



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

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

**11 Laurier St. / 11, rue Laurier**

**Place du Portage, Phase III**

**Core 0B2 / Noyau 0B2**

**Gatineau**

**Québec**

**K1A 0S5**

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

**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**

This document contains a security requirement  
Ce document contient des exigences relatives à la  
sécurité

**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

<b>Title - Sujet</b> Peoplesoft Appli. Services (TBIPS)	
<b>Solicitation No. - N° de l'invitation</b> B8987-180005/A	<b>Date</b> 2018-01-23
<b>Client Reference No. - N° de référence du client</b> B8987-180005	
<b>GETS Reference No. - N° de référence de SEAG</b> PW-\$\$ZM-626-32139	
<b>File No. - N° de dossier</b> 626zm.B8987-180005	<b>CCC No./N° CCC - FMS No./N° VME</b>
<b>Solicitation Closes - L'invitation prend fin</b> <b>at - à 02:00 PM</b> <b>on - le 2018-02-12</b>	<b>Time Zone</b> <b>Fuseau horaire</b> Eastern Standard Time EST
<b>F.O.B. - F.A.B.</b> <b>Plant-Usine:</b> <input type="checkbox"/> <b>Destination:</b> <input checked="" type="checkbox"/> <b>Other-Autre:</b> <input type="checkbox"/>	
<b>Address Enquiries to: - Adresser toutes questions à:</b> Holden, Carole	<b>Buyer Id - Id de l'acheteur</b> 626zm
<b>Telephone No. - N° de téléphone</b> (613) 858-9217 ( )	<b>FAX No. - N° de FAX</b> ( ) -
<b>Destination - of Goods, Services, and Construction:</b> <b>Destination - des biens, services et construction:</b> IMMIGRATION, REFUGEES AND CITIZENSHIP CANADA OCIO 365 LAURIER AVENUE WEST, JETS A904 OTTAWA Ontario K1A 1L1 Canada	

**Instructions: See Herein**

**Instructions: Voir aux présentes**

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

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**BID SOLICITATION**

**FOR CONTRACTS AGAINST A SUPPLY ARRANGEMENT FOR TASK-  
BASED INFORMATICS PROFESSIONAL SERVICES (TBIPS)**

**(TIER 2 – NCR)**

**FOR VARIOUS RESOURCE CATEGORIES FOR  
PEOPLESFT APPLICATION SERVICES**

**FOR  
CITIZENSHIP AND IMMIGRATION CANADA (CIC)**

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Solicitation No. - N° de l'invitation  
B8987-180005/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
626zm

Client Ref. No. - N° de réf. du client  
B8987-180005

File No. - N° du dossier  
626zm B8987-180005

CCC No./N° CCC - FMS No/ N° VME

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Annex A Statement of Work

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**Forms:**

Form 1: Bidder Corporate Capacity Form

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**BID SOLICITATION**

**FOR CONTRACTS AGAINST A SUPPLY ARRANGEMENT FOR TASK-BASED INFORMATICS PROFESSIONAL SERVICES (TBIPS)**

**(TIER 2 – NCR)**

**FOR VARIOUS RESOURCE CATEGORIES FOR**

**PEOPLESOFT APPLICATION SERVICES**

**FOR**

**CITIZENSHIP AND IMMIGRATION CANADA (CIC)**

**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 annexes and attachments 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 and Additional Information: includes the certifications and additional information 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 Citizenship and Immigration Canada (CIC) (the "Client") for Task-Based Informatics Professional Services (TBIPS) under the TBIPS Supply Arrangement (SA) method of supply. This requirement is for the provision of PeopleSoft Application Services on an "as-and-when-requested" basis.
- (b) This bid solicitation allows bidders to use the epost Connect service provided by Canada Post Corporation for bid submission. Bidders must refer to Part 2 of the bid solicitation entitled Instructions to bidders for further information.
- (c) It is intended to result in the award of up to two contracts for two years plus three one-year irrevocable options allowing Canada to extend the term of the contract.
- (d) 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 and Security Program (ISP) of Public Works and Government Services Canada (<http://ssi-iss.tpsgc-pwgsc.gc.ca/index-eng.html>) website.

- (e) The requirement is subject to the provisions of the World Trade Organization Agreement on Government Procurement (WTO-AGP), the North American Free Trade Agreement (NAFTA), the Canada-Chile Free Trade Agreement (CCFTA), the Canada-Peru Free Trade Agreement (CPFTA), the Canada-Columbia Free Trade Agreement (CColFTA), the Canada-Panama Free Trade Agreement (CPanFTA), the Canada-European Union Comprehensive Economic and Trade Agreement (CETA), the Canada-Honduras Free Trade Agreement, the Canada-Korea Free Trade Agreement, and the Canadian Free Trade Agreement (CFTA).
- (f) The Federal Contractors Program (FCP) for employment equity applies to this procurement; see Part 5 - Certifications, Part 7 - Resulting Contract Clauses and the attachment titled Federal Contractors Program for Employment Equity - Certification.
- (g) Only TBIPS SA Holders currently holding a TBIPS SA for Tier 2 in the National Capital Region under the EN578-170432 series of SAs 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.
- (h) 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.
- (i) 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.1 Application / Software Architect – PeopleSoft Application Specialist	2	1
A.1 Application / Software Architect – PeopleSoft Application Specialist	3	2
A.1 Application / Software Architect – PeopleSoft Upgrade Specialist	2	1
A.1 Application / Software Architect – PeopleSoft Upgrade Specialist	3	2
A.3 ERP Programmer Analyst - PeopleSoft	2	1
I.1 Data Conversion Specialist - PeopleSoft	2	1
I.1 Data Conversion Specialist - PeopleSoft	3	2
A.2 ERP Functional Analyst – PeopleSoft	2	3
A.2 ERP Functional Analyst – PeopleSoft	3	2

### 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) The 2003 standard instructions is amended as follows:
  - Section 01, entitled Integrity Provisions – bid, is amended as follows:
    - subsection 3.a) is deleted in its entirety and replaced with the following:

“a. at the time of submitting an arrangement under the Request for Supply Arrangements (RFSAs), 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”.
  - Section 05, entitled Submission of bids, is amended as follows:
    - subsection 1 is deleted entirely and replaced with the following:

“Canada requires that each bid, at solicitation closing date and time or upon request from the Contracting Authority, for example in the case of epost Connect service, be signed by the Bidder or by an authorized representative of the Bidder. If a bid is submitted by a joint venture, it must be in accordance with the section entitled Joint venture.”
    - subsection 2.d is deleted entirely and replaced with the following:

“send its bid only to the specified Bid Receiving Unit of Public Works and Government Services Canada (PWGSC) identified in the bid solicitation, or to the address specified in the bid solicitation, as applicable;”
    - subsection 2.e is deleted entirely and replaced with the following:

“ensure that the Bidder's name, return address and procurement business number, bid solicitation number, and solicitation closing date and time are clearly visible on the bid; and,”
    - subsection 4 is amended as follows:

