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Proposal to: Canada Revenue Agency
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 and/or attached hereto, the goods and/or services listed herein and on any attached sheets at the price(s) set out therefor.

Proposition à : l'Agence du revenu du Canada
Nous offrons par la présente de vendre à Sa Majesté la Reine du Chef du Canada, en conformité avec les conditions énoncées dans la présente incluses par référence dans la présente et/ou incluses par référence aux annexes jointes à la présente et ci-jointes, les biens et/ou services énumérés ici sur toute feuille ci-annexée, au(x) prix indiqué(s).

Bidder's Legal Name and Address - (ensure the Bidder's complete legal name is properly set out)
Raison sociale et adresse du Soumissionnaire - (s'assurer que le nom légal au complet du soumissionnaire est correctement indiqué)

Blank lines for bidder information

Bidder is required to identify below the name and title of the individual authorized to sign on behalf of the Bidder - Soumissionnaire doit identifier ci-bas le nom et le titre de la personne autorisée à signer au nom du soumissionnaire

Name /Nom

Title/Titre

Signature

Date (yyyy-mm-dd)/(aaaa-mm-jj)

Telephone No. - No de téléphone

Fax No. - No de télécopieur

E-mail address - Adresse de courriel

AMENDMENT TO REQUEST FOR PROPOSAL / MODIFICATION DE DEMANDE DE PROPOSITION

Table with 2 columns: Solicitation No. - No de l'invitation, Date, Amendment No. - N° modif., Solicitation closes - L'invitation prend fin, Time zone - Fuseau horaire, Contracting Authority - Autorité contractante, Telephone No. - No de téléphone, Fax No. - No de télécopieur, Destination - Destination, THIS DOCUMENT CONTAINS A SECURITY REQUIREMENT. LE PRÉSENT DOCUMENT COMPORTE UNE EXIGENCE EN MATIÈRE DE SÉCURITÉ.



## SOLICITATION AMENDMENT # 002

This solicitation amendment is raised to:

1. Address the following questions submitted during the solicitation period as per RFP; and
2. Amend the RFP.

### 1. QUESTIONS AND ANSWERS

- Q1. While large contract management is a very important qualifier, the 5 X \$5M contracts seems excessive and severely limits the eligible companies who can meet this high bar. In addition, the criteria refers to contract AWARD as the critical qualifier which means a company who was awarded a \$5M services contract in the last month could claim that contract even though they have not actually fulfilled on the contract requirements in any meaningful way. Conversely a company that was awarded contract 8 years ago that was only just completed a year or 2 ago would not be able to claim that contract because the award dates back further than 5 years. While we understand the concern around experience being recent, would the crown consider amending the qualifying bar on M5 to more appropriately address their needs
- a) If the contract award exceeds 5 years, the qualifying contract must have been completed in the last 3 years
  - b) The completed value of the contract must have reached a minimum of 75% of the \$5M value
  - c) Reduce the number of qualifying contracts from 5 to 3 contracts
- A1. CRA will not make the above changes. Please see Section 2 Amendments to RFP, #1 below.
- Q2. For mandatory corporate experience criteria M5, the Bidder must have been awarded at least five (5) Professional Services Contracts. Each of these contract must have a minimum value of \$5,000,000.00 (including taxes) and have been awarded within the past five years (as of bid closing date). Many successful contracts span further back in time than the 5 years as specified in the RFP. Would CRA consider modifying the requirement to recognize contracts with earlier, than the five year award date, as long as the actual resource placements referenced to support the bidder's claim of a minimum value of \$5M, occurred within the last five years (as of the closing date of the RFP). This would equally provide the evidence of a vendor's current capability to address the volumes anticipated by CRA.
- A2. Please see Section 2 Amendments to RFP, #1 below.
- Q3. Regarding section 1.2 Mandatory Corporate Experience Criteria, M5 on page 26: Please confirm CRA will accept contracts awarded prior to 2012 where the Bidder demonstrates, via client letter and contact information, that it has billed \$5,000,000.00 (including taxes) within the last 5 years (as of bid closing date).
- A3. Please see Section 2 Amendments to RFP, #1 below.
- Q4. Referencing mandatory Corporate Criteria M5 - would CRA consider changing the criteria of have been awarded within the past 5 years (as of bid closing) to must be active within the past 5 years (as of bid closing). I.e. awarded Dec 2010 but active until March 2018?
- A4. Please see Section 2 Amendments to RFP, #1 below.
- Q5. Page 26 – Section 1.2 – Mandatory Corporate Experience Criteria M5: In reference to M5 – under Mandatory Corporate Experience Criteria, the bidder must have been awarded at least five (5) Professional Services Contracts. Each of these contracts must have a minimum value of \$5,000,000.00 (including taxes) and have been awarded within the past five years (as of bid closing date). This criteria will limit the submissions for evaluation to mostly larger companies. In the interest of fairness to smaller companies, we respectfully request that the timeline for this be adjusted to include contracts that have been awarded within the past seven (7) years (as of bid closing date) allowing more companies to bid.



