



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

**Bid Receiving - PWGSC / Réception des
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11 Laurier St. / 11, rue Laurier

Place du Portage, Phase III

Core 0B2 / Noyau 0B2

Gatineau

Québec

K1A 0S5

Bid Fax: (819) 997-9776

**REQUEST FOR PROPOSAL
DEMANDE DE PROPOSITION**

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

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

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

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

Comments - Commentaires

Vendor/Firm Name and Address

Raison sociale et adresse du

fournisseur/de l'entrepreneur

Issuing Office - Bureau de distribution

Informatics Professional Services Division / Division des
services professionnels en informatique

11 Laurier St., / 11, rue Laurier

4C2, Place du Portage

Gatineau

Québec

K1A 0S5

Title - Sujet NEW TBIPS-RFP		
Solicitation No. - N° de l'invitation A0156-163781/A	Date 2017-10-03	
Client Reference No. - N° de référence du client A0156-163781		
GETS Reference No. - N° de référence de SEAG PW-\$\$ZM-627-31851		
File No. - N° de dossier 627zm.A0156-163781	CCC No./N° CCC - FMS No./N° VME	
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2017-10-24		Time Zone Fuseau horaire Eastern Daylight Saving Time EDT
F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input checked="" type="checkbox"/> Other-Autre: <input type="checkbox"/>		
Address Enquiries to: - Adresser toutes questions à: Florent, Michel		Buyer Id - Id de l'acheteur 627zm
Telephone No. - N° de téléphone (819) 420-5428 (00)		FAX No. - N° de FAX () -
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction: INDIGENOUS AND NORTHERN AFFAIRS CANADA 10 WELLINGTON STREET, 23rd FLOOR Dir. Education Branch Dir. des programmes de l'éducation GATINEAU Quebec K1A0H4 Canada		

Instructions: See Herein

Instructions: Voir aux présentes

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

Solicitation No. – N° de l’invitation A0156-163781/A	Amd. No – N° de la modif.	Buyer ID – Id de l’acheteur 627ZM
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**BID SOLICITATION
FOR A CONTRACT AGAINST A SUPPLY ARRANGEMENT FOR TASK-
BASED INFORMATICS PROFESSIONAL SERVICES (TBIPS).
RESOURCE CATEGORY - LEVEL 1, 2 AND 3**

**NATIONAL MAINTENANCE AND APPLICATION DEVELOPMENT
SERVICES**

FOR

DEPARTMENT OF INDIAN AFFAIRS AND NORTHERN DEVELOPMENT

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Annex A – Statement of Work

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

Annex B – Basis of Payment

Annex C – Security Requirements Check List

- Appendix A to Annex C – Security Classification Guide

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: Mandatory Technical Criteria
 -Attachment 4.2: Point-Rated Technical Criteria
 -Attachment 4.3: Pricing Schedule

List of Attachment to Part 5 (Certifications):

-Attachment 5.1: Set-Aside for Aboriginal Business – Certification
 -Attachment 5.2: Federal Contractors Program for Employment Equity – Certification
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BID SOLICITATION
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PART 1 – GENERAL INFORMATION

1.1 Introduction

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

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

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

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

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

Part 5 Certifications: 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 and any other annexes.

1.2 Summary

- (a) This bid solicitation is being issued to satisfy the requirement of the Department of Indian Affairs and Northern Development (DIAND) (the “**Client**”) for Task-Based Informatics Professional Services (TBIPS) under the TBIPS Supply Arrangement (SA) method of supply. DIAND has a requirement for the provision IT Business, Project Management, and Instructional/Training resources in support of the functional development, maintenance and production support for the ESDPP’s EIS and FNCFS Systems, the RIA’s IREMS System (referenced as “the Systems”), as well as any new systems that come under development on an “as and when requested” basis

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- (b) It is intended to result in the award of one contract for an initial period of 2 years plus 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 Works and Government Services Canada (<http://ssi-iss.tpsgc-pwgsc.gc.ca/index-eng.html>) website.
- (d) The requirement is subject to a preference for Canadian goods and/or services.
- (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) This procurement is set aside under the federal government's Procurement Strategy for Aboriginal Business.
- (g) This procurement is set aside from the international trade agreements under the provision each has for set-asides for small and minority businesses.
- (h) Further to Article 800 of the Canadian Free Trade Agreement (CFTA), CFTA does not apply to this procurement.
- (i) Only Aboriginal TBIPS SA Holders currently holding a TBIPS SA for Tier 2 in the National Capital Region under the EN578-170432 series of SA's are eligible to compete. The TBIPS SA EN578-170432 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.
- (j) 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 # EN578-170432 as that joint venture at the time of bid closing in order to submit a bid.
- (k) The Resource Categories described below are required on an as and when requested basis in accordance with the TBIPS SA Annex "A":

RESOURCE CATEGORY	LEVEL OF EXPERTISE	ESTIMATED NUMBER OF RESOURCES REQUIRED
A.11 – Tester	Level 1	1
A.11 – Tester	Level 2	1
A.11 – Tester	Level 3	1
B.1 - Business Analyst	Level 1	1
B.1 - Business Analyst	Level 2	3
B.1 - Business Analyst	Level 3	2
B.2 - Business Architect	Level 3	1
B.9 - Courseware Developer	Level 2	1

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B.9 - Courseware Developer	Level 3	2
B.11 - Instructor, IT	Level 2	1
B.11 - Instructor, IT	Level 3	1
B.14 - Technical Writer	Level 2	1
B.14 - Technical Writer	Level 3	1
P.1 - Change Management Consultant	Level 1	1
P.1 - Change Management Consultant	Level 3	2
P.7 – Project Coordinator	Level 2	1
P.9 Project Manager	Level 2	1
P.9 Project Manager	Level 3	2
P.12 Risk Management Specialist	Level 2	1

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.

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PART 2 - BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

- (a) All instructions, clauses and conditions identified in the bid solicitation by number, date and title are set out in the *Standard Acquisition Clauses and Conditions Manual* (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.
- (b) Bidders who submit a bid agree to be bound by the instructions, clauses and conditions of the bid solicitation and accept the clauses and conditions of the resulting contract(s).
- (c) The 2003 (2017/04/27), Standard Instructions - Goods or Services - Competitive Requirements are incorporated by reference into and form part of the bid solicitation. If there is a conflict between the provisions of 2003 and this document, this document prevails.
- (d) Subsection 3.a) of Section 01, Integrity Provisions - Bid of Standard Instructions 2003 incorporated by reference above is deleted in its entirety and replaced with the following:
 - a. at the time of submitting an arrangement under the Request for Supply Arrangement (RFSA), the Bidder has already provided a list of names, as requested under the *Ineligibility and Suspension Policy*. During this procurement process, the Bidder must immediately inform Canada in writing of any changes affecting the list of names.
- (e) Subsection 5(4) of 2003, Standard Instructions – Goods and Services – Competitive Requirements is amended as follows:
 - (i) Delete: 60 days
 - (ii) Insert: 180 days

2.2 Submission of Bids

- (a) Bids must be submitted only to the Public Works and Government Services Canada (PWGSC) Bid Receiving Unit by the date, time and at the PWGSC 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 PWGSC 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 to all Bidders. Enquiries not submitted in a form that can be distributed to all Bidders may not be answered by Canada.

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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

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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 Volumetric Data

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

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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 4 soft copies on a USB key.
- (ii) Section II: Financial Bid (2 hard copy) and 1 copy on a USB key.
- (iii) Section III: Certifications not included in the Technical Bid (1 hard copy).

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 Bid:**

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

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- (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.

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

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

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

- (iii) **Substantiation of Technical Compliance (Attachments 4.1 and 4.2):** The technical bid must substantiate the compliance with the specific articles of Attachments 4.1 and 4.2 which is the requested format for providing the substantiation. The substantiation must not simply be a repetition of the requirement(s), but must explain and demonstrate how the Bidder will meet the requirements and carry out the required Work. 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 Attachments 4.1 and 4.2, where Bidders are requested to indicate where in the bid the reference material can be found, including the title of the document, and the page and paragraph numbers; where the reference is not sufficiently precise, Canada may request that the Bidder direct Canada to the appropriate location in the documentation.
- (iv) **For Proposed Resources:** The technical bid must include the résumés of the proposed resources for each of the resource categories as identified in Attachments 4.1 and 4.2. The same individual must not be proposed for more than one Resource Category. The Technical bid must demonstrate that each proposed individual meets the qualification requirements described (including any educational requirements, work experience requirements, and professional designation or membership requirements). With respect to the proposed resources:

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- (A) Proposed resources may be employees of the Bidder or employees of a subcontractor, or these individuals may be independent contractors to whom the Bidder would subcontract a portion of the Work (refer to Part 5, Certifications).
- (B) For educational requirements for a particular degree, designation or certificate, PWGSC will only consider educational programs that were successfully completed by the resource by the time of bid closing. If the degree, designation or certification was issued by an educational institution outside of Canada, the Bidder must provide a copy of the results of the academic credential assessment and qualification recognition service issued by an agency or organization recognized by the Canadian Information Centre for International Credentials (CICIC).
- (C) For requirements relating to professional designation or membership, the resource must have the required designation or membership by the time of bid closing and must continue, where applicable, to be a member in good standing of the profession or membership throughout the evaluation period and Contract Period. Where the designation or membership must be demonstrated through a certification, diploma or degree, such document must be current, valid and issued by the entity specified in this solicitation. If the entity is not specified, the issuer must have been an accredited or otherwise recognized body, institution or entity at the time the document was issued. If the degree, diploma or certification was issued by an educational institution outside of Canada, the Bidder must provide a copy of the results of the academic credential assessment and qualification recognition service issued by an agency or organization recognized by the Canadian Information Centre for International Credentials (CICIC).
- (D) For work experience, PWGSC will not consider experience gained as part of an educational program, except for experience gained through a formal co-operative program at a post-secondary institution.
- (E) For any requirements that specify a particular time period (e.g., 2 years) of work experience, PWGSC will disregard any information about experience if the technical bid does not include the relevant dates (month and year) for the experience claimed (i.e., the start date and end date). Canada will evaluate only the duration that the resource actually worked on a project or projects (from his or her start date to end date), instead of the overall start and end date of a project or a combination of projects in which a resource has participated.
- (F) For work experience to be considered by Canada, the technical bid must not simply indicate the title of the individual's position, but must demonstrate that the resource has the required work experience by explaining the responsibilities and work performed by the individual while in that position. In situations in which a proposed resource worked at the same time on more than one project, the duration of any overlapping time period will be counted only once toward any requirements that relate to the individual's length of experience.
- (v) **Customer Reference Contact Information:**
 - (A) The Bidder must provide customer references. The customer references must each confirm, if requested by PWGSC, the information required under MTC1.1 through MTC1.5 for the Bidder of Attachment 4.1.
 - (B) The form of question to be used to request confirmation from customer references is as follows:
"Has [the Bidder] provided your organization with the services described below?"

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The Bidder must demonstrate its experience and capacity in providing IM/IT related professional resources for project management or training to support Business applications. The Projects identified must:

1. *Have been within the seven last years (as of bid closing date) for client organizations external to the Bidder's organization;*
 2. *Have a minimum billing of \$500K (for professional services only, taxes extra and be of a minimum duration of four months;*
 3. *Have been experience in providing professional IM/IT services to its clients in support of an IT system related to a minimum two of the following:*
 - i) education programs or education policy; or*
 - ii) social programs or social programs policy, or*
 - iii) Indigenous individuals.*
 4. *Have been experience in providing resources to its client in two of the following three Resource Categories simultaneously (i.e. during the same dates/duration and on the same project):*
 - i) Tester;*
 - ii) Business Analyst;*
 - iii) Business Architect.*
 5. *Have been experience in providing resources to its client in two of the following three Resource Categories simultaneously (i.e. during the same dates/duration and on the same project):*
 - i) Courseware Developer;*
 - ii) IT Instructor;*
 - iii) Business Architect; and*
 6. *Have been experience in providing resources to its client in two of the following three Resource Categories simultaneously (i.e. during the same dates/duration and on the same project):*
 - i) Change Management Consultant;*
 - ii) Project Coordinator;*
 - iii) Project Manager;*
 - iv) Risk Management Specialist.*
- (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.

3.3 Section II: Financial Bid

- (a) **Pricing:** Bidders must submit their financial bid in accordance with the Pricing Schedule provided in Attachment 4.3. 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.

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- (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.

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PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

- (a) Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria. There are several steps in the evaluation process, which are described below. Even though the evaluation and selection will be conducted in steps, the fact that Canada has proceeded to a later step does not mean that Canada has conclusively determined that the Bidder has successfully passed all the previous steps. Canada may conduct steps of the evaluation in parallel.
- (b) An evaluation team composed of representatives of the Client and PWGSC will evaluate the bids on behalf of Canada. Canada may hire any independent consultant, or use any Government resources, to evaluate any bid. Not all members of the evaluation team will necessarily participate in all aspects of the evaluation.
- (c) In addition to any other time periods established in the bid solicitation:
 - (i) **Requests for Clarifications:** If Canada seeks clarification or verification from the Bidder about its bid, the Bidder will have 2 working days (or a longer period if specified in writing by the Contracting Authority) to provide the necessary information to Canada. Failure to meet this deadline will result in the bid being declared non-responsive.
 - (ii) **Extension of Time:** If additional time is required by the Bidder, the Contracting Authority may grant an extension in his or her sole discretion.

4.2 Technical Evaluation

- (a) **Mandatory Technical Criteria:**
 - (i) Each bid will be reviewed for compliance with the mandatory requirements of the bid solicitation. Any element of the bid solicitation that is identified specifically with the words "must" or "mandatory" is a mandatory requirement. Bids that do not comply with each and every mandatory requirement will be declared non-responsive and be disqualified.
 - (ii) The mandatory technical criteria are described in Attachment 4.1.
- (b) **Point-Rated Technical Criteria:**
 - (i) Each bid will be rated by assigning a score to the rated requirements, which are identified in the bid solicitation by the word "rated" or by reference to a score. Bidders who fail to submit complete bids with all the information requested by this bid solicitation will be rated accordingly.
 - (ii) The rated requirements are described in Attachment 4.2.
- (c) **Number of Resources Evaluated**

Only a certain number of resources per Resource Category will be evaluated as part of this bid solicitation as identified in Attachment 4.1 and Attachment 4.2. Additional Resources will only be assessed after contract award once specific tasks are requested of the Contractor. After contract award, the Task Authorization process will be in accordance with Part 7 – Resulting Contract Clauses, the Article titled "Task Authorization". When a Task Authorization Form (TA Form) is issued, the Contractor will be requested to propose a resource to satisfy the specific requirement based on the TA Form's Statement of Work. The proposed resource will then be assessed against the criteria identified in the Contract's Statement of Work in accordance with Appendix C of Annex A.
- (d) **Reference Checks:**

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- (i) Whether or not to conduct reference checks is discretionary. However, if PWGSC chooses to conduct reference checks for any given rated or mandatory requirement, it will check the references for that requirement for all bidders to be recommended for contract award.
- (ii) For reference checks, Canada will conduct the reference check in writing by e-mail. Canada will send all e-mail reference check requests to contacts supplied by all the Bidders on the same day using the e-mail 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 e-mail was sent.
- (iii) On the third working day after sending out the reference check request, if Canada has not received a response, Canada will notify the Bidder by e-mail, 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 e-mail 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 5 working days will not be extended to provide additional time for the new contact to respond.
- (iv) Wherever information provided by a reference differs from the information supplied by the Bidder, the information supplied by the reference will be the information evaluated.
- (v) Points will not be allocated and/or a bidder will not meet the mandatory experience requirement (as applicable) if (1) the reference customer states he or she is unable or unwilling to provide the information requested, or (2) the customer reference is not a customer of the Bidder itself (for example, the customer cannot be the customer of an affiliate of the Bidder instead of being a customer of the Bidder itself). Nor will points be allocated or a mandatory met if the customer is itself an affiliate or other entity that does not deal at arm's length with the Bidder.

4.3 Financial Evaluation

- (a) There are two possible financial evaluation methods for this requirement. The first method will be used if three or more bids are determined responsive (see (b) Financial Evaluation - Method A below). The second method will be used if fewer than three bids are determined responsive (see (c) Financial Evaluation - Method B below).
- (b) **Financial Evaluation - Method A:** The following financial evaluation method will be used if three or more bids are determined responsive:
 - (i) **Calculation of Total Bid Price:** The financial evaluation will be conducted using the pricing tables completed by the Bidders and the Firm Per Diem Median Rate Evaluation Method explained below. A financial calculation will occur for each Bidder by multiplying its firm per diem rates, or Median Rate(s) if applicable, for the Initial Contract Period and the option period(s) with the estimated number of days of work for each period, for all the Resource Categories stated in Attachment 4.3 - Pricing Schedule. The sum of such rates will constitute the Total Bid Price for that Bidder.
 - (ii) **Firm Per Diem Median Rate Evaluation**
 - (A) **Use:** The firm per diem median rate calculation will apply to modify the rate to be assessed in the financial evaluation of a Bidder, where that Bidder submits a firm per diem rate for a resource category that is lower than the Lower Band Limit as calculated below. The firm per diem median rate calculation is for evaluation

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purposes only, and the actual submitted per diem rate will be used in any resulting contract in all instances.

(B) Calculation for both the Initial Contract Period and the Option Period medians:

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

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

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

- (i) **Calculation of Total Bid Price:** The financial evaluation will be conducted using the pricing tables completed by the Bidders. A financial calculation will occur for each Bidder by multiplying its firm per diem rates for the Initial Contract Period and the option period(s) with the estimated number of days of work for each period, for all the Resource Categories stated in Attachment 4.3 - Pricing Schedule. The sum of such rates will constitute the Total Bid Price for that Bidder.

- (d) **Substantiation of Professional Services Rates**

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

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

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- (iii) the name, telephone number and, if available, e-mail address of a contact person at the customer who received each invoice submitted under (i), so that Canada may verify any information provided by the Bidder.