Delete: 60 days  
Insert: 180 days
  - Section 06, entitled Late bids, is deleted entirely and replaced with the following:

“PWGSC will return bids delivered after the stipulated solicitation closing date and time, unless they qualify as a delayed bid as described in the section entitled Delayed bids. For bids submitted using means other than the Canada Post Corporation's epost Connect service, the bid will be returned. For bids submitted using Canada Post Corporation's epost Connect service, conversations initiated by the Bid Receiving Unit via the epost Connect service that contain access, records and information pertaining to a late bid will be deleted.”
  - Section 07, entitled Delayed bids, is amended as follows:

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- subsection 1 is amended to add the following piece of evidence:  
"d. a CPC epost Connect service date and time record indicated in the epost Connect conversation activity."
  - Section 08, entitled Transmission by facsimile, is deleted and replaced by the following:  
"Transmission by facsimile or by epost Connect"
    1. Facsimile
      - a. Unless specified otherwise in the bid solicitation, bids may be submitted by facsimile. The only acceptable facsimile number for responses to bid solicitations issued by PWGSC headquarters is 819-997-9776 or, if applicable, the facsimile number identified in the bid solicitation. The facsimile number for responses to bid solicitations issued by PWGSC regional offices is identified in the bid solicitation.
      - b. For bids transmitted by facsimile, Canada will not be responsible for any failure attributable to the transmission or receipt of the faxed bid including, but not limited to, the following:
        - i. receipt of garbled or incomplete bid;
        - ii. availability or condition of the receiving facsimile equipment;
        - iii. incompatibility between the sending and receiving equipment;
        - iv. delay in transmission or receipt of the bid;
        - v. failure of the Bidder to properly identify the bid;
        - vi. illegibility of the bid; or
        - vii. security of bid data.
      - c. A bid transmitted by facsimile constitutes the formal bid of the Bidder and must be submitted in accordance with the section entitled Submission of bids.
    2. ePost Connect
      - a. Unless specified otherwise in the bid solicitation, bids may be submitted by using the [epost Connect service provided by Canada Post Corporation](https://www.canadapost.ca/web/en/products/details.page?article=epost_connect_send_a) ([https://www.canadapost.ca/web/en/products/details.page?article=epost\\_connect\\_send\\_a](https://www.canadapost.ca/web/en/products/details.page?article=epost_connect_send_a)).
      - b. To submit a bid using epost Connect service, the Bidder must either:
        - i. send directly its bid only to the specified PWGSC Bid Receiving Unit, using its own licensing agreement for epost Connect provided by Canada Post Corporation; or
        - ii. send as early as possible, and in any case, at least six business days prior to the solicitation closing date and time, an email that includes the bid solicitation number to the specified PWGSC Bid Receiving Unit requesting to open an epost Connect conversation. Requests to open an epost Connect conversation received after that time may not be answered.
      - c. If the Bidder is sending an email to the Bid Receiving Unit, the Bid Receiving Unit will then initiate an epost Connect conversation which will allow the Bidder to transmit its bid afterward at any time prior to the solicitation closing date and time. The epost Connect conversation will create an email notification from Canada Post Corporation prompting the Bidder to access the message within the conversation, and the Bidder can reply to the email notification by transmitting its bid.
      - d. If the Bidder is using its own licensing agreement to send its bid, the Bidder must keep the epost Connect conversation open until at least 30 business days after solicitation closing date and time.
      - e. The email address of PWGSC Bid Receiving Unit in Headquarters is: [TPSGC.DGAreceptiondessoumissions-ABBidReceiving.PWGSC@tpsgc-pwgsc.gc.ca](mailto:TPSGC.DGAreceptiondessoumissions-ABBidReceiving.PWGSC@tpsgc-pwgsc.gc.ca).



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The solicitation number must be identified in the epost Connect message field of all electronic transfers.

- f. It should be noted that the use of epost Connect service requires a Canadian mailing address. Should a bidder not have a Canadian address, they may use the Bid Receiving Unit address specified on page 1 of the solicitation in order to register for the epost Connect service.
- g. For bids transmitted by epost Connect service, Canada will not be responsible for any failure attributable to the transmission or receipt of the bid including, but not limited to, the following:
  - i. receipt of a garbled or incomplete bid;
  - ii. availability or condition of the epost Connect service;
  - iii. incompatibility between the sending and receiving equipment;
  - iv. delay in transmission or receipt of the bid;
  - v. failure of the Bidder to properly identify the bid;
  - vi. illegibility of the bid;
  - vii. security of bid data; or
  - viii. inability to create an electronic conversation through the epost Connect service.
- h. A bid transmitted by epost Connect service constitutes the formal bid of the Bidder and must be submitted in accordance with the section entitled Submission of bids."

## **2.2 Submission of Bids**

- (a) The Bidder must submit its bid either electronically by epost Connect as detailed in article 3.1 (a) **OR** in Soft Copy (USB or CD) as detailed in article 3.1 (b).
- (b) If the Bidder simultaneously provides an epost Connect bid submission and a Soft copy bid submission, and if there is a discrepancy between the wording of the epost Connect bid submission and the Soft copy bid submission, the wording of the epost Connect submission will have priority over the wording of the Soft copy bid submission.
- (c) Bids submitted through epost Connect must be submitted by the date and time indicated on page 1 of the bid solicitation.
- (d) Bids submitted in soft copies must be submitted only to Public Works and Government Services Canada (PWGSC) Bid Receiving Unit by the date, time and place indicated on page 1 of the bid solicitation.
- (e) Due to the nature of the bid solicitation, bids transmitted by facsimile will not be accepted.

## **2.3 Enquiries - Bid Solicitation**

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

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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 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.

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**(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**

Any resulting contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in the province of 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 resource category 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) Epost Connect Bid Submission

- (i) If the Bidder chooses to submit its bid electronically, Canada requests that the Bidder submits its bid in accordance with section 8 of the 2003 standard instructions and as amended in Part 2 - Bidder Instructions, Article 2.1 Standard Instructions, Clauses and Conditions. Bidders are required to provide their bid in a single transmission. The epost Connect service has the capacity to receive multiple documents, up to 1GB per individual attachment.
- (ii) The bid must be gathered per section and separated as follows:
  - Section I: Technical Bid
  - Section II: Financial Bid
  - Section III: Certifications

#### (b) Soft Copy Bid Submission (CD or USB)

- (i) If the Bidder chooses to submit its bid in soft copy, Canada requests that the Bidder submits its bid in separate sections as follows:
  - Section I: Technical Bid - One (1) soft copy on a CD or USB key
  - Section II: Financial Bid - One (1) soft copy on a CD or USB key
  - Section III: Certifications - One (1) soft copy on a CD or USB key
- (ii) Canada is not requesting a hard copy of the bid. However, if the bidder submits a hard copy of its bid, and if there is a discrepancy between the wording of the soft copy and the hard copy, the wording of the soft copy will have priority over the wording of the hard copy.

#### (c) 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;
  - (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.

**(d) Joint Venture Experience:**

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

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

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

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

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

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

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

That show in total 100 billable days.