- A5. Please see Section 2 Amendments to RFP, #1 below.
- Q6. With respect to Stream 4, R2.1. It is very unclear how points are awarded. It appears that there are 0 points for having a local contract manager and then 5 points for each certification that person has. Please clarify if points will be awarded for the quality of the contract management plan? Is the contract manager awarded points for certification or is it the company certifications that achieve points? How many points total can be scored for the certification? Please provide clarification of what is required and the scoring.
- A6. Please see Section 2 Amendments to RFP, #2 below.
- Q7. For Point rated corporate criteria, R2.1 Contract Management Plan, rating scale – applicable certifications, for the individual staffing certifications (ie CSP, CTSS, CHRP) please confirm Bidders are not restricted to certified staff in the NCR, as a Bidder's other office locations (ie Head Office outside the NCR) can contribute individuals for peak staffing activities/levels and thus demonstrate a greater corporate capability for recruiting niche or hard to find skill sets.
- A7. Please see Section 2 Amendments to RFP, #2 below.
- Q8. Please confirm that Institute of Professional Management - Registered Professional Recruiter Certification is an acceptable certification for R2.1 2) with a 5 point allocation
- A8. Yes, this is an acceptable certification with a 5 point allocation. Please see Section 2 Amendments to RFP, #2 below.
- Q9. For R2.1 please confirm that you will accept a Registered Professional Recruiter Certification as granted by the Association of Professional Recruiters of Canada.
- A9. Yes, this is an acceptable certification with a 5 point allocation. Please see Section 2 Amendments to RFP, #2 below.
- Q10. Re: R2.1 – Contract Management Plan Rating Scale

The Contract Management Plan Rating Scale provided in R2.1 appears to not award points for the quality or relevance of the plan itself. The only explanation for how the 35 points for this criterion will be awarded is 1) for the client management presence within the NCR (10 points), and 2) for applicable certifications (25 points).

a) As the Contract Management Plan is a key value differentiator between Bidders, and is critical to CRA controlling risk, we ask that the Crown further clarify how the Contract Management Plan itself will be scored, for example:

- Would the Crown consider reducing item 2) to a maximum of 5 points for all certifications (e.g. 2 points per certification)?
- The Crown could then allocate 20 points to the relevancy and quality of the Contract Management Plan?

b) Item 2) states "Applicable certifications which may include, but are not limited to" to support the requirement for Bidders to demonstrate "ongoing commitment and continuous improvement to the management of the contract". As ISO is usually only obtained by firms where their core business is to provide a product or solution, therefore would the Crown consider the following additional evidence to demonstrate a Bidder's stability:

- 3-5 consecutive years of audited financial statements (providing year-over-year comparisons);
- Industry Recognition such as Canada's 50 Best Managed Companies (which is independently audited by Deloitte);

c) Item 2) indicates that 5 points would be awarded for specific certifications including CSP, CTSS and CHRP. These professional designations are associated to the individuals who achieved them and are not



intended to corporate claimed as corporate experience. [See the following quote from the NAPS website (<http://www.naps360.org/?page=CertProgramRules>) "The designation of Certified Personnel consultant (CPC) and Certified Temporary Staffing- Specialist (CTS) are individual designations and must not be represented as a firm's designation. The designation may be used following the professional name of the certified individual, (unless such use is prohibited by applicable state law) provided the application for the designation shall be made in the full legal name of the candidate and that the candidate shall disclose to NAPS the professional name to be used in connection with the designation. The designation shall be in type no larger than that used in the certified individual's name."]

Therefore, could the Crown please clarify?

- As these are individual (not corporate) certifications, can the Crown confirm that the person holding the certification must be described (including their role/contribution) in the Contract Management Plan as part of the Bidders account delivery team?
- To prevent Bidders from claiming certifications of sub-consultants/contracted resources, can the Crown confirm that to be eligible to claim an individual's certification the person must be a Full-time Employee of the Bidder and a contributing member of its proposed account delivery team?
- Some of the individual certifications listed are American (e.g. CSP) and do not reflect Canadian regulations (for HR, Privacy and/or Data), therefore would the Crown consider removing these as they do not support the scope this CRA requirement?
- As CPC is similar in scope and context to those mentioned specifically (CSP, CTSS, CHRP), would it be awarded the same number of points?

- A10. a) There will be no change to this requirement.  
b) There will be no change to this requirement.  
c) Please see Section 2 Amendments to RFP, #2 below.

Q11. Regarding Evaluation Criterion R2.1 Contract Management Plan – it appears that ISO 9001 Certification (10 points) is of higher value than the actual Contract Management Plan. Would CRA consider removing the ISO 9001 Certification or at least reducing the 10 points allocated to it and put points toward the submitted Contract Management Plan?

A11. Please see Section 2 Amendments to RFP, #2 below.

Q12. Can the Crown please clarify the Rating Scale for Item R2.1, 2), as it reads "which may include but are not limited to" however, the point values are not consistent (ranging from 5 to 10 points). Would the crown accept Registered Professional Recruiter (RPR) as an equivalent certification? And, if so, please confirm the point value.

A12. Yes, CRA would accept Registered Professional Recruiter (5pts). Please see Section 2 Amendments to RFP, #2 below.

Q13. Ref Appendix 2: Point Rated Criteria, Stream 1, Item R2.1, Contract Management Plan, no. 2) on Rating Scale, Pg. 40

The basis on which CRA are awarding points for this criterion is inconsistent and irrelevant to the Contract Management Plan qualification criteria, as described under the Rated Criteria column for both 1) and 2).

We request the removal of the requirement for ISO certification as this does not demonstrate the capability for delivering professional services to the Federal Government. The absence of an ISO certification is not an impediment to maintaining and delivering a very high quality Contract Management Plan, for which we are more than capable of demonstrating as evidenced by our ability to deliver quality professional consulting services to the Federal Government. Furthermore, we request that you remove the requirement for the personal certifications ... CSP, Certified Temporary Staffing Specialist, and CHRP ... as these are not an effective measure of the overall quality and continuity of a Corporate Plan that can be executed over the long term to meet CRA's requirements, regardless of which staff have attained such certifications. Specific descriptions of our Contract Management Plan and how we have implemented it in the Federal Government is far more relevant than personal certifications.