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

(e) **Formulae in Pricing Tables**

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

4.4 Basis of Selection

Selection Process: The following selection process will be conducted as follows:

- (a) A bid must comply with the requirements of the bid solicitation, meet all mandatory evaluation criteria and obtain the required pass marks for the point rated criteria identified in this bid solicitation to be declared responsive.
- (b) The responsive bid that obtains the highest Total Bidder Score will be recommended for award of a contract. For any given Bidder, the greatest possible Total Technical Score is 60 while the greatest possible Total Financial Score is 40.
- (i) **Calculation of Total Technical Score:** The Total Technical Score will be computed for each responsive bid by converting the Technical Score obtained for the point-rated technical criteria using the following formula, rounded to two decimal places:
- $$\frac{\text{Technical Score}}{\text{Maximum Technical Points (bidders, please refer to the maximum technical points in Attachment 4.2)}} \times 60 = \text{Total Technical Score}$$
- (ii) **Calculation of Total Financial Score:** The Total Financial Score will be computed for each responsive bid by converting the Financial Score obtained for the financial evaluation using the following formula rounded to two decimal places:
- $$\frac{\text{Lowest Financial Evaluated Price}}{\text{The Bidder's Financial Evaluated Price}} \times 40 = \text{Total Financial Score}$$
- (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) In the event of identical Total Bidder Scores occurring, then the bid with the highest Total Technical Score will become the top-ranked bidder. In the event of identical Total Technical Scores occurring, then the highest Total Financial Score will become the top-ranked Bidder.
- (d) One contract may be awarded in total as a result of this bid solicitation.
- (e) Bidders should note that all contract awards are subject to Canada's internal approvals process, which includes a requirement to approve funding in the amount of any proposed contract. Despite the fact that the Bidder may have been recommended for contract award, a contract will only be awarded if internal approval is granted according to Canada's internal policies. If approval is not granted, no contract will be awarded.

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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 Certification Required with Bid

Bidders must submit the following duly completed certifications as part of their bid.

5.1.1 Canadian Content Certification

- (A) This procurement is conditionally limited to Canadian goods and Canadian services.
- (B) Subject to the evaluation procedures contained in the bid solicitation, bidders acknowledge that only bids with a certification that the goods and services offered are Canadian goods and Canadian services, as defined in clause A3050T, may be considered.
- (C) Failure to provide this certification completed with the bid will result in the goods and services offered being treated as non-Canadian goods and non-Canadian services.
- (D) For more information on how to determine the Canadian content for a mix of goods, a mix of services or a mix of goods and services, consult Annex 3.6.(9), Example 2, of the Supply Manual.

5.1.1.2 Canadian Content Definition

- (A) SACC Manual Clause A3050T (2014/11/027), Canadian Content Definition.

5.1.1.3 Set-aside for Aboriginal Business

- (A) This procurement is set aside for Aboriginal business under the federal government Set-aside Program for Aboriginal Business. Bidders must complete and sign the certification entitled "Certification Requirements for the Set-aside Program for Aboriginal Business" attached as Attachment 5.1 Set-Aside for Aboriginal Business - Certification.
- (B) By executing the certification, the Bidder warrants that it is an Aboriginal business as defined in the Set-aside Program for Aboriginal Business.
- (C) SACC Manual clause A3001T (2014/11/27) applies.

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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) Federal Contractors Program for Employment Equity - Bid Certification

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

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

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

The Bidder must provide the Contracting Authority with a completed Attachment 5.2, 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) Professional Services Resources

- (i) By submitting a bid, the Bidder certifies that, if it is awarded a contract as a result of the bid solicitation, every individual proposed in its bid will be available to perform the Work as required by Canada's representatives and at the time specified in the bid solicitation or agreed to with Canada's representatives.
- (ii) By submitting a bid, the Bidder certifies that all the information provided in the résumés and supporting material submitted with its bid, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Bidder to be true and accurate. Furthermore, the Bidder warrants that every individual proposed by the Bidder for the requirement is capable of performing the Work described in the resulting contract.
- (iii) If a Bidder has proposed any individual who is not an employee of the Bidder, by submitting a bid, the Bidder certifies that it has the permission from that individual to propose his/her services in relation to the Work to be performed and to submit his/her résumé to Canada. The Bidder must, upon request from the Contracting Authority, provide a written confirmation, signed by the individual, of the permission given to the Bidder and of his/her availability. Failure to comply with the request may result in the bid being declared non-responsive.

(b) 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.

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PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS

6.1 Security Requirement

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

6.2 Financial Capability

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

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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) **TO BE INSERTED UPON CONTRACT AWARD** (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 the Department of Indian Affairs and Northern Development (DIAND)
- (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 contract number;
 - (B) the task number;
 - (C) 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);
 - (D) the details of any financial coding to be used;

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- (E) the categories of resources and the number required;
 - (F) a description of the work for the task outlining the activities to be performed and identifying any deliverables (such as reports);
 - (G) the start and completion dates;
 - (H) milestone dates for deliverables and payments (if applicable);
 - (I) the number of person-days of effort required;
 - (J) whether the work requires on-site activities and the location;
 - (K) the language profile of the resources required;
 - (L) the level of security clearance required of resources;
 - (M) 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
 - (N) 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 DIAND Technical Representative, within 2 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:**
- (i) To be validly issued, a TA must be signed by the Contracting Authority.
Any TA that does not bear the appropriate signatures 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.
- (f) **Periodic Usage Reports:**
- (i) The Contractor must compile and maintain records on its provision of services to the federal government under Task Authorizations validly issued under the Contract. The Contractor must provide this data to Canada in accordance with the reporting requirements detailed below. If some data is not available, the reason must be indicated. If services are not provided during a given period, the Contractor must still provide a "NIL" report. The data must be submitted on a quarterly basis to the Contracting Authority. From time to time, the Contracting Authority may also require an interim report during a reporting period.
 - (ii) The quarterly periods are defined as follows:
 - (A) 1st quarter: April 1 to June 30;
 - (B) 2nd quarter: July 1 to September 30;
 - (C) 3rd quarter: October 1 to December 31; and

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(D) 4th 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 **"Minimum Contract Value"** means \$20,000.00 (excluding Applicable Taxes).
- (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

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- (i) for default;
- (ii) for convenience as a result of any decision or recommendation of a tribunal or court that the contract be cancelled, re-tendered or awarded to another supplier; or
- (iii) for convenience within ten business days of Contract award.

7.4 Standard Clauses and Conditions

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

(a) **General Conditions:**

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

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

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

(b) **Supplemental General Conditions:**

The following Supplemental General Conditions:

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

apply to and form part of the Contract.

(a) Supplemental General Conditions, in the following order:

- (i) 4007 (2010/08/16), Supplemental General Conditions - Canada to Own Intellectual Property Rights in Foreground Information;

7.5 Security Requirement

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

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

7.6 Contract Period

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

7.7 Authorities

(a) Contracting Authority

The Contracting Authority for the Contract is:

Michel Florent
Supply Specialist
Public Works and Government Services Canada
Informatics Professional Services Division (IPSD)
Space, Innovation, and Informatics Projects Directorate
Place du Portage, Phase III, Tower C,
11 Laurier Street,
Gatineau, Quebec K1A 0S5
Telephone: (819) 420-5428

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Facsimile: (819) 956-1156

E-mail address: michel.florent@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:

TO BE INSERTED UPON CONTRACT AWARD

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

TO BE INSERTED UPON CONTRACT AWARD

7.8 Proactive Disclosure of Contracts with Former Public Servants

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

7.9 Payment

(a) Basis of Payment

- (i) **Professional Services provided under a Task Authorization with a Maximum Price:** For professional services requested by Canada, in accordance with a validly issued Task Authorization, Canada will pay the Contractor, in arrears, up to the Maximum Price for the TA, for actual time worked and any resulting deliverables in accordance with the firm all-inclusive per diem rates set out in Annex B, Basis of Payment, Applicable Taxes extra. Partial days will be prorated based on actual hours worked based on a 7.5-hour workday.
- (ii) **Travel and Living Expenses – National Joint Council Travel Directive** The Contractor will be reimbursed its authorized travel and living expenses reasonably and properly incurred in the performance of the Work, at cost, without any allowance for profit and/or administrative overhead, in accordance with the meal and private vehicle expenses provided in Appendices B, C and D of the National Joint Council Travel Directive and with the other provisions of the directive referring to “travellers”, rather than those referring to “employees”. All travel must have the prior authorization of the Technical Authority. All payments are subject to government audit.
- (iii) **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.
- (iv) **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

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the Contractor does not respond or refuses to provide an individual with the qualifications described in the Contract within the time described in the Contract (or proposes instead to provide someone from an alternate category at a different rate), whether or not Canada terminates the Contract as a whole or in part or chooses to exercise any of the rights provided to it under the general conditions, Canada may impose sanctions or take other measures in accordance with the PWGSC Vendor Performance Corrective Measure Policy (or equivalent) then in effect, which measures may include an assessment that results in conditions applied against the Contractor to be fulfilled before doing further business with Canada, or full debarment of the Contractor from bidding on future requirements.

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

- (i) Canada's total liability to the Contractor under the Contract for all validly issued Task Authorizations (TAs), inclusive of any revisions, must not exceed the amount set out on page 1 of the Contract, less any Applicable taxes. With respect to the amount set out on page 1 of the Contract, Customs duties are included and Applicable Taxes are included
- (ii) No increase in the total liability of Canada will be authorized or paid to the Contractor unless an increase has been approved, in writing, by the Contracting Authority.
- (iii) The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:
 - (A) when it is 75 percent committed, or
 - (B) 4 months before the contract expiry date, or
 - (C) As soon as the Contractor considers that the sum is inadequate for the completion of the Work required in all authorized TAs, inclusive of any revisions, whichever comes first.
- (iv) If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority a written estimate for the additional funds required. Providing this information does not increase Canada's liability.

(c) **Method of Payment for Task Authorizations with a Maximum Price:** For each Task Authorization validly issued under the Contract that contains a maximum price:

- (i) Canada will pay the Contractor no more frequently than once a month in accordance with the Basis of Payment. The Contractor must submit time sheets for each resource showing the days and hours worked to support the charges claimed in the invoice.
- (ii) Once Canada has paid the maximum TA price, Canada will not be required to make any further payment, but the Contractor must complete all the work described in the TA, all of which is required to be performed for the maximum TA price. If the work described in the TA is completed in less time than anticipated, and the actual time worked (as supported by the time sheets) at the rates set out in the Contract is less than the maximum TA price, Canada is only required to pay for the time spent performing the work related to that TA.

(d) **Time Verification**

Time charged and the accuracy of the Contractor's time recording system are subject to verification by Canada, before or after payment is made to the Contractor. If verification is done after payment, the Contract must repay any overpayment, at Canada's request.

(e) **Payment Credits**

- (i) **Failure to Provide Resource:**

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- (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.

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(f) **No Responsibility to Pay for Work not performed due to Closure of Government Offices**

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

7.10 Invoicing Instructions

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

(b) **SACC Manual Clauses**

SACC clause A3000C (2014/11/27), Aboriginal Business Certification.

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:

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- (b) these Articles of Agreement, including any individual SACC clauses incorporated by reference in these Articles of Agreement;
- (c) Supplemental General Conditions, in the following order:
 - (ii) 4006 (2010/08/16), Supplemental General Conditions - Contractor to Own Intellectual Property Rights in Foreground Information;
- (d) General Conditions 2035 (2016/04/04), Higher Complexity - Services;
- (e) Annex A, Statement of Work – 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;
- (f) Annex B, Basis of Payment;
- (g) Annex C, Security Requirements Check List – including its Appendix as follows:
 - (i) Appendix A to Annex C – Security Classification Guide;
- (h) the validly issued Task Authorizations and any required certifications (including all of their annexes, if any) ; and
- (i) the Contractor's bid dated **TO BE INSERTED UPON CONTRACT AWARD**, as clarified on "or" as amended **TO BE INSERTED UPON CONTRACT AWARD** 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

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provide the Contractor with a time frame within which to meet the requirement. Failure to comply with the request of the Contracting Authority and meet the requirement within the time period will constitute a default under the General Conditions. The Contractor must, if requested by the Contracting Authority, forward to Canada a certified true copy of all applicable insurance policies.

(b) **Commercial General Liability Insurance**

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

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- (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.

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- (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 _____ and that it is comprised of the following members: **[BIDDERS MUST LIST ALL THE JOINT VENTURE MEMBERS NAMED IN THE CONTRACTOR'S ORIGINAL BID].**

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

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

7.20 Professional Services - General

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

Replacement of Specific Individuals

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

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(B) security information on the proposed replacement as specified by Canada, if applicable.

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

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

(A) exercise Canada's rights or remedies under the Contract or at law, including terminating the Contract in whole or in part for default under the Article titled "Default of the Contractor", or

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

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

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

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

7.21 Safeguarding Electronic Media

(a) Before using them on Canada's equipment or sending them to Canada, the Contractor must use a regularly updated product to scan electronically all electronic media used to perform the Work for computer viruses and other coding intended to cause malfunctions. The Contractor must notify Canada if any electronic media used for the Work are found to contain computer viruses or other coding intended to cause malfunctions.

(b) If magnetically recorded information or documentation is damaged or lost while in the Contractor's care or at any time before it is delivered to Canada in accordance with the Contract, including accidental erasure, the Contractor must immediately replace it at its own expense.

7.22 Representations and Warranties

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

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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 Implementation of Professional Services

If similar professional services are currently being provided by another supplier or by Canada's own personnel, the Contractor is responsible for ensuring that the transition to the professional services it provides under the Contract is completed in a way that does not disrupt Canada's operations or users, and does not result in any interim degradation to the timeliness or quality of service. The Contractor is solely responsible for any additional training required by its resources to perform the Work, and time spent by resources on that training or becoming familiar with the Client's environment must not be charged to Canada. The transition will be considered complete once the Contractor has demonstrated, to the satisfaction of the Technical Authority that it is ready and able to carry out the Work. The transition must be complete by no later than 10 working days after the Contract is awarded. All costs associated with establishing itself to provide the professional services are the responsibility of the Contractor.

7.25 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.

7.26 Transition Period

The Contractor acknowledges that the nature of the services provided under the Contract requires continuity and that a transition period may be required at the end of the Contract. The Contractor agrees that Canada may, at its discretion, extend the Contract by a period of two months under the same

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conditions to ensure the required transition. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions as set out in the Basis of Payment.

The Contracting Authority will advise the Contractor of the extension by sending a written notice to the Contractor at least 20 calendar days before the contract expiry date. The extension will be evidenced for administrative purposes only, through a contract amendment.

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ANNEX A **STATEMENT OF WORK (SOW)** **NATIONAL MAINTENANCE AND APPLICATION** **DEVELOPMENT SERVICES**

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1. **Background**

The Department of Indian Affairs and Northern Development (DIAND), known currently as Indigenous and Northern Affairs Canada (INAC) supports Indigenous people (First Nations, Inuit and Métis) and Northerners in their efforts to:

- improve social well-being and economic prosperity;
- develop healthier, more sustainable communities; and
- participate more fully in Canada's political, social and economic development, to the benefit of all Canadians.

DIAND is one of the federal government departments responsible for meeting the Government of Canada's (GoC) obligations and commitments to First Nations, Inuit and Métis, and for fulfilling the federal government's constitutional responsibilities in the North.

Numerous statutes, negotiated agreements and relevant legal decisions largely determine DIAND's responsibilities. Most of the Department's programs, representing a majority of its spending - are delivered through partnerships with Indigenous communities and federal-provincial or federal-territorial agreements. DIAND also works with urban Indigenous people, Métis and Non-Status Indians (many of whom live in rural areas).

1.1 **Education Branch**

In order to achieve meaningful gains in education outcomes for First Nations, Budget 2016 proposed significant funding to support the transformation of the current on reserve education system, and Budget 2017 proposed additional funding for post-secondary education.

DIAND has primary responsibility for education for First Nations on reserve, including administering funding for elementary and secondary education for First Nation students ordinarily resident on-reserve, provides post-secondary education financial support for First Nation and eligible Inuit students, and provides support to Canadian post-secondary institutions for the design and delivery of university and college level courses that respond to the education needs of First Nation and Inuit students. The government believes every First Nation child should get the best start in life, and is committed to working in partnership with First Nations in supporting their goals for a quality education system that delivers improved outcomes for First Nation students on reserve.

Education Information System (EIS)

The Education Information System (EIS) is the computer database that manages the education programs information within the DIAND Services Portal. The system tracks performance outcomes in First Nations Education, and the resulting information allows DIAND and First Nations to address concerns faster and make enhancements, where necessary, to support improved educational outcomes of students.

The secure system is designed to modernize and replace the old paper-based processes for reporting, while streamlining data collection practices. It supports DIAND and First Nations in strengthening accountabilities in the delivery of First Nation education. It also helps DIAND and First Nations gain a better understanding of the performance of students and schools.

The EIS exchanges depersonalized and grouped data with the Education Reports and Analysis Solution, to provide timely statistical reporting on First Nations education.

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Additional information on the EIS can be found at: <http://www.aadnc-aandc.gc.ca/eng/1100100033778/1100100033779>.

1.2 Social Policy and Programs Branch

The goal of DIAND's First Nations Child and Family Services (FNCFS) program is to support First Nations communities in providing culturally sensitive child welfare services comparable to those available to other provincial and territorial residents in similar circumstances. The FNCFS program is one of many DIAND programs and services dedicated to individual and family well-being.

The First Nations Child and Family Services System

The FNCFS System is a redesign of the Indian Child and Family Services legacy application resulting in a web based application to meet established DIAND information system standards. The redesign also improves management of maintenance costs and ensures that the system complies with Federal Government software and accessibility standards.

Version 1.0 of the FNCFS System was released in 2014, to implement fixes to legacy issues; provide improved reporting capabilities and data entry and user training. The System was stabilized over the period of 2014-2016.

1.3 Individual Affairs Branch

The Individual Affairs program contributes to ensuring federal stewardship of the legislative and administrative responsibilities of the federal government pertaining to registration, membership, status cards and estates. Results are achieved through direct client services and partnerships with First Nations to determine eligibility for registration under the *Indian Act*, issuing proof of registration documents such as the Secure Certificate of Indian Status, and administering estates under the *Indian Act*. Through client-centric service delivery, the sound administration of individual affairs contributes to the well-being of First Nation individuals, families and communities.

