Software Architect, Level 3	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate (in column 'C') that the proposed resource meets the mandatory requirements stipulated in column 'B':		
'A'	'B'	'C'
Criteria	Mandatory Requirement	Contractor's Response
M-12.1	<p>The proposed resource must have experience in the proposed resource category including:</p> <ul style="list-style-type: none"> <li>a) a minimum of ten years of cumulative experience, within the twelve years preceding the closing date of this solicitation, working as an Application / Software Architect (as defined in section 3.12 of Annex A, SOW); and</li> <li>b) that within that body of experience, the resource has experience performing each of the ten tasks listed for a minimum of six cumulative months of experience per task:               <ul style="list-style-type: none"> <li>1) Develop technical architectures, frameworks and strategies, either for an organization or for a major application area, to meet the business and application requirements.</li> <li>2) Identify the policies and requirements that drive out a particular solution.</li> <li>3) Analyze and evaluate alternative technology solutions to meet business problems.</li> <li>4) Ensures the integration of all aspects of technology solutions.</li> <li>5) Monitor industry trends to ensure that solutions fit with government and industry directions for technology.</li> <li>6) Analyze functional requirements to identify information, procedures and decision flows.</li> <li>7) Evaluate existing procedures and methods, identify and document database content, structure, and application sub-systems, and develop data dictionary.</li> <li>8) Define and document interfaces of manual to automated operations within application sub-systems, to external systems and between new and existing systems.</li> <li>9) Define input/output sources, including detailed plan for technical design phase, and obtain approval of the system proposal.</li> <li>10) Identify and document system specific standards relating to programming, documentation and testing, covering program libraries, data dictionaries, naming conventions, etc.</li> </ul> </li> </ul>	

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<b>Resource Assessment Criteria</b>		
<b>Resource Category</b>	12. Application / Software Architect, Level 3	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate (in column 'C') that the proposed resource meets the mandatory requirements stipulated in column 'B':		
<b>'A'</b>	<b>'B'</b>	<b>'C'</b>
<b>Criteria</b>	<b>Mandatory Requirement</b>	<b>Contractor's Response</b>
	The required experience can be demonstrated over one or more Customer Reference Projects.	
M-12.2	The resource must have a minimum of five years of experience, within the ten years preceding the closing date of this solicitation, developing technical architectures, frameworks and strategies to meet the business and application requirements for an application development or application enhancement project with systems developed on the Microsoft .Net framework.	
M-12.3	The resource must have experience on a minimum of two Customer Reference Projects, within the five years preceding the closing date of this solicitation that demonstrates experience in Coaching and Assisting development teams including each of the following activities: a) leading design review, b) leading code walkthrough, and c) providing instructions on industry best practices.  To be considered, the resource must have worked on each of the Customer Reference Projects for a minimum duration of six months.	
M-12.4	The resource must have experience on a minimum of two Customer Reference Projects, within the five years preceding the closing date of this solicitation developing and documenting reference architectures for software development projects.  To be considered, the resource must have worked on each of the Customer Reference Projects for a minimum duration of six months.	
M-12.5	The Contractor must demonstrate that it has previously contracted the proposed resource for a minimum period of six months within the last two years by providing the following Customer Reference Project information:  a) Customer organization name; b) Customer Contact Information; c) Role of the resource (resource category) under the contract; and d) Start and end dates of the proposed resource on the Customer Reference Project.	

**13. GIS Architect (Level 3)**

<b>Resource Assessment Criteria</b>		
<b>Resource Category</b>	13. GIS Architect, Level 3	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate (in column 'C') that the proposed resource meets the mandatory requirements stipulated in column 'B':		
<b>'A'</b>	<b>'B'</b>	<b>'C'</b>
<b>Criteria</b>	<b>Mandatory Requirement</b>	<b>Contractor's Response</b>
M-13.1	<p>The proposed resource must have experience in the proposed resource category including:</p> <ul style="list-style-type: none"> <li>a) a minimum of ten years of cumulative experience, within the twelve years preceding the closing date of this solicitation, working as a GIS Architect (as defined in section 3.13 of Annex A, SOW); and</li> <li>b) that within that body of experience, the resource has experience performing each of the seven tasks listed for a minimum of six cumulative months of experience per task:               <ul style="list-style-type: none"> <li>1) Evaluate the enterprise's business/GIS architecture; determine its consistency and integration with the organization's business/GIS strategies, assess the degree of its alignment with Government of Canada's Federal Geospatial Platform (FGP).</li> <li>2) Provide Geomatics Architectural expertise to transition current Geo application to ESRI platform delivered through Government of Canada's Federal Geospatial Platform (FGP).</li> <li>3) Assess the feasibility of migrating from the current state to the target business architecture and enabling technologies and identify the risks associated with migrating to the target business architecture and technologies and make recommendations for risk mitigation.</li> <li>4) Identify business and technology trends that create opportunities for business improvement, advise business and ICT Senior Executives on GIS trends and emerging technologies and the impact on the organization's and government ICT architectures and business strategies.</li> <li>5) Model "What if" scenarios and recommend appropriate changes to the existing architecture and department geographical infrastructure, and recommend alternative solutions, methodologies and strategies.</li> <li>6) Produce an architectural evolution plan, recommend prioritization of architecture evolution initiatives, and develop and/or implement an architecture evolution</li> </ul> </li> </ul>	

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<b>Resource Assessment Criteria</b>		
<b>Resource Category</b>	13. GIS Architect, Level 3	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate (in column 'C') that the proposed resource meets the mandatory requirements stipulated in column 'B':		
<b>'A'</b>	<b>'B'</b>	<b>'C'</b>
<b>Criteria</b>	<b>Mandatory Requirement</b>	<b>Contractor's Response</b>
	plan. 7) Coach, mentor and train the organization to perform any of the above.  The required experience can be demonstrated over one or more Customer Reference Projects.	
M-13.2	The resource must have a minimum of five years of experience, within the twelve years preceding the closing date of this solicitation, developing and maintaining GIS application.	
M-13.3	The Contractor must demonstrate that it has previously contracted the proposed resource for a minimum period of six months within the last two years by providing the following Customer Reference Project information:  a) Customer organization name; b) Customer Contact Information; c) Role of the resource (resource category) under the contract; and d) Start and end dates of the proposed resource on the Customer Reference Project.	

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## APPENDIX D TO ANNEX A CERTIFICATIONS AT THE TA STAGE

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

### 1. CERTIFICATION OF EDUCATION AND EXPERIENCE

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

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

\_\_\_\_\_  
Date

### 2. CERTIFICATION OF AVAILABILITY OF PERSONNEL

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

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

\_\_\_\_\_  
Date

### 3. CERTIFICATION OF STATUS OF PERSONNEL

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

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

\_\_\_\_\_  
Date

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4. CERTIFICATION OF LANGUAGE - [Unilingual English, Bilingual or Unilingual French]

Note, each TA will identify the language Certification requirements (Option 1, 2 or 3 as indicated below) for each associated TA resource, as applicable.

The Contractor certifies that the proposed resource(s) in response to this draft Task Authorization is/are

Option 1 - Unilingual English - fluent in English. The individual(s) proposed must be able to communicate orally and in writing in English without any assistance and with minimal errors.

Option 2 - Bilingual fluent in both official languages of Canada (French and English). The individual(s) proposed must be able to communicate orally and in writing in French and English without any assistance and with minimal errors.

Option 3 - Unilingual French fluent in French. The individual(s) proposed must be able to communicate orally and in writing in French without any assistance and with minimal errors.

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

\_\_\_\_\_  
Date

## **ANNEX B**

### **BASIS OF PAYMENT**

#### **1.0 GENERAL**

- 1.1 This Annex B describes the framework and fee structure that Canada will use to establish payments to the Contractor for Work performed pursuant to the Contract. The framework and fee structure will be in place for the duration of the Contract including any applicable Option Periods.
- 1.2 All services and deliverables are F.O.B. Destination, and Canadian Customs Duty and Excise Taxes included, if applicable.
- 1.3 The Contractor's proposed pricing forms part of the Contract.
- 1.4 Canada will not pay the Contractor for any design changes, modifications or interpretations of the Work, unless they have been authorized, in writing, by the Contracting Authority before their incorporation into the Work.
- 1.5 **Professional Services provided under a Task Authorization with a Maximum Price:**  
For professional services requested by Canada, in accordance with a validly issued Task Authorization, Canada will pay the Contractor, in arrears, up to the Maximum Price for the TA, for actual time worked and any resulting deliverables in accordance with the firm all-inclusive per diem rates set out herein, Applicable Taxes extra.
- 1.6 **Professional Services provided under a Task Authorization with a Firm Price:**  
For professional services requested by Canada, in accordance with a validly issued Task Authorization, Canada will pay the Contractor the firm price set out in the Task Authorization (based on the firm, all-inclusive per diem rates set out herein), Applicable Taxes extra.
- 1.7 **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.
- 1.8 **Professional Services Rates:**  
In Canada's experience, bidders from time to time propose rates at the time of bidding for one or more Resource Categories that they later refuse to honour, on the basis that these rates do not allow them to recover their own costs and/or make a profit. This denies Canada of the benefit of the awarded contract. If the Contractor does not respond or refuses to provide an individual with the qualifications described in the Contract within the time described in the Contract (or proposes instead to provide someone from an alternate category at a different rate), whether or not Canada terminates the Contract as a whole or in part or chooses to exercise any of the rights provided to it under the general conditions, Canada may impose sanctions or take other measures in accordance with the PSPC's Vendor Performance Corrective Measure Policy (or equivalent) then in effect, which measures may include an assessment that results in conditions applied against the Contractor to be fulfilled before doing further business with Canada, or full debarment of the Contractor from bidding on future requirements.

**1.9 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 goods or services in these amounts. Any commitment to purchase specific amounts or values of goods or services is described elsewhere in the Contract.

**2 PROFESSIONAL SERVICES PER DIEM RATES**

**2.1 Firm Per Diem Rates**

The following firm, all-inclusive, per diem rates, including overhead and profit based on a 7.5 hour day, will be used to calculate the labour costs for any TA. The qualifications for the personnel shall be in accordance with Annex A of the SOW.

**Note: If two contracts are awarded, the resulting Basis of Payment will include only the relevant table below.**

**Table 1 – Workstream 1 – IM/IT Management Services**

Resource Category	Level of Expertise	Firm Per Diem Rate			
		Initial Contract Period	Option Years		
		2 years	1	2	3
Organizational Development Consultant	Level 3	\$	\$	\$	\$
Business Transformation Architect	Level 3	\$	\$	\$	\$
Project Executive	Level 3	\$	\$	\$	\$

**Table 2 – Workstream 2 – IM/IT Project Services**

Resource Category	Level of Expertise	Firm Per Diem Rate			
		Initial Contract Period	Option Years		
		2 years	1	2	3
Project Administrator	Level 2	\$	\$	\$	\$
Project Administrator	Level 3	\$	\$	\$	\$
Project Manager	Level 2	\$	\$	\$	\$
Project Manager	Level 3	\$	\$	\$	\$
Business Analyst	Level 2	\$	\$	\$	\$
Business Analyst	Level 3	\$	\$	\$	\$
IM Architect	Level 3	\$	\$	\$	\$
Technology Architect	Level 3	\$	\$	\$	\$

Resource Category	Level of Expertise	Firm Per Diem Rate			
		Initial Contract Period	Option Years		
		2 years	1	2	3
Application/Software Architect	Level 3	\$	\$	\$	\$
GIS Application Architect	Level 3				

## 2.2 Additional Firm Per Diem Rates

Firm Per Diem rates for Professional Services Categories not identified above and which are required for "as and when requested" Work to be performed in accordance with Article 7.1 of the Contract, Task Authorizations, will be negotiated as and when required by the Contracting Authority. Per Diem rates shall be fair and reasonable and the Contractor must demonstrate they are not in excess of the best price for similar type quality and quantity of work. Canada reserves the right to apply Contract Cost Principles 1031-2 and the PWGSC departmental Profit Policy in effect at the time. The rates will only apply to the TA for which they were negotiated unless incorporated into the Contract through a formal Contract amendment issued by the Contracting Authority.

## 2.3 Definition of a Day/Proration

A day is defined as 7.5 hours exclusive of meal breaks. Payment shall be for days actually worked with no provision for annual leave, statutory holidays and sick leave. Time worked which is more or less than a day shall be prorated to reflect actual time worked in accordance with the following formula:

$$\frac{\text{Hours worked}}{7.5 \text{ hours}} \times \text{Fixed Per Diem Labour Rate}$$

## 3.0 TRAVEL AND LIVING EXPENSES – TASK AUTHORIZATIONS – COST REIMBURSABLE

3.1 Should a requirement for travel outside of the National Capital Region arise as part of a TA, the Contractor will be paid for pre-authorized reasonable and proper travel and living expenses incurred in the performance of the work, without any allowance therein for overhead or profit. These expenses will be in accordance with the lesser of current Treasury Board (TB) Travel Directive or the Contractor's travel guidelines. With respect to the TB Travel Directive, only the meal, private vehicle and incidental allowances specified in Appendices B, C and D of the TB Travel Directive [http://www.tbs-sct.gc.ca/hr-rh/gtla-vgcl/index\\_e.asp](http://www.tbs-sct.gc.ca/hr-rh/gtla-vgcl/index_e.asp), and the other provisions of the directive referring to "travellers", rather than those referring to "employees", are applicable. All payments are subject to Government Audit and all travel must have the prior authorization of the INFC Technical Authority.

3.2 Canada will not accept any travel and living expenses incurred by the Contractor, except where indicated otherwise in the Contract.

## 4.0 OTHER DIRECT COSTS

Other direct costs, approved by the Technical Authority, reasonably and properly incurred as part of Work carried out under a TA, shall be reimbursed at actual cost with no allowance thereon for profit or

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overhead, provided that the amount has been deemed appropriate and fair and reasonable by Canada and preauthorized, as part of the TA. All costs must be supported by receipts and/or documentation.

## **5.0 GOODS AND SERVICES TAX / HARMONIZED SALES TAX**

- 5.1 All prices and amounts of money in the Contract are exclusive of GST or HST, as applicable, unless otherwise indicated. The GST or HST, whichever is applicable, is extra to the price herein and will be paid by Canada.
- 5.2 The estimated GST or HST is included in the total estimated cost. GST or HST, to the extent applicable, will be incorporated into all invoices and progress claims and shown as a separate item on invoices and progress claims. All items that are zero-rated, exempt or to which the GST or HST does not apply, are to be identified as such on all invoices. The Contractor agrees to remit to the Canada Revenue Agency any amounts of GST and HST paid or due.