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

**3.2 Section I: Technical Bid**

- (a) The technical bid consists of the following:

- (i) **Bid Submission Form:** Bidders are requested to include the Bid Submission Form - Attachment 3.1 with their bids. It provides a common form in which bidders can provide information required for evaluation and contract award, such as a contact name and the Bidder's Procurement Business Number, etc. Using the form to provide this information is not mandatory, but it is recommended. If Canada determines that the information required by the Bid Submission Form is incomplete or requires correction, Canada will provide the Bidder with an opportunity to do so.
- (ii) **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 the Bidder with an opportunity 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:** 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 number of résumés, per Resource Category, 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:
- (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 and Additional Information).
- (B) For educational requirements for a particular degree, designation or certificate, Canada will only consider educational programmes that were successfully completed by the resource by the time of bid closing. If the degree, designation or certification was issued by an educational institution outside of Canada, the



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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 be 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, Canada will not consider experience gained as part of an educational program, except for experience gained through a formal co-operative program at a post-secondary institution.
- (E) For any requirements that specify a particular time period (e.g., 2 years) of work experience, Canada will disregard any information about experience if the technical bid does not include the relevant 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 one or more customer references for MTC1 and RTC2, as applicable. The customer reference must confirm, if requested by PWGSC, the information required for the Bidder in MTC1 of Attachment 4.1 and RTC2 of Attachment 4.2.
- (B) The form of question to be used to request confirmation from the customer reference is as follows:

i) For MTC1:

*Has [the Bidder] provided your organization with the services described below?*

*The Bidder must have performed one PeopleSoft Application Services contract. These services must have been provided within the past five years (as of bid closing date). The contract identified must:*

*1. Have been with a single client;*

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2. *Have an initial minimum value of \$2,000,000.00 (Cdn) excluding applicable taxes, not including amendments*
  3. *Have an initial minimum contract period of one year;*
  4. *Have been completed in the last five years (as of bid closing date) or has been ongoing for a minimum of six months (as of bid closing date); and*
  5. *Have included the provision of the services in at least two of the following same or similar categories listed in Section 5. (copy attached) of the Statement of Work of this bid solicitation:*
    - a) *A.1 Application / Software Architect – PeopleSoft Application Specialist, Level 2 or Level 3;*
    - b) *A.1 Application / Software Architect – PeopleSoft Upgrade Specialist, Level 2 or Level 3;*
    - c) *A.3 ERP Programmer Analyst – PeopleSoft, Level 2;*
    - d) *I.1 Data Conversion Specialist – PeopleSoft, Level 2 or Level 3;*
    - e) *A.2 ERP Functional Analyst – PeopleSoft, Level 2 or Level 3.*

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

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

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

ii) For RTC2:

*Has [the Bidder] provided your organization with the services of the resource categories described below?*

1. *Have included the provision of the services in one or more of the following same or similar categories listed in Section 5. (copy attached) of the Statement of Work of this bid solicitation on one or more contracts, within the last five years (as of bidding closing):*
  - a) *A.1 Application / Software Architect – PeopleSoft Application Specialist, Level 2 or Level 3;*
  - b) *A.1 Application / Software Architect – PeopleSoft Upgrade Specialist, Level 2 or Level 3;*
  - c) *A.3 ERP Programmer Analyst – PeopleSoft, Level 2;*
  - d) *I.1 Data Conversion Specialist – PeopleSoft, Level 2 or Level 3;*
  - e) *A.2 ERP Functional Analyst – PeopleSoft, Level 2 or Level 3*

\_\_\_\_\_ Yes, the Bidder has provided my organization with the services of (specify number) of the resource categories described above.

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

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



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- (C) For the customer reference, the Bidder must, at a minimum, provide the name and e-mail address for a contact person.

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.
- (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) **Requests for Further Information:** If Canada requires additional information in order to do any of the following pursuant to the Section entitled "Conduct of Evaluation" in 2003, Standard Instructions - Goods or Services - Competitive Requirements:
    - (A) verify any or all information provided by the Bidder in its bid; or
    - (B) contact any or all references supplied by the Bidder (e.g., references named in the résumés of individual resources) to verify and validate any information submitted by the Bidder,the Bidder must provide the information requested by Canada within 2 working days of a request by the Contracting Authority.
  - (iii) **Extension of Time:** If additional time is required by the Bidder, the Contracting Authority may grant an extension in his or her sole discretion.

### 4.2 Technical Evaluation

- (a) **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 technical requirements are described in Attachment 4.2.

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(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 Attachments 4.1 and 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:**

- (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 all bidders to be recommended for contract award.
- (ii) For reference checks, Canada will conduct the reference check in writing by email. Canada will send all email reference check requests to contacts supplied by all the Bidders on the same day using the email address provided in the bid. Canada will not award any points and/or a bidder will not meet the mandatory experience requirement (as applicable) unless the response is received within 5 working days of the date that Canada's email was sent.
- (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 email, to allow the Bidder to contact its reference directly to ensure that it responds to Canada within 5 working days. If the individual named by a Bidder is unavailable when required during the evaluation period, the Bidder may provide the name and email address of an alternate contact person from the same customer. Bidders will only be provided with this opportunity once for each customer, and only if the originally named individual is unavailable to respond (i.e., the Bidder will not be provided with an opportunity to submit the name of an alternate contact person if the original contact person indicates that he or she is unwilling or unable to respond). The 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 resources and 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 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 resources and 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:

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- (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 bid solicitation closing date, 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
  - (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 - Highest Responsive Combined Rating of Technical Merit and Price**

Selection Process: The following selection process will be conducted for each bid:

- (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(s) 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:
$$\frac{\text{Technical Score}}{\text{Maximum Technical Points (Bidders, please refer to the total maximum points available in Section 3.0 of Attachment 4.2)}} \times 60 = \text{Total Technical Score}$$
  - (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:

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$$\frac{\text{Lowest Total Bid Price}}{\text{The Bidder's Total Bid Price}} \times 40 = \text{Total Financial Score}$$

- (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 bid with the highest Total Financial Score will become the top-ranked Bidder.
- (d) Up to two contracts may be awarded in total as a result of this bid solicitation.
- (e) **Contract Funding Allocation:** Where more than one contract is awarded, each contract will be issued with an amount of funding specified in the article titled "Limitation of Expenditure" calculated based on the following:

Bidder	Total Bidder Score	Fund Allocation Formula (%)	Total Funds Allocated
1	98	$98/187 \times 100 = 52.41$	\$5,241,000.00
2	89	$89/187 \times 100 = 47.59$	\$4,759,000.00
Total	187		\$10,000,000.00
Total funds available: \$10,000,000.00			

**NOTE: This is an example only. Actual numbers will be determined after bid evaluation.**

- (f) 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 the Bidder's certifications. Failure to comply and to cooperate with any request or requirement imposed by the Contracting Authority will render the bid non-responsive or constitute a default under the Contract.