The Individual Affairs' Branch's priorities are to modernize Indian registration and the Secure Certificate of Indian Status issuance processes to improve services across Canada and to continue to promote awareness and enhance capacity for estate planning.

The Individual Affairs Branch relies on four systems to deliver on its mandate:

- The Indian Registration System – to process registration applications, determine entitlement to Indian Status, and maintain the Indian Register;
- The Secure Certificate of Indian Status web application – to process applications for Secure Cards for registered Indians;
- The Treaty Payment System– to monitor and manage monies owing to clients due to Treaty Agreements; and
- The Estate Management System – to support management of individual estates in the event of death, or living estates in the event of dependent adult or minor.

Three of the four current supporting systems were developed using older technology and as such are not scalable to meet current needs. Users have identified numerous new requirements that cannot easily be implemented leaving gaps in system support that have led to manual paper-based workaround situations, process inefficiencies and ultimately data integrity issues.

All systems and technology use a common set of information about an individual client but sharing that information is a very manual and time-consuming process that generates work and data duplication.

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2.0 OBJECTIVE:

DIAND has a requirement for the provision of IT Business, Project Management, and Instructional/Training resources in support of the functional development, maintenance and production support for the ESDPP’s EIS and FNCFS Systems, the RIA’s IREMS System (referenced as “the Systems”), as well as any new systems that come under development, and related work.

It is expected that these systems will continue to enhance the Department’s ability to manage its programs and report on results in a timely fashion without increasing recipients’ reporting burden, improving services to clients, and gaining internal efficiency.

2.1 Definitions and application documents:

The following list of terms and acronyms is not exhaustive, but rather is intended to ensure clarity of understanding of critical terms used within this Statement of Work.

Term/Acronym	Definition
DIAND	The client, the Department of Indian Affairs and Northern Development (formerly known as Aboriginal Affairs and Northern Development Canada), also referred to as Indigenous and Northern Affairs (INAC)
CIDM	DIAND’s Records and Document Information Management system (RDIMS) is currently the Hummingbird™ Document Management solution, customized as a single integrated solution for all departmental records and correspondence, branded as Corporate Document and Information Management (CIDM).
EIS	Education Information system
FNCFS IMS	First Nations Child and Family Services Information Management system
FNITP	First Nations and Inuit Transfer Payments s (otherwise known as GCIMS)
GCDocs	DIAND is transitioning to GCDocs (the GoC’s branding of OpenText’s enterprise content management (ECM) system - Content Server) - the Federal Government of Canada’s official electronic documents and records management solution (EDRMS)
GCIMS	Grants and Contributions Information Management system (otherwise known as FNITP)
GoC	Government of Canada
IREMS	Indian Registration and Estate Management system
NCR	National Capital Region

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Term/Acronym	Definition
SOW	Statement of Work
“the Systems”	ESDPP’s EIS and FNCFS Systems and/or RIA’s IREMS Systems

- 2.1.1 In addition to any provisions contained within the Contract, the following websites may provide further useful information to the Contractor in determining the context of this requirement, as well as its size and scope:
- 2.1.2 DIAND Mandate, Roles and Responsibilities: <https://www.aadnc-aandc.gc.ca/eng/1100100010023/1100100010027>
- 2.1.3 Education Partnerships Program: <https://www.aadnc-aandc.gc.ca/eng/1320335380835/1320335427045>
- 2.1.4 First Nations Child and Family Services (FNCFS): <https://www.aadnc-aandc.gc.ca/eng/1100100035204/1100100035205>
- 2.1.5 Individual Affairs: <http://www.aadnc-aandc.gc.ca/eng/1382702626948/1382702680155>

3.0 BUSINESS AND TECHNICAL ENVIRONMENT

3.1 Business Environment

- 3.1.1 DIAND’s ESDPP and RIA sectors are located within the National Capital Region (NCR). The sectors operate within a standard office environment for supporting IT projects, and maintains regular working hours (Monday to Friday, 09:00 to 17:00 Eastern Time, excluding statutory and government holidays (“Regular Working Hours”)) (RIA also has an office in Winnipeg, Manitoba operating under Central time).
- 3.1.2 The Contractor must provide services to the Client in relation to this requirement during the Department’s Regular Working Hours, as identified above, with occasional requirements for availability to provide services outside the Regular Working Hours of the Client, as specified in any Task Authorization(s).
- 3.1.3 *Work Outside of Regular Working Hours*
All Contractor personnel must be available to work outside Regular Working Hours for scheduled work as required, during the duration of the Contract. The Project Authority will advise the Contractor of requirements for scheduled extended hours of work and/or work outside Regular Working Hours at least 48 hours in advance.
- 3.1.4 The Application Development / Database and Data Administration (ADDDA) Directorate will provide technical expertise and conduct any technical work required on any systems with which the Contractor will work.

3.2 Technical Environment

- 3.2.1 The Contractor must provide all written deliverables and services provided in conformance with DIAND’s standard desktop operating software, currently, Microsoft Office Suite (including Word, Excel, and PowerPoint) format.
- 3.2.2 The current Education Information System has information input by First Nations users and by public sector employees in one of three ways: through the web portal; through PDF documents, and through xml schema. The FNCFS Information system has information input by public sector

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employees in one of three ways: through PDF documents; through xml schema; and through excel spreadsheets.

- 3.2.3 In addition, both Systems are integrated with a number of other DIAND systems with which information is shared, for example the GCIMS or FNITP and the Indian Registry System (IRS). As a result, a change in one interconnected system may result in a required change in any of the EIS or FNCFS or IREMS System(s).
- 3.2.4 When working on-site at DIAND, Contractor Resource(s) will be provided with access to workstations with the following software sets:
 - a) Windows 7 Enterprise;
 - b) MS Office Suite;
 - c) CIDM (DIAND's RDIMS implementation) / GCDocs.
- 3.2.5 Adobe Captivate software is DIAND's course development software, which will be made available for Contractor Resource(s) as and when required for the conduct of the work.
- 3.2.6 DIAND uses advanced form-fillable functionality of PDF formats through Adobe software suites. It is anticipated that form development work will be supported by DIAND's ADDDA.
- 3.2.7 All technical and/or research documentation gathered or produced during the course of work must be stored in the Client's document management repository (either CIDM or GCDocs, as specified by the Project Authority).
- 3.2.8 Applicable policies that the Contractor must follow in the performance of related aspects of the project include DIAND's Data Collection Policy (which will be provided to the Contractor on request), and the Treasury Board Policy on Information Management (<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12742>).
- 3.2.9 The ESDPP Systems is developed using Microsoft .NET Framework 3.5 with an Oracle database.
- 3.2.10 The CASE tool Enterprise Architect (EA) must be used to capture all requirements and design data. All project deliverables (except those in EA) must be managed within the departmental document management repository.
- 3.2.11 The EIS is currently operational, and in a state of ongoing functional maintenance. In 2015-2016 and 2016-2017, ESDPP has completed consultation with stakeholders to identify and prioritize functional requirements for on-going maintenance and development of the EIS.
- 3.2.12 The FNCFS System is currently operational, and in a state of ongoing functional maintenance.
- 3.2.13 IREMS is a system to be developed.

4.0 SCOPE OF WORK / TASKS:

4.1.0 Contractor Responsibilities

- 4.1.1 The Contractor must provide support for the functional development and maintenance of the ESDPP's and RIA's Systems, as and when requested by Canada.
- 4.1.2 The Contractor will be requested to perform tasks identified in this Statement of Work, as per each category mentioned below, or as it may be specified in any of the Task Authorization(s).
- 4.1.3 All work must be done in conformity with the instructions issued by and to the satisfaction of the Project Authority.

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- 4.1.4 The Contractor must conduct work related to their Resource Category, and within the following categories, as defined in any Task Authorization:

4.2.0 Resource Group 1: Business Resources

The Contractor must provide resources for the following categories:

4.2.1 A.11 Tester – Level 1

Tasks include but are not limited to:

- a) Conducting functional testing of system changes and related reporting;
- b) Developing test scenarios and test scripts;
- c) Establishing software testing procedures for unit test, integration testing and regression testing with emphasis on automating the testing procedures;
- d) Creating and maintaining traceability matrices; and
- e) Any other Work related to this category.

4.2.2 A.11 Tester – Level 2

Tasks include but are not limited to:

- a) Planning and coordinating testing;
- b) Managing walkthroughs and reviews related to testing and implementation readiness;
- c) Providing status reports to project management and Client representatives;
- d) Establishing and operating "interoperability" testing procedures to ensure that the interaction and co-existence of various software elements, which are proposed to be distributed on the common infrastructure, conform to appropriate departmental standards (e.g. for performance, compatibility, etc.) and have no unforeseen detrimental effects on the shared infrastructure;
- e) Supervising testing in accordance with the established test plan(s) for all levels of testing; and
- f) Any other Work related to this category.

4.2.3 A.11 Tester – Level 3

Tasks include but are not limited to:

- a) Managing walkthroughs and reviews related to testing and implementation readiness;
- b) Management and monitoring of test plans for all levels of testing;
- c) Providing status reports to project management and Client representatives; and
- d) Any other Work related to this category.

4.2.4 B.1 Business Analyst – Level 1

Tasks include but are not limited to:

- a) Conducting User Acceptance Testing;
- b) Providing Tier 2 help desk support for functional/business issues from users;

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- c) Developing and documenting statements of requirements for considered alternatives;
- d) Performing business analyses of functional requirements to identify information, procedures, and decision flows;
- e) Establishing acceptance test criteria with Client;
- f) Defining and documenting interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems; and
- g) Any other Work related to this category.

4.2.5 B.1 Business Analyst – Level 2

Tasks include but are not limited to:

- a) Fulfilling Performance Measurement functions, particularly developing and/or reviewing or expanding performance measurement strategies;
- b) Fulfilling Business Intelligence functions, including building and adjusting reporting capabilities and reporting formats in Cognos;
- c) Evaluating existing procedures and methods, identifying and documenting items such as database content, structure, application subsystems;
- d) Defining and documenting interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems; and
- e) Any other Work related to this category.

4.2.6 B.1 Business Analyst – Level 3

Tasks include but are not limited to:

- a) Providing expert advice on and leading the implementation of Performance Measurement strategies;
- b) Providing expert advice on and leading the implementation of Business Intelligence strategies;
- c) Supporting the Client in defining functional user requirements and developing system(s) training and user guidance;
- d) Providing training or user coaching/guidance to support functional users in effectively using the system(s); and
- e) Any other Work related to this category.

4.2.7 B.2 Business Architect – Level 3

Tasks include but are not limited to:

- a) Managing business processes;
- b) Assisting and guiding the Client through major business changes;
- c) Developing policies and rules that allow an organization to carry out its mandate and functional responsibilities, and that govern the organization's actual and planned capabilities

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- in terms of computers, data, information, human resources, communication facilities, software and management responsibilities;
- d) Developing the specifications for where, how and why the various organizational components fit together as they do, and how they support the organization's mandate;
- e) Overseeing and/or coordinating development of training and coordination with other stakeholders;
- f) Creating presentations, presenting to various stakeholders, and facilitating meetings and discussions;
- g) Analyzing and developing business "critical success factors";
- h) Analyzing and developing architecture requirements design, process development, process mapping and training;
- i) Being responsible for leading other functional Resources to define business strategy and processes in support of transformation and change management activities;
- j) Participating in change impact analysis and change management activities; and
- k) Any other Work related to this category.

4.3.0 Resource Group 2: Training/Instruction

DIAND will be responsible for providing training rooms and any equipment required for the delivery of training, as well as providing access to physical / technological resources for the production of training materials (e.g. paper, printers, photocopiers, and binders).

The Contractor must provide resources for the following categories:

4.3.1 B.9 Courseware Developer – Level 2

Tasks include but are not limited to:

- a) Developing new or modifying existing e-learning training courses/material, ensuring business rules are taken into consideration. E-learning courses to be developed in such a way that they are user friendly, and timed properly;
- b) Performing needs assessment / analysis for training purposes;
- c) Planning and monitoring training projects; and
- d) Any other Work related to this category.

4.3.2 B.9 Courseware Developer – Level 3

Tasks include but are not limited to:

- a) Recommending instructional media and strategies;
- b) Developing new or modifying existing e-learning training courses/material;
- c) Performing needs assessment / analysis for training purposes;
- d) Developing performance measurement standards;
- e) Planning and monitoring training projects;
- f) Preparing end-users for implementation of courseware materials;
- g) Communicating effectively by visual, oral, and written form with individuals, small groups, and in front of large audiences. and
- h) Any other Work related to this category

4.3.3 B.11 Instructor, IT – Level 2

Tasks include but are not limited to:

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- a) Conducting in-class and/or e-learning/webinar /live-video-based training courses;
- b) Assessing the relevant characteristics of a target audience;
- c) Preparing end-users for implementation of courseware materials;
- d) Communicating effectively by visual, oral, and written form with individuals, small groups, and in front of large audiences; and
- e) Any other Work related to this category

4.3.4 B.11 Instructor, IT – Level 3

Tasks include but are not limited to:

- a) Conducting in-class and/or e-learning/webinar /live-video-based training courses;
- b) Assessing the relevant characteristics of a target audience;
- c) Preparing end-users for implementation of courseware materials;
- d) Communicating effectively by visual, oral, and written form with individuals, small groups, and in front of large audiences;
- e) Providing as-required user coaching and guidance in the effective use of the system(s) to perform business functions; and
- f) Any other Work related to this category

4.3.5 B.14 Technical Writer – Level 2

Tasks include but are not limited to:

- a) Supporting content development for training material;
- b) Documenting help text, user manuals, technical documentation, web page content, etc;
- c) Determining documentation requirements and making plans for meeting them;
- d) Gathering information concerning the features and functions provided by the developers;
- e) Developing a table of content for each document/manual and writing or editing the required content;
- f) Preparing or coordinating the preparation of any required illustrations and diagrams.
- g) Designing the layout of the documents/manuals;
- h) Using word-processing, desk-top publishing and graphics software packages to produce final camera-ready copy; and
- i) Any other Work related to this category

4.3.6 B.14 Technical Writer – Level 3

Tasks include but are not limited to:

- a) Supporting content development for training material;
- b) Documenting help text, user manuals, technical documentation, web page content, etc;
- c) Determining documentation requirements and making plans for meeting them;
- d) Gathering information concerning the features and functions provided by the developers;
- e) Developing a table of content for each document/manual and writing or editing the required content;
- f) Preparing or coordinating the preparation of any required illustrations and diagrams.
- g) Designing the layout of the documents/manuals;
- h) Using word-processing, desk-top publishing and graphics software packages to produce final camera-ready copy;
- i) Reviewing documentation standards and the existing project documentation, and recommending standards and updates;
- j) Assessing the audience for the documents/manuals which are required and preparing a statement of purpose and scope for each;
- k) Performing proofreading and editing of developed materials. As required by the Client, this may include concordant proof-reading / editing between French and English texts; and

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- I) Any other Work related to this category

4.4.0 Resource Group 3: Project Management, Coordination and Communication

The Contractor must provide resources for the following categories:

4.4.1 P.1 Change Management Consultant – Level 1

Tasks include but are not limited to:

- a) Analyzing and develop business processes, process mapping and training;
- b) Being responsible for supporting other functional staff to define business strategy and processes in support of transformation and change management activities;
- c) Participating in change impact analysis and change management activities;
- d) Creating presentations and present to various stakeholders, and facilitate meetings and discussions;
- e) Designing interventions aimed at improving organizational effectiveness through system-centered change;
- f) Carrying out performance monitoring and reporting activities on change management; and
- g) Any other Work related to this category

4.4.2 P.1 Change Management Consultant – Level 3

Tasks include but are not limited to:

- a) Providing both internal and external communications, as well as review any written communications (including but not limited to power-point presentations, website content, content of forms, and press releases) for or about Indigenous communities to ensure cultural appropriateness and overall accuracy;
- b) Analyzing and developing business "critical success factors";
- c) Provide change management leadership which aligns to proven methodologies to support end-to-end change;
- d) Leading and participating in change impact identification, analysis and the design, development and implementation of change management activities;
- e) Support definition of training needs and other mediums to assist in implementing effective change;
- f) Creating presentations, briefing materials and decision documents, presenting to various stakeholders, and facilitating meetings and discussions; and
- g) Any other Work related to this category.

4.4.3 P.7 Project Coordinator – Level 2

Tasks include but are not limited to:

- a) Developing work breakdown structures, scheduling / work planning, coordinating and documenting tasks, assisting in project reporting;
- b) Assisting with financial management, contracts, security access, technical access (e.g. access to networks);
- c) Providing administrative and technical support of a clerical nature as required to a project team;

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- d) Assisting in performing such tasks as maintaining project documentation and application/system libraries;
- e) Tracking project change requests;
- f) Maintaining and updating relevant project information in manual and/or electronic files; project information might include such things as project activity schedule, status reports, correspondence;
- g) Communicating with project management and other project team members on administrative matters related to the project; and
- h) Any other Work related to this category.