## **6.0 TIME VERIFICATION**

This article applies to TAs utilizing the Professional Services categories under Article 2.1 above.

- 6.1 Time charged and the accuracy of the Contractor's time recording system may be verified by Canada's representatives before or after payment is made to the Contractor under the terms and conditions of the Contract. If verification is done after payment, the Contractor agrees to repay any overpayment immediately upon demand by Canada.
- 6.2 Canada shall have the right to holdback, drawback, deduct and set off from and against the amounts of any moneys owing at any time by Canada to the Contractor, any credits owing and unpaid under this article. Should Canada elect not to exercise the foregoing right at any given time, this shall not be deemed a waiver of this right nor shall it affect the right(s) described above.

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**ANNEX C**  
**Security Requirements Checklist (SRCL)**



Government of Canada / Gouvernement du Canada

Contract Number / Numéro du contrat
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	2. Branch or Directorate / Direction générale ou Direction
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 <i>IM/IT recently completed a review of its current professional services contracts and its anticipated requirements for contract resources over the next 2 to 5 years. As a result of this exercise INFC has identified the need to establish contract arrangements for the provision of resources in 3 distinct areas of requirement: App Dev and Data Mgmt, IM/IT Mgmt Services and Cyber Protection services</i>	
5. a) Will the supplier require access to Controlled Goods? Le fournisseur aura-t-il accès à des marchandises contrôlées?	<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques?	<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
6. Indicate the type of access required / Indiquer le type d'accès requis	
6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? (Specify the level of access using the chart in Question 7. c) (Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c)	<input type="checkbox"/> No / Non <input checked="" type="checkbox"/> Yes / Oui
6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé.	<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
6. c) Is this a commercial courier or delivery requirement with no overnight storage? S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit?	<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui

7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès

Canada <input checked="" type="checkbox"/>	NATO / OTAN <input type="checkbox"/>	Foreign / Étranger <input type="checkbox"/>
--	--------------------------------------	---

7. b) Release restrictions / Restrictions relatives à la diffusion

No release restrictions / Aucune restriction relative à la diffusion <input checked="" type="checkbox"/>	All NATO countries / Tous les pays de l'OTAN <input type="checkbox"/>	No release restrictions / Aucune restriction relative à la diffusion <input type="checkbox"/>
Not releasable / À ne pas diffuser <input type="checkbox"/>		
Restricted to: / Limité à: <input type="checkbox"/>	Restricted to: / Limité à: <input type="checkbox"/>	Restricted to: / Limité à: <input type="checkbox"/>
Specify country(ies): / Préciser le(s) pays:	Specify country(ies): / Préciser le(s) pays:	Specify country(ies): / Préciser le(s) pays:

7. c) Level of information / Niveau d'information

PROTECTED A / PROTÉGÉ A <input checked="" type="checkbox"/>	NATO UNCLASSIFIED / NATO NON CLASSIFIÉ <input type="checkbox"/>	PROTECTED A / PROTÉGÉ A <input type="checkbox"/>
PROTECTED B / PROTÉGÉ B <input checked="" type="checkbox"/>	NATO RESTRICTED / NATO DIFFUSION RESTREINTE <input type="checkbox"/>	PROTECTED B / PROTÉGÉ B <input type="checkbox"/>
PROTECTED C / PROTÉGÉ C <input checked="" type="checkbox"/>	NATO CONFIDENTIAL / NATO CONFIDENTIEL <input type="checkbox"/>	PROTECTED C / PROTÉGÉ C <input type="checkbox"/>
CONFIDENTIAL / CONFIDENTIEL <input checked="" type="checkbox"/>	NATO SECRET / NATO SECRET <input type="checkbox"/>	CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>
SECRET / SECRET <input checked="" type="checkbox"/>	COSMIC TOP SECRET / COSMIC TRÈS SECRET <input type="checkbox"/>	SECRET / SECRET <input type="checkbox"/>
TOP SECRET / TRÈS SECRET <input type="checkbox"/>		TOP SECRET / TRÈS SECRET <input type="checkbox"/>
TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>		TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>





Contract Number / Numéro du contrat
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<br>COTE DE FIABILITÉ | <input checked="" type="checkbox"/> CONFIDENTIAL<br>CONFIDENTIEL | <input checked="" type="checkbox"/> SECRET<br>SECRET | <input type="checkbox"/> TOP SECRET<br>TRÈS SECRET               |
| <input type="checkbox"/> TOP SECRET-SIGINT<br>TRÈS SECRET - SIGINT          | <input type="checkbox"/> NATO CONFIDENTIAL<br>NATO CONFIDENTIEL  | <input type="checkbox"/> NATO SECRET<br>NATO SECRET  | <input type="checkbox"/> COSMIC TOP SECRET<br>COSMIC TRÈS SECRET |
| <input type="checkbox"/> SITE ACCESS<br>ACCÈS AUX EMPLACEMENTS              |  |  |  |

Special comments:

Commentaires spéciaux :

NOTE: If multiple levels of screening are identified, a Security Classification Guide must be provided.

REMARQUE : Si plusieurs niveaux de contrôle de sécurité sont requis, un guide de classification de la sécurité doit être fourni.

10. b) May unscreened personnel be used for portions of the work?  
Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail?  No / 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
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	NATO RESTRICTED	NATO CONFIDENTIAL	NATO SECRET	COSMIC TOP SECRET COSMIC TRÉS SECRET	PROTECTED / PROTÉGÉ			CONFIDENTIAL	SECRET	TOP SECRET	
				CONFIDENTIEL	SECRET	TRÉS SECRET	NATO DIFFUSION RESTREINTE	NATO CONFIDENTIEL	SECRET		A	B	C	CONFIDENTIEL	SECRET	TRÉS SECRET	
Information / Assets / Renseignements / Biens / Production																	
IT Media / Support IT																	
IT Link / Lien électronique																	

12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED?  
La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE?  No / Non  Yes / Oui

**If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification".**  
**Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire.**

12. b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED?  
La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE?  No / Non  Yes / Oui

**If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification" and indicate with attachments (e.g. SECRET with Attachments).**  
**Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire et indiquer qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).**

Solicitation No. - N° de l'invitation  
QA001-175431/A  
Client Ref. No. - N° de réf. du client  
20175431

Amd. No. - N° de la modif.  
File No. - N° du dossier  
003xsQA001-175431

Buyer ID - Id de l'acheteur  
003xs  
CCC No./N° CCC - FMS No./N° VME

## ANNEX D

### NON-DISCLOSURE AGREEMENT

I, \_\_\_\_\_, recognize that in the course of my work as an employee or subcontractor of \_\_\_\_\_, I may be given access to information by or on behalf of Canada in connection with the Work, pursuant to Contract Serial No. \_\_\_\_\_ between Her Majesty the Queen in right of Canada, represented by the Minister of Public Services and Procurement Canada and Infrastructure Canada, *including any information that is confidential or proprietary to third parties, and information conceived, developed or produced by the Contractor as part of the Work. For the purposes of this agreement, information includes but not limited to: any documents, instructions, guidelines, data, material, advice or any other information whether received orally, in printed form, recorded electronically, or otherwise and whether or not labeled as proprietary or sensitive, that is disclosed to a person or that a person becomes aware of during the performance of the Contract.*

*I agree that I will not reproduce, copy, use, divulge, release or disclose, in whole or in part, in whatever way or form any information described above to any person other than a person employed by Canada on a need to know basis. I undertake to safeguard the same and take all necessary and appropriate measures, including those set out in any written or oral instructions issued by Canada, to prevent the disclosure of or access to such information in contravention of this agreement.*

*I also acknowledge that any information provided to the Contractor by or on behalf of Canada must be used solely for the purpose of the Contract and must remain the property of Canada or a third party, as the case may be.*

*I agree that the obligation of this agreement will survive the completion of the Contract No.:*

\_\_\_\_\_

\_\_\_\_\_  
Signature of resource  
(include printed name)

\_\_\_\_\_  
Date

Solicitation No. - N° de l'invitation  
 QA001-175431/A  
 Client Ref. No. - N° de réf. du client  
 20175431

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 File No. - N° du dossier  
 003xsQA001-175431

Buyer ID - Id de l'acheteur  
 003xs  
 CCC No./N° CCC - FMS No./N° VME

## ATTACHMENT 3.1 BID SUBMISSION FORM

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

Solicitation No. - N° de l'invitation  
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Client Ref. No. - N° de réf. du client  
20175431

Amd. No. - N° de la modif.  
File No. - N° du dossier  
003xsQA001-175431

Buyer ID - Id de l'acheteur  
003xs  
CCC No./N° CCC - FMS No./N° VME

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

## Attachment 4.1

### BID EVALUATION CRITERIA

#### Contents

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<b>Evaluation Criteria: Workstream 1 IM/IT Management Services</b> .....	<b>3</b>
<b>2. Mandatory Evaluation Criteria (Workstream 1)</b> .....	<b>3</b>
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**Note:** Bidders may respond to one, or both, Workstream(s). Each Workstream will be evaluated separately and one contract awarded per Workstream. If the same Bidder is successful in both Workstreams, one contract will be issued to that Bidder and it will include both Workstreams.

## 1. Instructions to Bidders

In addition to the Bid Preparation Instructions stipulated in Part 3 of this solicitation and the Evaluation Procedures and Basis of Selection requirements described under Part 4 of this solicitation, the following information and instructions relate to the submission and evaluation of the mandatory and point-rated **Resource** evaluation criteria contained in this Solicitation.

- i. The Bidder must fully complete the mandatory and point-rated evaluation tables contained in sections 3 and 4 below (respectively) for the Bidder itself and each proposed named resource, as applicable. Résumés are not required for the identified resources.
- ii. It should be noted that cutting and pasting wording from the RFP and/or simply citing the experience does not constitute demonstration of the requirement. The Bidder must substantiate its' response to the mandatory and point-rated criteria by providing a description of the identified resource's role including information which substantiates the experience claimed (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.).
- iii. Where the criteria specifies experience within a specific timeframe (e.g. within ten years) it is the period of time preceding the issuance date of this solicitation.
- iv. For any Customer Reference Project provided in response to the mandatory and point-rated resource evaluation criteria to be considered, the proposed named resource must have worked on the Customer Reference Project for the minimum duration stipulated (i.e. Level 2 = 4 months, Level 3 = 6 months).
- v. The Bidder is requested to include complete customer contact information for each Customer Reference Project (provided in response to the mandatory and point-rated criteria) including name, title, telephone number, and e-mail address. Canada reserves the right to request customer contact information, at any time during the evaluation process, for the purposes of verification in accordance with the process set out under section 3.2 of this solicitation.
- vi. If more than the requested number of Customer Reference Projects or Customer Reference Contracts are provided (e.g. maximum 3 Customer Reference Projects), Canada will only evaluate the maximum number stipulated in the order in which they are set out in the Bid.
- vii. Canada reserves the right to verify any information provided in the Bidder's response to the mandatory and point rated tables. The identified customer contact will then be asked to verify the information in accordance with the reference check process set out under section 3.2 of this solicitation.

**Evaluation Criteria: Workstream 1 IM/IT Management Services**

Bidders are advised to address each requirement in sufficient depth to permit a complete requisite analysis and assessment by the evaluation team. Bids failing to adequately respond to the mandatory evaluation criteria will be excluded from further consideration. Only Bids found to meet the mandatory evaluation criteria will be evaluated in accordance with the evaluation criteria subject to point rated requirements.

**2. Mandatory Evaluation Criteria (Workstream 1)**

**M-1 Corporate Experience**

The Bidder must provide three Customer Reference Contracts with a cumulative billed value of \$5M (Canadian, including taxes), where the Bidder was contracted to deliver IM/IT professional services.

Of the three Customer Reference Contracts provided, at least one contract must have been for a Government of Canada Department or Agency and had a minimum billed value of \$2M (Canadian, including taxes), over a cumulative period of three years or less.

To be considered, each Customer Reference Contract provided **must**:

- i. Have had a minimum contract duration of twelve months,
- ii. Been completed within the eight years preceding the issuance date of this solicitation, or if the contract is ongoing, the contract must have been in place for a minimum of twelve months preceding the issuance date of this solicitation;
- iii. Include complete client particulars including:
  - Client organization name;
  - Address;
  - Reference Contact Name and Title;
  - Contact telephone number and/or e-mail address.

**Note:** If more than the requested number of Customer Reference Contracts are provided, Canada will only evaluate the first 3 in the order in which they are set out in the hard copy of the Bid.

**M-2 Demonstrated Corporate Capability (Workstream 1)**

The Bidder must demonstrate its capability to provide qualified Workstream 1 resources “as and when requested” by identifying a resource in response to each of the requirements identified in the table below. Each of the identified resources must have previously been contracted by the Bidder for a minimum period of six months within the last two years.

The Bidder must complete the applicable tables that follow for each identified resource; substantiation of demonstrated experience must be included in the table.