Please reference the methodology used to evaluate delivery capabilities in CRA's previous Supply Arrangement (reference Solicitation RFP#1000276181).

- A13. CRA will not remove the requirement for certifications.
- Q14. Notwithstanding a company's track record of success in recruiting for, and administering, multi-resource contracts, the crown is attributing over 40% of the corporate rated points in R2.1 2 to a contract management plan. While a local presence is certainly an important consideration for this, as is demonstrated ongoing commitment and continuous improvement to the management of contract, the rating scale allocates 30% of the TOTAL corporate rated points to certifications. Commitment to project management can be demonstrated by more than just certifications, in fact individual certifications for corporate criteria seems inappropriate as people change jobs all the time and it will be difficult to monitor compliancy over life of contract. Will the crown consider removing the certifications for points and evaluate the contract management plan based on local presence and an actual proven management plan.
- A14. CRA will not make any changes to the point allocation.
- Q15. Criteria R2.1 awards points for various certifications but CHRP certification is only for HR professionals in Ontario. Please confirm that you will accept equivalent certifications i.e. Quebec's CRHA (conseillers en ressources humaines agréés).
- A15. Yes, CRA will accept equivalent certifications.
- Q16. Page 40 – Appendix 2 – Point Rated Criteria R2.1: In reference to R2.1 – under Point Rated Corporate Criteria, one of the applicable certifications listed is ISO certification. Since the intent is to provide assurance that the bidder can prove that it addresses a commitment to ongoing improvement and professionalism in the management of a contract, would the Crown consider proof that the bidder's company policies and procedures in place are aligned with the ISO principles for the 10 points allocated for ISO certification?
- A16. For this requirement, proof of ISO certification is required.
- Q17. Regarding Evaluation Criterion R2.1 Contract Management Plan – the scoring criteria is somewhat confusing. It appears that the Contract Management Plan itself is not being evaluated as there are only 35 possible points which can be attained just by meeting items 1) and 2). Would CRA please indicate if the Contract Management Plan is in fact being evaluated and if so what is the maximum number of points that could be scored for an excellent Contract Management Plan?
- A17. The point allocation for the Evaluation Criterion R2.1 is identified in the RFP.
- Q18. The terms and conditions in Part 7 (Model Multiple-Award Contract) of the RFP does not contain a clause limiting the Contractor's liability for damages. A standard limitation of liability clause has been developed primarily by PWGSC for IM/IT procurements. There can be no doubt that the CRA solicitation is an IM/IT solicitation given a number of the requirements applicable to, for example, Streams 1 and 2, including development and management of IT solutions/ systems The PWGSC limitation of liability clause reflects for the most part, a commercially reasonable allocation of risk between Canada and the Contractor in keeping with Treasury Board policy regarding Contractors' liability in Crown procurements. Since this RFP describes an IM/IT procurement, we request that the RFP be amended to insert in the Articles of Agreement in Part 7 of the RFP the standard IM/IT limitation of liability clause available in the SACC Manual having ID N0000C (2013-04-25) and entitled Limitation of Liability-Information Management/Information Technology.
- A18. A Limitation of Liability clause has been included in this RFP. Please see Section 2 Amendments to RFP, #3 below.



- Q19. Page 10 – Section 2.2 – Standard Instructions, Clauses and Conditions A0000T (2012-07-16) does not indicate the limitation of liability for this requirement. Can CRA please provide the dollar amount?
- A19. A Limitation of Liability clause has been included in this RFP. Please see Section 2 Amendments to RFP, #3 below.
- Q20. Section 1.2, Glossary of Terms, Day/Month/Year appears to offer vendors a way to estimate the number of billable hours worked by individual resources. Please confirm that, when available, vendors may count the actual number of billable hours worked, e.g. 210 days billed in a calendar year would equal 1,575 billable hours (210 days x 7.5 hours).
- A20. The definition above is not applicable to this RFP and is removed from the RFP. Please see Section 2 Amendments to RFP, #4 below.
- Q21. At page 7 paragraph 1.2 – Glossary of Terms, Day/Mont/Year, the following is stated: “For purposes of technical evaluation, one (1) month shall equal a minimum of 16.67 billable days (a day equals 7.5 hours) and one (1) year equals a minimum of 200 billable days. Any additional billable days within the same year will not increase the experience gained for the purposes of evaluation” We assume that this is not applicable to the current RFP given that the demonstration requested is based on “hours billed” as opposed to days or months billed. Can you please confirm?
- A21. The definition above is not applicable to this RFP and is removed from the RFP. Please see Section 2 Amendments to RFP, #4 below.
- Q22. Regarding RFP #1000335302, we respectfully request an extension to the submission deadline in order to prepare a complete and compliant bid.
- A22. Please see RFP amendment #1 released on July 27, 2017.
- Q23. Given that August is the period when most employees, and Clients (bid requires five signed client letters) take vacation/leave, and the level of effort required to ensure a complete and quality proposal, we request a minimum four (4) week extension to the closing date of this Solicitation.
- A23. Please see RFP amendment #1 released on July 27, 2017.
- Q24. With more than half a million billable hours required to meet corporate and rated requirements, and additional complex mandatory and rated requirements for each stream, would the client please work with vendors by granting an extension of four (4) weeks.
- A24. Please see RFP amendment #1 released on July 27, 2017.
- Q25. Given the extremely high number of billable hours required to demonstrate experience (over 1.2 million hours) and the need for client letters which are difficult to obtain at this time of year as it's a heavy vacation period, would the Crown consider granting a 2-week extension to ensure its receiving high quality submissions.
- A25. Please see RFP Amendment #1 released on July 27, 2017.