4.4.4 P.9 Project Manager – Level 2

Tasks include but are not limited to:

- a) Performing project management duties for one or more concurrent projects;
- b) Developing and delivering presentations to senior management;
- c) Managing several Team Leads, each responsible for an element of the project and its associated project team;
- d) Managing projects during the development, implementation and operations start-up by ensuring that resources are made available and that the project is developed and is fully operational within previously agreed time, cost and performance parameters;
- e) Ensuring that project team members adhere to specified methodologies, standards and guidelines to produce consistent quality products;
- f) Formulating statements of problems; establishing procedures for the development and implementation of significant, new or modified project elements to solve these problems, and obtaining approval thereof;
- g) Defining and documenting the objectives for the project;
- h) Determining budgetary requirements, the composition, roles and responsibilities and terms of reference for the project team;
- i) Reporting progress of the project on an ongoing basis and at scheduled points in the life cycle;
- j) Meeting in conference with stakeholders and other project managers and states problems in a form capable of being solved;
- k) Preparing plans, charts, tables and diagrams to assist in analyzing or displaying problems;
- l) Working with a variety of project management tools;
- m) Being responsible for project sign-off; and
- n) Any other Work related to this category

4.4.5 P.9 Project Manager – Level 3

Tasks include but are not limited to:

- a) Performing project management duties for one or more concurrent projects.
- b) Developing and delivering presentations to senior management.
- c) Managing several Team Lead, each responsible for an element of the project and its associated project team.
- d) Managing the integration and coordination of projects/initiatives with other complementary branch, sector, departmental and inter-departmental initiatives, coordinating with their associated project managers and its associated project team.
- e) Planning, organizing and coordinating all activities related to IM/IT projects.
- f) Performing cost/benefit, risk and impact analyses of proposed initiatives, including implementation plans.

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- g) Managing projects during the development, implementation and operations start-up by ensuring that resources are made available and that the project is developed and is fully operational within previously agreed time, cost and performance parameters.
- h) Ensuring that project team members adhere to specified methodologies, standards and guidelines to produce consistent quality products.
- i) Formulating statements of problems; establishing procedures for the development and implementation of significant, new or modified project elements to solve these problems, and obtaining approval thereof.
- j) Defining and documenting the objectives for the project.
- k) Determining budgetary requirements, the composition, roles and responsibilities and terms of reference for the project team.
- l) Reporting progress of the project on an ongoing basis and at scheduled points in the life cycle.
- m) Meeting in conference with stakeholders and other project managers and states problems in a form capable of being solved.
- n) Preparing plans, charts, tables and diagrams to assist in analyzing or displaying problems.
- o) Working with a variety of project management tools.
- p) Being responsible for project sign-off.
- q) Conducting closeout activities, including post mortems, development of lessons learned.
- r) Ensuring that all processes are documented and that documents are appropriately archived.
- s) Any other Work related to this category

4.4.6 P.12 Risk Management Specialist –Level 2

Tasks include but are not limited to:

- a) Supporting the Project Management function through Program risk analysis, particularly as associated with the risk to the government-Indigenous communities relationship.
- b) Conducting project risk assessments.
- c) Identifying project risks and overall project risks.
- d) Recommending alternative solutions, methodologies and strategies for risk mitigation and management.
- e) Producing and updating risk management plans.
- f) Conducting risk assessments for troubled projects to quickly assess associated risks and recommend courses of action to minimize inherent risks.
- g) Assisting in prioritization and assignment of risks.
- h) Assisting in the development and/or implementation of Risk Management Plans.
- i) Managing the implementation of Risk Management Plans to identify, analyze, plan, track and control project risks on a continuous basis throughout the project life cycle.
- j) Coaching, mentoring and training project teams in risk mitigation techniques.
- k) Any other Work related to this category

5.0 REPORTING REQUIREMENTS

- 5.1 Prior to commencing work under a Task Authorization, the Contractor must attend a preliminary meeting with the Project Authority at the time and location designated by DIAND.
- 5.2 The Contractor must facilitate and maintain regular communication with the Project Authority and upon request from the Project Authority must provide written or oral status updates regarding the

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progress of work completed under any Task Authorization(s). Specific Contractor reporting requirements and obligations will be further identified by DIAND, as required, within each Task Authorization and may include, but not necessarily be limited to, any of the following:

- a) Status updates, describing the state of ongoing project work, and covering specific issues as requested by the Project Authority. Status updates must be delivered as required, with fortnightly status updates at a minimum.
- b) Records of Decision, describing decisions and action items arising from meetings. Records of Decisions must be delivered weekly.
- c) Time-sheets, delivered as required, with monthly time-sheets at a minimum.
- d) Milestone Reports, describing the completion of a significant portion of work, delivered as required.
- e) Other reports, as required.

5.3 Reports must be in MS Word format, unless otherwise specified by the Project Authority.

5.4 The Contractor must immediately notify the Project Authority of any issues, problems, or areas of concern that could adversely affect the ability of the Contractor to complete the work specified under any Task Authorization.

6.0 GOVERNMENT REPRESENTATIVE AND SUPPORT

6.1 As required for the completion of work, DIAND will provide:

- a) Access to DIAND's facilities, the Project Authority and/or other DIAND personnel as required for meetings, consultations, and information for the successful completion of the Contractor's work under this Contract and any authorized Task(s);
- b) Access to relevant documentation and reference materials to which the Contractor would not otherwise have access as required to complete the Work;
- c) Review of submissions, as required, and the provision of comments/suggested revisions, in a timely manner;
- d) Other assistance and support as appropriate.

7.0 LOCATION OF WORK AND TRAVEL

7.1 The majority of the Work to be completed under the Contract must be conducted at the Client's premises, located in the National Capital Region (NCR). Some of the Work may take place at the Contractor's premises.

7.2 There may be a requirement for Contractor personnel to travel to major centers outside of the NCR to deliver training as well as for stakeholder engagement, as determined and specified by the Client for any defined task within a Task Authorization.

8.0 LANGUAGE OF WORK

8.1 As a Department of the federal government, DIAND is required under the *Official Languages Act* to provide its services in either Official Language of Canada.

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- 8.2 The majority of work will be conducted in English, with some resources requiring proficiency in French and Bilingually (English and French), as follows:
- a) **B.1 IT Instructor Level 3 and B.11 Business Analyst Level 3:** When requested by DIAND, the specified number of resource(s) to provide training or user coaching and guidance must be proficient (verbal and comprehension) in French and Bilingually (English and French); and
 - b) **B.14 Technical Writer Level 3:** When requested by DIAND, the specified number of resource(s) must be proficient in writing, proofreading and editing English, French and Bilingual French/English documentation (e.g. user guidance documents);
- 8.3 The language(s) of work and deliverables will be specified in each Task Authorization.
- 8.4 In order to ensure quality service delivery to DIAND and Indigenous communities, DIAND reserves the right to require any resource by the Contractor to demonstrate his/her language proficiency through providing evidence of his/her previous work experience providing comparable services to those required by DIAND (which may include written samples of work produced by the resource) in the language(s) of work, and including the contact information of previous clients who can verify the experience.

APPENDIX A TO ANNEX A TASKING ASSESSMENT PROCEDURE

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

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

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

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APPENDIX B TO ANNEX A TASK AUTHORIZATION (TA) FORM

TASK AUTHORIZATION (TA) FORM				
Contractor:		Contract Number:		
Commitment Number:		Client reference number (if required) :		
Task Number (Amendment):		Financial Coding:		
Issue Date:		Response required by:		
1. STATEMENT OF WORK (WORK ACTIVITIES, CERTIFICATIONS AND DELIVERABLES)				
Description of the Project / Work Required:				
2. PERIOD OF SERVICES		FROM (DATE):	TO (DATE):	
3. Work Location:				
4. Invoice sent to:				
5. Travel Requirements:				
6. Language Requirements:				
7. Other Conditions / Constraints:				
8. Level of Security Clearance Required for the Contractor Personnel:				
9. Contractor's Response:				
Category and Name of Proposed Resource	PWGSC Security File Number	Firm Per Diem Rate	Estimated # of Days	Total cost
Estimated Cost (A):				
Applicable Taxes (B):				
Total Labour Cost (C= A + B):				
Total Travel & Living Cost (D):				
Maximum TA Price (E = C + D)				
Please note that consultants must not exceed the maximum number of days allocated in the TA.				
9. Contractor's Signature				
Name, Title and Signature of Individual Authorized to Sign on Behalf of Contractor (type or print)		Signature: _____ Date: _____		
10. Approval – Signing Authority				
Signatures (Client)				
Name, Title and Signature of Technical Authority to Sign on Behalf of (type or print)		Signature: _____ Date: _____		

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TASK AUTHORIZATION (TA) FORM	
Signatures (PWGSC)	
Name, Title and Signature of *Contracting Authority to Sign on Behalf of Public Works and Government Services Canada (type or print)	Signature: _____ Date: _____
*Signature required for projects valued at \$0.00 or more, Applicable Taxes included.	
You are requested to sell to her Majesty the Queen in Right of Canada, in accordance with the terms and conditions set out herein, referred to herein, or attached hereto, the services listed herein and in any attached sheets at the price set out there of.	

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APPENDIX C TO ANNEX A

RESOURCES ASSESSMENT CRITERIA AND RESPONSE TABLE

To facilitate resource assessment, Contractors must prepare and submit a response to a draft Task Authorization using the tables provided in this Appendix. 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.

RESOURCE GROUP 1 – BUSINESS RESOURCES

A.11 Tester - Level 1

A.11 Tester – Level 1			
MTC#	Mandatory Technical Criteria	Met / Not Met	Contractor's Response (Cross Reference to Résumé)
MTC1	The proposed resource must demonstrate a minimum of three years of experience as a Tester in an IT environment.		

A.11 Tester – Level 1					
RTC#	Rated Technical Criteria	Years of Experience	Point Rating	Score	Contractor's Response (Cross Reference to Résumé)
RTC1	The proposed resource should demonstrate experience in defining/documenting or analyzing testing scenarios, as well as conducting testing for IT systems which included personal and/or sensitive data.	1 to 2 years 2+ to 3 years	8 points 10 points		
RTC2	The proposed resource should demonstrate experience in testing functions for IT applications that support public sector (federal, provincial, territorial and/or municipal) users.	1 to 2 years 2+ to 3 years	8 points 10 points		
Maximum Points Available:				20	
Minimum Points Required:				16	

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A.11 Tester - Level 2

A.11 Tester – Level 2			
MTC#	Mandatory Technical Criteria	Met / Not Met	Contractor's Response (Cross Reference to Résumé)
MTC1	The proposed resource must demonstrate seven years of experience as a Tester in an IT environment.		

A.11 Tester – Level 2					
RTC#	Rated Technical Criteria	Years of Experience	Point Rating	Score	Contractor's Response (Cross Reference to Résumé)
RTC1	The proposed resource should demonstrate experience in defining/documenting or analyzing testing scenarios, as well as conducting testing for IT systems which included personal and/or sensitive data.	3 to 4 years 4+ to 5 years	12 points 14 points		
RTC2	The proposed resource should demonstrate experience in testing functions for IT applications that support public sector (federal, provincial, territorial and/or municipal) users.	3 to 4 years 4+ to 5 years	12 points 14 points		
	Maximum Points Available:			28	
	Minimum Points Required:			24	

A.11 Tester - Level 3

A.11 Tester – Level 3			
MTC#	Mandatory Technical Criteria	Met / Not Met	Contractor's Response (Cross Reference to Résumé)
MTC1	The proposed resource must demonstrate a minimum of ten years of experience as a Tester in an IT environment.		

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A.11 Tester – Level 3

RTC#	Rated Technical Criteria	Years of Experience	Point Rating	Score	Contractor's Response (Cross Reference to Résumé)
RTC1	The proposed resource should demonstrate experience in defining/documenting or analyzing testing scenarios, as well as conducting testing for IT systems which included personal and/or sensitive data.	6+ to 8 years 8+ to 10 years or more	16 points 20 points		
RTC2	The proposed resource should demonstrate experience in testing functions for IT applications that support public sector (federal, provincial, territorial and/or municipal users).	6+ to 8 years 8+ to 10 years or more	16 points 20 points		
	Maximum Points Available:			40	
	Minimum Points Required:			20	

B.1 Business Analyst – Level 1

B.1 Business Analyst – Level 1

MTC#	Mandatory Technical Criteria	Met / Not Met	Contractor's Response (Cross Reference to Résumé)
MTC1	The proposed resource must demonstrate a minimum of three years of experience as a Business Analyst in an IT environment.		

B.1 Business Analyst – Level 1

RTC#	Rated Technical Criteria	Years of Experience	Point Rating	Score	Contractor's Response (Cross Reference to Résumé)
RTC1	The proposed resource should demonstrate experience in establishing acceptance test criteria with Clients.	1 to 2 years 2+ to 3 years	8 points 10 points		
RTC2	The proposed resource should demonstrate experience in performing	1 to 2 years 2+ to 3 years	8 points 10 points		

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B.1 Business Analyst – Level 1

RTC#	Rated Technical Criteria	Years of Experience	Point Rating	Score	Contractor's Response (Cross Reference to Résumé)
	functional requirements to identify information, procedures and decisions flow.				
	Maximum Points Available:			20	
	Minimum Points Required:			16	

B.1 Business Analyst – Level 2

B.1 Business Analyst – Level 2

MTC#	Mandatory Technical Criteria	Met / Not Met	Contractor's Response (Cross Reference to Résumé)
MTC1	The proposed resource must demonstrate a minimum of seven years of experience as a Business Analyst in an IT environment.		

B.1 Business Analyst – Level 2

RTC#	Rated Technical Criteria	Years of Experience	Point Rating	Score	Contractor's Response (Cross Reference to Résumé)
RTC1	The proposed resource should demonstrate experience in performing measurement functions such as, developing, reviewing or expanding performance measurement strategies.	3 to 4 years 4+ to 5 years	12 points 14 points		
RTC2	The proposed resource should demonstrate experience in the evaluation of existing procedures and methods, database documenting such as content, structure, application and subsystems.	3 to 4 years 4+ to 5 years	12 points 14 points		
RTC3	The proposed resource should demonstrate experience in Business	3 to 4 years 4+ to 5 years	12 points 14 points		

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B.1 Business Analyst – Level 2

RTC#	Rated Technical Criteria	Years of Experience	Point Rating	Score	Contractor's Response (Cross Reference to Résumé)
	Intelligence functions, including building, adjusting reporting formats.				
Maximum Points Available:				42	
Minimum Points Required:				36	

B.1 Business Analyst – Level 3

B.1 Business Analyst – Level 3

MTC#	Mandatory Technical Criteria	Met / Not Met	Contractor's Response (Cross Reference to Résumé)
MTC1	The proposed resource must demonstrate a minimum of ten years of experience as a Business Analyst in an IT environment.		

B.1 Business Analyst – Level 3

RTC#	Rated Technical Criteria	Years of Experience	Point Rating	Score	Contractor's Response (Cross Reference to Résumé)
RTC1	The proposed resource should demonstrate experience in providing expert advice on leading the implementation of Performance and Business Intelligence Strategies.	6+ to 8 years 8+ to 10 years or more	16 points 20 points		
RTC2	The proposed resource should demonstrate experience in providing training, coaching and/or guidance to support functional users in using the system effectively.	6+ to 8 years 8+ to 10 years or more	16 points 20 points		
RTC3					
Maximum Points Available:				40	
Minimum Points Required:				32	

B.2 Business Architect – Level 3

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B.2 Business Architect – Level 3

MTC#	Mandatory Technical Criteria	Met / Not Met	Contractor's Response (Cross Reference to Résumé)
MTC1	The proposed resource must demonstrate a minimum of ten years of experience as a Business Architect in an IT environment.		

B.2 Business Architect – Level 3

RTC#	Rated Technical Criteria	Years of Experience	Point Rating	Score	Contractor's Response (Cross Reference to Résumé)
RTC1	The proposed resource should demonstrate experience in managing business processes.	6+ to 8 years 8+ to 10 years or more	16 points 20 points		
RTC2	The proposed resource should demonstrate experience in analyzing and developing architecture requirements design, process development, process mapping and training.	6+ to 8 years 8+ to 10 years or more	16 points 20 points		
RTC3	The proposed resource should demonstrate experience in developing the specifications for where, how and why the various organizational components fit together and how they support the organization's mandate	6+ to 8 years 8+ to 10 years or more	16 points 20 points		
Maximum Points Available:				60	
Minimum Points Required:				48	

RESOURCE GROUP 2: TRAINING/INSTRUCTION

B.9 Courseware Developer – Level 2

B.9 Courseware Developer – Level 2

MTC#	Mandatory Technical Criteria	Met / Not Met	Contractor's Response (Cross Reference to Résumé)
MTC1	The proposed resource must demonstrate a minimum of seven years		

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	of experience as Courseware Developer in an IT environment.		
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B.9 Courseware Developer – Level 2

RTC#	Rated Technical Criteria	Years of Experience	Point Rating	Score	Contractor’s Response (Cross Reference to Résumé)
RTC1	The proposed resource should demonstrate experience in planning and monitoring training projects.	3 to 4 years 4+ to 5 years	12 points 14 points		
RTC2	The proposed resource should demonstrate experience in developing e-learning training courses/material, ensuring business rules are taken into consideration.	3 to 4 years 4+ to 5 years	12 points 14 points		
	Maximum Points Available:			28	
	Minimum Points Required:			24	

B.9 Courseware Developer – Level 3

B.9 Courseware Developer – Level 3

MTC#	Mandatory Technical Criteria	Met / Not Met	Contractor’s Response (Cross Reference to Résumé)
MTC1	The proposed resource must demonstrate a minimum of ten years of experience as Courseware Developer in an IT environment.		

B.9 Courseware Developer – Level 3

RTC#	Rated Technical Criteria	Years of Experience	Point Rating	Score	Contractor’s Response (Cross Reference to Résumé)
RTC1	The proposed resource should demonstrate experience in having communicated effectively by visual, oral, and written form with individuals, small	6+ to 8 years 8+ to 10 years or more	16 points 20 points		

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B.9 Courseware Developer – Level 3

RTC#	Rated Technical Criteria	Years of Experience	Point Rating	Score	Contractor's Response (Cross Reference to Résumé)
	groups and in front of large audiences. Note: small group is defined as 5 individuals or less whereas large audience is 6 individuals or more..				
RTC2	The proposed resource should demonstrate experience in assessing and/or analyzing the needs for training purposes.	6+ to 8 years 8+ to 10 years or more	16 points 20 points		
RTC3	The proposed resource should demonstrate experience in planning and monitoring training projects.	6+ to 8 years 8+ to 10 years or more	16 points 20 points		
	Maximum Points Available:			60	
	Minimum Points Required:			48	

B.11 Instructor, IT – Level 2

B.11 Instructor, IT – Level 2

MTC#	Mandatory Technical Criteria	Met / Not Met	Contractor's Response (Cross Reference to Résumé)
MTC1	The proposed resource must demonstrate a minimum of seven years of experience as Instructor in an IT environment.		