TBIPS Resource Category	Level	# of resources to be identified
1) Organizational Development Consultant	Level 3	4 resources (total, in at least 2 out of 3 categories)
2) Business Transformation Architect	Level 3	
3) Project Executive	Level 3	

TBIPS Resource Category	Level	# of resources to be identified
<b>Total # Resources</b>		<b>4</b>

**Note:** The resources identified in response to this requirement will be used to assess Corporate Capability only. Required resources will be requested using the Task Authorization (TA) process and evaluated at time of TA using the Resource Assessment Criteria contained in Appendix C to Annex A

**M-2.1 Organizational Development Consultant (Level 3)**

Resource Evaluation Criteria		
<b>Resource Category</b>	1. Organizational Development Consultant, Level 3	
<b>Name of Proposed Resource:</b>	<insert name>	
The Bidder must demonstrate (in column 'C') that the identified resource meets the mandatory requirements stipulated in column 'B':		
'A'	'B'	'C'
Criteria	Mandatory Requirement	Bidder's Response
M-2.1.1	<p>The identified resource must have experience in the identified resource category including:</p> <ul style="list-style-type: none"> <li>a) a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this solicitation, working as an Organizational Development Consultant (as defined in section 3.1 of Annex A, SOW); and</li> <li>b) that within that body of experience, the resource has experience performing at least eight (out of twelve) tasks listed for a minimum of six cumulative months of experience per task:               <ul style="list-style-type: none"> <li>1) Enable, facilitate, and mediate the evolution of the various organizational or departmental structures toward the organization's or department's desired outcome or structure;</li> <li>2) Assist with organizational needs assessment and strategic planning to ensure development of human capital to meet business objectives and goals;</li> <li>3) Provide advice, support and consultation to senior staff, business unit requests, and front line management to achieve strategic initiatives and goals;</li> <li>4) Research, design, implement and maintain employee development programs including leadership development and other management development programs;</li> <li>5) Develop and implement processes to measure the effectiveness of development and learning efforts to ensure performance improvements are focused on measurable and attainable results;</li> <li>6) Serve as an expert resource by collaborating with Human Resource (HR) and business unit executives</li> </ul> </li> </ul>	

<b>Resource Evaluation Criteria</b>		
<b>Resource Category</b>	1. Organizational Development Consultant, Level 3	
<b>Name of Proposed Resource:</b>	<insert name>	
The Bidder must demonstrate (in column 'C') that the identified resource meets the mandatory requirements stipulated in column 'B':		
<b>'A'</b>	<b>'B'</b>	<b>'C'</b>
<b>Criteria</b>	<b>Mandatory Requirement</b>	<b>Bidder's Response</b>
	<p>to ensure clear standards and metrics linked to talent reviews and employee development plans;</p> <p>7) Develop strategic partnerships with other internal project managers to identify and consult on change management initiatives to support strategic projects requiring organizational culture change;</p> <p>8) Proactively address and respond to Organizational Development issues by bringing key stakeholders together to assess root causes and performance gaps and recommend appropriate interventions;</p> <p>9) Practice continuous improvement processes and procedures, eliminating non-value added activities.</p> <p>10) Conduct focus groups and/or process improvement sessions as needed;</p> <p>11) Implement and manage the organization's training to ensure cost effective employee development activities that support the organization's strategic initiatives; and</p> <p>12) Manage and facilitate organizational initiatives and projects as requested.</p> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	
M-2.1.2	<p>The resource must have experience on a minimum of two Customer Reference Projects where the resource provided guidance and advice related to strategic IM/IT transformation initiatives in support of business stakeholders.</p> <p>The resource must have worked on the Customer Reference Project for a minimum duration of six months.</p>	
M-2.1.3	<p>The Bidder must demonstrate that it has previously contracted the identified resource for a minimum period of six months within the last two years by providing the following Customer Reference Project information:</p> <p>a) Customer organization name;</p> <p>b) Customer Contact Information;</p> <p>c) Role of the resource (resource category) under the contract; and</p> <p>d) Start and end dates of the identified resource on the Customer Reference Project.</p>	

**M-2.2 Business Transformation Architect (Level 3)**

<b>Resource Evaluation Criteria</b>		
<b>Resource Category</b>	2. Business Transformation Architect, Level 3	
<b>Name of Proposed Resource:</b>	<insert name>	
The Bidder must demonstrate (in column 'C') that the identified resource meets the mandatory requirements stipulated in column 'B':		
<b>'A'</b>	<b>'B'</b>	<b>'C'</b>
<b>Criteria</b>	<b>Mandatory Requirement</b>	<b>Bidder's Response</b>
M-2.2.1	<p>The identified resource must have experience in the identified resource category including:</p> <ul style="list-style-type: none"> <li>a) a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this solicitation, working as a Business Transformation Architect (as defined in section 3.2 of Annex A, SOW); and</li> <li>b) that within that body of experience, the resource has experience performing each of the seven tasks listed for a minimum of six cumulative months of experience per task:               <ul style="list-style-type: none"> <li>1) Analysis and development of business success "critical success factors".</li> <li>2) Analysis and development of architecture requirements design, process development, process mapping and training.</li> <li>3) Responsible for leading other functional staff to define business strategy and processes in support of transformation and change management activities.</li> <li>4) Participate in change impact analysis and change management activities.</li> <li>5) Participate in organizational realignment (job re-design organizational re-structuring).</li> <li>6) Coordinate development of training and coordination with other stakeholders.</li> <li>7) Create presentations and present to various stakeholders, and facilitate meetings and discussions.</li> </ul> </li> </ul> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	
M-2.2.2	<p>The resource must have a minimum of five years of experience, within the twelve years preceding the issuance date of this solicitation, conducting reviews of existing systems and business processes to identify strategies and processes in support of IM/IT and business transformation activities.</p>	
M-2.2.3	<p>The Bidder must demonstrate that it has previously contracted the identified resource for a minimum period of six months</p>	

Resource Evaluation Criteria		
<b>Resource Category</b>	2. Business Transformation Architect, Level 3	
<b>Name of Proposed Resource:</b>	<insert name>	
The Bidder must demonstrate (in column 'C') that the identified resource meets the mandatory requirements stipulated in column 'B':		
'A'	'B'	'C'
Criteria	Mandatory Requirement	Bidder's Response
	<p>within the last two years by providing the following Customer Reference Project information:</p> <ul style="list-style-type: none"> <li>a) Customer organization name;</li> <li>b) Customer Contact Information;</li> <li>c) Role of the resource (resource category) under the contract; and</li> <li>d) Start and end dates of the identified resource on the Customer Reference Project.</li> </ul>	

**M-2.3 Project Executive (Level 3)**

Resource Evaluation Criteria		
<b>Resource Category</b>	3. Project Executive, Level 3	
<b>Name of Proposed Resource:</b>	<insert name>	
The Bidder must demonstrate (in column 'C') that the identified resource meets the mandatory requirements stipulated in column 'B':		
'A'	'B'	'C'
Criteria	Mandatory Requirement	Bidder's Response
M-2.3.1	<p>The identified resource must have experience in the identified resource category including:</p> <ul style="list-style-type: none"> <li>a) a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this solicitation, working as a Project Executive (as defined in section 3.3 of Annex A, SOW); and</li> <li>b) that within that body of experience, the resource has experience performing at least six (out of eight) tasks listed for a minimum of six cumulative months of experience per task unless otherwise specified:             <ul style="list-style-type: none"> <li>1) Develop project objectives and strategies for IM/IT transformation initiatives in support of business stakeholders;</li> <li>2) Develop project planning and approval documents such as business cases, project charters, and TB submissions;</li> <li>3) Develop and deliver communications at executive levels to create awareness and support with the</li> </ul> </li> </ul>	

Resource Evaluation Criteria		
<b>Resource Category</b>	3. Project Executive, Level 3	
<b>Name of Proposed Resource:</b>	<insert name>	
The Bidder must demonstrate (in column 'C') that the identified resource meets the mandatory requirements stipulated in column 'B':		
'A'	'B'	'C'
Criteria	Mandatory Requirement	Bidder's Response
	organization for the project / initiative; 4) Obtain project sign-off. 5) Provide leadership and oversight of strategic IM/IT projects and change initiatives; 6) Meet with other organizational executives to ensure all stakeholders are committed and moving forward on project and organizational goals; 7) Develop, initiate, monitor and report on risk management procedures to ensure all risks have mitigations, and residual risks are acceptable to senior stakeholders; and 8) Resolve issues related to the project.  The required experience can be demonstrated over one or more Customer Reference Projects.	
M-2.3.2	The resource must have experience as a Project Executive on a minimum of two Customer Reference Projects where the resource developed the business case or project charter for an IM/IT transformation project, with a budget of at least \$5M that was approved.  The resource must have worked on the Customer Reference Project for a minimum duration of six months.	
M-2.3.3	The Bidder must demonstrate that it has previously contracted the identified resource for a minimum period of six months within the last two years by providing the following Customer Reference Project information:  a) Customer organization name; b) Customer Contact Information; c) Role of the resource (resource category) under the contract; and d) Start and end dates of the identified resource on the Customer Reference Project.	

### 3. Point-Rated Evaluation Criteria (Workstream 1)

Workstream 1 Bids, that meet all of the mandatory qualifications, will be further evaluated against the following rated requirements. A Technical Proposal Score out of 70 points, subject to Reference Checking, will be computed using the formulas below.

Workstream 1 Technical Evaluation Criteria	Max. Score
R-1 Bench Strength	240
R-2 Corporate OCM Practice	250
R-3 Technical Expertise of Identified Resources	200
<b>Sub-total</b>	690
<b>Technical Proposal Score (70 points maximum)</b>	[Bidders Score (out of 690) / 690] x 70 points

### R-1 Bench Strength

The Bidder should further demonstrate its bench strength in the area of project management and support professional services by identifying by name up to four individual resources, in addition to the four resources identified in response to mandatory #M-2 above, where the Bidder has contracted (under the TBIPS SA or TSPS SA) the services of the individual for a minimum of 200 cumulative billed days, within the last two years, in the National Capital Region (NCR), in any of the following TBIPS categories:

- Organizational Development Consultant
- Project Executive
- Business Transformation Architect

Resources	Resource Name	TBIPS Category & Level	# of billed days	Client Organization Name & Location	Contract / Reference #	Contract Period
<b>Consultant #1:</b>	<i>e.g. John Smith</i>	P.5 Project Executive, L3	63	<i>NavCanada</i>	555123456	<i>Jan 2014 to March 2014</i>
		P.5 Project Executive, L3	164	<i>Treasury Board, Secretariat</i>	63490AB	<i>Jul 2014 to March 2015</i>
	<b>Sub-total (min 200)</b>		227			
<b>Consultant #2:</b>						
<b>Consultant #3:</b>						
<b>Consultant #4:</b>						

Evaluation Criteria: The Bidder will be awarded up to 240 points (60 points per resource).

### R-2 Corporate OCM Practice

The Bidder should demonstrate the extent to which it has formally established a corporate practice in the area of Organizational Change Management (OCM). Examples of establishing a corporate practice include, but are not limited to, the implementation of a formal OCM methodology; the documentation of

formal processes that are routinely applied to deliver OCM services; the establishment of an OCM community of practice to provide a forum for practitioners to share tips and best practices, ask questions of their colleagues, and provide support for each other; formal training or mentoring programs to ensure all resource are knowledgeable and adhere to corporate methods; or other initiatives the Bidder has implemented to develop corporate knowledge and expertise in OCM and ensure that OCM-related professional services delivered to clients reflect best practices.

In addition, the Bidder should provide up to two Customer Reference Projects where it has utilized specific assets from its' OCM Practice (describe above) to deliver the OCM services. For the project to be considered, the Customer Reference Projects must have been contracted with the Bidder. The customer organization must not be a partner or sub-contractor of the Bidder or other entity that does not have an arm's length relationship with the Bidder.

Evaluation Criteria: The Bidder will be awarded up to 250 points as follows:

Point-Rated Criteria	Maximum # Points
<p><u>Description of the Bidder's OCM Practice</u> – The extent to which the Bidder has clearly described its OCM practice will be evaluated and points awarded as follows:</p> <ul style="list-style-type: none"> <li>• <b>75 points</b> - OCM Practice is clearly described and includes complete details of robust methods and activities that have been implemented to develop corporate knowledge and expertise in OCM and ensure that OCM-related professional services delivered to clients reflect best practices;</li> <li>• <b>40 points</b> –OCM Practice is adequately described with some detail of established methods and activities;</li> <li>• <b>20 points</b> - OCM Practice is poorly described with few details; or</li> <li>• <b>0 points</b> - An OCM Practice is not described.</li> </ul>	<b>75 points</b>
<p><u>Maturity of Bidder's OCM Practice</u> - The Bidder's response will be awarded points as follows:</p> <ul style="list-style-type: none"> <li>• <b>75 points</b> - Response clearly demonstrates an established and robust OCM practice which includes a proven methodology and processes and formal training or mentoring programs to ensure all resource are knowledgeable and adhere to corporate methods;</li> <li>• <b>40 points</b> - Response demonstrates an established OCM practice but lacking some features/functions of a more robust practice;</li> <li>• <b>20 points</b> - Response demonstrates an OCM practice which is still in early development; or</li> <li>• <b>0 points</b> – Bidder does not have an established OCM practice.</li> </ul>	<b>75 points</b>
<p><u>Customer Reference Projects</u> – Each Customer Reference Projects (maximum 2) will be awarded up to 50 points as follows:</p> <ul style="list-style-type: none"> <li>• <b>20 points</b> – The Bidder has clearly demonstrated how it utilized specific assets from its' OCM Practice to deliver the OCM services;</li> <li>• <b>20 points</b> – If the project was related to an Organization-wide impact or scope of change initiative within the client organization, <u>or</u> <b>10 points</b> - If the project was related to a business unit or Region-specific impact or scope of change initiative within the client organization; and</li> <li>• <b>10 points</b> - If the client is a GOC Department, Agency or Crown Corporation.</li> </ul>	<b>100 points</b>
<b>Maximum Score</b>	<b>250 points</b>

**R-3 Technical Expertise of Identified Resources**

The Bidder should further demonstrate the relevant experience of the identified resources (i.e. resources identified in response to requirement #M-2) in accordance with the point-rated criteria below.

Evaluation Criteria: The Bidder will be awarded up to 50 points for each resource (total 200 points).