Q26. For mandatory corporate experience criteria M5, the Bidder must have been awarded at least five (5) Professional Services Contracts. Each of these contract must have a minimum value of \$5,000,000.00 (including taxes). Does the minimum value of \$5M refer to the face value of the awarded contracts?

A26. The minimum value refers to the face value of the contract.

Q27. For stream-specific mandatory criteria SSM 1.1, the Bidder must demonstrate a minimum annual gross revenue, focused on Professional Services, of forty million dollars (\$40M) averaged over each of the last three (3) years. Would audited financial statements of the Bidder for the last 3 years that demonstrate annual gross revenue of \$40M + for Professional Services meet this requirement?

A27. Yes, documents that demonstrate the SSM 1.1 criteria will meet the requirement.

Q28. At page 28, SSM 1.1: Our understanding of this requirement is that the firm must have billed an average of \$40M on average per year over the last 3 years. For example, a firm that billed \$39M, \$42M and \$48M respectively over the past 3 years, for an average of \$43M per year, will be compliant to this requirement. Can you please confirm?

A28. Yes, this is correct.

Q29. Please reference SSM 1.2 System Analyst, which requires a minimum of 290,000 billable hours: the number of billable hours required for this resource category is more than 5 times higher than the next highest number of billable hours required. Will the client consider reducing the number of billable hours for SSM 1.2 System Analyst to 50,000 to bring it more in line with the other stream requirements?

A29. There will be no change to the minimum billable hours.

Q30. For stream specific Mandatory SSM 1.2, SSM 2.2, SSM 2.3, SSM 2.4 & SSM 2.5 and the subsequent rated R1.1, R1.2, R1.3, R1.4 & R1.5, would CRA change the criteria of experience must occur in the last 5 years prior to RFP closing to must occur within the last 7 years. The volume of billable hours to show is very high so a larger year span to work within is needed.

A30. CRA will not change this requirement.

Q31. At page 28, SSM 1.2: The number of hours requested for Systems Analysts is excessive. 290,000 hours are required in this mandatory criteria and 70% more are required to pass the rated requirements. This represents 493,000 hours needed just to pass, which is 65,733 days (60 people consistently over 5 years – based on 220 days of work per year) just for this one category – and just to pass! This is an excessive requirement for bidders to have to demonstrate this many hours to show capability. This requirement will effectively eliminate many capable firms preventing them from bidding on this stream and consequently will strongly favour incumbents. We request that the number of hours required for the Systems Analyst be reduced to a more realistic and reasonable number. This will ensure that more firms can bid on this stream with the result of giving CRA more choice and more competitive pricing. Will CRA please consider reducing the number of hours by half for the System Analyst?

A31. The minimum billable hours for the System Analyst is to meet the needs of CRA's requirements. There will be no change to this criteria.

Q32. As most large contracts with high volume resourcing requirements span multiple years, can that Crown please confirm that for all evaluation criteria (except for M5) that the Bidders experience and resource billed hours claimed must be for time delivered within the last 5 years, but that the master contracts' themselves could have been awarded prior to August 2012.



- A32. Resource billed hours must have occurred within the five (5) years prior to the RFP closing date.
- Q33. For stream-specific mandatory criteria SSM 1.2, Attachment B of Appendix 1– Corporate Reference Template, Resource Details Section, can Bidders demonstrate the work billed for each resource by including the resource name, start date, end date and number of hours billed and a cross reference from the referenced contract category to the resource category listed in the PSSC Catalogue (ie , Jane Doe, 01 January 2015 to 31 December 2015, 1,500 billed days, referenced contract category Tester, Cross-referenced PSSC Catalogue resource category Quality Assurance Specialist). In other words, the resource details provided are individual placement information and the cross reference is at the resource category level (and no further information is required to demonstrate each resource category is similar in nature beyond the cross reference).
- A33. Specific resource details (i.e name, DOB) are not required.
- Q34. For stream-specific mandatory criteria SSM 1.2, to demonstrate the total number of billable hours per resource category, can Bidders use as many contracts as necessary to demonstrate billable days?
- A34. Yes.
- Q35. The solicitation requires bidders to demonstrate a substantial number of billable hours within five (5) years; a very short timeframe considering the magnitude of this request. We have bid on a significant number of Federal Government/Crown Corps and Agencies contract opportunities and, in most all cases, were required to demonstrate experience occurring within the last ten (10) years when supporting billable hours/days. In addition, none of the aforementioned Solicitations required the high volume of billable hours requested by CRA as in this Solicitation, and unfairly provides a key advantage to current suppliers of IT professional services to CRA. We request that, for all Streams, CRA permit bidders to demonstrate/support number of billable hours occurring within the last ten (10) years to allow for a fair, consistent, competitive and transparent competition.
- A35. There will be no change to this requirement.
- Q36. At page 39, a contract reference form is required to be filled out for every contract used in demonstrating hours for all categories. Given the number of hours requested, bidders may have to use a large number of contracts to demonstrate. This places undue burden on bidders to fill out an excessive (10+) number of reference forms. Can CRA please reduce the number of forms to be completed by requesting that at least half of the hours claimed be referenced using the form at bid time and reserving the right to request the additional references if required during the evaluation?
- A36. No, contract reference forms must be filled out for all billable hours.
- Q37. Regarding Evaluation Criterion R2.1 Contract Management Plan – the scoring criteria is somewhat confusing. It appears that the Contract Management Plan itself is not being evaluated as there are only 35 possible points which can be attained just by meeting items 1) and 2). Would CRA please indicate if the Contract Management Plan is in fact being evaluated and if so what is the maximum number of points that could be scored for an excellent Contract Management Plan?
- A37. The point allocation for the Evaluation Criterion R2.1 is identified in the RFP.
- Q38. Many government projects contract for resources selectively using expertise as and when required. In this manner the same person may be called up under a task Authorization more than once during a project. Each time a role is filled (as described in Annex A Section 1 - Work Distribution Process) the same staffing process is required – whether it is a new person or not. Providing that all other conditions (min. 6 consecutive months, with