B.11 Instructor, IT – Level 2

RTC#	Rated Technical Criteria	Years of Experience	Point Rating	Score	Contractor's Response (Cross Reference to Résumé)
RTC1	The proposed resource should demonstrate experience in preparing end-users for implementation of courseware material and conducting in class / e-	3 to 4 years 4+ to 5 years	12 points 14 points		

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B.11 Instructor, IT – Level 2

RTC#	Rated Technical Criteria	Years of Experience	Point Rating	Score	Contractor's Response (Cross Reference to Résumé)
	learning/webinar, training courses.				
RTC2	The proposed resource should demonstrate experience in having communicated effectively by visual, oral, and written form with individuals, small groups and in front of large audiences. Note: small group is defined as 5 individuals or less whereas large audience is 6 individuals or more.	3 to 4 years 4+ to 5 years	12 points 14 points		
	Maximum Points Available:			28	
	Minimum Points Required:			24	

B.11 - Instructor, IT – Level 3

B.11 Instructor, IT – Level 3

MTC#	Mandatory Technical Criteria	Met / Not Met	Contractor's Response (Cross Reference to Résumé)
MTC1	The proposed resource must demonstrate a minimum of ten years of experience as Instructor in an IT environment.		

B.11 Instructor, IT – Level 3

RTC#	Rated Technical Criteria	Years of Experience	Point Rating	Score	Contractor's Response (Cross Reference to Résumé)
RTC1	The proposed resource should demonstrate experience in preparing end-users for implementation of courseware material and conducting in class / e-learning/webinar, training courses.	6+ to 8 years 8+ to 10 years or more	16 points 20 points		

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B.11 Instructor, IT – Level 3

RTC#	Rated Technical Criteria	Years of Experience	Point Rating	Score	Contractor's Response (Cross Reference to Résumé)
RTC2	The proposed resource should demonstrate experience in having communicated effectively by visual, oral, and written form with individuals, small groups and in front of large audiences. Note: small group is defined as 5 individuals or less whereas large audience is 6 individuals or more.	6+ to 8 years 8+ to 10 years or more	16 points 20 points		
	Maximum Points Available:			40	
	Minimum Points Required:			32	

B.14 Technical Writer – Level 2

B.14 Technical Writer – Level 2

MTC#	Mandatory Technical Criteria	Met / Not Met	Contractor's Response (Cross Reference to Résumé)
MTC1	The proposed resource must demonstrate a minimum of seven years of experience as a Technical Writer in an IT environment.		

B.14 Technical Writer – Level 2

RTC#	Rated Technical Criteria	Years of Experience	Point Rating	Score	Contractor's Response (Cross Reference to Résumé)
RTC1	The proposed resource should demonstrate experience in preparing or coordinating the preparation of user manuals, technical documentation, web page content, illustrations and diagrams creation and designing the layout of the documents/manual.	3 to 4 years 4+ to 5 years	12 points 14 points		

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B.14 Technical Writer – Level 2

RTC#	Rated Technical Criteria	Years of Experience	Point Rating	Score	Contractor's Response (Cross Reference to Résumé)
RTC2	The proposed resource should demonstrate experience in using word-processing, desk-top publishing and graphics software packages to produce final camera-ready copy.	3 to 4 years 4+ to 5 years	12 points 14 points		
RTC3	The proposed resource should demonstrate experience in supporting content development for training material.	3 to 4 years 4+ to 5 years	12 points 14 points		
Maximum Points Available:				42	
Minimum Points Required:				36	

B.14 - Technical Writer – Level 3

B.14 Technical Writer – Level 3

MTC#	Mandatory Technical Criteria	Met / Not Met	Contractor's Response (Cross Reference to Résumé)
MTC1	The proposed resource must demonstrate a minimum of ten years of experience as a Technical Writer in an IT environment.		

B.14 Technical Writer – Level 3

RTC#	Rated Technical Criteria	Years of Experience	Point Rating	Score	Contractor's Response (Cross Reference to Résumé)
RTC1	The proposed resource should demonstrate experience in preparing or coordinating the preparation of user manuals, technical documentation, web page content, illustrations ad diagrams creation,	6+ to 8 years 8+ to 10 years or more	16 points 20 points		

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B.14 Technical Writer – Level 3

RTC#	Rated Technical Criteria	Years of Experience	Point Rating	Score	Contractor's Response (Cross Reference to Résumé)
	designing the layout of the documents/manual.				
RTC2	The proposed resource should demonstrate experience in using word-processing, desk-top publishing and graphics software packages to produce final camera-ready copy.	6+ to 8 years 8+ to 10 years or more	16 points 20 points		
RTC3	The proposed resource should demonstrate experience in supporting content development for training material.	6+ to 8 years 8+ to 10 years or more	16 points 20 points		
RTC4	The proposed resource should demonstrate experience in proofreading and editing of developed materials.	6+ to 8 years 8+ to 10 years or more	16 points 20 points		
	Maximum Points Available:			80	
	Minimum Points Required:			64	

RESOURCE GROUP 3: PROJECT MANAGEMENT, COORDINATION AND COMMUNICATION

P.1 Change Management Consultant – Level 1

P.1 Change Management Consultant – Level 1			
MTC#	Mandatory Technical Criteria	Met / Not Met	Contractor's Response (Cross Reference to Résumé)
MTC1	The proposed resource must demonstrate a minimum of three years of experience as a Change Management Consultant in an IT environment.		

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P.1 Change Management Consultant – Level 1

RTC#	Rated Technical Criteria	Years of Experience	Point Rating	Score	Contractor's Response (Cross Reference to Résumé)
RTC1	The proposed resource should demonstrate experience in analyzing and developing business processes, mapping and training.	1 to 2 years 2+ to 3 years	8 points 10 points		
RTC2	The proposed resource should demonstrate experience being responsible for supporting other functional staff to define business strategy and processes.	1 to 2 years 2+ to 3 years	8 points 10 points		
RTC3	The proposed resource should demonstrate experience in carrying out performance monitoring and reporting activities.	1 to 2 years 2+ to 3 years	8 points 10 points		
Maximum Points Available:				30	
Minimum Points Required:				24	

P.1 Change Management Consultant – Level 3

P.1 Change Management Consultant – Level 3

MTC#	Mandatory Technical Criteria	Met / Not Met	Contractor's Response (Cross Reference to Résumé)
MTC1	The proposed resource must demonstrate a minimum of ten years of experience as a Change Management Consultant in an IT environment.		

P.1 Change Management Consultant – Level 3

RTC#	Rated Technical Criteria	Years of Experience	Point Rating	Score	Contractor's Response (Cross Reference to Résumé)
RTC1	The proposed resource should demonstrate experience in leading and participating in change impact identification,	6+ to 8 years 8+ to 10 years or more	16 points 20 points		

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P.1 Change Management Consultant – Level 3

RTC#	Rated Technical Criteria	Years of Experience	Point Rating	Score	Contractor's Response (Cross Reference to Résumé)
	analysis and the design, development and implementation of change management activities.				
RTC2	The proposed resource should demonstrate experience in implementing effective change, providing both internal and external communications.	6+ to 8 years 8+ to 10 years or more	16 points 20 points		
RTC3	The proposed resource should demonstrate experience in implementing effective change.	6+ to 8 years 8+ to 10 years or more	16 points 20 points		
	Maximum Points Available:			60	
	Minimum Points Required:			48	

P.7 - Project Coordinator – Level 2

P.7 Project Coordinator – Level 2

MTC#	Mandatory Technical Criteria	Met / Not Met	Contractor's Response (Cross Reference to Résumé)
MTC1	The proposed resource must demonstrate a minimum of seven years of experience as a Project Coordinator in an IT environment.		

P.7 Project Coordinator – Level 2

RTC#	Rated Technical Criteria	Years of Experience	Point Rating	Score	Contractor's Response (Cross Reference to Résumé)
RTC1	The proposed resource should demonstrate experience in developing work breakdown structures, scheduling/work planning, coordinating and documenting tasks, tracking project changes requests,	3 to 4 years 4+ to 5 years	12 points 14 points		

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P.7 Project Coordinator – Level 2

RTC#	Rated Technical Criteria	Years of Experience	Point Rating	Score	Contractor's Response (Cross Reference to Résumé)
	assisting in project reporting.				
RTC2	The proposed resource should demonstrate experience in communicating with a project management and other project team members on administrative matters related to the project.	3 to 4 years 4+ to 5 years	12 points 14 points		
RTC3	The proposed resource should demonstrate experience in providing administrative and technical support of a clerical nature.	3 to 4 years 4+ to 5 years	12 points 14 points		
Maximum Points Available:				42	
Minimum Points Required:				36	

P.9 Project Manager – Level 2

P.9 Project Manager – Level 2

MTC#	Mandatory Technical Criteria	Met / Not Met	Contractor's Response (Cross Reference to Résumé)
MTC1	The proposed resource must demonstrate a minimum of seven years of experience as a Project Manager in an IT environment.		

P.9 Project Manager – Level 2

RTC#	Rated Technical Criteria	Years of Experience	Point Rating	Score	Contractor's Response (Cross Reference to Résumé)
RTC1	The proposed resource should demonstrate experience in managing several Team leads, each responsible for an element of the project.	3 to 4 years 4+ to 5 years	12 points 14 points		
RTC2	The proposed resource should demonstrate	3 to 4 years	12 points		

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P.9 Project Manager – Level 2

RTC#	Rated Technical Criteria	Years of Experience	Point Rating	Score	Contractor's Response (Cross Reference to Résumé)
	experience in determining budgetary requirements, the composition, roles and responsibilities and terms of reference for the project team.	4+ to 5 years	14 points		
RTC3	The proposed resource should demonstrate experience in reporting on the progress of the project on an ongoing basis and throughout the life cycle of the project.	3 to 4 years 4+ to 5 years	12 points 14 points		
RTC4	The proposed resource should demonstrate experience in ensuring that project team members adhere to specified methodologies, standards and guidelines to produce consistent quality products.	3 to 4 years 4+ to 5 years	12 points 14 points		
Maximum Points Available:				56	
Minimum Points Required:				48	

P.9 Project Manager – Level 3

P.9 Project Manager – Level 3

MTC#	Mandatory Technical Criteria	Met / Not Met	Contractor's Response (Cross Reference to Résumé)
MTC1	The proposed resource must demonstrate a minimum of ten years of experience as a Project Manager in an IT environment.		

P.9 Project Manager – Level 3

RTC#	Rated Technical Criteria	Years of Experience	Point Rating	Score	Contractor's Response (Cross Reference to Résumé)
RTC1	The proposed resource should demonstrate	6+ to 8 years	16 points		

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P.9 Project Manager – Level 3

RTC#	Rated Technical Criteria	Years of Experience	Point Rating	Score	Contractor's Response (Cross Reference to Résumé)
	experience in planning, organizing and coordinating all activities related to IM/IT projects including conducting closeout activities, post mortems.	8+ to 10 years or more	20 points		
RTC2	The proposed resource should demonstrate experience in reporting on the progress of the project on an ongoing basis and throughout the life cycle of the project.	6+ to 8 years 8+ to 10 years or more	16 points 20 points		
RTC3	The proposed resource should demonstrate experience in managing projects during the development, implementation and operations start-up by ensuring that resources are made available and that the project is developed and is fully operational within previously agreed time, cost and performance parameters including being responsible for project sign-off.	6+ to 8 years 8+ to 10 years or more	16 points 20 points		
RTC4	The proposed resource should demonstrate experience in meeting in conference with stakeholders and other project managers and states problems in a form capable of being solved.	6+ to 8 years 8+ to 10 years or more	16 points 20 points		
	Maximum Points Available:			80	
	Minimum Points Required:			64	

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P.12 Risk Management Specialist – Level 2

P.12 Risk Management Specialist – Level 2			
MTC#	Mandatory Technical Criteria	Met / Not Met	Contractor's Response (Cross Reference to Résumé)
MTC1	The proposed resource must demonstrate a minimum of seven years of experience as a Risk Management Specialist in an IT environment.		

P.12 Risk Management Specialist – Level 2					
RTC#	Rated Technical Criteria	Years of Experience	Point Rating	Score	Contractor's Response (Cross Reference to Résumé)
RTC1	The proposed resource should demonstrate experience in identifying and conducting project risks assessments and recommend courses of action to minimize inherent risks.	3 to 4 years 4+ to 5 years	12 points 14 points		
RTC2	The proposed resource should demonstrate experience in the implementation and managing a Risk Management Plan by identifying, analyzing, planning, tracking and controlling project risks on a continuous basis throughout the project life cycle.	3 to 4 years 4+ to 5 years	12 points 14 points		
RTC3	The proposed resource should demonstrate experience in coaching, mentoring and training project teams in risk mitigation techniques.	3 to 4 years 4+ to 5 years	12 points 14 points		
	Maximum Points Available:			42	
	Minimum Points Required:			36	

Note to Bidders: Attachments 4.1 – Mandatory Technical Criteria and 4.2 – Point-Rated Criteria will be inserted and will form part of the resulting contract.

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

Print name of authorized individual & sign above

Date

2. CERTIFICATION OF AVAILABILITY OF PERSONNEL

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

Print name of authorized individual & sign above

Date

3. CERTIFICATION OF STATUS OF PERSONNEL

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

Print name of authorized individual & sign above

Date

4. CERTIFICATION OF LANGUAGE

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

Print name of authorized individual & sign above

Date

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ANNEX B BASIS OF PAYMENT

INITIAL CONTRACT PERIODS:

Initial Contract Period (Year 1)		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.11 - Tester	Level 1	<i>To be inserted upon contract award</i>
A.11 – Tester	Level 2	<i>To be inserted upon contract award</i>
A.11 – Tester	Level 3	<i>To be inserted upon contract award</i>
B.1 - Business Analyst	Level 1	<i>To be inserted upon contract award</i>
B.1 - Business Analyst	Level 2	<i>To be inserted upon contract award</i>
B.1 - Business Analyst	Level 3	<i>To be inserted upon contract award</i>
B.2 - Business Architect	Level 3	<i>To be inserted upon contract award</i>
B.9 - Courseware Developer	Level 2	<i>To be inserted upon contract award</i>
B.9 - Courseware Developer	Level 3	<i>To be inserted upon contract award</i>
B.11 - Instructor, IT	Level 2	<i>To be inserted upon contract award</i>
B.11 - Instructor, IT	Level 3	<i>To be inserted upon contract award</i>
B.14 - Technical Writer	Level 2	<i>To be inserted upon contract award</i>
B.14 - Technical Writer	Level 3	<i>To be inserted upon contract award</i>
P.1 - Change Management Consultant	Level 1	<i>To be inserted upon contract award</i>
P.1 - Change Management Consultant	Level 3	<i>To be inserted upon contract award</i>
P.7 Project Coordinator	Level 2	<i>To be inserted upon contract award</i>
P.9 Project Manager	Level 2	<i>To be inserted upon contract award</i>
P.9 Project Manager	Level 3	<i>To be inserted upon contract award</i>
P.12 Risk Management Specialist	Level 2	<i>To be inserted upon contract award</i>

Initial Contract Period (Year 2)		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.11 - Tester	Level 1	<i>To be inserted upon contract award</i>
A.11 – Tester	Level 2	<i>To be inserted upon contract award</i>
A.11 – Tester	Level 3	<i>To be inserted upon contract award</i>
B.1 - Business Analyst	Level 1	<i>To be inserted upon contract award</i>

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B.1 - Business Analyst	Level 2	<i>To be inserted upon contract award</i>
B.1 - Business Analyst	Level 3	<i>To be inserted upon contract award</i>
B.2 - Business Architect	Level 3	<i>To be inserted upon contract award</i>
B.9 - Courseware Developer	Level 2	<i>To be inserted upon contract award</i>
B.9 - Courseware Developer	Level 3	<i>To be inserted upon contract award</i>
B.11 - Instructor, IT	Level 2	<i>To be inserted upon contract award</i>
B.11 - Instructor, IT	Level 3	<i>To be inserted upon contract award</i>
B.14 - Technical Writer	Level 2	<i>To be inserted upon contract award</i>
B.14 - Technical Writer	Level 3	<i>To be inserted upon contract award</i>
P.1 - Change Management Consultant	Level 1	<i>To be inserted upon contract award</i>
P.1 - Change Management Consultant	Level 3	<i>To be inserted upon contract award</i>
P.7 Project Coordinator	Level 2	<i>To be inserted upon contract award</i>
P.9 Project Manager	Level 2	<i>To be inserted upon contract award</i>
P.9 Project Manager	Level 3	<i>To be inserted upon contract award</i>
P.12 Risk Management Specialist	Level 2	<i>To be inserted upon contract award</i>

OPTION PERIODS:

Option Contract Period (Year 1)		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.11 - Tester	Level 1	<i>To be inserted upon contract award</i>
A.11 – Tester	Level 2	<i>To be inserted upon contract award</i>
A.11 – Tester	Level 3	<i>To be inserted upon contract award</i>
B.1 - Business Analyst	Level 1	<i>To be inserted upon contract award</i>
B.1 - Business Analyst	Level 2	<i>To be inserted upon contract award</i>
B.1 - Business Analyst	Level 3	<i>To be inserted upon contract award</i>
B.2 - Business Architect	Level 3	<i>To be inserted upon contract award</i>
B.9 - Courseware Developer	Level 2	<i>To be inserted upon contract award</i>
B.9 - Courseware Developer	Level 3	<i>To be inserted upon contract award</i>
B.11 - Instructor, IT	Level 2	<i>To be inserted upon contract award</i>
B.11 - Instructor, IT	Level 3	<i>To be inserted upon contract award</i>

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Client Ref. No. – No de réf. De client A0156-163781	File No. – No du dossier 627ZM. A0156-163781	CCC No./ No CCC – FMS No/ No VME