<b>Organizational Development Consultant, Level 3</b>	
<b>Point-Rated Criteria</b>	<b>Max # pts (per Resource)</b>
<p>a) The Bidder should demonstrate that the resource holds a professional accreditation in Change Management as follows:</p> <ul style="list-style-type: none"> <li>a. Prosci Change Management Certification; or</li> <li>b. Change Management Institute (CMI) Accredited Change Manager (Foundation or Master level).</li> </ul> <p><u>Evaluation Criteria:</u></p> <ul style="list-style-type: none"> <li>• 10 points - Evidence of valid accreditation provided</li> </ul>	10
<p>b) The Bidder should demonstrate that the resource has experience, on up to two projects for a minimum duration of six months (per project), within the ten years preceding the issuance date of this solicitation, as an Organizational Development Consultant engaging at the intermediate and senior management levels while conducting the following activities in support of change initiatives:</p> <ul style="list-style-type: none"> <li>a) Conducting interviews;</li> <li>b) Group facilitation; and</li> <li>c) Delivering oral presentations.</li> </ul> <p><u>Evaluation Criteria:</u>            Up to 10 points per project (maximum 2 projects) as follows:</p> <ul style="list-style-type: none"> <li>• <b>10 points</b> – The Bidder’s response:               <ul style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph b) above; and</li> <li>ii. demonstrates all aspects of the experience of the identified resource by providing a description of the work performed in the role;</li> </ul> </li> <li>• <b>6 points</b> – The Bidder’s response:               <ul style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph b) above; and</li> <li>ii. provides information which demonstrates some (but not all) aspects of the experience claimed;</li> </ul> </li> <li>• <b>2 points</b> - The Bidder’s response:               <ul style="list-style-type: none"> <li>i. fails to address each item of the point rated criteria in paragraph b) above; or</li> <li>ii. addresses each item of the point rated criteria in paragraph b) above but does not provide any information which demonstrates the experience claimed; or</li> </ul> </li> <li>• <b>0 points</b> – The Bidder’s response does not address the stated point rated criteria in paragraph b) above.</li> </ul>	20

<b>Organizational Development Consultant, Level 3</b>	
<b>Point-Rated Criteria</b>	<b>Max # pts (per Resource)</b>
<p>c) The Bidder should demonstrate that the resource has experience, on up to two projects for a minimum duration of six months (per project), within the ten years preceding the issuance date of this solicitation, as an Organizational Development Consultant on an information technology project which delivered an updated or new technology capability to end-users.</p> <p><u>Evaluation Criteria:</u>            Up to 10 points per project (maximum 2 projects) as follows:</p> <ul style="list-style-type: none"> <li>• <b>10 points</b> – The Bidder's response:               <ul style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph c) above; and</li> <li>ii. demonstrates all aspects of the experience of the identified resource by providing a description of the work performed in the role;</li> </ul> </li> <li>• <b>6 points</b> – The Bidder's response:               <ul style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph c) above; and</li> <li>ii. provides information which demonstrates some (but not all) aspects of the experience claimed;</li> </ul> </li> <li>• <b>2 points</b> - The Bidder's response:               <ul style="list-style-type: none"> <li>i. fails to address each item of the point rated criteria in paragraph c) above; or</li> <li>ii. addresses each item of the point rated criteria in paragraph c) above but does not provide any information which demonstrates the experience claimed; or</li> </ul> </li> <li>• <b>0 points</b> – The Bidder's response does not address the stated point rated criteria in paragraph c) above.</li> </ul>	<p>20</p>
<b>Maximum Score</b>	<b>50</b>

<b>Business Transformation Architect, Level 3</b>	
<b>Point-Rated Criteria</b>	<b>Max # pts (per Resource)</b>
<p>a) The Bidder should demonstrate that the resource holds a professional accreditation in Project Management or Change Management as follows:</p> <ul style="list-style-type: none"> <li>a. Project Management Professional (PMP),</li> <li>b. PRINCE2 Practitioner,</li> <li>c. Prosci Change Management Certification, or</li> <li>d. Change Management Institute (CMI) Accredited Change Manager (Foundation or Master level).</li> </ul> <p><u>Evaluation Criteria:</u></p> <ul style="list-style-type: none"> <li>• <b>10 points</b> - Evidence of valid accreditation provided.</li> </ul>	10
<p>b) The Bidder should demonstrate that the resource has experience, on up to two projects for a minimum duration of six months (per project), within the ten years preceding the issuance date of this solicitation, as a Business Transformation Architect engaging at the intermediate and senior management levels while conducting the following activities in support of change initiatives:</p> <ul style="list-style-type: none"> <li>a) Conducting interviews;</li> <li>b) Group facilitation; and</li> <li>c) Delivering oral presentations.</li> </ul> <p><u>Evaluation Criteria:</u>            Up to 10 points per project (maximum 2 projects) as follows:</p> <ul style="list-style-type: none"> <li>• <b>10 points</b> – The Bidder’s response:               <ul style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph b) above; and</li> <li>ii. demonstrates all aspects of the experience of the identified resource by providing a description of the work performed in the role;</li> </ul> </li> <li>• <b>6 points</b> – The Bidder’s response:               <ul style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph b) above; and</li> <li>ii. provides information which demonstrates some (but not all) aspects of the experience claimed;</li> </ul> </li> <li>• <b>2 points</b> - The Bidder’s response:               <ul style="list-style-type: none"> <li>i. fails to address each item of the point rated criteria in paragraph b) above; or</li> <li>ii. addresses each item of the point rated criteria in paragraph b) above but does not provide any information which demonstrates the experience claimed; or</li> </ul> </li> <li>• <b>0 points</b> – The Bidder’s response does not address the stated point rated criteria in paragraph b) above.</li> </ul>	20
<p>c) The Bidder should demonstrate that the resource has experience, on up to two projects for a minimum duration of six months (per project), within the ten years preceding the issuance date of this solicitation, as a Business</p>	20

<b>Business Transformation Architect, Level 3</b>	
<b>Point-Rated Criteria</b>	<b>Max # pts (per Resource)</b>
<p>Transformation Architect on an information technology project which delivered an updated or new technology capability to end-users.</p> <p><u>Evaluation Criteria:</u>            Up to 10 points per project (maximum 2 projects) as follows:</p> <ul style="list-style-type: none"> <li>• <b>10 points</b> – The Bidder’s response:               <ul style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph c) above; and</li> <li>ii. demonstrates all aspects of the experience of the identified resource by providing a description of the work performed in the role;</li> </ul> </li> <li>• <b>6 points</b> – The Bidder’s response:               <ul style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph c) above; and</li> <li>ii. provides information which demonstrates some (but not all) aspects of the experience claimed;</li> </ul> </li> <li>• <b>2 points</b> - The Bidder’s response:               <ul style="list-style-type: none"> <li>i. fails to address each item of the point rated criteria in paragraph c) above; or</li> <li>ii. addresses each item of the point rated criteria in paragraph c) above but does not provide any information which demonstrates the experience claimed; or</li> </ul> </li> <li>• <b>0 points</b> – The Bidder’s response does not address the stated point rated criteria in paragraph c) above.</li> </ul>	
<b>Maximum Score</b>	<b>50</b>

<b>Project Executive, Level 3</b>	
<b>Point-Rated Criteria</b>	<b>Max # pts (per Resource)</b>
<p>a) The Bidder should demonstrate that the resource holds a professional accreditation in Project Management as follows:</p> <ul style="list-style-type: none"> <li>a. Project Management Professional (PMP), or</li> <li>b. PRINCE2 Practitioner</li> </ul> <p><u>Evaluation Criteria:</u></p> <ul style="list-style-type: none"> <li>• <b>10 points</b> - Evidence of valid accreditation provided</li> </ul>	10
<p>b) The Bidder should demonstrate that the resource has experience, on up to two projects for a minimum duration of six months (per project), within the ten years preceding the issuance date of this solicitation, as a Project Executive providing expert advice and guidance to senior management to develop strategic program and project goals.</p> <p><u>Evaluation Criteria:</u>            Up to 10 points per project (maximum 2 projects) as follows:</p> <ul style="list-style-type: none"> <li>• <b>10 points</b> – The Bidder’s response:               <ul style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph b) above; and</li> <li>ii. demonstrates all aspects of the experience of the identified resource by providing a description of the work performed in the role;</li> </ul> </li> <li>• <b>6 points</b> – The Bidder’s response:               <ul style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph b) above; and</li> <li>ii. provides information which demonstrates some (but not all) aspects of the experience claimed;</li> </ul> </li> <li>• <b>2 points</b> - The Bidder’s response:               <ul style="list-style-type: none"> <li>i. fails to address each item of the point rated criteria in paragraph b) above; or</li> <li>ii. addresses each item of the point rated criteria in paragraph b) above but does not provide any information which demonstrates the experience claimed; or</li> </ul> </li> <li>• <b>0 points</b> – The Bidder’s response does not address the stated point rated criteria in paragraph b) above.</li> </ul>	20
<p>c) The Bidder should demonstrate that the resource has experience, on up to two projects for a minimum duration of six months (per project), within the ten years preceding the issuance date of this solicitation, as a Project Executive developing strategic long-range IM/IT strategies and plans to achieve strategic organizational objectives.</p> <p><u>Evaluation Criteria:</u>            Up to 10 points per project (maximum 2 projects) as follows:</p> <ul style="list-style-type: none"> <li>• <b>10 points</b> – The Bidder’s response:</li> </ul>	20

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<b>Project Executive, Level 3</b>	
<b>Point-Rated Criteria</b>	<b>Max # pts (per Resource)</b>
<ul style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph c) above; and</li> <li>ii. demonstrates all aspects of the experience of the identified resource by providing a description of the work performed in the role;</li> <li>• <b>6 points</b> – The Bidder's response:             <ul style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph c) above; and</li> <li>ii. provides information which demonstrates some (but not all) aspects of the experience claimed;</li> </ul> </li> <li>• <b>2 points</b> - The Bidder's response:             <ul style="list-style-type: none"> <li>i. fails to address each item of the point rated criteria in paragraph c) above; or</li> <li>ii. addresses each item of the point rated criteria in paragraph c) above but does not provide any information which demonstrates the experience claimed; or</li> </ul> </li> <li>• <b>0 points</b> – The Bidder's response does not address the stated point rated criteria in paragraph c) above.</li> </ul>	
<b>Maximum Score</b>	<b>50</b>

## Evaluation Criteria: Workstream 2 IM/IT Project Services

Bidders are advised to address each requirement in sufficient depth to permit a complete requisite analysis and assessment by the evaluation team. Bids failing to adequately respond to the mandatory evaluation criteria will be excluded from further consideration. Only bids found to meet the mandatory evaluation criteria will be evaluated in accordance with the evaluation criteria subject to point rated requirements.

### 4. Mandatory Evaluation Criteria (Workstream 2)

#### M-3 Corporate Experience

The Bidder must provide three Customer Reference Contracts with a cumulative billed value of \$10M (Canadian, including taxes), where the Bidder was contracted to deliver IM/IT professional services.

Of the three Customer Reference Contracts provided, at least one contract must have been for a Government of Canada Department or Agency and had a minimum billed value of \$5M (Canadian, including taxes), over a cumulative period of three years or less.

To be considered, each Customer Reference Contracts provided **must**:

- i. Have had a minimum contract duration of twelve months,
- ii. Been completed within the eight years preceding the issuance date of this solicitation, or if the contract is ongoing, the contract must have been in place for a minimum of twelve months preceding the issuance date of this solicitation;
- iii. Include complete client particulars including:
  - Client organization name;
  - Address;
  - Reference Contact Name and Title;
  - Contact telephone number and/or e-mail address.

**Note:** If more than the requested number of Customer Reference Contracts are provided, Canada will only evaluate the first 3 in the order in which they are set out in the hard copy of the Bid.

#### M-4 Demonstrated Corporate Capability (Workstream 2)

The Bidder must demonstrate its capability to provide qualified Workstream 2 resources "as and when requested" by identifying a resource in response to each of the requirements identified in the table below. Each of the identified resources must have previously been contracted by the Bidder for a minimum period of six months within the last two years.

The Bidder must complete the applicable tables that follow for each identified resource; substantiation of demonstrated experience must be included in the table.

TBIPS Resource Category	Level	# of resources to be identified
4) Project Administrator	Level 2	--
5) Project Administrator	Level 3	--
6) Project Manager	Level 2	2 (Level 2 or 3)

TBIPS Resource Category	Level	# of resources to be identified
7) Project Manager	Level 3	
8) Business Analyst	Level 2	1
9) Business Analyst	Level 3	2
10) IM Architect	Level 3	1 in each of 3 (out of 4) categories
11) Technology Architect	Level 3	
12) Application / Software Architect	Level 3	
13) GIS Application Architect	Level 3	
<b>Total # Resources</b>		<b>8</b>

**Note:** The resources identified in response to this requirement will be used to assess Corporate Capability only. Required resources will be requested using the Task Authorization (TA) process and evaluated at time of TA using the Resource Evaluation Criteria contained in Attachment 1 to the SOW.

**M-4.1 Project Manager (Level 2)**

Resource Evaluation Criteria		
<b>Resource Category</b>	6. Project Manager, Level 2	
<b>Name of Proposed Resource:</b>	<insert name>	
The Bidder must demonstrate (in column 'C') that the identified resource meets the mandatory requirements stipulated in column 'B':		
'A'	'B'	'C'
Criteria	Mandatory Requirement	Bidder's Response
M-4.1.1	<p>The identified resource must have experience in the identified resource category including:</p> <ul style="list-style-type: none"> <li>a) a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this solicitation, working as a Project Manager (as defined in section 3.6 of Annex A, SOW); and</li> <li>b) that within that body of experience, the resource has experience performing at least eight (out of twelve) tasks listed for a minimum of four cumulative months of experience per task:               <ul style="list-style-type: none"> <li>1) Provide subject matter expertise in the areas of Risk Management, Integration Management, Change Management, Planning and Scheduling, Quality Management, and Earned Value Management;</li> <li>2) Manage the project during planning, monitoring, execution and closing phases;</li> <li>3) Create clear and attainable project objectives, building the project requirements, and managing project management constraints including cost, time, scope, and quality;</li> <li>4) Identify resource needs and work with the Technical Authority to assign individual responsibilities;</li> <li>5) Create and execute project work plans and timelines and revise as appropriate to meet changing needs</li> </ul> </li> </ul>	

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<b>Resource Evaluation Criteria</b>		
<b>Resource Category</b>	6. Project Manager, Level 2	
<b>Name of Proposed Resource:</b>	<insert name>	
The Bidder must demonstrate (in column 'C') that the identified resource meets the mandatory requirements stipulated in column 'B':		
<b>'A'</b>	<b>'B'</b>	<b>'C'</b>
<b>Criteria</b>	<b>Mandatory Requirement</b>	<b>Bidder's Response</b>
	<p>and requirements;</p> <p>6) Manage day-to-day operational aspects of a project and scope, which includes reviewing deliverables prepared by team before presenting to stakeholders and resolve or escalate issues in a timely fashion;</p> <p>7) Communicate effectively relevant project information to team and stakeholders;</p> <p>8) Communicate project changes and updates to appropriate team members;</p> <p>9) Organise and facilitate team and stakeholder meetings to review work;</p> <p>10) Prepare regular status reports and distribute as necessary;</p> <p>11) Ensure documents are complete, current, and stored appropriately; and</p> <p>12) Provide documentation as required to support approval processes.</p> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	
M-4.1.2	<p>The Bidder must demonstrate that it has previously contracted the identified resource for a minimum period of six months within the last two years by providing the following Customer Reference Project information:</p> <p>a) Customer organization name;</p> <p>b) Customer Contact Information;</p> <p>c) Role of the resource (resource category) under the contract; and</p> <p>d) Start and end dates of the identified resource on the Customer Reference Project.</p>	