### 5.1 Certifications 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

- (i) 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" list ([http://www.labour.gc.ca/eng/standards\\_equity/eq/emp/fcp/list/inelig.shtml](http://www.labour.gc.ca/eng/standards_equity/eq/emp/fcp/list/inelig.shtml)) available from Employment and Social Development Canada (ESDC) - Labour's website.
- (ii) 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" list at the time of contract award.
- (i) Canada will also have the right to terminate the Contract for default if a Contractor, or any member of the Contractor if the Contractor is a Joint Venture, appears on the "FCP Limited Eligibility to Bid" list during the period of the Contract.
- (iv) The Bidder must provide the Contracting Authority with a completed Attachment 5.1, 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.

### 5.2 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

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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; and
  - (ii) the Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work site(s) must each meet the security requirements as indicated in Part 7 - Resulting Contract Clauses.
- (b) Bidders are reminded to obtain the required security clearance promptly. Any delay in the award of a contract to allow the successful Bidder to obtain the required clearance will be at the entire discretion of the Contracting Authority.
- (c) For additional information on security requirements, Bidders should refer to the Industrial Security Program (ISP) of Public 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 Citizenship and Immigration Canada (CIC).
- (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) **Allocation of Task Authorizations:** More than one contract has been awarded for this requirement. As a result, the Task Authorizations issued under this series of contracts will be allocated in accordance with the following:
  - (i) At the time this series of contracts was awarded, each Contractor was allocated an amount of funding as specified in the Limitation of Expenditure in respect of Task Authorizations based on the evaluation process described in the bid solicitation that resulted in the award of this series of contracts.
  - (ii) Canada will make a reasonable effort to ensure that the dollar value of the TAs issued to the Contractors are proportionally balanced throughout the Contract Period based on the percentage values in the Fund Allocation Formula. A review of TAs issued to the Contractors will be conducted at six-month intervals and at the beginning of each fiscal year to confirm proportional utilization and distribution of the TAs.
  - (iii) Should a contractor refuse a TA under the Contract the next Contractor, under the same allocation process, will be offered the draft TA. The dollar value of the refused TA will be

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subtracted from the dollar value of the Contractor's Contract and may be re-allocated, at the Contracting Authority's sole discretion, in whole or in part, to one or more of the other Contractors. Should all Contractors refuse a TA under the Contract, Canada reserves the right to use other methods of supply. In the event that Canada determines the proposed resource(s) does not meet the minimum experience or other requirements of the categories identified in the draft TA, Canada may, at its entire discretion request that the contractor propose another resource and the contractor will have the time set out in the subparagraph "Contractor's Response to Draft Task Authorization" to respond. If the contractor fails to respond on time or Canada determines that the proposed resource(s) does not meet the minimum experience or other requirements of the categories identified in the draft TA, the draft TA will be forwarded to the next contractor, under the same allocation process.

- (c) **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.
- (d) **Form and Content of Task Authorization:**
  - (i) The CIC Procurement Representative will provide the Contractor with a description of the task using the form specified in Appendix B of 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;
    - (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, indicating 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.

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- (e) **Contractor's Response to Draft Task Authorization:** The Contractor must provide the CIC Procurement 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.
- (f) **Task Authorization Limit and Authorities for Validly Issuing Task Authorizations:** To be validly issued, a TA must be signed by the Technical Authority and the Contracting Authority. Any TA that does not bear the appropriate signature(s) is not validly issued by Canada. Any work performed by the Contractor without receiving a validly issued TA is done at the Contractor's own risk. If the Contractor receives a TA that is not appropriately signed, the Contractor must notify the Contracting Authority.
- (g) **Periodic Usage Reports:**
- (i) The Contractor must compile and maintain records on its provision of services to the federal government under validly issued TAs issued under the Contract. The Contractor must provide this data to Canada in accordance with the reporting requirements detailed below. If any required information is not available, the Contractor must indicate the reason. If services are not provided during a given period, the Contractor must still provide a "NIL" report. The Contractor must submit the periodic usage reports 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) April 1 to June 30;
  - (B) July 1 to September 30;
  - (C) October 1 to December 31; and
  - (D) 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 TAs (as amended):

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- (A) the amount ( Applicable Taxes extra) specified in the contract (as last amended, if applicable) as Canada's total liability to the contractor for all validly issued TAs; and
- (B) the total amount, Applicable Taxes extra, expended to date against all validly issued TAs.
- (h) **Refusal of Task Authorizations or Submission of a Response which is not Valid:** The Contractor is not required to submit a response to every draft TA sent to it by Canada. However, in addition to Canada's other rights to terminate the Contract, Canada may immediately, and without further notice, terminate the Contract for default in accordance with the General Conditions if the Contractor in at least three instances has either not responded or has not submitted a valid response when sent a draft TA. For greater clarity, each draft TA, which is identifiable by its task number, will only count as one instance. A valid response is one that is submitted within the required time period and meets all requirements of the draft TA issued, including proposing the required number of resources who each meet the minimum experience and other requirements of the categories identified in the draft TA at pricing not exceeding the rates set out in Annex B.
- (i) **Consolidation of TAs 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 TAs for administrative purposes.

### 7.3 Minimum Work Guarantee

- (a) In this clause,
- (i) **"Maximum Contract Value"** means the amount specified in the **"Limitation of Expenditure"** clause set out in the Contract (excluding Applicable Taxes); and
- (ii) **"Minimum Contract Value"** means \$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
- (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 10 business days of Contract award.

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## 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 4, 5 and 6:

- 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.

## 7.5 Security Requirement

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

- (a) The Contractor must, at all times during the performance of the Contract, hold a valid Facility Security Clearance at the level of **SECRET**, issued by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC).
- (b) The Contractor personnel requiring access to PROTECTED/CLASSIFIED information, assets or sensitive work site(s) must EACH hold a valid personnel security screening at the level of **RELIABILITY STATUS, CONFIDENTIAL** or **SECRET** as required, granted or approved by CISD/PWGSC.

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- (c) The Contractor MUST NOT remove any PROTECTED/CLASSIFIED information from the identified work site(s), and the Contractor 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 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 two years later; and
  - (ii) The period during which the Contract is extended, if Canada chooses to exercise any options set out in the Contract.
- (b) **Option to Extend the Contract:**
  - (i) The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to three additional one-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:

Carole Holden

Space, Innovation and Informatics Projects Directorate  
Services and Technology Acquisition Management Sector  
Public Services and Procurement Canada  
Les Terrasses de la Chaudière  
10 rue Wellington, 4th floor  
Gatineau, Québec K1A 0S5  
Telephone: 613-858-9217  
E-mail address: carole.holden@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.



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(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) **CIC Procurement Representative**

The CIC Procurement Representative for the Contract is:

***TO BE INSERTED UPON CONTRACT AWARD***

The CIC Procurement Representative 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 administrative aspects of the Work under the Contract, communication with PWGSC Contracting Authority on all matters concerning the Contract, procurement initiation authority, and providing PWGSC reports on Contract utilization. Technical matters may be discussed with the CIC Procurement Representative; however, the CIC Procurement Representative 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.

(d) **Contractor's Representative**

The Contractor's Representative is:

***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.



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- (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 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

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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:**

(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 twelve-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 by giving the Contractor three months' written notice of its intent, if:

- (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

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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.