675 hours in a given six month period) are met for each discrete TA, please confirm that the same resource may be counted more than once on a project to satisfy this criteria.

- A38. Yes, the same resource may be counted more than once on a project as long as the services are not performed at the same period of time.
- Q39. For R2.2, the criteria as written does not appear to require that the Bidder substantiate the actual timing and duration for the individual resources with its proposal. Does this mean CRA will ask for substantiation if required? If no, this represents much more documentation so please clarify exactly what is required.
- A39. As stated in R2.2 of the RFP, The Bidder must provide for each contract reference the following information:  
Client organization name;  
Client contact name and title and contact information;  
Contract start and end dates,  
Contract number;  
Resource name, category, and number of hours billed.
- Q40. Regarding mandatory requirement M5 -The Bidder must submit for each contract:  
(1) A letter from its client (referencing a contract award date and a contract serial number or other unique contract identifier) that shows that the Bidder is providing or has provided such services under a contract with a minimum value of \$5,000,000.00 (including taxes).  
Would it be acceptable for proponents to submit signed covering sheets from the contracts that include the requested information?
- A40. No, as stated in the RFP a letter from its client (referencing a contract award date and a contract serial number or other unique contract identifier) is required.
- Q41. In regards to Stream 5 - Administrative Services, the categories included in this stream span a number of very unique and niche skill sets which are not typically grouped together (ATIP, Learning Coordinator, Process Improvement), which will likely result in a lower number of proposals/respondents in Stream 5. For example, firms with a depth of experience providing consulting services in Finance, Business Analysis and process improvement may not be able to respond to this stream as they may not have provided ATIP consulting services (very small niche market of firms who provide this type of expertise). To ensure the Crown receives a fair number of proposals we recommend creating Stream 6 and amending Stream 5 to include only the following categories:  
Business Analyst, Process Improvement Consultant, Project Coordinator, Project Officer and Financial Analyst  
Stream 6: ATIP Consultant, Communications Officer , Privacy Impact Assessment Specialist and Learning Coordinator.
- A41. A stream 6 will not be created. Stream 5 will remain as is.
- Q42. 7.3.1 Requirement to use CRA E-Procurement Solution, we assume that there are costs (licensing, infrastructure.) associated with leveraging the Synergy (Ariba) p2p solution and network and would like clarification and additional information related to:  
1. Confirm that the Bidder is responsible for these fees, and the annual membership?  
2. The costs associated with using the system (software/licensing fees)?  
3. Should a firm need to gather further information related to CRA's Synergy (Ariba) p2p solution for costs and compliance purposes, who or how would they go about doing so?
- A42. 1. As stated in section 1.3.1, Ariba Supplier Network (ASN) Membership Requirement, of the RFP: "All costs associated with this membership shall be borne by the Bidder."  
2. As stated in section 1.3.1, Ariba Supplier Network (ASN) Membership Requirement, of the RFP: "All costs associated with this membership shall be borne by the Bidder."  
3. For more information about Ariba, see <http://www.ariba.com/>.



Q43. I have read all the details of the offer, but I am not sure to fully grasp the offer purpose, Could you give me more detail regarding the specific purpose of the offer?

A43. All details of the RFP can be found within the RFP solicitation document.

Q44. This requirement requires bidders to '... demonstrate experience providing professional services resources to support Cobol systems using a maximum of two (2) client contract references within the past five years ... 5 points for each reference ... and, further, ... 10 points for 15 or more resources placed ... is extreme, heavily weighted, excessive, biased and unfairly favours incumbent firms who are currently (and recently) providing Cobol resources to CRA.

This criterion is not an effective measure of how resource-based firms are able to provide specialized (i.e., COBOL) resources to CRA. In fact, the majority of Tier-2 Professional Services firms in the NCR provide a wide range of professional consulting resource services to the Government of Canada, Crown Corporations and Agencies and, essentially, work from similar databases and use the same recruiting tools. For example, we have over 100 COBOL resources in our database. In addition, this criterion is uncharacteristically focused on COBOL given that this Stream (1) (ref. Annex B) covers seven (7) categories and for which only four (4) of those categories require experience with Cobol. It appears quite unusual that CRA would discount those firms with contract experience in the majority of the other technologies in this Stream, i.e., .Net, Oracle, Java, ASP, Cold Fusion, Cognos, etc. It is questionable why CRA would focus and highly weight COBOL references when this technology is a small percentage of CRA's overall contract resource needs. This criterion is also inconsistent in that the remaining four (4) Streams do not have a second rated criterion that requires demonstration of experience with a specific technology.

Please confirm that CRA will remove this criterion or, at the very least, expand the contract references to include application systems and technologies that are more representative of Stream 1 requirements.

A44. There will be no change to this criterion.