**M-4.2 Project Manager (Level 3)**

Resource Evaluation Criteria		
Resource Category	7. Project Manager, Level 3	
Name of Proposed Resource:	<insert name>	
The Bidder must demonstrate (in column 'C') that the identified resource meets the mandatory requirements stipulated in column 'B':		
'A'	'B'	'C'
Criteria	Mandatory Requirement	Bidder's Response
M-4.2.1	<p>The identified resource must have experience in the identified resource category including:</p> <ul style="list-style-type: none"> <li>a) a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this solicitation, working as a Project Manager (as defined in section 3.7 of Annex A, SOW); and</li> <li>b) that within that body of experience, the resource has experience performing at least nine (out of twelve ) tasks listed for a minimum of four cumulative months of experience per task:               <ul style="list-style-type: none"> <li>1) Provide subject matter expertise in the areas of Risk Management, Integration Management, Change Management, Planning and Scheduling, Quality Management, and Earned Value Management;</li> <li>2) Manage the project during the planning, executing, monitoring and closing phases;</li> <li>3) Create clear and attainable project objectives, building the project requirements, and managing project management constraints including cost, time, scope, and quality;</li> <li>4) Identify resource needs and work with the Technical Authority to assign individual responsibilities;</li> <li>5) Create and execute project work plans and timelines and revise as appropriate to meet changing needs and requirements;</li> <li>6) Manage day-to-day operational aspects of a project and scope, which includes reviewing deliverables prepared by team before presenting to stakeholders and resolve or escalate issues in a timely fashion;</li> <li>7) Communicate effectively relevant project information to team and stakeholders;</li> <li>8) Document, evaluate impact of, seek approval for and communicate project changes and updates to appropriate team members;</li> <li>9) Organize and facilitate team and stakeholder meetings to review work;</li> <li>10) Prepare regular status reports and distribute as necessary;</li> </ul> </li> </ul>	

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<b>Resource Evaluation Criteria</b>		
<b>Resource Category</b>	7. Project Manager, Level 3	
<b>Name of Proposed Resource:</b>	<insert name>	
The Bidder must demonstrate (in column 'C') that the identified resource meets the mandatory requirements stipulated in column 'B':		
<b>'A'</b>	<b>'B'</b>	<b>'C'</b>
<b>Criteria</b>	<b>Mandatory Requirement</b>	<b>Bidder's Response</b>
	11) Ensure documents are complete, current, and stored appropriately; and 12) Provide documentation as required to support approval processes.  The required experience can be demonstrated over one or more Customer Reference Projects.	
M-4.2.2	The resource must have experience on a minimum of two Customer Reference Projects, within the eight years preceding the issuance date of this solicitation, developing and delivering oral presentations to brief client management / executive on the status of an IM/IT project.  The resource must have worked on the Customer Reference Project for a minimum duration of six months.	
M-4.2.3	The Bidder must demonstrate that it has previously contracted the identified resource for a minimum period of six months within the last two years by providing the following Customer Reference Project information:  a) Customer organization name; b) Customer Contact Information; c) Role of the resource (resource category) under the contract; and d) Start and end dates of the identified resource on the Customer Reference Project.	

**M-4.3 Business Analyst, Level 2**

<b>Resource Evaluation Criteria</b>		
<b>Resource Category</b>	8. Business Analyst, Level 2	
<b>Name of Proposed Resource:</b>	<insert name>	
The Bidder must demonstrate (in column 'C') that the identified resource meets the mandatory requirements stipulated in column 'B'::		
<b>'A'</b>	<b>'B'</b>	<b>'C'</b>
<b>Criteria</b>	<b>Mandatory Requirement</b>	<b>Contractor's Response</b>
M-4.3.1	<p>The identified resource must have experience in the identified resource category including:</p> <ul style="list-style-type: none"> <li>a) a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this solicitation, working as a Business Analyst (as defined in section 3.8 of Annex A, SOW); and</li> <li>b) that within that body of experience, the resource has experience performing at least five (out of eight) tasks listed for a minimum of four cumulative months of experience per task:               <ul style="list-style-type: none"> <li>1) Determine operational objectives by studying business functions; gathering information; evaluating output requirements and formats;</li> <li>2) Perform business analyses of functional requirements to identify information, procedures, and decision flows;</li> <li>3) Ensure all documentation accurately reflect the current status of changes and outstanding issues so that business requirements reflect application features and functions;</li> <li>4) Evaluate existing procedures and methods, identify and document items such as database content, structure, application subsystems;</li> <li>5) Recommend controls by identifying problems and writing improved procedures;</li> <li>6) Establish acceptance test criteria with client;</li> <li>7) Provide references for users by writing and maintaining user documentation; providing help desk support; and training users; or</li> <li>8) Prepare reports by collecting, analyzing, and summarizing information and trends.</li> </ul> </li> </ul> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	
M-4.3.2	The resource must have a minimum of three years of experience, within the five years preceding the issuance date of this solicitation, developing and documenting statements of	

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<b>Resource Evaluation Criteria</b>		
<b>Resource Category</b>	8. Business Analyst, Level 2	
<b>Name of Proposed Resource:</b>	<insert name>	
The Bidder must demonstrate (in column 'C') that the identified resource meets the mandatory requirements stipulated in column 'B'::		
<b>'A'</b>	<b>'B'</b>	<b>'C'</b>
<b>Criteria</b>	<b>Mandatory Requirement</b>	<b>Contractor's Response</b>
	<p>requirements and performing business analysis of functional requirements to identify information, procedure and decision flows for application development, application delivery or information management projects.</p> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	
M-4.3.3	<p>The resource must have experience on a minimum of two Customer Reference Projects, within the five years preceding the issuance date of this solicitation, facilitating Joint Application Development sessions with Business and IT Stakeholders to identify and develop system requirements.</p> <p>The resource must have worked on the Customer Reference Project for a minimum duration of four months.</p>	
M-4.3.4	<p>The resource must have experience on a minimum of two Customer Reference Projects, within the five years preceding the issuance date of this solicitation, translating functional AND non-functional business requirements into deliverables which include activity mapping, use cases, Business Requirements Documents, and process flow diagrams.</p> <p>The resource must have worked on the Customer Reference Project for a minimum duration of four months.</p>	
M-4.3.5	<p>The Bidder must demonstrate that it has previously contracted the identified resource for a minimum period of six months within the last two years by providing the following Customer Reference Project information:</p> <ul style="list-style-type: none"> <li>a) Customer organization name;</li> <li>b) Customer Contact Information;</li> <li>c) Role of the resource (resource category) under the contract; and</li> <li>d) Start and end dates of the identified resource on the Customer Reference Project.</li> </ul>	

**M-4.4 Business Analyst, Level 3**

<b>Resource Category</b>		9. Business Analyst, Level 3
<b>Name of Proposed Resource:</b>		<insert name>
The Bidder must demonstrate (in column 'C') that the identified resource meets the mandatory requirements stipulated in column 'B':		
<b>'A'</b>	<b>'B'</b>	<b>'C'</b>
<b>Criteria</b>	<b>Mandatory Requirement</b>	<b>Bidder's Response</b>
M-4.4.1	<p>The identified resource must have experience in the identified resource category including:</p> <ul style="list-style-type: none"> <li>a) a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this solicitation, working as a Business Analyst (as defined in section 3.9 of Annex A, SOW); and</li> <li>b) that within that body of experience, the resource has experience performing at least six (out of nine) tasks listed for a minimum of six cumulative months of experience per task:           <ul style="list-style-type: none"> <li>1) Lead a team of Business Analysts, provide guidance and advice and assign tasks;</li> <li>2) Determine operational objectives by studying business functions; gathering information; evaluating output requirements and formats;</li> <li>3) Perform business analyses of functional requirements to identify information, procedures, and decision flows;</li> <li>4) Ensure all documentation accurately reflect the current status of changes and outstanding issues so that business requirements reflect application features and functions;</li> <li>5) Evaluate existing procedures and methods, identify and document items such as database content, structure, application subsystems;</li> <li>6) Recommend controls by identifying problems and writing improved procedures;</li> <li>7) Establish acceptance test criteria with client;</li> <li>8) Provide references for users by writing and maintaining user documentation; providing help desk support; and training users; or</li> <li>9) Prepare reports by collecting, analyzing, and summarizing information and trends.</li> </ul> </li> </ul> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	
M-4.4.2	The resource must have a minimum of five years of experience, within the eight years preceding the issuance	

<b>Resource Category</b>		9. Business Analyst, Level 3
<b>Name of Proposed Resource:</b>		<insert name>
The Bidder must demonstrate (in column 'C') that the identified resource meets the mandatory requirements stipulated in column 'B':		
<b>'A'</b>	<b>'B'</b>	<b>'C'</b>
<b>Criteria</b>	<b>Mandatory Requirement</b>	<b>Bidder's Response</b>
	<p>date of this solicitation, developing and documenting statements of requirements and performing business analysis of functional requirements to identify information, procedure and decision flows for application development, application delivery or information management projects.</p> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	
M-4.4.3	<p>The resource must have experience on a minimum of three Customer Reference Projects, within the eight years preceding the issuance date of this solicitation, facilitating Joint Application Development sessions with Business and IT Stakeholders to identify and develop system requirements.</p> <p>The resource must have worked on each of the Customer Reference Projects for a minimum duration of six months.</p>	
M-4.4.4	<p>The resource must have experience on a minimum of three Customer Reference Projects, within the eight years preceding the issuance date of this solicitation, translating functional AND non-functional business requirements into deliverables which include activity mapping, use cases, Business Requirements Documents, and process flow diagrams.</p> <p>The resource must have worked on each of the Customer Reference Projects for a minimum duration of six months.</p>	
M-4.4.5	<p>The Bidder must demonstrate that it has previously contracted the identified resource for a minimum period of six months within the last two years by providing the following Customer Reference Project information:</p> <ul style="list-style-type: none"> <li>a) Customer organization name;</li> <li>b) Customer Contact Information;</li> <li>c) Role of the resource (resource category) under the contract; and</li> <li>d) Start and end dates of the identified resource on the Customer Reference Project.</li> </ul>	

**M-4.5 IM Architect (Level 3)**

<b>Resource Evaluation Criteria</b>		
<b>Resource Category</b>	10. IM Architect, Level 3	
<b>Name of Proposed Resource:</b>	<insert name>	
The Bidder must demonstrate (in column 'C') that the identified resource meets the mandatory requirements stipulated in column 'B':		
<b>'A'</b>	<b>'B'</b>	<b>'C'</b>
<b>Criteria</b>	<b>Mandatory Requirement</b>	<b>Bidder's Response</b>
M-4.5.1	<p>The identified resource must have experience in the identified resource category including:</p> <ul style="list-style-type: none"> <li>a) a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this solicitation, working as an IM Architect as defined in section 3.10 of Annex A, SOW); and</li> <li>b) that within that body of experience, the resource has experience performing each of the eight tasks listed for a minimum of six cumulative months of experience per task:               <ul style="list-style-type: none"> <li>1) Analyse existing capabilities and requirements, develop redesigned frameworks and recommend areas for improved capability and integration. Develop and document detailed statements of requirements.</li> <li>2) Evaluate existing procedures and methods, identify and document database content, structure, and application subsystems, and develop data dictionary.</li> <li>3) Define and document interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems.</li> <li>4) Prototype potential solutions, provide trade off information and suggest recommended courses of action.</li> <li>5) Perform information modelling in support of BPR implementation.</li> <li>6) Perform cost/benefit analysis of implementing new processes and solutions.</li> <li>7) Provide advice in developing and integrating process and information models between business processes to eliminate information and process redundancies.</li> <li>8) Provide advice in defining new requirements and opportunities for applying efficient and effective solutions; identify and provide preliminary costs of potential options.</li> </ul> </li> </ul> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	
M-4.5.2	The resource must have a minimum of five years of	

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<b>Resource Evaluation Criteria</b>		
<b>Resource Category</b>	10. IM Architect, Level 3	
<b>Name of Proposed Resource:</b>	<insert name>	
The Bidder must demonstrate (in column 'C') that the identified resource meets the mandatory requirements stipulated in column 'B':		
<b>'A'</b>	<b>'B'</b>	<b>'C'</b>
<b>Criteria</b>	<b>Mandatory Requirement</b>	<b>Bidder's Response</b>
	experience, within the twelve years preceding the issuance date of this solicitation, developing strategies and plans and /or providing recommendations related to information management for an organization with at least 1,000 end users.	
M-4.5.3	<p>The Bidder must demonstrate that it has previously contracted the identified resource for a minimum period of six months within the last two years by providing the following Customer Reference Project information:</p> <ul style="list-style-type: none"> <li>a) Customer organization name;</li> <li>b) Customer Contact Information;</li> <li>c) Role of the resource (resource category) under the contract; and</li> <li>d) Start and end dates of the identified resource on the Customer Reference Project.</li> </ul>	

**M-4.6 Technology Architect (Level 3)**

Resource Evaluation Criteria		
<b>Resource Category</b>	11. Technology Architect, Level 3	
<b>Name of Proposed Resource:</b>	<insert name>	
The Bidder must demonstrate (in column 'C') that the identified resource meets the mandatory requirements stipulated in column 'B':		
'A'	'B'	'C'
Criteria	Mandatory Requirement	Bidder's Response
M-4.6.1	<p>The identified resource must have experience in the identified resource category including:</p> <ul style="list-style-type: none"> <li>a) a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this solicitation, working as a Technology Architect (as defined in section 3.11 of Annex A, SOW); and</li> <li>b) that within that body of experience, the resource has experience performing each of the nine tasks listed for a minimum of six cumulative months of experience per task:               <ul style="list-style-type: none"> <li>1) Develop technical architectures, frameworks and strategies, either for an organization or for a major application area, to meet the business and application requirements.</li> <li>2) Identify the policies and requirements that drive out a particular solution.</li> <li>3) Analyze and evaluate alternative technology solutions to meet business problems.</li> <li>4) Ensures the integration of all aspects of technology solutions.</li> <li>5) Monitor industry trends to ensure that solutions fit with government and industry directions for technology.</li> <li>6) Provide information, direction and support for emerging technologies.</li> <li>7) Perform impact analysis of technology changes.</li> <li>8) Provide support to applications and/or technical support teams in the proper application of existing infrastructure.</li> <li>9) Review application and program design or technical infrastructure design to ensure adherence to standards and to recommend performance improvements.</li> </ul> </li> </ul> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	
M-4.6.2	The resource must have a minimum of five years of experience, within the twelve years preceding the issuance date of this solicitation, developing technical architectures,	