(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 and provide an electronic copy to the Contracting Authority.

**7.11 Certifications**

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.

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## 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 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](#). 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 the province of Ontario.

## 7.14 Priority of Documents

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

- (a) these Articles of Agreement, including any individual SACC clauses incorporated by reference in these Articles of Agreement;
- (b) Supplemental General Conditions, in the following order:
  - (i) 4006 (2010-08-16), Supplemental General Conditions - Contractor to Own Intellectual Property Rights in Foreground Information;
- (c) General Conditions 2035 (2016-04-04) Higher Complexity - Services;
- (d) Annex A, Statement of Work - Annex A including its Appendices as follows:
  - (i) Appendix A to Annex A - Tasking Assessment Procedure;
  - (ii) Appendix B to Annex A - Task Authorization (TA) Form;
  - (iii) Appendix C to Annex A - Resource Assessment Criteria and Response Table;
  - (iv) Appendix D to Annex A - Certifications at the TA stage;
- (e) Annex B, Basis of Payment;
- (f) Annex C, Security Requirements Check List;
  - (i) Appendix A to Annex C – Security Classification Guide
- (g) the validly issued Task Authorizations and any required certifications (including all of their annexes, if any); and
- (h) 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.*

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

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

## **7.17 Insurance Requirements**

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

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

### **(b) Commercial General Liability Insurance**

- (i) The Contractor must obtain Commercial General Liability Insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature, but for not less than \$2,000,000 per accident or occurrence and in the annual aggregate.
- (ii) The Commercial General Liability policy must include the following:
  - (A) Additional Insured: Canada is added as an additional insured, but only with respect to liability arising out of the Contractor's performance of the Contract. The interest of Canada should read as follows: Canada, as represented by Public 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.
- (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.



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(b) **First Party Liability:**

- (i) The Contractor is fully liable for all damages to Canada, including indirect, special or consequential damages, caused by the Contractor's performance or failure to perform the Contract that relate to:
  - (A) any infringement of intellectual property rights to the extent the Contractor breaches the section of the General Conditions entitled "Intellectual Property Infringement and Royalties";
  - (B) physical injury, including death.
- (ii) The Contractor is liable for all direct damages caused by the Contractor's performance or failure to perform the Contract affecting real or tangible personal property owned, possessed, or occupied by Canada.
- (iii) Each of the Parties is liable for all direct damages resulting from any breach of confidentiality under the Contract. Each of the Parties is also liable for all indirect, special or consequential damages in respect of any unauthorized disclosure of the other Party's trade secrets (or trade secrets of a third party provided by one Party to another under the Contract) relating to information technology.
- (iv) The Contractor is liable for all direct damages relating to any encumbrance or claim relating to any portion of the Work for which Canada has made any payment. This does not apply to encumbrances or claims relating to intellectual property rights, which are addressed under (i) (A) above.
- (v) The Contractor is also liable for any other direct damages to Canada caused by the Contractor's performance or failure to perform the Contract that relates 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, to pay a third party in respect of damages caused by the Contractor, the Contractor must reimburse Canada by the amount finally determined by a court of competent jurisdiction to be the Contractor's portion of the damages to the third party. However, despite Sub-article (i), with respect to special, indirect, and consequential damages of third parties covered by this Section, the Contractor is only liable for reimbursing Canada for the Contractor's portion of those damages that Canada is required by a court to pay to a third party as a result of joint and several liability that relate to the infringement of a third party's intellectual property rights; physical injury of a third party, including death; damages affecting a third party's real or tangible personal property; liens or encumbrances on any portion of the Work; or breach of confidentiality.
- (iii) The Parties are only liable to one another for damages to third parties to the extent described in this Sub-article (c).

#### 7.19 Joint Venture Contractor

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

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



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## 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 Section 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 the individual's departure or failure to commence Work (or, if Canada has requested the replacement, within 10 working days of Canada's notice of the requirement for a replacement) provide to the Contracting Authority:
  - (A) the name, qualifications and experience of a proposed replacement immediately available for Work; and
  - (B) security information on the proposed replacement as specified by Canada, if applicable.

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

- (ii) Subject to an Excusable Delay, where Canada becomes aware that a specific individual identified under the 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 for default under Section 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 propose a replacement to be rated by the Technical Authority. The replacement must have qualifications and experience that meet 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 subarticle (c).

Where an Excusable Delay applies, Canada may require (c) (ii) (B) above instead of terminating under the "Excusable Delay" Section. 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

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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 TAs. 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 TAs. The Contractor also represents and warrants that it has, and all its resources and subcontractors that perform the Work have, and at all times during the Contract Period they will have, the skills, qualifications, expertise and experience necessary to perform and manage the Work in accordance with the Contract, and that the Contractor (and any resources or subcontractors it uses) has previously performed similar services for other customers.

#### **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.

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## 7.25 Transition Period

- (a) 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 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.
- (b) 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.

## 7.26 Identification Protocol Responsibilities

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

- (a) Contractor Representatives who attend a Government of Canada meeting (whether internal or external to Canada's offices) must identify if an individual is not a permanent employee of the Contractor prior to the commencement of the meeting, to ensure that each meeting participant is aware of the fact that the individual is not a Contractor permanent employee;
- (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;
- (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; and
- (e) In addition to any other rights it has under the Contract, Canada may terminate the Contract for default if the corrective measures required of the Contractor described above are not met.

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**ANNEX A**  
**STATEMENT OF WORK**  
**PEOPLESOFT APPLICATION SERVICES**

***Note to Bidders:** A Word version of this document is available by sending a request by email to [carole.holden@tpsgc-pwgsc.gc.ca](mailto:carole.holden@tpsgc-pwgsc.gc.ca)*

**1. BACKGROUND**

- 1.1 Citizenship and Immigration Canada's (CIC) mandate comes from the shared jurisdiction of Section 95 of the Constitution Act, 1867; the Citizenship Act; the Canadian Passport Order and the Immigration and Refugee Protection Act. The Strategic Plan will guide CIC over the next five years, helping CIC achieve its vision of a stronger Canada: a safe and secure country with a shared bond of citizenship and values; a country that continues to support CIC's humanitarian tradition and draws the best from the world to help build a nation that is economically, socially and culturally prosperous. Much of the work that CIC accomplishes is done through partnerships—with provinces and territories, along with organizations and governments from across the world.
- 1.2 Citizenship and Immigration Canada (CIC) is still the legal name of Immigration, Refugees and Citizenship Canada (IRCC).