B.14 - Technical Writer	Level 2	<i>To be inserted upon contract award</i>
B.14 - Technical Writer	Level 3	<i>To be inserted upon contract award</i>
P.1 - Change Management Consultant	Level 1	<i>To be inserted upon contract award</i>
P.1 - Change Management Consultant	Level 3	<i>To be inserted upon contract award</i>
P.7 Project Coordinator	Level 2	<i>To be inserted upon contract award</i>
P.9 Project Manager	Level 2	<i>To be inserted upon contract award</i>
P.9 Project Manager	Level 3	<i>To be inserted upon contract award</i>
P.12 Risk Management Specialist	Level 2	<i>To be inserted upon contract award</i>

Option Contract Period (Year 2)		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.11 - Tester	Level 1	<i>To be inserted upon contract award</i>
A.11 – Tester	Level 2	<i>To be inserted upon contract award</i>
A.11 – Tester	Level 3	<i>To be inserted upon contract award</i>
B.1 - Business Analyst	Level 1	<i>To be inserted upon contract award</i>
B.1 - Business Analyst	Level 2	<i>To be inserted upon contract award</i>
B.1 - Business Analyst	Level 3	<i>To be inserted upon contract award</i>
B.2 - Business Architect	Level 3	<i>To be inserted upon contract award</i>
B.9 - Courseware Developer	Level 2	<i>To be inserted upon contract award</i>
B.9 - Courseware Developer	Level 3	<i>To be inserted upon contract award</i>
B.11 - Instructor, IT	Level 2	<i>To be inserted upon contract award</i>
B.11 - Instructor, IT	Level 3	<i>To be inserted upon contract award</i>
B.14 - Technical Writer	Level 2	<i>To be inserted upon contract award</i>
B.14 - Technical Writer	Level 3	<i>To be inserted upon contract award</i>
P.1 - Change Management Consultant	Level 1	<i>To be inserted upon contract award</i>
P.1 - Change Management Consultant	Level 3	<i>To be inserted upon contract award</i>
P.7 Project Coordinator	Level 2	<i>To be inserted upon contract award</i>
P.9 Project Manager	Level 2	<i>To be inserted upon contract award</i>
P.9 Project Manager	Level 3	<i>To be inserted upon contract award</i>
P.12 Risk Management Specialist	Level 2	<i>To be inserted upon contract award</i>

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Option Contract Period (Year 3)		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.11 - Tester	Level 1	<i>To be inserted upon contract award</i>
A.11 – Tester	Level 2	<i>To be inserted upon contract award</i>
A.11 – Tester	Level 3	<i>To be inserted upon contract award</i>
B.1 - Business Analyst	Level 1	<i>To be inserted upon contract award</i>
B.1 - Business Analyst	Level 2	<i>To be inserted upon contract award</i>
B.1 - Business Analyst	Level 3	<i>To be inserted upon contract award</i>
B.2 - Business Architect	Level 3	<i>To be inserted upon contract award</i>
B.9 - Courseware Developer	Level 2	<i>To be inserted upon contract award</i>
B.9 - Courseware Developer	Level 3	<i>To be inserted upon contract award</i>
B.11 - Instructor, IT	Level 2	<i>To be inserted upon contract award</i>
B.11 - Instructor, IT	Level 3	<i>To be inserted upon contract award</i>
B.14 - Technical Writer	Level 2	<i>To be inserted upon contract award</i>
B.14 - Technical Writer	Level 3	<i>To be inserted upon contract award</i>
P.1 - Change Management Consultant	Level 1	<i>To be inserted upon contract award</i>
P.1 - Change Management Consultant	Level 3	<i>To be inserted upon contract award</i>
P.7 Project Coordinator	Level 2	<i>To be inserted upon contract award</i>
P.9 Project Manager	Level 2	<i>To be inserted upon contract award</i>
P.9 Project Manager	Level 3	<i>To be inserted upon contract award</i>
P.12 Risk Management Specialist	Level 2	<i>To be inserted upon contract award</i>

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627ZM

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627ZM, A0156-163781

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ANNEX C



Government of Canada
Gouvernement du Canada

COMMON-PS-SRCL#6

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		
5. a) Will the supplier require access to Controlled Goods? Le fournisseur aura-t-il accès à des marchandises contrôlées? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes Non Oui		
5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes Non Oui		
6. Indicate the type of access required / Indiquer le type d'accès requis		
6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? (Specify the level of access using the chart in Question 7. c) (Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c) <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes Non Oui		
6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé. <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes Non Oui		
6. c) Is this a commercial courier or delivery requirement with no overnight storage? S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes Non 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"/>
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 type="checkbox"/>	NATO CONFIDENTIAL NATO CONFIDENTIEL <input type="checkbox"/>	PROTECTED C PROTÉGÉ C <input type="checkbox"/>
CONFIDENTIAL CONFIDENTIEL <input type="checkbox"/>	NATO SECRET NATO SECRET <input type="checkbox"/>	CONFIDENTIAL CONFIDENTIEL <input type="checkbox"/>
SECRET SECRET <input 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"/>

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Buyer ID – Id de l'acheteur
627ZM

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A0156-163781

File No. – N° du dossier
627ZM. A0156-163781

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Government of Canada
Gouvernement du Canada

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 ☐ Yes
Non ☐ Oui
- If Yes, indicate the level of sensitivity:
Dans l'affirmative, indiquer le niveau de sensibilité :
9. Will the supplier require access to extremely sensitive INFOSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate? ☒ No ☐ Yes
Non ☐ Oui
- Short Title(s) of material / Titre(s) abrégé(s) du matériel :
Document Number / Numéro du document :

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

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

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

Special comments:

Commentaires spéciaux : _____

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

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

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

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

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

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

PRODUCTION

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

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

11. d) Will the supplier be required to use its IT systems to electronically process, produce or store PROTECTED and/or CLASSIFIED information or data?
Le fournisseur sera-t-il tenu d'utiliser ses propres systèmes informatiques pour traiter, produire ou stocker électroniquement des renseignements ou des données PROTÉGÉS et/ou CLASSIFIÉS? ☒ No ☐ Yes
Non ☐ Oui
11. e) Will there be an electronic link between the supplier's IT systems and the government department or agency?
Disposera-t-on d'un lien électronique entre le système informatique du fournisseur et celui du ministère ou de l'agence gouvernementale? ☒ No ☐ Yes
Non ☐ Oui

Solicitation No. – N° de l'invitation
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Amd. No – N° de la modif.

Buyer ID – Id de l'acheteur
627ZM

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A0156-163781

File No. – N° du dossier
627ZM. A0156-163781

CCC No./ N° CCC – FMS No/ N° VME

COMMON-PS-SRCL#6



Government of Canada
Gouvernement du Canada

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

12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED?

La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE?

☒ No
Non

☐ Yes
Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification".

Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire.

12. b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED?

La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE?

☒ No
Non

☐ Yes
Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification" and indicate with attachments (e.g. SECRET with Attachments).

Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire et indiquer qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).

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Solicitation No. – N° de l'invitation A0156-163781/A	Amd. No – N° de la modif.	Buyer ID – Id de l'acheteur 627ZM
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COMMON-PS-SRCL#6



Government of Canada
Gouvernement du Canada

Contract Number / Numéro du contrat
Security Classification / Classification de sécurité UNCLASSIFIED

PART D - AUTHORIZATION / PARTIE D - AUTORISATION

13. Organization Project Authority / Chargé de projet de l'organisme

Name (print) - Nom (en lettres moulées)	Title - Titre	Signature
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel
Date		

14. Organization Security Authority / Responsable de la sécurité de l'organisme

Name (print) - Nom (en lettres moulées)	Title - Titre	Signature
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel
Date		

15. Are there additional instructions (e.g. Security Guide, Security Classification Guide) attached?

Des instructions supplémentaires (p. ex. Guide de sécurité, Guide de classification de la sécurité) sont-elles jointes?

<input type="checkbox"/> No Non	<input type="checkbox"/> Yes Oui
------------------------------------	-------------------------------------

16. Procurement Officer / Agent d'approvisionnement

Name (print) - Nom (en lettres moulées)	Title - Titre	Signature
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel
Date		

17. Contracting Security Authority / Autorité contractante en matière de sécurité

Name (print) - Nom (en lettres moulées)	Title - Titre	Signature
Saumur, Jacques 0		Digitally signed by Saumur, Jacques 0 DN: c=CA, o=GC, ou=PWGSC-TPSGC, cn=Saumur, Jacques 0 Date: 2017.02.02 11:46:22 -05'00'
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel
Date		

Jacques Saumur
Contract Security Officer
Contracts Security Division | Division des contrats sécurité /
Contract Security Program | Programme de sécurité des contrats /
Public Services and Procurement Canada | Services publics et Approvisionnement Canada
Jacques.Saumur@tpsgc-pwgsc.gc.ca
Telephone | Téléphone 613-948-1732
Facsimile | Télécopieur 613-948-1712

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APPENDIX A TO ANNEX C

SECURITY CLASSIFICATION GUIDE

The Security Requirements Check List (SRCL) (Section 10.a) specifies that this Security Classification Guide must be provided whenever multiple levels of screening are identified.

The related Statement of Work (SOW) defines the professional service required under the National Maintenance and Application Development Project for the Department of Indian Affairs and Northern Development (DIAND) related tasks. The SOW covers aspects related to the provision of multiple personnel at any given time for the duration of the Contract.

Various categories of professional services will be required.

Resource Category	Level	Minimum Security Clearance
A.11 Testeur	Level 1	Reliability Status
A.11 Testeur	Level 2	Reliability Status
A.11 Testeur	Level 3	Reliability Status
B.1 Analyste des activités	Level 1	Reliability Status
B.1 Analyste des activités	Level 2	Reliability Status
B.1 Analyste des activités	Level 3	Reliability Status
B.2 Architecte d'Affaires	Level 3	Reliability Status
B.9 Développeur de didacticiel	Level 2	Reliability Status
B.9 Développeur de didacticiel	Level 3	Reliability Status
B.11 Instructeur, TI	Level 2	Reliability Status
B.11 Instructeur, TI	Level 3	Reliability Status
B.14 Rédacteur technique	Level 2	Reliability Status
B.14 Rédacteur technique	Level 3	Reliability Status
P.1 Conseiller en gestion du changement	Level 1	Reliability Status
P.1 Conseiller en gestion du changement	Level 3	Reliability Status
P.7 Coordonnateur de projet	Level 2	Reliability Status
P.9 Gestionnaire de projet	Level 2	Reliability Status
P.9 Gestionnaire de projet	Level 3	Reliability Status
P.12 Spécialiste en gestion du risque	Level 2	Reliability Status

All resources assigned to this Contract without exception must be cleared at a minimum to the Reliability Status Level.

In addition, each task issued during this Contract will specify as required and when required the requirements for SECRET clearance.

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ATTACHMENT 3.1 BID SUBMISSION FORM

BID SUBMISSION FORM													
Bidder's full legal name													
Authorized Representative of Bidder for evaluation purposes (e.g., clarifications)	<table style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 60%; border-bottom: 1px solid black;">Name</td><td style="border-bottom: 1px solid black;"></td></tr> <tr><td style="border-bottom: 1px solid black;">Title</td><td style="border-bottom: 1px solid black;"></td></tr> <tr><td style="border-bottom: 1px solid black;">Address</td><td style="border-bottom: 1px solid black;"></td></tr> <tr><td style="border-bottom: 1px solid black;">Telephone #</td><td style="border-bottom: 1px solid black;"></td></tr> <tr><td style="border-bottom: 1px solid black;">Fax #</td><td style="border-bottom: 1px solid black;"></td></tr> <tr><td style="border-bottom: 1px solid black;">Email</td><td style="border-bottom: 1px solid black;"></td></tr> </table>	Name		Title		Address		Telephone #		Fax #		Email	
Name													
Title													
Address													
Telephone #													
Fax #													
Email													
Number of the Supply Arrangement (SA): <i>[Note to Bidders: Please ensure to provide your Supply Arrangement number].</i>													
Bidder's Procurement Business Number (PBN) [see the Standard Instructions 2003] <i>[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.]</i>													
Jurisdiction of Contract: Province or territory in Canada the Bidder wishes to be the legal jurisdiction applicable to any resulting contract (if other than as specified in solicitation).													
Former Public Servants See the Article in Part 2 of the bid solicitation entitled Former Public Servant for a definition of "Former Public Servant".	<p>Is the Bidder a FPS in receipt of a pension as defined in the bid solicitation? Yes _____ No _____</p> <p>If yes, provide the information required by the Article in Part 2 entitled "Former Public Servant"</p> <hr/> <p>Is the Bidder a FPS who received a lump sum payment under the terms of the Work Force Adjustment Directive? Yes _____ No _____</p> <p>If yes, provide the information required by the Article in Part 2 entitled "Former Public Servant"</p>												
Security Clearance Level of Bidder: (Include both the level and the date it was granted) <i>[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].</i>	<p>Level: _____</p> <p>Date granted: _____</p>												

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

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

Signature of Authorized Representative of Bidder

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ATTACHMENT 4.1
MANDATORY TECHNICAL CRITERIA

1. The Bidder

MTC#	Mandatory Technical Criteria	Bidder's Response (Reference to additional substantiating materials included in Bid)
MTC1	<p>Bidder's Project Experience:</p> <p>The Bidder must demonstrate its experience and capacity in providing IM/IT related professional resources for project management or training to support Business applications (e.g. functional maintenance, functional application development, testing, data services, IM/IT project management, IT related Instruction/Training/user guidance/coaching).</p> <p>This experience must be demonstrated in submitting a minimum of two projects, up to a maximum of five projects, conducted in the last seven years (as of bid closing date), for client organizations external to the Bidder's organization. The projects submitted will be used to assess the mandatory criteria listed under sub-sections MTC 1.1 through MTC 1.5 below.</p> <p>For each of the projects submitted, the Bidder must include the following:</p> <ul style="list-style-type: none"> i) a brief description of the scope of services provided (including the value and resource categories and levels) ii) the duration of the project, including start and end dates (dates should be identified by month and year – for example March 2010 – February 2012); iii) a brief summary of the project objectives, needs and issues which necessitated the Bidder's contribution; iv) the extent to which the services were provided on-time, on-budget and in accordance with the established project objectives; 	

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MTC#	Mandatory Technical Criteria	Bidder's Response (Reference to additional substantiating materials included in Bid)
	<p>v) the total dollar-value invoiced for each project presented. Canada reserves the right to request documents to validate the billings claimed (e.g. copies of invoices paid by the client, a letter signed by the client attesting to the volume of work delivered for the amount cited, etc.).</p> <p>vi) the client organization name where the services were provided, along with the contact reference information (name, phone number and valid email address) that can confirm the stated experience.</p>	
MTC1.1	Two of the five projects presented in response to MTC1 must each be of a minimum duration of four months, within the last seven years (as of bid closing date) and have a minimum billing of \$500K (for professional services only, taxes extra).	
MTC1.2	<p>Two of the five projects presented in response to MTC1 must each demonstrate the Bidder's experience in providing professional IM/IT services to its clients in support of an IT system related to one of the following:</p> <ul style="list-style-type: none"> i) education programs or education policy; or ii) social programs or social programs policy, or iii) Indigenous individuals. 	
MTC1.3	<p>Resource Group 1 – Business Resources:</p> <p>Two of the five projects submitted in response to MTC1 must each demonstrate that the Bidder provided resources to its client in two of the following three Resource Categories simultaneously (i.e. during the same dates/duration and on the same project):</p> <ul style="list-style-type: none"> i) Tester; ii) Business Analyst; 	

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MTC#	Mandatory Technical Criteria	Bidder's Response (Reference to additional substantiating materials included in Bid)
	iii) Business Architect.	
MTC1.4	<p>Resource Group 2 – Training/Instruction Resources:</p> <p>Two of the five projects submitted in response to MTC1 must each demonstrate that the Bidder provided resources to its client in two of the following three Resource Categories simultaneously (i.e. during the same dates/duration and on the same project):</p> <ul style="list-style-type: none"> i) Courseware Developer; ii) IT Instructor; iii) Business Architect. 	
MTC1.5	<p>Resource Group 3 – Project Management Resources:</p> <p>Two of the five projects submitted in response to MTC1 must each demonstrate that the Bidder provided resources to its client in two of the following four Resource Categories simultaneously (i.e. during the same dates/duration and on the same project):</p> <ul style="list-style-type: none"> i) Change Management Consultant; ii) Project Coordinator; iii) Project Manager; iv) Risk Management Specialist. 	