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<b>Resource Evaluation Criteria</b>		
<b>Resource Category</b>	11. Technology Architect, Level 3	
<b>Name of Proposed Resource:</b>	<insert name>	
The Bidder must demonstrate (in column 'C') that the identified resource meets the mandatory requirements stipulated in column 'B':		
<b>'A'</b>	<b>'B'</b>	<b>'C'</b>
<b>Criteria</b>	<b>Mandatory Requirement</b>	<b>Bidder's Response</b>
	frameworks and strategies to meet the business and application requirements for a Business Intelligence Application enhanced project.	
M-4.6.3	<p>The Bidder must demonstrate that it has previously contracted the identified resource for a minimum period of six months within the last two years by providing the following Customer Reference Project information:</p> <ul style="list-style-type: none"> <li>a) Customer organization name;</li> <li>b) Customer Contact Information;</li> <li>c) Role of the resource (resource category) under the contract; and</li> <li>d) Start and end dates of the identified resource on the Customer Reference Project.</li> </ul>	

**M-4.7 Application / Software Architect (Level 3)**

<b>Resource Evaluation Criteria</b>		
<b>Resource Category</b>	12. Application / Software Architect, Level 3	
<b>Name of Proposed Resource:</b>	<insert name>	
The Bidder must demonstrate (in column 'C') that the identified resource meets the mandatory requirements stipulated in column 'B':		
<b>'A'</b>	<b>'B'</b>	<b>'C'</b>
<b>Criteria</b>	<b>Mandatory Requirement</b>	<b>Bidder's Response</b>
M-4.7.1	<p>The identified resource must have experience in the identified resource category including:</p> <ul style="list-style-type: none"> <li>a) a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this solicitation, working as an Application / Software Architect (as defined in section 3.12 of Annex A, SOW); and</li> <li>b) that within that body of experience, the resource has experience performing each of the ten tasks listed for a minimum of six cumulative months of experience per task:               <ul style="list-style-type: none"> <li>1) Develop technical architectures, frameworks and strategies, either for an organization or for a major application area, to meet the business and application requirements.</li> <li>2) Identify the policies and requirements that drive out a particular solution.</li> <li>3) Analyze and evaluate alternative technology solutions to meet business problems.</li> <li>4) Ensures the integration of all aspects of technology solutions.</li> <li>5) Monitor industry trends to ensure that solutions fit with government and industry directions for technology.</li> <li>6) Analyze functional requirements to identify information, procedures and decision flows.</li> <li>7) Evaluate existing procedures and methods, identify and document database content, structure, and application sub-systems, and develop data dictionary.</li> <li>8) Define and document interfaces of manual to automated operations within application sub-systems, to external systems and between new and existing systems.</li> <li>9) Define input/output sources, including detailed plan for technical design phase, and obtain approval of the system proposal.</li> <li>10) Identify and document system specific standards relating to programming, documentation and testing, covering program libraries, data dictionaries, naming conventions, etc.</li> </ul> </li> </ul>	

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<b>Resource Evaluation Criteria</b>		
<b>Resource Category</b>	12. Application / Software Architect, Level 3	
<b>Name of Proposed Resource:</b>	<insert name>	
The Bidder must demonstrate (in column 'C') that the identified resource meets the mandatory requirements stipulated in column 'B':		
<b>'A'</b>	<b>'B'</b>	<b>'C'</b>
<b>Criteria</b>	<b>Mandatory Requirement</b>	<b>Bidder's Response</b>
	The required experience can be demonstrated over one or more Customer Reference Projects.	
M-4.7.2	The resource must have a minimum of five years of experience, within the ten years preceding the issuance date of this solicitation, developing technical architectures, frameworks and strategies to meet the business and application requirements for an application development or application enhancement project with systems developed on the Microsoft .Net framework.	
M-4.7.3	The resource must have experience on a minimum of two Customer Reference Projects, within the five years preceding the issuance date of this solicitation that demonstrates experience in Coaching and Assisting development teams including each of the following activities: a) leading design review, b) leading code walkthrough, and c) providing instructions on industry best practices.  The resource must have worked on each of the Customer Reference Projects for a minimum duration of six months.	
M-4.7.4	The resource must have experience on a minimum of two Customer Reference Projects, within the five years preceding the issuance date of this solicitation developing and documenting reference architectures for software development projects.  The resource must have worked on each of the Customer Reference Projects for a minimum duration of six months.	
M-4.7.5	The Bidder must demonstrate that it has previously contracted the identified resource for a minimum period of six months within the last two years by providing the following Customer Reference Project information:  a) Customer organization name; b) Customer Contact Information; c) Role of the resource (resource category) under the contract; and d) Start and end dates of the identified resource on the Customer Reference Project.	

**M-4.8 GIS Architect (Level 3)**

<b>Resource Evaluation Criteria</b>		
<b>Resource Category</b>	13. GIS Architect, Level 3	
<b>Name of Proposed Resource:</b>	<insert name>	
The Bidder must demonstrate (in column 'C') that the identified resource meets the mandatory requirements stipulated in column 'B':		
<b>'A'</b>	<b>'B'</b>	<b>'C'</b>
<b>Criteria</b>	<b>Mandatory Requirement</b>	<b>Bidder's Response</b>
M-4.8.1	<p>The identified resource must have experience in the identified resource category including:</p> <ul style="list-style-type: none"> <li>a) a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this solicitation, working as a GIS Architect (as defined in section 3.13 of Annex A, SOW); and</li> <li>b) that within that body of experience, the resource has experience performing each of the seven tasks listed for a minimum of six cumulative months of experience per task:               <ul style="list-style-type: none"> <li>1) Evaluate the enterprise's business/GIS architecture; determine its consistency and integration with the organization's business/GIS strategies, assess the degree of its alignment with Government of Canada's Federal Geospatial Platform (FGP).</li> <li>2) Provide Geomatics Architectural expertise to transition current Geo application to ESRI platform delivered through Government of Canada's Federal Geospatial Platform (FGP).</li> <li>3) Assess the feasibility of migrating from the current state to the target business architecture and enabling technologies and identify the risks associated with migrating to the target business architecture and technologies and make recommendations for risk mitigation.</li> <li>4) Identify business and technology trends that create opportunities for business improvement, advise business and ICT Senior Executives on GIS trends and emerging technologies and the impact on the organization's and government ICT architectures and business strategies.</li> <li>5) Model "What if" scenarios and recommend appropriate changes to the existing architecture and department geographical infrastructure, and recommend alternative solutions, methodologies and strategies.</li> <li>6) Produce an architectural evolution plan, recommend prioritization of architecture evolution initiatives, and develop and/or implement an architecture evolution</li> </ul> </li> </ul>	

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<b>Resource Evaluation Criteria</b>		
<b>Resource Category</b>	13. GIS Architect, Level 3	
<b>Name of Proposed Resource:</b>	<insert name>	
The Bidder must demonstrate (in column 'C') that the identified resource meets the mandatory requirements stipulated in column 'B':		
<b>'A'</b>	<b>'B'</b>	<b>'C'</b>
<b>Criteria</b>	<b>Mandatory Requirement</b>	<b>Bidder's Response</b>
	plan. 7) Coach, mentor and train the organization to perform any of the above.  The required experience can be demonstrated over one or more Customer Reference Projects.	
M-4.8.2	The resource must have a minimum of five years of experience, within the twelve years preceding the issuance date of this solicitation, developing and maintaining GIS application.	
M-4.8.3	The Bidder must demonstrate that it has previously contracted the identified resource for a minimum period of six months within the last two years by providing the following Customer Reference Project information:  a) Customer organization name; b) Customer Contact Information; c) Role of the resource (resource category) under the contract; and d) Start and end dates of the identified resource on the Customer Reference Project.	

## 5. Point-Rated Evaluation Criteria (Workstream 2)

Workstream 2 Bids, that meet all of the mandatory qualifications, will be further evaluated against the following rated requirements. A Technical Proposal Score out of 70 points, subject to Reference Checking, will be computed using the formulas below.

Technical Evaluation Criteria	Max. Score
<b>R-4 Bench Strength</b>	240
<b>R-5 Technical Expertise of Identified Resources</b>	400
<b>Sub-total</b>	640
<b>Technical Proposal Score (70 points maximum)</b>	[Bidders Score (out of 640) / 640] x 70 points

### R-4 Bench Strength

The Bidder should further demonstrate its bench strength in the area of project management and support professional services by identifying by name up to four individual resources, in addition to the nine resources identified in response to mandatory #M-4 above, where the Bidder has contracted (under the TBIPS SA) the services of the individual for a minimum of 200 cumulative billed days, within the last two years, in the National Capital Region (NCR), in any of the following TBIPS categories:

- Application / Software Architect
- IM Architect
- Technology Architect
- Application / Software Architect
- GIS Application Architect

Resources	Resource Name	TBIPS Category & Level	# of billed days	Client Organization Name & Location	Contract / Reference #	Contract Period
<b>Consultant #1:</b>	<i>e.g. John Smith</i>	A.1 Application / Software Architect, L3	63	<i>NavCanada</i>	<i>555123456</i>	<i>Jan 2014 to March 2014</i>
		A.1 Application / Software Architect, L3	164	<i>Treasury Board, Secretariat</i>	<i>63490AB</i>	<i>Jul 2014 to March 2015</i>
	<b>Sub-total (min 200)</b>		227			
<b>Consultant #2:</b>						
<b>Consultant #3:</b>						
<b>Consultant #4:</b>						

Evaluation Criteria: The Bidder will be awarded up to 240 points (60 points per resource).

**R-5 Technical Expertise of Identified Resources**

The Bidder should further demonstrate the relevant experience of the identified resources (i.e. resources identified in response to requirement #M-4) in accordance with the point-rated criteria below.

Evaluation Criteria: The Bidder will be awarded up to 50 points for each resource (total maximum 450 points), with points awarded as follows

<b>Project Manager, Level 2</b>	
<b>Point-Rated Criteria</b>	<b>Max # pts (per Resource)</b>
a) The Bidder should demonstrate that the resource holds a professional accreditation in Project Management as follows: <ul style="list-style-type: none"> <li>a. Project Management Professional (PMP), or</li> <li>b. PRINCE2 Practitioner</li> </ul> <p><u>Evaluation Criteria:</u></p> <ul style="list-style-type: none"> <li>• <b>10 points</b> - Evidence of valid accreditation provided</li> </ul>	10
b) The Bidder should demonstrate that the resource has experience, on up to two projects for a minimum duration of four months (per project), within the ten years preceding the issuance date of this solicitation, as a Project Manager managing the end-to-end system development lifecycle for a MS Dynamics implementation project. <p><u>Evaluation Criteria:</u>            Up to 10 points per project (maximum 2 projects) as follows:</p> <ul style="list-style-type: none"> <li>• <b>10 points</b> – The Bidder’s response:               <ul style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph b) above; and</li> <li>ii. demonstrates all aspects of the experience of the identified resource by providing a description of the work performed in the role;</li> </ul> </li> <li>• <b>6 points</b> – The Bidder’s response:               <ul style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph b) above; and</li> <li>ii. provides information which demonstrates some (but not all) aspects of the experience claimed;</li> </ul> </li> <li>• <b>2 points</b> - The Bidder’s response:               <ul style="list-style-type: none"> <li>i. fails to address each item of the point rated criteria in paragraph b) above; or</li> <li>ii. addresses each item of the point rated criteria in paragraph b) above but does not provide any information which demonstrates the experience claimed; or</li> </ul> </li> <li>• <b>0 points</b> – The Bidder’s response does not address the stated point rated criteria in paragraph b) above.</li> </ul>	20
c) The Bidder should demonstrate that the resource has experience, on up to	20

<b>Project Manager, Level 2</b>	
<b>Point-Rated Criteria</b>	<b>Max # pts (per Resource)</b>
<p>two projects for a minimum duration of four months (per project), within the ten years preceding the issuance date of this solicitation, as a Project Manager where the software development lifecycle was based on the Agile methodology and the resource had the role of “Scrum Master”.</p> <p><u>Evaluation Criteria:</u>            Up to 10 points per project (maximum 2 projects) as follows:</p> <ul style="list-style-type: none"> <li>• <b>10 points</b> – The Bidder’s response:               <ul style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph c) above; and</li> <li>ii. demonstrates all aspects of the experience of the identified resource by providing a description of the work performed in the role;</li> </ul> </li> <li>• <b>6 points</b> – The Bidder’s response:               <ul style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph c) above; and</li> <li>ii. provides information which demonstrates some (but not all) aspects of the experience claimed;</li> </ul> </li> <li>• <b>2 points</b> - The Bidder’s response:               <ul style="list-style-type: none"> <li>i. fails to address each item of the point rated criteria in paragraph c) above; or</li> <li>ii. addresses each item of the point rated criteria in paragraph c) above but does not provide any information which demonstrates the experience claimed; or</li> </ul> </li> <li>• <b>0 points</b> – The Bidder’s response does not address the stated point rated criteria in paragraph c) above.</li> </ul>	
<b>Maximum Score</b>	<b>50</b>