**2. SCOPE**

- 2.1 The scope of this requirement is for the provision of PeopleSoft Application Services on an "as and when requested" basis in support of the CIC Portfolio which includes work associated with supporting CIC's PeopleSoft HRMS system, the Phoenix system, and the Government of Canada's MyGCHR system.
- 2.2 The Contractor must provide resources for the following categories:

No.	Category	Level
1	A.1 Application / Software Architect – PeopleSoft Application Specialist	2
2.	A.1 Application / Software Architect – PeopleSoft Application Specialist	3
3.	A.1 Application / Software Architect – PeopleSoft Upgrade Specialist	2
4.	A.1 Application / Software Architect – PeopleSoft Upgrade Specialist	3
5.	A.3 ERP Programmer Analyst - PeopleSoft	2
6.	I.1 Data Conversion Specialist - PeopleSoft	2
7.	I.1 Data Conversion Specialist - PeopleSoft	3
8.	A.2 ERP Functional Analyst – PeopleSoft	2
9.	A.2 ERP Functional Analyst – PeopleSoft	3

**3. REQUIREMENTS**

3.1 The Contractor must:

- a. supply support services resources via a Task Authorization (TA) on an "as and when requested" basis in the resource categories described in this Statement of Work (SOW);
- b. ensure that the resources are fluent in the language(s) specified in the TA;
- c. ensure that the resources have the security clearance specified in the TA;
- d. ensure that resources support operational working hours as specified in the TA;
- e. attend, as a minimum, quarterly meetings with the Technical Authority to review:
  - i. the financial elements of the Contract based on the monthly financial report; and
  - ii. other issues as deemed necessary by either party.

4. CIC CORE TECHNOLOGY INFRASTRUCTURE

4.1 CIC's technology infrastructure is most heavily concentrated in Ottawa, Ontario - serving the needs of staff in the National Capital Region. Significant amounts of hardware and software are also installed in other offices in Canada and in overseas missions around the world.

4.2 Software Environment:

4.2.1 Programming Languages

- |        |                |            |
|--------|----------------|------------|
| • Java | • Perl         | • SQL      |
| • .NET | • C,C+,C++,C#  | • e-Script |
| • ABAP | • Java Script  | • JPython  |
| • ASP  | • Transact-SQL | • Python   |
| • HTML | • CSS          |            |
| • VXML | • PowerBuilder |            |
| • R    |                |            |

4.2.2 ERPs

- |                                     |   |   |
|-------------------------------------|---|---|
| • Siebel CRM (Open UI)              | • Team Foundation Server                        | • CA Erwin ModelMart & workgroup Data Modeler |
| • Siebel BIP                        | • Sparx Systems Enterprise Architect            | • Informatica PowerCenter Advanced Edition    |
| • HP Mercury LoadRunner             | • Rational Suite (ClearCase, Functional Tester) | • Informatica Data Quality & Address Dr       |
| • Oracle BI (including Publisher)   | • Oracle API Gateway                            | • SSA-Name-3, informatica Identity Resolution |
| • Adobe (Central Server, LiveCycle) | • Oracle GoldenGate                             | • SPSS Modeler & Statistics                   |
| • SAP                               | • SAS (ABM, forecast, Miner...)                 | • BigInsight                                  |
| • PeopleSoft                        | • WebCims                                       | • Cognos Analytics Suite                      |
| • Remedy                            |   |   |

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#### 4.2.3 Integrated Development Environments:

- Visual Studio
- Eclipse
- CA Erwin

#### 4.2.4 Operating Environments:

- Windows 7 64 Bit and higher
- Windows 7 Enterprise 64 Bit and higher
- UNIX (Solaris/ HP-UX/Linux)
- MS Windows 2008 Server migrating to 2012R2
- Windows 10 and higher

#### 4.2.5 Middleware/Framework:

- Tomcat
- Tuxedo
- Biztalk
- Oracle Portal
- CITRIX
- MQ Series
- SSA-Name-III
- JAWS
- MPS 500
- WebLogic
- IIS
- Spring
- IBM WebSphere
- Jboss
- MSMQ
- Adobe

#### 4.2.6 Database Technologies:

- Oracle
- MS SQL Server
- MySQL
- Hadoop
- SAP ASE
- DB2
- IBM Pure Data for Analytics (Netezza)
- Dahdb
- Sybase

Note: CIC Technology infrastructure will change with time.

## 5 CONTRACTOR RESPONSIBILITIES

The Contractor must provide resources for the following categories:

### 5.1 A.1 Application / Software Architect – PeopleSoft Application Specialist, Level 2 and 3

Tasks include but are not limited to:

- a. Develop technical architectures, frameworks and strategies, for an organization to meet the business and application requirements;
- b. Identify the policies and requirements that drive out a particular solution;
- c. Analyze and evaluate alternative technology solutions to meet business problems;
- d. Ensure the integration of all aspects of technology solutions;

- 
- e. Monitor industry trends to ensure that solutions fit with government and industry directions for technology;
  - f. Analyze functional requirements to identify information, procedures and decision flows;
  - g. Evaluate existing procedures and methods, identify and document database content, structure, and application sub-systems, and develop data dictionary;
  - h. Define and document interfaces of manual to automated operations within application sub-systems, to external systems and between new and existing systems;
  - i. Define input/output sources, including detailed plan for technical design phase;
  - j. Identify and document system specific standards relating to programming, documentation and testing, covering program libraries, data dictionaries, naming conventions, etc.;
  - k. Provide related briefings and status reports to management;
  - l. Assist the Technical Authority in the preparation of the relevant project documentation for the PeopleSoft HRMS Upgrade / MyGCHR Onboarding to Version 8.9 or higher. This includes presenting options, developing application architectural strategies, planning and estimating the work that will be required;
  - m. Support the Technical Authority throughout the various phases of the PeopleSoft HRMS Upgrade / MyGCHR Onboarding to Version 8.9 or higher. The format of any documentation produced will be specified by the Technical Authority;
  - n. Collect and analyse technical information regarding the PeopleSoft HRMS Version 8.9 or higher. Upgrade / MyGCHR Onboarding process;
  - o. Provide detailed advice and guidance regarding the PeopleSoft GC HRMS Version 8.9 or higher product and the upgrade process;
  - p. Develop strategies for potential move to new database solution;
  - q. Propose options and upgrade strategies with respect to technical environments;
  - r. Provide technical expertise to the Technical Authority, as well as to members of the PeopleSoft Technical Team and the PeopleSoft Functional Team, regarding PeopleSoft GC HRMS Version 8.9 or higher and the upgrade / onboarding process;
  - s. Participate in weekly status meetings of the PeopleSoft Technical Team;
  - t. Attend weekly status meeting of the PeopleSoft Functional Team;
  - u. Provide weekly status reports to the Technical Authority;
  - v. Assist in the development and verification of PeopleSoft upgrade planning;
  - w. Assist in the development of the resource plan, including the identification of the skill sets or expertise required to execute PeopleSoft update work packages; and
  - x. Any other work related to this category.