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2. RESOURCES

MTC#	Mandatory Technical Criteria	Bidder's Response (Reference to additional substantiating materials included in Bid)
MTC2	<p>Bidder's Proposed Resources under Resource Group 1 – Business Resources:</p> <ul style="list-style-type: none"> a) Resource Category: A.11 Tester - Level 3; b) Resource Category: B.1 Business Analyst -Level 3 c) Resource Category: B.2 Business Architect – Level 3 <p>For this Resource Group, the Bidder must propose one resource in only two of the three Resource Categories and levels identified above, for a total of two resources. If more than one resource per Resource Category is proposed, only the first listed resource will be considered. The Bidder must provide with its bid a résumé for each of the proposed resources.</p> <p>For each proposed resource, the Bidder must demonstrate the resource's experience providing professional IM/IT services relevant and similar to the tasks for the Resource Category as described in the SOW of this bid solicitation.</p> <p>In order to be considered, project experience summaries must include sufficient information in order to allow Canada to determine its similarity and relevance to the SOW requirements of this bid solicitation. This includes:</p> <ul style="list-style-type: none"> a) The name of the client organization for whom the services were provided; b) A summary of the project objectives, needs and issues which necessitated the contribution of the resource; c) A description of the services and deliverables provided by the resource and how they relate to the SOW of this bid solicitation; and 	

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MTC#	Mandatory Technical Criteria	Bidder's Response (Reference to additional substantiating materials included in Bid)
	<p>d) The duration, including start and finish dates (dates should be identified by month and year – for example March 2010 – February 2012).</p>	
MTC2.1	<p>Each proposed resource must meet the minimum years of experience in accordance to the Resource Category under which they have been proposed as indicated below:</p> <ul style="list-style-type: none"> a) A.11 Tester – Level 3 (10+ years of experience); b) B.1 Business Analyst – Level 3 (10+ years of experience); c) B.2 Business Architect – Level 3 (10+ years of experience, or 5+ years of experience with a recognized professional certification). <p>For each project(s) listed under the proposed resource's résumé, it must include the following information:</p> <ul style="list-style-type: none"> i) the specified number of years of experience in accordance with each resource category level; ii) a summary of the project objectives, needs and issues which necessitated the contribution of the proposed resource; iii) a description of the services and deliverables provided by the resource; iv) the duration, including start and end dates (month and year); v) the client organization name where the services were provided, along with the contact reference information (name, phone number and valid email address) that can confirm the stated experience. 	
MTC3	<p>Bidder's Proposed Resources under Resource Group 2 – Training/Instruction Resources:</p> <ul style="list-style-type: none"> a) Resource Category: B.9 Courseware Developer - Level 3; b) Resource Category: B.11 Instructor, IT -Level 3 	

Solicitation No. – N° de l'invitation A0156-163781/A	Amd. No – N° de la modif.	Buyer ID – Id de l'acheteur 627ZM
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MTC#	Mandatory Technical Criteria	Bidder's Response (Reference to additional substantiating materials included in Bid)
	<p>c) Resource Category: B.14 Technical Writer – Level 3</p> <p>For this Resource Group, the Bidder must propose one resource in only two of the three Resource Categories and levels identified above, for a total of two resources. If more than one resource per Resource Category is proposed, only the first listed resource will be considered. The Bidder must provide with its bid a résumé for each proposed resources.</p> <p>For each proposed resource, the Bidder must demonstrate the resource's experience providing professional IM/IT services relevant and similar to the tasks for the resource category as described in the SOW of this bid solicitation.</p> <p>In order to be considered, project experience summaries must include sufficient information in order to allow Canada to determine its similarity and relevance to the SOW requirements of this bid solicitation. This includes:</p> <ul style="list-style-type: none"> a) The name of the client organization for whom the services were provided; b) A summary of the project objectives, needs and issues which necessitated the contribution of the Resource; c) A description of the services and deliverables provided by the Resource and how they relate to the SOW of this bid solicitation; and d) The duration, including start and finish dates (dates should be identified by month and year – for example March 2010 – February 2012). 	
MTC3.1	<p>Each proposed resource must meet the minimum years of experience in accordance to the Resource Category under which they have been proposed as indicated below:</p> <ul style="list-style-type: none"> a) B.9 Courseware Developer – Level 3 (10+ years of experience); b) B.11 Instructor, IT – Level 3 (10+ years of experience); 	

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MTC#	Mandatory Technical Criteria	Bidder's Response (Reference to additional substantiating materials included in Bid)
	<p>c) B.14 Technical Writer – Level 3 (10+ years of experience).</p> <p>For each project(s) listed under the proposed resource's résumé, it must include the following information:</p> <ul style="list-style-type: none"> i) the specified number of years of experience in accordance with each resource category level, including certification if applicable; ii) a summary of the project objectives, needs and issues which necessitated the contribution of the proposed resource; iii) a description of the services and deliverables provided by the resource; iv) the duration, including start and end dates (month and year); v) the client organization name where the services were provided, along with the contact reference information (name, phone number and valid email address) that can confirm the stated experience. 	
MTC4	<p>Bidder's Proposed Resources under Resource Group 3 – Project Management Resources:</p> <ul style="list-style-type: none"> a) Resource Category: P.1 Change Management Consultant - Level 3; b) Resource Category: P.7 Project Coordinator – Level 2; c) Resource Category: P.9 Project Manager – Level 3; d) Resource Category: P.12 Risk Management Specialist – Level 2. <p>For this Resource Group, the Bidder must propose one resource in only two of the four Resource Categories and levels identified above, for a total of two resources. If more than one resource per Resource Category is proposed, only the first listed resource will be considered.</p> <p>For each proposed resource, the Bidder must demonstrate the resource's experience providing professional IM/IT services relevant and similar to</p>	

Solicitation No. – N° de l'invitation A0156-163781/A	Amd. No – N° de la modif.	Buyer ID – Id de l'acheteur 627ZM
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MTC#	Mandatory Technical Criteria	Bidder's Response (Reference to additional substantiating materials included in Bid)
	<p>the tasks for the resource category as described in the SOW of this bid solicitation.</p> <p>In order to be considered, project experience summaries must include sufficient information in order to allow Canada to determine its similarity and relevance to the SOW requirements of this bid solicitation. This includes:</p> <ul style="list-style-type: none"> a) The name of the client organization for whom the services were provided; b) A summary of the project objectives, needs and issues which necessitated the contribution of the Resource; c) A description of the services and deliverables provided by the resource and how they relate to the SOW of this bid solicitation; and d) The duration, including start and finish dates (dates should be identified by month and year – for example March 2010 – February 2012). 	
MTC4.1	<p>Each proposed resource must meet the minimum years of experience in accordance to the Resource Category under which they have been proposed as indicated below:</p> <ul style="list-style-type: none"> a) P.1 Change Management Consultant – Level 3 (10+ years of experience, or 5+ years of experience with a recognized professional certification); b) P.7 Project Coordinator – Level 2 (5 to 10 years of experience); c) P.9 Project Manager – Level 3 (10+ years of experience, or 5+ years of experience with a recognized professional certification); 	

Solicitation No. – N° de l'invitation A0156-163781/A	Amd. No – N° de la modif.	Buyer ID – Id de l'acheteur 627ZM
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MTC#	Mandatory Technical Criteria	Bidder's Response (Reference to additional substantiating materials included in Bid)
	<p>d) P.12 Risk Management Specialistist – Level 2 (5 to 10 years of experience).</p> <p>For each project(s) listed under the proposed resource's résumé, it must include the following information:</p> <ul style="list-style-type: none"> i) the specified number of years of experience in accordance with each resource category level, including certifications if applicable; ii) a summary of the project objectives, needs and issues which necessitated the contribution of the proposed resource; iii) a description of the services and deliverables provided by the resource; iv) the duration, including start and end dates (month and year); v) the client organization name where the services were provided, along with the contact reference information (name, phone number and valid email address) that can confirm the stated experience. 	

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ATTACHMENT 4.2
POINT-RATED TECHNICAL CRITERIA

1. THE BIDDER

RTC#	Rated Technical Criteria	Points Scale	Maximum Points	Bidder's Response (Reference to additional Substantiating Materials included in Bid)
RTC1	<p>Bidder's Demonstrated Resource Capacity</p> <p>The projects submitted in response to Mandatory Criterion MTC1 will be evaluated on the basis of the Bidder's experience in providing professional IM/IT resources, for project management or training/instruction, to support Business applications (e.g. functional maintenance, functional application development, testing and data services), and Production Support (i.e. Project Management and IT-related Instruction/Training/user guidance/coaching) and its relevance and similarity to DIAND's requirements, in terms of scope and complexity, nature, and size, as it is described in the SOW of this bid solicitation.</p> <p>The Bidder should use two of the projects submitted for MTC1, to demonstrate experience for each of RTC1 a), RTC1 b), and RTC1 c).</p>			
RTC1 a)	<p>Scope and Complexity:</p> <p>The scope and complexity of the services provided by the Bidder during the cited projects, and the extent to which this scope of services is consistent with DIAND's requirement as expressed within the SOW of this bid solicitation. Similar and relevant services include:</p> <ul style="list-style-type: none"> i. Providing business services for a large (over 250-users) IT system by establishing business requirements, documenting the system's business architecture, running requirements sessions and prioritization sessions, etc.; ii. Providing training services to IT system users, including IT-related Instruction/Training/user guidance/coaching services, creation of training materials (e.g. manuals, e-learning modules), preparation of training plans, provision of technical writing services for manuals, instructions and other documents, etc.; iii. Providing project management services, including project change or risk management activities with stakeholders as well as 	<p>4 points per project</p> <p>4 points per project</p> <p>4 points per project</p>	24	

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RTC#	Rated Technical Criteria	Points Scale	Maximum Points	Bidder's Response (Reference to additional Substantiating Materials included in Bid)	
	internal and external IT system users, internal and external communications with clients and/or stakeholders, financial and budget management, briefing senior management, or other related project management activities.				
RTC1 b)	<p>Nature:</p> <p>The nature of the client's project to whom the Bidder has provided services, demonstrating experience, understanding and knowledge relevant and similar to DIAND's requirements as expressed in the SOW of this bid solicitation and based on the following:</p> <ul style="list-style-type: none"> i. Application/project supported by the Bidder involved services for the support of Indigenous organizations and First Nation band councils; ii. Application/project supported by the Bidder involved the fields of education; or social programs; or policy; or services to Indigenous individuals. iii. The experience, understanding and knowledge demonstrated by the Bidder involved: <ul style="list-style-type: none"> 1) The obligations of INAC in providing services to Indigenous communities; and 2) Case management systems. 	<p>2 points per project</p> <p>2 points per project</p> <p>1 point per project for iii 1) 1 point per project for iii 2)</p>	12		
RTC1 c)	<p>Size:</p> <p>The (size) similarity and relevance of the client organization's environment and requirement for resources, and the extent to which this requirement is consistent with DIAND's requirement as expressed within the SOW of this bid solicitation. Similar and relevant environment and requirement for resources include:</p> <ul style="list-style-type: none"> i. Operating in a public sector (Federal, Provincial, Territorial or Municipal) environment; 	2 points per project	8		

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RTC#	Rated Technical Criteria	Points Scale	Maximum Points	Bidder's Response (Reference to additional Substantiating Materials included in Bid)	
	ii. Supplying at least two categories of resources at various levels during the same time period for any of the resource categories identified under MTC1.3, MTC1.4 and MTC1.5.	2 points per project			
RTC2	Bidder's Approach and Methodology The Bidder should include within its bid a written description of its approach and methodology in providing professional IM/IT resources to support Business applications (e.g. functional maintenance, functional application development, testing and data services), and Production Support (i.e. Project Management and IT-related Instruction/Training/user guidance/coaching). In this section of its bid, the Bidder should address each of the Technical Criteria (RTC2 a) and RTC2 b)) listed below, detailing how it proposes to provide quality services to DIAND and demonstrating how its approach has been applied effectively in delivery of services to its clients. The Bidder will be evaluated based on the description of its proposed work approach and methodologies in each of the areas of Resourcing, and Transition and Work Management with respect to the thoroughness of the approach and demonstration of delivering previous quality outcomes for clients, as described below.				
RTC2 a)	Resourcing: The Bidder's approach to Resourcing will be evaluated as follows: i) Bidder's approach effectively addresses the following: 1. resource identification; 2. vetting/qualification; 3. securing/placement of resources with the client; and 4. resource retention. ii) Bidder's approach demonstrates experience ensuring availability of resources in a variety of categories, levels and skillsets and mitigation of resource transition/turnover.	RTC2 a) i) and ii) will each be assessed, and points will be allocated based on the following: <i>Points will be allocated based on the Bidder proposed description of how it intends to respond to each elements identified under RTC2 a) i).</i> <i>2 points will be allocated for <u>each</u> of the elements under RTC a) i</i>		12	

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RTC#	Rated Technical Criteria	Points Scale	Maximum Points	Bidder's Response (Reference to additional Substantiating Materials included in Bid)	
		<i>4 points will be allocated based on the Bidder's demonstrated experience ensuring availability of resources in a variety of categories, and its ability to deliver outcomes in accordance to RTC2 a) ii).</i>			
RTC2 b)	<p>Transition and Project Management:</p> <p>The Bidder's approach to Transition Management and Project Management at the Task, Project/System and contract level, will be evaluated as follows:</p> <p>i) Bidder's approach provides for effective knowledge transfer to incoming and from outgoing project resources (including both Client staff and any contractors/external resources, as appropriate), resulting in timely ramp-up(s) and close-out(s) and a sustainable and reusable knowledge base that is readily accessible by the client.</p> <p>ii) Bidder's overall approach to Work Management at the Task, Project and Contract levels demonstrates a thorough approach to planning, implementation and management of timelines, delivery of deliverables/milestones, cost/budget and expenditures, quality assurance and reporting.</p>	<p>RTC2 b) i) and ii) will each be assessed using the following scale (as applicable to the maximum number of points available per criterion):</p> <p>RTC2 b) i</p> <p>5 points – Very Good</p> <p>The response demonstrates a very good knowledge transfer to incoming and from outgoing project resources (i.e. timely ramp-up(s) and close-out(s) and a sustainable and reusable knowledge).</p> <p>3 points – Good</p> <p>The response demonstrates a good knowledge transfer to incoming and from outgoing project resources (i.e.</p>	10		

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RTC#	Rated Technical Criteria	Points Scale	Maximum Points	Bidder's Response (Reference to additional Substantiating Materials included in Bid)	
		<p>timely ramp-up(s) and close-out(s) and a sustainable and reusable knowledge).</p> <p>2 points – Acceptable</p> <p>The response demonstrates an acceptable knowledge transfer to incoming and from outgoing project resources (i.e. timely ramp-up(s) and close-out(s) and a sustainable and reusable knowledge).</p> <p>1 point – Poor</p> <p>The response demonstrate a poor knowledge transfer to incoming and from outgoing project resources (i.e. timely ramp-up(s) and close-out(s) and a sustainable and reusable knowledge).</p>			
		Maximum Points Available:	66		
		Minimum Points Required:	48		

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2. RESOURCES

2.1 Resource Group 1 – Business Resources

Note to Bidders: The two proposed resources submitted in response to attachment 4.1, Mandatory Technical Criteria MTC2, will be evaluated using the below applicable Rated Technical Criteria.

2.1.1 A.11 Tester – Level 3

RTC#	Rated Technical Criteria	Points Scale	Maximum Points	Bidder's Response (Reference to additional substantiating materials included in Bid)
RTC3	The project summaries submitted for the A.11 Tester – Level 3 will be evaluated on the basis of the resource's demonstrated experience in providing Testing Services as follows: a) Experience in defining/documenting or analyzing testing scenarios, as well as conducting testing for IT systems which included personal and/or sensitive data; and b) Experience in testing functions for IT applications that support public sector (federal, provincial, territorial and/or municipal) users.	a) 2 points per year up to 10 years. b) 2 points per year up to 10 years.	20 20	
		Maximum Points Available:	40	
		Minimum Points Required:	30	

2.1.2 B.1 Business Analyst – Level 3

RTC#	Rated Technical Criteria	Points Scale	Maximum Points	Bidder's Response (Reference to additional substantiating materials included in Bid)
RTC4	The project summaries submitted for the B.1 Business Analyst – Level 3 will be evaluated on the basis of the resource's demonstrated experience in providing Business Analysis Services as follows: a) Experience in defining/documenting or analyzing functional user requirements that relate to any one of the following:	a) 2 points per year up to 10 years.	20	

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RTC#	Rated Technical Criteria	Points Scale	Maximum Points	Bidder's Response (Reference to additional substantiating materials included in Bid)	
	<ul style="list-style-type: none"> - Indigenous groups, Indigenous issues, programs focused on Indigenous issues or needs; - education or social applications; or - programs delivering public services (to the Canadian public). <p>b) Experience in fulfilling performance measurement or business intelligence functions for IT applications that support public sector and public users.</p>	b) 2 points per year up to 10 years.	20		
		Maximum Points Available:	40		
		Minimum Points Required:	30		

B.2 Business Architect – Level 3

RTC#	Rated Technical Criteria	Points Scale	Maximum Points	Bidder's Response (Reference to additional substantiating materials included in Bid)	
RTC5	<p>The project summaries submitted for the B.2 Business Architect – Level 3 will be evaluated on the basis of the Resource's demonstrated experience in providing Business Services as follows:</p> <p>a) Experience in analysing and developing architecture requirements design, process development, process mapping and training that relate to any one of the following:</p> <ul style="list-style-type: none"> - Indigenous groups, Indigenous issues, programs focused on Indigenous issues or needs; - education or social applications; or - programs delivering public services (to the Canadian public). <p>b) Experience in developing policies and rules that allow an organization to carry out its mandate and functional responsibilities,</p>	<p>a) 2 points per year up to 10 years.</p> <p>b) 2 points per year up to 10 years.</p>	20		

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RTC#	Rated Technical Criteria	Points Scale	Maximum Points	Bidder's Response (Reference to additional substantiating materials included in Bid)	
	and that govern the organization's actual and planned capabilities in a public sector environment.				
		Maximum Points Available:	40		
		Minimum Points Required:	30		

2.2 Resource Group 2 – Training/Instruction Resources

Note to the Bidders: The two proposed resources submitted in response to attachment 4.1, Mandatory Technical Criteria MTC3, will be evaluated using the below applicable Rated Technical Criteria.