Q45. With regards to Mandatory Administrative Requirements M3, for joint venture Bidders, each company that is a member of the joint venture must: provide a breakdown of each member's contribution to compliance against evaluation criteria, as applicable. Beyond the requirement that each company that is a member of the joint venture must meet mandatory criteria M4, are there any restrictions on how a joint venture bidder meets the other mandatory and rated criteria (ie can joint venture bidder's use a combination of contracts and references from each company that is a member to provide compliance against evaluation criteria?)

A45. Yes, a combination of experience from each member of the joint venture can be used.

Q46. For mandatory corporate experience criteria M4 and R1, A Bidder must include documents demonstrating at least 10 years in delivering Professional Services, as described in Annex A Statement of Work and Annex B, PSSC Catalogue of Resources. Would Articles of Incorporation meet this requirement for documentation or are you looking for placement history in the various roles/categories going back over 17 years for max points?

A46. It is up to the Bidder to demonstrate the years of experience delivering Professional Services. Documents can include, but are not limited to Articles of Incorporation.

Q47. With respect to Stream 4, Rated 1, the requirement that a company has to have provided professional services for over 17 years to score full points penalizes very experienced SAP consulting companies who have been in business 10 years, are financially stable, and are able to provide excellent service to CRA.



We respectfully request that this requirement be removed and replaced with point rating for SAP Company certification – SAP Services Partner= 5 points, SAP Gold Partner = 10, SAP certified Professional Center of Expertise = 15 points.

A47. CRA will not make any changes to this requirement.

Q48. Several of the mandatory and rated requirements are dependent on experience gained within the last xx years prior to the closing date of the solicitation. It is quite standard for solicitations of this nature to be extended to accommodate questions and answers, clarifications, requirement revisions, summer vacations, etc. which may shift the closing date into a new month and therefore changing the time period bidders can use to demonstrate their experience. This often results in additional requests for extensions as bidders have to re-evaluate the experience they are demonstrating and may have to modify large portions of their bid. To prevent this from occurring, would the Crown consider locking down the acceptable duration according to the current closing date (August 1, 20xx to July 31, 2017) regardless of any possible extensions?

A48. CRA will not be making any amendments to the time frames in which bidders must use to demonstrate experience.

Q49. Please confirm the following terms apply to companies submitting as a joint venture (as per similar large Federal Government RFP terms and conditions)

1. Individual members of a joint venture cannot participate in another bid, either by submitting a bid alone or by participating in another joint venture.

2. 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 development 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.

A49. The above terms are not applicable to this RFP.

Q50. This Supply Chain contract will have multiple companies represented in each and every stream which reduces the onus on an individual company to provide all services requirements in that stream. Take for example the Cyber Protection Services stream which has only 2 categories with 3 levels per category. It is unlikely that the crown would have a requirement for over 100 resources in these 2 categories which means the shared burden is much more manageable and niche players could add a lot of value for the crown. Will the crown consider adjusting the point allocation such that companies who are supporting large scale contracts of 10 to 20 resources in this stream can obtain more points and be eligible to compete?

A50. CRA will not make any changes to the point allocation.

Q51. What is the incremental value of a company with 15 years of experience vs 17 years? A company that has been providing these services for 15 years is more than fully qualified to fulfill this requirement. Please consider allocating full points for 15 years

A51. CRA values the years of experience as important to support its legacy systems. The point allocation will remain unchanged.

Q52. For Point rated corporate criteria, R2.2, the Bidder should demonstrate their ability to supply, manage and retain multiple qualified resources in support of a single project using a maximum of two (2) client contacts with contract references within the past five years. Please confirm that the maximum 2 contracts referenced in support of a single project can be a single client with omnibus type or Supply Chain requirements (ie requirements across the organization/enterprise)

A52. There is no maximum number of contracts. There can only be a maximum of two (2) client contacts.

Q53. M 1.3 – Mandatory Stream Specific Criteria

Requirement M1.3 requires Bidders to complete the table in Attachment A and the Corporate Reference Template in Attachment B. However, there is not a place to indicate the names of the resources used in each category for the billing hours claimed. To ensure Bidders are providing truthful data and it is easy for the reference contacts to validate/confirm, would the Crown please confirm that:

- a) Bidders must provide, for each resource category, the resource names (minimum of first initial and last name) and associated TA/PO number where their billed hours were counted in the aggregate total for each contract/reference; and
- b) Bidders cannot use the same resource's billed hours in more than one resource category within a single reference.

A53. a) Resource names are not required.  
b) Correct, Bidders cannot use the same resource's billed hours.