5.2 A.1 Application / Software Architect – PeopleSoft Upgrade Specialist, Level 2 and 3

Tasks include but are not limited to:

- a. Develop technical architectures, frameworks and strategies for an organization to meet the business and application requirements;
- b. Identify the policies and requirements that drive out a particular solution;
- c. Analyze and evaluate alternative technology solutions to meet business problems;
- d. Ensure the integration of all aspects of technology solutions;
- e. Monitor industry trends to ensure that solutions fit with government and industry directions for technology;
- f. Analyze functional requirements to identify information, procedures and decision flows;
- g. Evaluate existing procedures and methods, identify and document database content, structure, and application sub-systems, and develop data dictionary;
- h. Define and document interfaces of manual to automated operations within application sub-systems, to external systems and between new and existing systems;
- i. Define input/output sources, including detailed plan for technical design phase;



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- j. Identify and document system specific standards relating to programming, documentation and testing, covering program libraries, data dictionaries, naming conventions, etc.;
  - k. Provide related briefings and status reports to management;
  - l. Assist the Technical Authority in the preparation of the relevant project documentation for the PeopleSoft HRMS Upgrade / MyGCHR Onboarding to Version 8.9 or higher. This includes presenting options, developing application architectural strategies, planning and estimating the work that will be required;
  - m. Support the Technical Authority throughout the various phases of the PeopleSoft HRMS Upgrade / MyGCHR Onboarding to Version 8.9 or higher. The format of any documentation produced will be specified by the Technical Authority;
  - n. Collect and analyse technical information regarding the PeopleSoft HRMS Version 8.9 or higher Upgrade / MyGCHR Onboarding process;
  - o. Execute the various tasks to upgrade / onboard the PeopleSoft HRMS application;
  - p. Mentor and assist the technical team in performing the upgrade processes;
  - q. Provide detailed advice and guidance regarding the PeopleSoft GC HRMS Version 8.9 or higher product and the upgrade process;
  - r. Propose options and upgrade strategies with respect to technical environments;
  - s. Provide technical expertise to the Technical Authority, as well as to members of the PeopleSoft Technical Team and the PeopleSoft Functional Team, regarding PeopleSoft GC HRMS Version 8.9 or higher and the upgrade / onboarding process;
  - t. Participate in weekly status meetings of the PeopleSoft Technical Team;
  - u. Attend weekly status meeting of the PeopleSoft Functional Team;
  - v. Provide weekly status reports to the Technical Authority;
  - w. Assist in the development and verification of PeopleSoft upgrade planning;
  - x. Assist in the development of the resource plan, including the identification of the skill sets or expertise required to execute PeopleSoft update work packages; and
  - y. Any other work related to this category.
- .

5.3 A.3 ERP Programmer Analyst - PeopleSoft, Level 2

Tasks include but are not limited to:

- a. Collect and analyze technical information regarding the PeopleSoft HRMS Version 8.9 or higher Upgrade / MyGCHR Onboarding process;
- b. Develop low-level detailed requirements in support of the upgrade / MyGCHR onboarding of a PeopleSoft HRMS Version 8.9 or higher;
- c. Provide programming expertise to the Technical Authority, as well as to members of the PeopleSoft Technical Team and the PeopleSoft Functional Team, regarding PeopleSoft GC HRMS Version 8.9 or higher and the upgrade / onboarding process;
- d. Participate in weekly status meetings of the PeopleSoft Technical Team;
- e. Attend weekly status meeting of the PeopleSoft Functional Team;
- f. Provide other related PeopleSoft Technical Team tasks as may be requested by the Technical Authority which include but are not limited to providing detailed advice and guidance regarding the PeopleSoft GC HRMS Version 8.9 or higher product and the upgrade / onboarding process;
- g. Provide weekly status reports to the Technical Authority; and
- h. Any other work related to this category.

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5.4 I.1 Data Conversion Specialist - PeopleSoft, Level 2 and 3

Tasks include but are not limited to:

- a. Oversee all facilities of the conversion process;
- b. Complete mapping, interfaces, mock conversion work, enhancements, actual conversion, and verify completeness and accuracy of converted data;
- c. Establish a strong working relationship with all clients, interact effectively with all levels of client personnel and provide conversion support;
- d. Analyze and coordinate data file conversions;
- e. Work with importing files from heterogeneous platforms;
- f. Modify conversion scripts as required;
- g. Define data conversion strategy in conjunction with the Database Administrator;
- h. Define database conversion specifications in conjunction with the Technical Authority;
- i. Develop customized database conversion routines;
- j. Finalize conversion strategy in conjunction with the Technical Authority and Database Administrator;
- k. Work closely with the users in order to maintain and safeguard the integrity of the data;
- l. Identify requirements for improvements to existing data by determining users' information requirements and functional requirements;
- m. Develop and maintain meta data;
- n. Advise programmers, analysts and users about the efficient use of data;
- o. Provide technical expertise to the Technical Authority, as well as to members of the PeopleSoft Technical Team and the PeopleSoft Functional Team, regarding PeopleSoft GC HRMS Version 8.9 or higher and the upgrade / onboarding process;
- p. Participate in weekly status meetings of the PeopleSoft Technical Team;
- q. Attend weekly status meeting of the PeopleSoft Functional Team;
- r. Provide weekly status reports to the Technical Authority;
- s. Provide related briefing and status reports to management; and
- t. Any other work related to this category

5.5 A.2 ERP Functional Analyst – PeopleSoft, Level 2 and 3

Tasks include but are not limited to:

- a. Develop and document ERP functional, business, and/or system requirements specifications;
- b. Develop and document screen, report and interface requirements;
- c. Develop and document Business Process Models, System Use Cases and System Requirements from detailed business requirements;
- d. Develop functional, business, and/or system interface or capability interaction;
- e. Make configuration changes to PeopleSoft as required for each module; and
- f. Any other work related to this category

## 6. DELIVERABLES

- 6.1 Deliverables will be specified within the TA. The scope of work attached to each TA will identify the particular deliverable(s), tasks, and other relevant areas of consideration that are required to be implemented by the Contractor in the provision of services.
- 6.2 The Contractor must provide various project status updates as driven by the applications used, as well as project deliverables resulting from the tasks performed as described in the TA.

## 7. LANGUAGE REQUIREMENTS

- 7.1 Contractor personnel must be fluent in the English language. Contractor personnel must be able to communicate orally and in writing in English without any assistance and with minimal errors. Specific requirements for Contractor personnel to be fluent in both the English and French languages will be detailed in each Task Authorization.

## 8. OPERATIONAL WORKING HOURS

- 8.1 Operational working hours will be from 07:00 to 17:30 Monday through Friday where the Contractor's resources will be expected to work 7.5 hours each day between those hours. The Contractor's resources must be available to work outside normal operational hours during the duration of the Contract. The Contractor may need to provide the resources on evenings, weekends and/or holidays. Any time worked over the number of billable hours/days in a month must be pre-approved by the Technical Authority.

## 9. SUPPORT PROVIDED BY CANADA

- 9.1 Workspace will only be provided when contractor personnel require access to the CIC network, GCDOCS, non-production and production environments, and/or CIC protected assets.
- 9.2 The Contractor must, at no additional cost to Canada, be prepared to provide a continuous flow of contracted service from its own offices or place of business if, for any reason, suitable CIC office facilities become unavailable.

## 10. CONSTRAINTS

### 10.1 Travel Requirements

All of the work is located in the National Capital Region (NCR). Travel outside the NCR will not be required. Travel costs outside and within the NCR will not be reimbursed.