2.2.1 B.9 Courseware Developer – Level 3

RTC#	Rated Technical Criteria	Points Scale	Maximum Points	Bidder's Response (Reference to additional substantiating materials included in Bid)
RTC6	<p>The project summaries submitted for the B.9 Courseware Developer – Level 3 will be evaluated on the basis of the resource's demonstrated experience in development of courseware for users of IM/IT systems as follows:</p> <ul style="list-style-type: none"> a) Experience in gathering information concerning the features and functions of a system and developing courseware and learning materials related to any one of the following: <ul style="list-style-type: none"> - Indigenous groups, Indigenous issues, programs focused on Indigenous issues or needs; - education or social applications; or - programs delivering public services (to the Canadian public) b) Experience assessing audience requirements and developing a variety of courseware and training tools (e.g. training manuals, training documents with screenshots and other visuals, job aids and 	<p>a) 2 points per year up to 10 years.</p> <p>b) 2 points per year up to 10 years.</p>	20	

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RTC#	Rated Technical Criteria	Points Scale	Maximum Points	Bidder's Response (Reference to additional substantiating materials included in Bid)	
	other tips tools, training documentation) for multiple type(s) of IT system users (e.g. public sector administrators, public users, etc.).				
		Maximum Points Available:	40		
		Minimum Points Required:	30		

2.2.2 B.11 Instructor, IT – Level 3

RTC#	Rated Technical Criteria	Points Scale	Maximum Points	Bidder's Response (Reference to additional substantiating materials included in Bid)
RTC7	<p>The project summaries submitted for the B.11 Instructor, IT – Level 3 will be evaluated on the basis of the resource's demonstrated experience in the delivery of training services for users of IM/IT systems as follows:</p> <p>a) Experience in delivering in person and virtual training/instruction to any one of the following:</p> <ul style="list-style-type: none"> - Indigenous groups, Indigenous issues, programs focused on Indigenous issues or needs; - education or social applications; or - programs delivering public services (to the Canadian public) <p>b) Experience assessing audience requirements and developing training approaches adequate for the different audiences for multiple type(s) of IT system users (e.g. public sector administrators, public users, etc.)</p>	<p>a) 2 points per year up to 10 years.</p> <p>b) 2 points per year up to 10 years.</p>	<p>20</p> <p>20</p>	
		Maximum Points Available:	40	
		Minimum Points Required:	30	

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2.2.3 B.14 Technical Writer – Level 3

RTC#	Rated Technical Criteria	Points Scale	Maximum Points	Bidder's Response (Reference to additional substantiating materials included in Bid)
RTC8	<p>The project summaries submitted for the B.14 Technical Writer – Level 3 will be evaluated on the basis of the resource's demonstrated experience in development of written documentation for users of IM/IT systems and its relevance and similarity to DIAND's requirements as described in the SOW of this bid solicitation in terms of nature, size, scope and complexity, as follows:</p> <p>a) Experience in gathering information concerning the features and functions of a system and developing systems documentation for functional requirements related to any one of the following:</p> <ul style="list-style-type: none"> - Indigenous groups, Indigenous issues, programs focused on Indigenous issues or needs; - education or social applications; or - programs delivering public services to Canadian citizens. <p>b) Experience assessing audience requirements and developing a variety of systems documentation (e.g. help text, user manuals, technical documentation, web page content) for multiple type(s) of IT system users (e.g. public sector administrators, public users, etc.)</p>	<p>a) 2 points per year up to 10 years.</p> <p>b) 2 points per year up to 10 years.</p>	<p>20</p> <p>20</p>	
		Maximum Points Available:	40	
		Minimum Points Required:	30	

2.3 Resource Group 3 –Project Management Resources

Note to the Bidders: The two proposed resources submitted in response to attachment 4.1, Mandatory Technical Criteria MTC4, will be evaluated using the below applicable Rated Technical Criteria.

2.3.1 P.1 Change Management Consultant – Level 3

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RTC#	Rated Technical Criteria	Points Scale	Maximum Points	Bidder's Response (Reference to additional substantiating materials included in Bid)	
RTC9	<p>The project summaries submitted for the P.1 Change Management Consultant – Level 3 will be evaluated on the basis of the resource's demonstrated experience in providing Change Management Services and its relevance and similarity to DIAND's requirements as described in the SOW of this bid solicitation in terms of nature, size, scope and complexity, as follows:</p> <p>a) Experience in providing both internal and external communications (including written communications) (e.g. power-point presentations, website content, content of forms, and press releases, etc.) for or about Indigenous communities to ensure cultural appropriateness and overall accuracy.</p> <p>b) Experience in leading and participating in change impact identification, analysis and the design, development and implementation of change management activities in a public sector environment.</p>	<p>a) 2 points per year up to 10 years</p> <p>b) 2 points per year up to 10 years</p>	<p>20</p> <p>20</p>		
	Maximum Points Available:		40		
	Minimum Points Required:		30		

2.3.2 P.7 Project Coordinator – Level 2

RTC#	Rated Technical Criteria	Points Scale	Maximum Points	Bidder's Response (Reference to additional substantiating materials included in Bid)	
RTC10	<p>The project summaries submitted for the P.7 Project Coordinator – Level 2 will be evaluated on the basis of the resource's demonstrated experience in coordinating team members' work within IM/IT projects as follows:</p> <p>a) Experience coordinating projects during the development, implementation and operations start-up (e.g. coordination of human resources/contractors, tracking of financial transactions, work plans, documentation) for IM/IT projects.</p>	<p>a) 2 points per year up to 10 years</p>	<p>20</p>		

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RTC#	Rated Technical Criteria	Points Scale	Maximum Points	Bidder's Response (Reference to additional substantiating materials included in Bid)	
	b) Experience coordinating projects related to any one of the following: Indigenous groups, Indigenous issues, programs focused on Indigenous issues or needs, or education or social applications, or programs delivering public services to Canadian citizens.	b) 2 points per year up to 10 years	20		
		Maximum Points Available:	40		
		Minimum Points Required:	30		

2.3.3 P.9 Project Manager – Level 3

RTC#	Rated Technical Criteria	Points Scale	Maximum Points	Bidder's Response (Reference to additional substantiating materials included in Bid)
RTC11	The project summaries submitted for the P.9 Project Manager – Level 3 will be evaluated on the basis of the resource's demonstrated experience in managing IM/IT as follows: a) Experience managing projects during the development, implementation and operations start-up by ensuring that resources are made available and that the project is developed and is fully operational within previously agreed time, cost and performance parameters, for multi-million dollar IM/IT projects. b) Experience in meeting in conference with stakeholders and other project managers and stating problems in a form capable of being solved, involving a variety of stakeholders (e.g. public sector, Indigenous, general public, etc.).	a) 2 points per year up to 10 years b) 2 points per year up to 10 years	20 20	
		Maximum Points Available:	40	
		Minimum Points Required:	30	

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2.3.4 P.12 Risk Management Specialist – Level 2

RTC#	Rated Technical Criteria	Points Scale	Maximum Points	Bidder's Response (Reference to additional substantiating materials included in Bid)
RTC12	<p>The project summaries submitted for the P.12 Risk Management Specialist – Level 2 will be evaluated on the basis of the resource's demonstrated experience in providing expert services to manage the risks related to IM/IT projects as follows:</p> <p>a) Experience providing risk management services during the development, implementation and operations start-up where risks and issues are identified and mitigation strategies considered and/or implemented to support the manager in ensuring that the project is developed and is fully operational within previously agreed time, cost and performance parameters, for multi-million dollar IM/IT projects.</p> <p>b) Experience in meeting in conference with stakeholders, the project management team and other team members in a setting involving multiple groups such as the public sector, Indigenous groups, general public, etc.).</p>	<p>a) 2 points per year up to 10 years</p> <p>b) 2 points per year up to 10 years</p>	<p>20</p> <p>20</p>	
			40	
		Maximum Points Available:	30	
		Minimum Points Required:		

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3.0 RATED TECHNICAL CRITERIA – POINTS SUMMARY

Item	Reference	Maximum. Points Available	Minimum Points Required
1.	The Bidder	66	48
2.1	Resource Group 1 – Business Resources (Proposed resources in only two of the three following resource Category) <ul style="list-style-type: none"> - A.11 Tester – Level 3 - B.1 Business Analyst – Level 3 - B.2 Business Architect – Level 3 	40 40	30 30
2.2	Resource Group 2 – Training/Instruction Resources (Proposed resources in only two of the three following resource Category) <ul style="list-style-type: none"> - B.9 Courseware Developer – Level 3 - B.11 Instructor, IT – Level 3 - B.14 Technical Writer – Level 3 	40 40	30 30
2.3	Resource Group 3 – Project Management Resources (Proposed resources in only two of the four following resource Category) <ul style="list-style-type: none"> - P.1 Change Management Consultant – Level 3 - P.7 Project Coordinator – Level 2 - P.9 Project Manager – Level 3 - P.12 Risk Management Specialist – Level 2 	40 40	30 30
	Maximum Points Available – Total:	306	
	Minimum Points Required – Total:		208

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ATTACHMENT 4.3 - INSTRUCTIONS TO BIDDERS	
INSTRUCTIONS AND NOTES	
1	<p>General Instructions:</p> <p>When completing the pricing sheet, the Bidder is requested to only to enter their firm per diem rate into the unshaded areas. The spreadsheet will automatically calculate the shaded areas where necessary. The formula located in the shaded areas are not to be changed by the Bidder, unless instructed by PWGSC.</p>
2	<p>All unit prices must:</p> <ul style="list-style-type: none">- Be in Canadian Funds;- Exclude the Applicable Taxes.
3	<p>Estimated Number of Days:</p> <p>In respect of the “<i>Estimated Number of Days</i>” listed in column (C) the estimated number of days is for evaluation purposes only during the solicitation process. The actual number of days during the Contract Period and option periods may be more or less, as determined by the Technical Authority.</p>
4	<p>Bidders must quote a firm per diem rate.</p>

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ATTACHMENT 4.3 - PRICING SCHEDULE

INITIAL CONTRACT PERIODS:

Initial Contract Period Year 1					
Resource Group 1 - Business Resources					
(A)	(B)	(C)	(D)	(E)	(F)
Resource Category	Level of expertise	Estimated Numbers of Resources	Estimated Numbers of Days	Firm Per Diem Rate	TOTAL COST (C x D x E)
A.11 - Tester	1	1	38		\$ -
A.11 - Tester	2	1	38		\$ -
A.11 - Tester	3	1	38		\$ -
B.1 - Business Analyst	1	1	77		\$ -
B.1 - Business Analyst	2	3	231		\$ -
B.1 - Business Analyst	3	2	110		\$ -
B.2 - Business Architect	3	1	77		\$ -
Resource Group 2 - Training/Instruction Resources					
(A)	(B)	(C)	(D)	(E)	(F)
Resource Category	Level of expertise	Estimated Numbers of Resources	Estimated Numbers of Days	Firm Per Diem Rate	TOTAL COST (C x D x E)
B.9 - Courseware Developer	2	1	38		\$ -
B.9 - Courseware Developer	3	2	55		\$ -
B.11 - Instructor, IT	2	1	38		\$ -
B.11 - Instructor, IT	3	1	38		\$ -
B.14 - Technical Writer	2	1	17		\$ -
B.14 - Technical Writer	3	1	77		\$ -
Resource Group 3 - Project Management Resources					
(A)	(B)	(C)	(D)	(E)	(F)
Resource Category	Level of expertise	Estimated Numbers of Resources	Estimated Numbers of Days	Firm Per Diem Rate	TOTAL COST (C x D x E)
P.1 - Change Management Consultant	1	1	29		\$ -
P.1 - Change Management Consultant	3	2	110		\$ -
P.7 - Project Coordinator	2	1	77		\$ -
P.9 - Project Manager	2	1	77		\$ -
P.9 - Project Manager	3	2	154		\$ -
P.12 - Risk Management Specialist	2	1	77		\$ -
TOTAL PRICE INITIAL CONTRACT PERIOD FOR YEAR 1:					\$ -

Initial Contract Period Year 2					
Resource Group 1 - Business Resources					
(A)	(B)	(C)	(D)	(E)	(F)
Resource Category	Level of expertise	Estimated Numbers of Resources	Estimated Numbers of Days	Firm Per Diem Rate	TOTAL COST (C x D x E)
A.11 - Tester	1	1	38		\$ -

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A.11 - Tester	2	1	38		\$ -
A.11 - Tester	3	1	38		\$ -
B.1 - Business Analyst	1	1	77		\$ -
B.1 - Business Analyst	2	3	231		\$ -
B.1 - Business Analyst	3	2	110		\$ -
B.2 - Business Architect	3	1	77		\$ -

Resource Group 2 - Training/Instruction Resources

(A)	(B)	(C)	(D)	(E)	(F)
Resource Category	Level of expertise	Estimated Numbers of Resources	Estimated Numbers of Days	Firm Per Diem Rate	TOTAL COST (C x D x E)
B.9 - Courseware Developer	2	1	38		\$ -
B.9 - Courseware Developer	3	2	55		\$ -
B.11 - Instructor, IT	2	1	38		\$ -
B.11 - Instructor, IT	3	1	38		\$ -
B.14 - Technical Writer	2	1	17		\$ -
B.14 - Technical Writer	3	1	77		\$ -

Resource Group 3 - Project Management Resources

(A)	(B)	(C)	(D)	(E)	(F)
Resource Category	Level of expertise	Estimated Numbers of Resources	Estimated Numbers of Days	Firm Per Diem Rate	TOTAL COST (C x D x E)
P.1 - Change Management Consultant	1	1	29		\$ -
P.1 - Change Management Consultant	3	2	110		\$ -
P.7 - Project Coordinator	2	1	77		\$ -
P.9 - Project Manager	2	1	77		\$ -
P.9 - Project Manager	3	2	154		\$ -
P.12 - Risk Management Specialist	2	1	77		\$ -

OPTIONAL CONTRACT PERIODS:

Option Period Year 1

Resource Group 1 - Business Resources

(A)	(B)	(C)	(D)	(E)	(F)
Resource Category	Level of expertise	Estimated Numbers of Resources	Estimated Numbers of Days	Firm Per Diem Rate	TOTAL COST (C x D x E)
A.11 - Tester	1	1	28		\$ -
A.11 - Tester	2	1	28		\$ -
A.11 - Tester	3	1	28		\$ -
B.1 - Business Analyst	1	1	55		\$ -
B.1 - Business Analyst	2	3	165		\$ -
B.1 - Business Analyst	3	2	110		\$ -
B.2 - Business Architect	3	1	55		\$ -

Resource Group 2 - Training/Instruction Resources

B.9 - Courseware Developer	2	1	28		\$ -
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B.9 - Courseware Developer	3	2	110		\$	-
B.11 - Instructor, IT	2	1	28		\$	-
B.11 - Instructor, IT	3	1	28		\$	-
B.14 - Technical Writer	2	1	55		\$	-
B.14 - Technical Writer	3	1	55		\$	-
Resource Group 3 - Project Management Resources						
P.1 - Change Management Consultant	1	1	110		\$	-
P.1 - Change Management Consultant	3	2	165		\$	-
P.7 - Project Coordinator	2	1	55		\$	-
P.9 - Project Manager	2	1	55		\$	-
P.9 - Project Manager	3	2	110		\$	-
P.12 - Risk Management Specialist	2	1	55		\$	-
TOTAL PRICE OPTION PERIOD YEAR 1:					\$	-

Option Period Year 2

Resource Group 1 - Business Resources

(A)	(B)	(C)	(D)	(E)	(F)
Resource Category	Level of expertise	Estimated Numbers of Resources	Estimated Numbers of Days	Firm Per Diem Rate	TOTAL COST (C x D x E)
A.11 - Tester	1	1	28		\$ -
A.11 - Tester	2	1	28		\$ -
A.11 - Tester	3	1	28		\$ -
B.1 - Business Analyst	1	1	55		\$ -
B.1 - Business Analyst	2	3	165		\$ -
B.1 - Business Analyst	3	2	110		\$ -
B.2 - Business Architect	3	1	55		\$ -

Resource Group 2 - Training/Instruction Resources

B.9 - Courseware Developer	2	1	28		\$	-
B.9 - Courseware Developer	3	2	110		\$	-
B.11 - Instructor, IT	2	1	28		\$	-
B.11 - Instructor, IT	3	1	28		\$	-
B.14 - Technical Writer	2	1	55		\$	-
B.14 - Technical Writer	3	1	55		\$	-

Resource Group 3 - Project Management Resources

P.1 - Change Management Consultant	1	1	110		\$	-
P.1 - Change Management Consultant	3	2	165		\$	-
P.7 - Project Coordinator	2	1	55		\$	-
P.9 - Project Manager	2	1	55		\$	-
P.9 - Project Manager	3	2	110		\$	-
P.12 - Risk Management Specialist	2	1	55		\$	-
TOTAL PRICE OPTION PERIOD YEAR 2:					\$	-

Option Period Year 3

Resource Group 1 - Business Resources

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(A)	(B)	(C)	(D)	(E)	(F)
Resource Category	Level of expertise	Estimated Numbers of Resources	Estimated Numbers of Days	Firm Per Diem Rate	TOTAL COST (C x D x E)
A.11 - Tester	1	1	28		\$ -
A.11 - Tester	2	1	28		\$ -
A.11 - Tester	3	1	28		\$ -
B.1 - Business Analyst	1	1	55		\$ -
B.1 - Business Analyst	2	3	165		\$ -
B.1 - Business Analyst	3	2	110		\$ -
B.2 - Business Architect	3	1	55		\$ -
Resource Group 2 - Training/Instruction Resources					
B.9 - Courseware Developer	2	1	28		\$ -
B.9 - Courseware Developer	3	2	110		\$ -
B.11 - Instructor, IT	2	1	28		\$ -
B.11 - Instructor, IT	3	1	28		\$ -
B.14 - Technical Writer	2	1	55		\$ -
B.14 - Technical Writer	3	1	55		\$ -
Resource Group 3 - Project Management Resources					
P.1 - Change Management Consultant	1	1	110		\$ -
P.1 - Change Management Consultant	3	2	165		\$ -
P.7 - Project Coordinator	2	1	55		\$ -
P.9 - Project Manager	2	1	55		\$ -
P.9 - Project Manager	3	2	110		\$ -
P.12 - Risk Management Specialist	2	1	55		\$ -
TOTAL PRICE OPTION PERIOD YEAR 3:					\$ -

ATTACHMENT 5.2 FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY - CERTIFICATION

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

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

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

Complete both A and B.

A. Check only one of the following:

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

OR

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

B. Check only one of the following:

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

OR

- ☐ B2. The Bidder is a Joint venture and each member of the Joint Venture must provide the Contracting Authority with a completed annex Federal Contractors Program for Employment Equity - Certification. (Refer to the Joint Venture section of the Standard Instructions).
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ATTACHMENT 5.3 CANADIAN CONTENT CERTIFICATION

Canadian Content Certification	
As described in the solicitation, bids with at least 80% Canadian content are being given a preference. For the definition of Canadian goods and services, consult the PWGSC SACC clause A3050T.	
On behalf of the bidder, by signing below, I confirm that [<i>check the box that applies</i>]:	
At least 80 percent of the total bid price consists of Canadian goods and services (as defined in the solicitation)	
Less than 80 percent of the total bid price consists of Canadian goods and services (as defined in the solicitation)	
Name of the Authorized Representative of Bidder: _____	
Signature of the Authorized Representative of Bidder: _____	
Solicitation Number: A0156-163781/A	