- Q54. For M4 please clarify what “documents” would be considered acceptable proof.
- A54. It is up to the Bidder to demonstrate M4. Documents can include, but are not limited to Articles of Incorporation.
- Q55. R2.2 “The Bidder should demonstrate their ability to supply, manage and retain multiple qualified resources in support of a single project using a maximum of two (2) client contacts with contract references within the past five years (as of the closing date of this RFP).”
- The language of this criterion is somewhat confusing. Can the Crown please confirm that the Bidder’s resources (40+ for max points) must have been provided in support of a “single project” and that two client contacts can be used, but only where they are in support of the same overall project?
- A55. Yes, that is correct.
- Q56. Regarding your posting for RFP#1000335302 this morning on Buy and Sell, would it be possible to obtain a copy of the RFP in Word format so it is easier to extract the grids?
- A56. Attachment A – Billable Hours Response Table and Attachment B – Corporate Reference Template of the RFP have been added as separate attachments (in Word format) in Buy and Sell.
- Q57. Given that each stream is being evaluated on a per-stream basis, is a Bidder permitted to bid on 1 stream within the RFP as a member of a joint venture and on the other streams as a an individual entity? Therefore a Bidder may appear in multiple submissions as long as they do not submit as an individual entity and as a joint venture within the same stream.
- A57. Yes, the Bidder is permitted to bid on one stream as a member of a joint venture and on the other streams as an individual entity.
- Q58. In regards to a joint venture submission, can CRA please confirm the definition of “Bidder” includes any member of the joint venture? Therefore with the exception of mandatory criteria M3 and M4 the experience of all members of the joint venture can be combined to respond to a single criteria (i.e. billable hours).
- A58. The Standard Instructions and Conditions 2003 (2016-04-04) states the definition of a Bidder as the following: “Bidder” means the person or entity (or, in the case of a joint venture, the persons or entities) submitting a bid to perform a contract for goods, services or both. It does not include the parent, subsidiaries or other affiliates of the Bidder, or its subcontractors.
- Q59. Page 15 – Section 3.1 – Bid – Number of Copies: Is it acceptable to submit multiple streams in a single Bid package or are Bidders required submit each stream individually in accordance with the requested format in Section 3.1?
- A59. Bidders are required to submit each stream individually in accordance with the requested format in Section 3.1.
- Q60. Page 26 – Section 1.2 – Mandatory Corporate Experience Criteria M4: “The Bidder must include documents demonstrating at least 10 years in delivering Professional Services as described in Annex A, Statement of Work, and Annex B, PSSC Catalogue of Resources, at the closing date of this RFP”. Can the Crown please clarify what types of documents are required to substantiate this requirement.
- A60. It is up to the Bidder to demonstrate M4. Documents can include, but are not limited to Articles of Incorporation.



- Q61. Can the Crown please provide details on the suppliers currently performing services under each stream along with their contract values?
- A61. All information regarding suppliers and contract values can be found on the Government of Canada proactive disclosure website <https://www.canada.ca/en/treasury-board-secretariat/services/reporting-government-spending/proactive-disclosure-department-agency.html>.
- Q62. For Point rated stream-specific criteria, R1.2, the Bidder should demonstrate their experience providing professional services resource to support Cobol systems using a maximum of two (2) client contacts with contract references within the past five years. Please confirm Bidders may reference contracts awarded further back in time than the 5 years, as long as the actual resource placements referenced to support the bidder's claim of a 15+ deployed resources, occurred within the last five years (as of the closing date of the RFP).
- A62. Yes, the actual resource placements must have occurred within the last five years (as of the closing date of the RFP).
- Q63. At page 40, R1: number of years in business. When bidding as a JV, can CRA please confirm that only the JV Prime company will be scored for the years in business?
- A63. Any member of the JV will be scored for years providing professional services. Points for years will only be given once for the period the the services occurred.
- Q64. At page 43, R1.2: Our understanding of this requirement is as follows:  
Each contract demonstrated will score 5 points each for a total of 10 points. If the total of resources on both contracts combined is more than 15, then the bidder scores 10 more points for a total of 20 points.  
Can you please confirm our understanding?
- A64. Yes, correct.
- Q65. Having only two opportunities to ask questions for such a significant and important requirement seems rather limiting and may not be in the best interests of CRA. Would CRA consider allowing a free flow question and answer process as per most requirements of this type and scope, or at the very least add a third or fourth question and answer session?
- A65. CRA will not allow a free flow question and answer process or add additional question and answer sessions.
- Q66. For SSM x.1 we are unclear on what "averaged over each of the last three years" means. Should this read "a minimum of \$4M per year for each of the last three years" instead?
- A66. No, it is the average.
- Q67. Regarding Evaluation Criterion R2.2, please confirm our understanding that for this criterion CRA is looking for Bidders to cite a single project, which was supported by up to two separate contracts, for the delivery of multiple resources.
- A67. Yes, correct.
- Q68. CRA's RFP 1000335302 allows for Bids from Joint Ventures comprised of multiple companies (business entities) but there are no restrictions on the number of proposals a single company can participate in. This could result in vendors submitting multiple competing bids on the same stream with different JV partnerships. This situation





could introduce problems when ensuring compliance of all parties with the Government of Canada's Integrity Regime. Therefore, would the Crown please consider restricting companies from participating in more than one (1) Bid/Proposal per stream?

- A68. CRA will not restrict companies from participating in more than one Bid per stream.
- Q69. Considering the range of applications and technologies stipulated on page 87 of 108 for the SAP System Analyst category, please confirm that you will accept billable hours for other SAP technical roles i.e. SAP Technical Analyst?
- A69. The billable hours must be for the resource categories identified in applicable stream of the RFP. The services delivered under each resource category must be similar in nature as described in the applicable stream of Annex B, PSSC Catalogue of Resources.
- Q70. Appendix 1, 1.2, M5, (1) requests "A letter from its client (referencing a contract award date and a contract serial number or other unique contract identifier) that shows that the Bidder is providing or has provided such services under a contract with a minimum value of \$5,000,000.00 (including taxes)". Please confirm that if using a Government of Canada contract, the front page of the contract that shows the details above may be provided instead of letter as federal government employees are often prohibited from providing such.
- A70. As stated in Appendix 1, Section 1.2, M5 of the RFP. A letter from its client (referencing a contract award date and a contract serial number or other unique contract identifier) that shows that the Bidder is providing or has provided such services under a contract with a minimum value of \$5,000,000.00 (including taxes) is required. The front page of a contract will not be sufficient.
- Q71. Please confirm that for SSM 4.1 that the revenues can be for any SAP Professional Services not just the categories listed (i.e. may include technical specialists).
- A71. For SSM 4.1, the revenues can be for any professional services.