<b>Project Manager, Level 3</b>	
<b>Point-Rated Criteria</b>	<b>Max # pts (per Resource)</b>
<p>a) The Bidder should demonstrate that the resource holds a professional accreditation in Project Management as follows:</p> <ul style="list-style-type: none"> <li>a. Project Management Professional (PMP), or</li> <li>b. PRINCE2 Practitioner</li> </ul> <p><u>Evaluation Criteria:</u></p> <ul style="list-style-type: none"> <li>• <b>10 points</b> - Evidence of valid accreditation provided</li> </ul>	10
<p>b) The Bidder should demonstrate that the resource has experience, on up to two projects for a minimum duration of six months (per project), within the ten years preceding the issuance date of this solicitation, as a Project Manager managing the end-to-end system development lifecycle for a MS Dynamics implementation project.</p> <p><u>Evaluation Criteria:</u>            Up to 10 points per project (maximum 2 projects) as follows:</p> <ul style="list-style-type: none"> <li>• <b>10 points</b> – The Bidder’s response:               <ul style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph b) above; and</li> <li>ii. demonstrates all aspects of the experience of the identified resource by providing a description of the work performed in the role;</li> </ul> </li> <li>• <b>6 points</b> – The Bidder’s response:               <ul style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph b) above; and</li> <li>ii. provides information which demonstrates some (but not all) aspects of the experience claimed;</li> </ul> </li> <li>• <b>2 points</b> - The Bidder’s response:               <ul style="list-style-type: none"> <li>i. fails to address each item of the point rated criteria in paragraph b) above; or</li> <li>ii. addresses each item of the point rated criteria in paragraph b) above but does not provide any information which demonstrates the experience claimed; or</li> </ul> </li> <li>• <b>0 points</b> – The Bidder’s response does not address the stated point rated criteria in paragraph b) above.</li> </ul>	20
<p>c) The Bidder should demonstrate that the resource has experience, on up to two projects for a minimum duration of six months (per project), within the ten years preceding the issuance date of this solicitation, as a Project Manager where the software development lifecycle was based on the agile methodology and the resource had the role of “Scrum Master”.</p> <p><u>Evaluation Criteria:</u>            Up to 10 points per project (maximum 2 projects) as follows:</p> <ul style="list-style-type: none"> <li>• <b>10 points</b> – The Bidder’s response:</li> </ul>	20

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<b>Project Manager, Level 3</b>	
<b>Point-Rated Criteria</b>	<b>Max # pts (per Resource)</b>
<ul style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph c) above; and</li> <li>ii. demonstrates all aspects of the experience of the identified resource by providing a description of the work performed in the role;</li> <li>• <b>6 points</b> – The Bidder’s response:             <ul style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph c) above; and</li> <li>ii. provides information which demonstrates some (but not all) aspects of the experience claimed;</li> </ul> </li> <li>• <b>2 points</b> - The Bidder’s response:             <ul style="list-style-type: none"> <li>i. fails to address each item of the point rated criteria in paragraph c) above; or</li> <li>ii. addresses each item of the point rated criteria in paragraph c) above but does not provide any information which demonstrates the experience claimed; or</li> </ul> </li> <li>• <b>0 points</b> – The Bidder’s response does not address the stated point rated criteria in paragraph c) above.</li> </ul>	
<b>Maximum Score</b>	<b>50</b>

<b>Business Analyst, Level 2</b>	
<b>Point-Rated Criteria</b>	<b>Max # pts (per Resource)</b>
<p>a) The Bidder should demonstrate that the resource that the resource holds a professional accreditation in Business Analysis as follows:</p> <ul style="list-style-type: none"> <li>a. Certified Business Analyst Professional (CBAP), or</li> <li>b. PMI Professional in Business Analysis (PMI-PBA).</li> </ul> <p><u>Evaluation Criteria:</u></p> <ul style="list-style-type: none"> <li>• <b>10 points</b> - Evidence of valid accreditation provided</li> </ul>	10
<p>b) The Bidder should demonstrate that the resource has experience, on up to two projects for a minimum duration of four months (per project), within the ten years preceding the issuance date of this solicitation, as a Business Analyst for initiatives related to Portal technologies for external and public uses.</p> <p><u>Evaluation Criteria:</u>            Up to 10 points per project (maximum 2 projects) as follows:</p> <ul style="list-style-type: none"> <li>• <b>10 points</b> – The Bidder’s response:               <ul style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph b) above; and</li> <li>ii. demonstrates all aspects of the experience of the identified resource by providing a description of the work performed in the role;</li> </ul> </li> <li>• <b>6 points</b> – The Bidder’s response:               <ul style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph b) above; and</li> <li>ii. provides information which demonstrates some (but not all) aspects of the experience claimed;</li> </ul> </li> <li>• <b>2 points</b> - The Bidder’s response:               <ul style="list-style-type: none"> <li>i. fails to address each item of the point rated criteria in paragraph b) above; or</li> <li>ii. addresses each item of the point rated criteria in paragraph b) above but does not provide any information which demonstrates the experience claimed; or</li> </ul> </li> <li>• <b>0 points</b> – The Bidder’s response does not address the stated point rated criteria in paragraph b) above.</li> </ul>	20
<p>c) The Bidder should demonstrate that the resource has experience, on up to two projects for a minimum duration of four months (per project), within the ten years preceding the issuance date of this solicitation, as a Business Analyst involving the implementation or enhancement to a Grants and Contribution management system* in a Canadian Federal or Provincial government organization.</p> <p><u>Evaluation Criteria:</u>            Up to 10 points per project (maximum 2 projects) as follows:</p> <ul style="list-style-type: none"> <li>• <b>10 points</b> – The Bidder’s response:</li> </ul>	20

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<b>Business Analyst, Level 2</b>	
<b>Point-Rated Criteria</b>	<b>Max # pts (per Resource)</b>
<p>i. addresses each item of the point rated criteria in paragraph c) above; and</p> <p>ii. demonstrates all aspects of the experience of the identified resource by providing a description of the work performed in the role;</p> <ul style="list-style-type: none"> <li>• <b>6 points</b> – The Bidder’s response:           <ul style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph c) above; and</li> <li>ii. provides information which demonstrates some (but not all) aspects of the experience claimed;</li> </ul> </li> <li>• <b>2 points</b> - The Bidder’s response:           <ul style="list-style-type: none"> <li>i. fails to address each item of the point rated criteria in paragraph c) above; or</li> <li>ii. addresses each item of the point rated criteria in paragraph c) above but does not provide any information which demonstrates the experience claimed; or</li> </ul> </li> <li>• <b>0 points</b> – The Bidder’s response does not address the stated point rated criteria in paragraph c) above.</li> </ul> <p><b>*Note:</b> Grants and Contribution (Gs&amp;Cs) management system refers to computer systems used to assess eligibility and process payments for a grants, contributions, or transfer payments.</p>	
<b>Maximum Score</b>	<b>50</b>

<b>Business Analyst, Level 3</b>	
<b>Point-Rated Criteria</b>	<b>Max # pts (per Resource)</b>
<p>a) The Bidder should demonstrate that the resource that the resource holds a professional accreditation in Business Analysis as follows:</p> <ul style="list-style-type: none"> <li>a. Certified Business Analyst Professional (CBAP), or</li> <li>b. PMI Professional in Business Analysis (PMI-PBA).</li> </ul> <p><u>Evaluation Criteria:</u></p> <ul style="list-style-type: none"> <li>• 10 points - Evidence of valid accreditation provided</li> </ul>	10
<p>b) The Bidder should demonstrate that the resource has experience, on up to two projects for a minimum duration of six months (per project), within the ten years preceding the issuance date of this solicitation, as a Business Analyst for initiatives related to Portal technologies for external and public uses.</p> <p><u>Evaluation Criteria:</u>            Up to 10 points per project (maximum 2 projects) as follows:</p> <ul style="list-style-type: none"> <li>• <b>10 points</b> – The Bidder’s response:               <ul style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph b) above; and</li> <li>ii. demonstrates all aspects of the experience of the identified resource by providing a description of the work performed in the role;</li> </ul> </li> <li>• <b>6 points</b> – The Bidder’s response:               <ul style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph b) above; and</li> <li>ii. provides information which demonstrates some (but not all) aspects of the experience claimed;</li> </ul> </li> <li>• <b>2 points</b> - The Bidder’s response:               <ul style="list-style-type: none"> <li>i. fails to address each item of the point rated criteria in paragraph b) above; or</li> <li>ii. addresses each item of the point rated criteria in paragraph b) above but does not provide any information which demonstrates the experience claimed; or</li> </ul> </li> <li>• <b>0 points</b> – The Bidder’s response does not address the stated point rated criteria in paragraph b) above.</li> </ul>	20
<p>c) The Bidder should demonstrate that the resource has experience, on up to two projects for a minimum duration of six months (per project), within the ten years preceding the issuance date of this solicitation, as a Business Analyst involving the implementation or enhancement to a Grants and Contribution management system* in a Canadian Federal or Provincial government organization.</p> <p><u>Evaluation Criteria:</u>            Up to 10 points per project (maximum 2 projects) as follows:</p> <ul style="list-style-type: none"> <li>• <b>10 points</b> – The Bidder’s response:</li> </ul>	20

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<b>Business Analyst, Level 3</b>	
<b>Point-Rated Criteria</b>	<b>Max # pts (per Resource)</b>
<p>i. addresses each item of the point rated criteria in paragraph c) above; and</p> <p>ii. demonstrates all aspects of the experience of the identified resource by providing a description of the work performed in the role;</p> <ul style="list-style-type: none"> <li>• <b>6 points</b> – The Bidder’s response:           <ul style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph c) above; and</li> <li>ii. provides information which demonstrates some (but not all) aspects of the experience claimed;</li> </ul> </li> <li>• <b>2 points</b> - The Bidder’s response:           <ul style="list-style-type: none"> <li>i. fails to address each item of the point rated criteria in paragraph c) above; or</li> <li>ii. addresses each item of the point rated criteria in paragraph c) above but does not provide any information which demonstrates the experience claimed; or</li> </ul> </li> <li>• <b>0 points</b> – The Bidder’s response does not address the stated point rated criteria in paragraph c) above.</li> </ul> <p><b>*Note:</b> Grants and Contribution (Gs&amp;Cs) management system refers to computer systems used to assess eligibility and process payments for a grants, contributions, or transfer payments.</p>	
<b>Maximum Score</b>	<b>50</b>

<b>IM Architect, Level 3</b>	
<b>Point-Rated Criteria</b>	<b>Max # pts (per Resource)</b>
<p>a) The Bidder should demonstrate that the resource has experience, on up to one project for a minimum duration of six months (per project), within the ten years preceding the issuance date of this solicitation, as conducting the following activities:</p> <ul style="list-style-type: none"> <li>a. Developing strategies and processes to collect, retrieve and capture information, including retrieval of critical archived information;</li> <li>b. Analyzing and reporting on the effectiveness of the implementation of information management standards; and</li> <li>c. Identifying and analyzing content management issues and providing recommendations to management for improvement of Information Management standards and policies.</li> </ul> <p><u>Evaluation Criteria:</u>            Up to 10 points per project (maximum 1 project) as follows:</p> <ul style="list-style-type: none"> <li>• <b>10 points</b> – The Bidder’s response:               <ul style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph a) above; and</li> <li>ii. demonstrates all aspects of the experience of the identified resource by providing a description of the work performed in the role;</li> </ul> </li> <li>• <b>6 points</b> – The Bidder’s response:               <ul style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph a) above; and</li> <li>ii. provides information which demonstrates some (but not all) aspects of the experience claimed;</li> </ul> </li> <li>• <b>2 points</b> - The Bidder’s response:               <ul style="list-style-type: none"> <li>i. fails to address each item of the point rated criteria in paragraph a) above; or</li> <li>ii. addresses each item of the point rated criteria in paragraph a) above but does not provide any information which demonstrates the experience claimed; or</li> </ul> </li> <li>• <b>0 points</b> – The Bidder’s response does not address the stated point rated criteria in paragraph a) above.</li> </ul>	10
<p>b) The Bidder should demonstrate that the resource has experience, on up to two projects for a minimum duration of six months (per project), within the ten years preceding the issuance date of this solicitation, as an IM Architect implementing enterprise-wide solutions based on ISO and/or other standards.</p> <p><u>Evaluation Criteria:</u>            Up to 10 points per project (maximum 2 projects) as follows:</p> <ul style="list-style-type: none"> <li>• <b>10 points</b> – The Bidder’s response:               <ul style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph b) above; and</li> <li>ii. demonstrates all aspects of the experience of the identified</li> </ul> </li> </ul>	20

<b>IM Architect, Level 3</b>	
<b>Point-Rated Criteria</b>	<b>Max # pts (per Resource)</b>
<p>resource by providing a description of the work performed in the role;</p> <ul style="list-style-type: none"> <li>• <b>6 points</b> – The Bidder’s response:           <ol style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph b) above; and</li> <li>ii. provides information which demonstrates some (but not all) aspects of the experience claimed;</li> </ol> </li> <li>• <b>2 points</b> - The Bidder’s response:           <ol style="list-style-type: none"> <li>i. fails to address each item of the point rated criteria in paragraph b) above; or</li> <li>ii. addresses each item of the point rated criteria in paragraph b) above but does not provide any information which demonstrates the experience claimed; or</li> </ol> </li> <li>• <b>0 points</b> – The Bidder’s response does not address the stated point rated criteria in paragraph b) above.</li> </ul>	
<p>c) The Bidder should demonstrate that the resource has experience, on up to two projects for a minimum duration of six months (per project), within the ten years preceding the issuance date of this solicitation, as an IM Architect planning, designing and implementing enterprise-wide tools in the Canadian Pubic Sector.</p> <p><u>Evaluation Criteria:</u>            Up to 10 points per project (maximum 2 projects) as follows:</p> <ul style="list-style-type: none"> <li>• <b>10 points</b> – The Bidder’s response:           <ol style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph c) above; and</li> <li>ii. demonstrates all aspects of the experience of the identified resource by providing a description of the work performed in the role;</li> </ol> </li> <li>• <b>6 points</b> – The Bidder’s response:           <ol style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph c) above; and</li> <li>ii. provides information which demonstrates some (but not all) aspects of the experience claimed;</li> </ol> </li> <li>• <b>2 points</b> - The Bidder’s response:           <ol style="list-style-type: none"> <li>i. fails to address each item of the point rated criteria in paragraph c) above; or</li> <li>ii. addresses each item of the point rated criteria in paragraph c) above but does not provide any information which demonstrates the experience claimed; or</li> </ol> </li> <li>• <b>0 points</b> – The Bidder’s response does not address the stated point rated criteria in paragraph c) above.</li> </ul>	20
<b>Maximum Score</b>	<b>50</b>