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## 2. AMENDMENTS TO THE RFP

1. At Appendix 1, section 1.2 Mandatory Corporate Experience Criteria;

### **DELETE:**

**M5** The Bidder must have been awarded at least five (5) Professional Services Contracts. Each of these contracts must have a minimum value of \$5,000,000.00 (including taxes) and have been awarded within the past five years (as of bid closing date).

### **INSERT:**

**M5** The Bidder must have been awarded at least five (5) Professional Services Contracts. Each of these contracts must have a minimum value of \$5,000,000.00 (including taxes) and have been awarded within the past seven years (as of bid closing date).



2. At Appendix 2, Section 2.1, Point Rated Corporate Criteria;

**DELETE:**

<p><b>R2.1</b></p>	<p><b>Contract Management Plan</b> The bidder should provide a plan as to how the resulting contract will be managed.</p> <p>The bidder should describe its proposed Contract Management Plan specifically addressing measures it proposes to manage the following elements:</p> <p>1) Demonstrated local presence for the managing of resources within the National Capital Region (NCR);</p> <p>2) Demonstrated ongoing commitment and continuous improvement to the management of contract.</p>	<p><b>35</b></p>	<p>1) Bidder demonstrates local client management presence within the NCR. (10pts)</p> <p>2) Applicable certifications which may include but are not limited to:</p> <ul style="list-style-type: none"> <li>-ISO 9001:2008 or 2015 certified (10pts),</li> <li>-Certified Staffing Professional (CSP) (5pts),</li> <li>-Certified Temporary Staffing Specialist (5pts),</li> <li>-Certified Human Resources Professional (CHRP) (5pts),</li> </ul>
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**INSERT:**

<p><b>R2.1</b></p>	<p><b>Contract Management Plan</b> The bidder should provide a plan as to how the resulting contract will be managed.</p> <p>The bidder should describe its proposed Contract Management Plan specifically addressing measures it proposes to manage the following elements:</p> <p>1) Demonstrated local presence for the managing of resources within the National Capital Region (NCR);</p> <p>2) Demonstrated ongoing commitment and continuous improvement to the management of contract.</p>	<p><b>35</b></p>	<p>1) Bidder demonstrates local client management presence within the NCR. (10pts)</p> <p>2) Applicable certifications which may include but are not limited to:</p> <p>Corporate Certification: (Points will only be given for one of the following ISO certifications, not both)</p> <ul style="list-style-type: none"> <li>-ISO 9001: 2008 certified (5pts)</li> <li>-ISO 9001: 2015 certified (10pts).</li> </ul> <p>Individual Certifications: (applicable only to the Client Manager proposed in M6) (max 15pts).</p> <ul style="list-style-type: none"> <li>-Certified Staffing Professional (CSP) (5pts),</li> <li>-Certified Temporary Staffing Specialist (5pts),</li> <li>-Certified Human Resources Professional (CHRP) (5pts),</li> <li>- Registered Professional Recruiter Certification (5pts).</li> </ul>
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3. At Part 7. Model Contract;

**INSERT:**

**7.36 Limitation of Liability**

1. This section applies despite any other provision of the Contract and replaces the section of the general conditions entitled "Liability". Any reference in this section to damages caused by the Contractor also includes damages caused by its employees, as well as its subcontractors, agents, and representatives, and any of their employees. This section applies regardless of whether the claim is based in contract, tort, or another cause of action. The Contractor is not liable to Canada with respect to the performance of or failure to perform the Contract, except as described in this section and in any section of the Contract pre-establishing any liquidated damages. The Contractor is only liable for indirect, special or consequential damages to the extent described in this section, even if it has been made aware of the potential for those damages.

2. First Party Liability:

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

whichever is greater.



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

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

3. Third Party Claims:

- a. Regardless of whether a third party makes its claim against Canada or the Contractor, each Party agrees that it is liable for any damages that it causes to any third party in connection with the Contract as set out in a settlement agreement or as finally determined by a court of competent jurisdiction, where the court determines that the Parties are jointly and severally liable or that one Party is solely and directly liable to the third party. The amount of the liability will be the amount set out in the settlement agreement or determined by the court to have been the Party's portion of the damages to the third party. No settlement agreement is binding on a Party unless its authorized representative has approved the agreement in writing.
- b. If Canada is required, as a result of joint and several liability, to pay a third party in respect of damages caused by the Contractor, the Contractor must reimburse Canada by the amount finally determined by a court of competent jurisdiction to be the Contractor's portion of the damages to the third party. However, despite paragraph (a), with respect to special, indirect, and consequential damages of third parties covered by this section, the Contractor is only liable for reimbursing Canada for the Contractor's portion of those damages that Canada is required by a court to pay to a third party as a result of joint and several liability that relate to the infringement of a third party's intellectual property rights; physical injury of a third party, including death; damages affecting a third party's real or tangible personal property; liens or encumbrances on any portion of the Work; or breach of confidentiality.
- c. The Parties are only liable to one another for damages to third parties to the extent described in this paragraph 3.

4. At Section 1.2, Glossary of Terms;

**DELETE:**

Day/Month/Year	For purposes of technical evaluation, one (1) month shall equal a minimum of 16.67 billable days (a day equals 7.5 hours) and one (1) year equals a minimum of 200 billable days. Any additional billable days within the same year will not increase the experience gained for the purposes of evaluation.
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**ALL OTHER TERMS AND CONDITIONS REMAIN UNCHANGED**