<b>Technology Architect, Level 3</b>	
<b>Point-Rated Criteria</b>	<b>Max # pts (per Resource)</b>
<p>a) The Bidder should demonstrate that the resource has experience, on one project for a minimum duration of six months, within the ten years preceding the issuance date of this solicitation, as a Technology Architect developing and/or enhancing applications in a Multi-dimensional Data warehouse Architecture.</p> <p><u>Evaluation Criteria:</u>            Up to 10 points per project (maximum 1 project) as follows:</p> <ul style="list-style-type: none"> <li>• <b>10 points</b> – The Bidder’s response:               <ul style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph a) above; and</li> <li>ii. demonstrates all aspects of the experience of the identified resource by providing a description of the work performed in the role;</li> </ul> </li> <li>• <b>6 points</b> – The Bidder’s response:               <ul style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph a) above; and</li> <li>ii. provides information which demonstrates some (but not all) aspects of the experience claimed;</li> </ul> </li> <li>• <b>2 points</b> - The Bidder’s response:               <ul style="list-style-type: none"> <li>i. fails to address each item of the point rated criteria in paragraph a) above; or</li> <li>ii. addresses each item of the point rated criteria in paragraph a) above but does not provide any information which demonstrates the experience claimed; or</li> </ul> </li> <li>• <b>0 points</b> – The Bidder’s response does not address the stated point rated criteria in paragraph a) above.</li> </ul>	10
<p>b) The Bidder should demonstrate that the resource has experience, on up to two projects for a minimum duration of six months (per project), within the ten years preceding the issuance date of this solicitation, as a Technology Architect designing and maintaining ETL (Extract Transfer Load) scripts using Oracle Warehouse Builder or Oracle Data Integrator.</p> <p><u>Evaluation Criteria:</u>            Up to 10 points per project (maximum 2 projects) as follows:</p> <ul style="list-style-type: none"> <li>• <b>10 points</b> – The Bidder’s response:               <ul style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph b) above; and</li> <li>ii. demonstrates all aspects of the experience of the identified resource by providing a description of the work performed in the role;</li> </ul> </li> <li>• <b>6 points</b> – The Bidder’s response:               <ul style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph b) above; and</li> </ul> </li> </ul>	20

<b>Technology Architect, Level 3</b>	
<b>Point-Rated Criteria</b>	<b>Max # pts (per Resource)</b>
<ul style="list-style-type: none"> <li>ii. provides information which demonstrates some (but not all) aspects of the experience claimed;</li> <li>• <b>2 points</b> - The Bidder's response:               <ul style="list-style-type: none"> <li>i. fails to address each item of the point rated criteria in paragraph b) above; or</li> <li>ii. addresses each item of the point rated criteria in paragraph b) above but does not provide any information which demonstrates the experience claimed; or</li> </ul> </li> <li>• <b>0 points</b> – The Bidder's response does not address the stated point rated criteria in paragraph b) above.</li> </ul>	
<p>c) The Bidder should demonstrate that the resource has experience, on up to two projects for a minimum duration of six months (per project) within the ten years preceding the issuance date of this solicitation, as a Technology Architect using Cognos Business Intelligence (BI) (v.10 or newer) visualization tools to create and customize interactive dashboards and reports.</p> <p><u>Evaluation Criteria:</u>            Up to 10 points per project (maximum 2 projects) as follows:</p> <ul style="list-style-type: none"> <li>• <b>10 points</b> – The Bidder's response:               <ul style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph c) above; and</li> <li>ii. demonstrates all aspects of the experience of the identified resource by providing a description of the work performed in the role;</li> </ul> </li> <li>• <b>6 points</b> – The Bidder's response:               <ul style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph c) above; and</li> <li>ii. provides information which demonstrates some (but not all) aspects of the experience claimed;</li> </ul> </li> <li>• <b>2 points</b> - The Bidder's response:               <ul style="list-style-type: none"> <li>i. fails to address each item of the point rated criteria in paragraph c) above; or</li> <li>ii. addresses each item of the point rated criteria in paragraph c) above but does not provide any information which demonstrates the experience claimed; or</li> </ul> </li> <li>• <b>0 points</b> – The Bidder's response does not address the stated point rated criteria in paragraph c) above.</li> </ul>	20
<b>Maximum Score</b>	<b>50</b>

<b>Application / Software Architect, Level 3</b>	
<b>Point-Rated Criteria</b>	<b>Max # pts (per Resource)</b>
<p>a) The Bidder should demonstrate that the resource has experience, on one project for a minimum duration of six months, within the ten years preceding the issuance date of this solicitation, as an Application / Software Architect for a MS Dynamics initiative CRM (version 2011 or more recent).</p> <p><u>Evaluation Criteria:</u>            Up to 10 points per project (maximum 1 project) as follows:</p> <ul style="list-style-type: none"> <li>• <b>10 points</b> – The Bidder’s response:               <ol style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph a) above; and</li> <li>ii. demonstrates all aspects of the experience of the identified resource by providing a description of the work performed in the role;</li> </ol> </li> <li>• <b>6 points</b> – The Bidder’s response:               <ol style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph a) above; and</li> <li>ii. provides information which demonstrates some (but not all) aspects of the experience claimed;</li> </ol> </li> <li>• <b>2 points</b> - The Bidder’s response:               <ol style="list-style-type: none"> <li>i. fails to address each item of the point rated criteria in paragraph a) above; or</li> <li>ii. addresses each item of the point rated criteria in paragraph a) above but does not provide any information which demonstrates the experience claimed; or</li> </ol> </li> <li>• <b>0 points</b> – The Bidder’s response does not address the stated point rated criteria in paragraph a) above.</li> </ul>	10
<p>b) The Bidder should demonstrate that the resource has experience, on up to two projects for a minimum duration of six months (per project), within the ten years preceding the issuance date of this solicitation, as an Application / Software Architect for initiatives related to Portal technologies for external and public uses.</p> <p><u>Evaluation Criteria:</u>            Up to 10 points per project (maximum 2 projects) as follows:</p> <ul style="list-style-type: none"> <li>• <b>10 points</b> – The Bidder’s response:               <ol style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph b) above; and</li> <li>ii. demonstrates all aspects of the experience of the identified resource by providing a description of the work performed in the role;</li> </ol> </li> <li>• <b>6 points</b> – The Bidder’s response:               <ol style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph b) above; and</li> <li>ii. provides information which demonstrates some (but not all)</li> </ol> </li> </ul>	20

Application / Software Architect, Level 3	
Point-Rated Criteria	Max # pts (per Resource)
<p>aspects of the experience claimed;</p> <ul style="list-style-type: none"> <li>• <b>2 points</b> - The Bidder's response:               <ul style="list-style-type: none"> <li>i. fails to address each item of the point rated criteria in paragraph b) above; or</li> <li>ii. addresses each item of the point rated criteria in paragraph b) above but does not provide any information which demonstrates the experience claimed; or</li> </ul> </li> <li>• <b>0 points</b> – The Bidder's response does not address the stated point rated criteria in paragraph b) above.</li> </ul>	
<p>c) The Bidder should demonstrate that the resource has experience, on up to two projects for a minimum duration of six months (per project), within the ten years preceding the issuance date of this solicitation, as an Application / Software Architect involving the implementation or enhancement to a Grants and Contribution management system* in a Canadian Federal or Provincial government organization.</p> <p><u>Evaluation Criteria:</u>            Up to 10 points per project (maximum 2 projects) as follows:</p> <ul style="list-style-type: none"> <li>• <b>10 points</b> – The Bidder's response:               <ul style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph c) above; and</li> <li>ii. demonstrates all aspects of the experience of the identified resource by providing a description of the work performed in the role;</li> </ul> </li> <li>• <b>6 points</b> – The Bidder's response:               <ul style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph c) above; and</li> <li>ii. provides information which demonstrates some (but not all) aspects of the experience claimed;</li> </ul> </li> <li>• <b>2 points</b> - The Bidder's response:               <ul style="list-style-type: none"> <li>i. fails to address each item of the point rated criteria in paragraph c) above; or</li> <li>ii. addresses each item of the point rated criteria in paragraph c) above but does not provide any information which demonstrates the experience claimed; or</li> </ul> </li> <li>• <b>0 points</b> – The Bidder's response does not address the stated point rated criteria in paragraph c) above.</li> </ul> <p><b>*Note:</b> Grants and Contribution (Gs&amp;Cs) management system refers to computer systems used to assess eligibility and process payments for a grants, contributions, or transfer payments.</p>	<p>20</p>
<b>Maximum Score</b>	<b>50</b>

<b>GIS Application Architect, Level 3</b>	
<b>Point-Rated Criteria</b>	<b>Max # pts (per Resource)</b>
<p>a) The Bidder should demonstrate that the resource has experience, on one project for a minimum duration of six months, within the ten years preceding the issuance date of this solicitation, as a GIS Application Architect integrating ESRI geo solution with Cognos v11 BI tool.</p> <p><u>Evaluation Criteria:</u>            Up to 10 points per project (maximum 1 project) as follows:</p> <ul style="list-style-type: none"> <li>• <b>10 points</b> – The Bidder’s response:               <ol style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph a) above; and</li> <li>ii. demonstrates all aspects of the experience of the identified resource by providing a description of the work performed in the role;</li> </ol> </li> <li>• <b>6 points</b> – The Bidder’s response:               <ol style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph a) above; and</li> <li>ii. provides information which demonstrates some (but not all) aspects of the experience claimed;</li> </ol> </li> <li>• <b>2 points</b> - The Bidder’s response:               <ol style="list-style-type: none"> <li>i. fails to address each item of the point rated criteria in paragraph a) above; or</li> <li>ii. addresses each item of the point rated criteria in paragraph a) above but does not provide any information which demonstrates the experience claimed; or</li> </ol> </li> <li>• <b>0 points</b> – The Bidder’s response does not address the stated point rated criteria in paragraph a) above.</li> </ul>	10
<p>b) The Bidder should demonstrate that the resource has experience, on up to two projects for a minimum duration of six months (per project), within the ten years preceding the issuance date of this solicitation, as a GIS Application Architect providing support for Geomatic and Middleware applications using Oracle APEX technology</p> <p><u>Evaluation Criteria:</u>            Up to 10 points per project (maximum 2 projects) as follows:</p> <ul style="list-style-type: none"> <li>• <b>10 points</b> – The Bidder’s response:               <ol style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph b) above; and</li> <li>ii. demonstrates all aspects of the experience of the identified resource by providing a description of the work performed in the role;</li> </ol> </li> <li>• <b>6 points</b> – The Bidder’s response:               <ol style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph b) above; and</li> <li>ii. provides information which demonstrates some (but not all)</li> </ol> </li> </ul>	20

<b>GIS Application Architect, Level 3</b>	
<b>Point-Rated Criteria</b>	<b>Max # pts (per Resource)</b>
<p>aspects of the experience claimed;</p> <ul style="list-style-type: none"> <li>• <b>2 points</b> - The Bidder's response:             <ul style="list-style-type: none"> <li>i. fails to address each item of the point rated criteria in paragraph b) above; or</li> <li>ii. addresses each item of the point rated criteria in paragraph b) above but does not provide any information which demonstrates the experience claimed; or</li> </ul> </li> <li>• <b>0 points</b> – The Bidder's response does not address the stated point rated criteria in paragraph b) above.</li> </ul>	
<p>c) The Bidder should demonstrate that the resource has experience, on up to two projects for a minimum duration of six months (per project), within the ten years preceding the issuance date of this solicitation, as a GIS Application Architect designing and maintaining Geo systems and data warehouses applications using any of the following tools or technologies:</p> <ul style="list-style-type: none"> <li>a. Oracle Spatial 11g,</li> <li>b. MapViewer 11g,</li> <li>c. Oracle 11g,</li> <li>d. PL/SQL,</li> <li>e. ASP.NET,</li> <li>f. JavaScript,</li> <li>g. APEX, and</li> <li>h. NAVTEQ.</li> </ul> <p><u>Evaluation Criteria:</u>            Up to 10 points per project (maximum 2 projects) as follows:</p> <ul style="list-style-type: none"> <li>• <b>10 points</b> – The Bidder's response:             <ul style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph c) above; and</li> <li>ii. demonstrates all aspects of the experience of the identified resource by providing a description of the work performed in the role;</li> </ul> </li> <li>• <b>6 points</b> – The Bidder's response:             <ul style="list-style-type: none"> <li>i. addresses each item of the point rated criteria in paragraph c) above; and</li> <li>ii. provides information which demonstrates some (but not all) aspects of the experience claimed;</li> </ul> </li> <li>• <b>2 points</b> - The Bidder's response:             <ul style="list-style-type: none"> <li>i. fails to address each item of the point rated criteria in paragraph c) above; or</li> <li>ii. addresses each item of the point rated criteria in paragraph c) above but does not provide any information which demonstrates the experience claimed; or</li> </ul> </li> <li>• <b>0 points</b> – The Bidder's response does not address the stated point rated criteria in paragraph c) above.</li> </ul>	20
<b>Maximum Score</b>	<b>50</b>

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## ATTACHMENT 4.2 PRICING SCHEDULE

1. All prices must be submitted as firm price(s) and entered into the Pricing schedule Table below. All applicable taxes extra.
2. All prices must be submitted to 2 decimal points.
3. Bidders are requested to adopt the format of the Tables attached.

**Table 1 – Work Stream 1 IM/IT Management Services**

Resource Category	Level of Expertise	Firm Per Diem Rate			
		Initial Contract Period	Option Years		
		2 years	1	2	3
P.4 Organizational Development Consultant	Level 3	\$	\$	\$	\$
B.7 Business Transformation Architect	Level 3	\$	\$	\$	\$
P.5 Project Executive	Level 3	\$	\$	\$	\$

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**Table 2 – Work Stream 2 IM/IT Project Services**

Resource Category	Level of Expertise	Firm Per Diem Rate			
		Initial Contract Period	Option Years		
		2 years	1	2	3
P.6 Project Administrator	Level 2	\$	\$	\$	\$
P.6 Project Administrator	Level 3	\$	\$	\$	\$
P.9 Project Manager	Level 2	\$	\$	\$	\$
P.9 Project Manager	Level 3	\$	\$	\$	\$
B.1 Business Analyst	Level 2	\$	\$	\$	\$
B.1 Business Analyst	Level 3	\$	\$	\$	\$
I.5 IM Architect	Level 3	\$	\$	\$	\$
I.11 Technology Architect	Level 3	\$	\$	\$	\$
A.1 Application/Software Architect	Level 3	\$	\$	\$	\$
G.4 GIS Application Architect	Level 3	\$	\$	\$	\$

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

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

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

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

Complete both A and B.

A. Check only one of the following:

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

A5. The Bidder has a combined workforce in Canada of 100 or more employees; and

- A5.1 The Bidder certifies already having a valid and current [Agreement to Implement Employment Equity](#) (AIEE) in place with ESDC-Labour.

OR

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

B. Check only one of the following:

- B1. The Bidder is not a Joint Venture.

OR

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