### 10.2 Interdependencies

Interdependencies exist with other departments and countries who are not within the same time zone. Thus, work falling outside of the normal core hours in the NCR (07:00 to 17:30) may be required.

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## 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 in accordance with the allocation methodology stated in the Contract Article titled "Allocation of Task Authorizations". Once a draft TA Form is received the Contractor must submit to the CIC Procurement Representative 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 2 working days 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, diploma, designation or certificate, Canada will only consider educational programs 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

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considered “demonstrated” for the purposes of the assessment. The Contractor should provide complete details as to where, when, month and year, and how, through which activities/responsibilities, the stated qualifications / experience were obtained. In situations in which a proposed resource worked at the same time on more than one project, the duration of any overlapping time period will be counted only once toward any requirements that relate to the individual's length of experience.

3. The qualifications and experience of the proposed resources will be assessed against the requirements set out in Appendix C to Annex A to determine each proposed resource's compliance with the mandatory and rated criteria. Canada may request proof of successful completion of formal training, as well as reference information. Canada may conduct reference checks to verify the accuracy of the information provided. If reference checks are done, they will be conducted in writing by e-mail (unless the contact at the reference is only available by telephone). Canada will not assess any points or consider a mandatory criteria 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 Contractor's quotation will be found 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 CIC Procurement Representative, 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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<b>10. Contractor's Signature</b>	
Name, Title and Signature of Individual Authorized to Sign on Behalf of <b>Contractor</b>  (type or print)	Signature: _____  Date: _____
<b>11. Approval – Signing Authority</b>	
<b>Signatures (Client)</b>	
Name, Title and Signature of <b>Technical Authority</b> to Sign on Behalf of  (type or print)	Signature: _____  Date: _____
Name, Title and Signature of <b>CIC Procurement Representative</b> to Sign on Behalf of CIC  (type or print)	Signature: _____  Date: _____
<b>Signatures (PWGSC)</b>	
Name, Title and Signature of <b>*Contracting Authority</b> to Sign on Behalf of Public Works and Government Services Canada  (type or print)	Signature: _____  Date: _____
You are requested to sell to her Majesty the Queen in Right of Canada, in accordance with the terms and conditions set out herein, referred to herein, or attached hereto, the services listed herein and in any attached sheets at the price set out there of.	



**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 Annex. When completing the resource grids, the specific information which demonstrates the requested criteria and reference to the page number of the résumé should be incorporated so that Canada can verify this information. The tables should not contain all the project information from the resume. Only the specific answer should be provided.

**A.1 Application / Software Architect – PeopleSoft Application Specialist, Level 2**

A.1 Application / Software Architect – PeopleSoft Application Specialist, Level 2					
MTC#	Mandatory Technical Criteria	Met / Not Met	Contractor's Response (Cross Reference to Résumé)		
MTC1	The proposed resource must clearly demonstrate at least 7 years of experience as an Application / Software Architect for IM/IT systems specializing in the PeopleSoft Application. The experience must come from at least 2 separate projects.				
A.1 Application / Software Architect – PeopleSoft Application 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 clearly demonstrate experience developing technical architectures, frameworks and strategies for an organization.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ years	2 points 4 points 6 points 8 points		
RTC2	The proposed resource should clearly demonstrate experience evaluating existing procedures and methods, identifying and documenting database content, structure, and applications sub-systems and developing a data dictionary.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ years	2 points 4 points 6 points 8 points		
RTC3	The proposed resource should clearly demonstrate experience with SQL and Relational Database Management Systems (RDBMS).	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ years	2 points 4 points 6 points 8 points		
RTC4	The proposed resource should clearly demonstrate experience as an Application Architect using the PeopleSoft HRMS Version 8.9 or higher.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ years	2 points 4 points 6 points 8 points		
RTC5	The proposed resource should clearly demonstrate experience as an Application Architect for a PeopleSoft Application Upgrade project to PeopleSoft HRMS Version 8.9 or higher.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ years	2 points 4 points 6 points 8 points		

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RTC6	The proposed resource should clearly demonstrate experience as an Application Architect for a PeopleSoft Upgrade project on at least one of the following database platforms: Sybase, Oracle or MS SQL Server.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ years	2 points 4 points 6 points 8 points		
Maximum Points Available:		48			
Minimum Points Required:		33			

**A.1 Application / Software Architect – PeopleSoft Upgrade Specialist, Level 2**

A.1 Application / Software Architect – PeopleSoft Upgrade Specialist, Level 2					
MTC#	Mandatory Technical Criteria			Met / Not Met	Contractor's Response (Cross Reference to Résumé)
MTC1	The proposed resource must clearly demonstrate at least 7 years of experience as an Application / Software Architect for IM/IT systems specializing in PeopleSoft upgrades. The experience must come from at least 2 separate projects.				
A.1 Application / Software Architect – PeopleSoft Upgrade 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 clearly demonstrate experience developing technical architectures, frameworks and strategies for an organization.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ years	2 points 4 points 6 points 8 points		
RTC2	The proposed resource should clearly demonstrate experience evaluating existing procedures and methods, identifying and documenting database content, structure, and applications sub-systems and developing a data dictionary.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ years	2 points 4 points 6 points 8 points		
RTC3	The proposed resource should clearly demonstrate experience with SQL and Relational Database Management Systems (RDBMS).	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ years	2 points 4 points 6 points 8 points		
RTC4	The proposed resource should clearly demonstrate experience as an Upgrade Specialist using the PeopleSoft HRMS Version 8.9 or higher.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ years	2 points 4 points 6 points 8 points		
RTC5	The proposed resource should clearly demonstrate experience as an Upgrade Specialist for a PeopleSoft Application Upgrade project to PeopleSoft HRMS Version 8.9 or higher.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ years	2 points 4 points 6 points 8 points		
RTC6	The proposed resource should clearly demonstrate experience as an Upgrade Specialist for a PeopleSoft Upgrade project on at least one of the following database platforms: Sybase, Oracle or MS SQL Server.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ years	2 points 4 points 6 points 8 points		
Maximum Points Available:		48			
Minimum Points Required:		33			

**A.3 ERP Programmer Analyst – PeopleSoft, Level 2**

A.3 ERP Programmer Analyst – PeopleSoft, Level 2					
MTC#	Mandatory Technical Criteria	Met / Not Met	Contractor's Response (Cross Reference to Résumé)		
MTC1	The proposed resource must clearly demonstrate at least 7 years of experience as an ERP Programmer Analyst for IM/IT systems specializing in the PeopleSoft Application. The experience must come from at least 2 separate projects.				
A.3 ERP Programmer Analyst – PeopleSoft, Level 2					
RTC#	Rated Technical Criteria	Years of experience	Point Rating	Score	Contractor's Response (Cross Reference to Résumé)
RTC1	The proposed resource should clearly demonstrate experience developing low-level detailed requirements, programming, and systems development and testing of ERP Systems.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ years	2 points 4 points 6 points 8 points		
RTC2	The proposed resource should clearly demonstrate experience in translating ERP business requirements into systems design and specifications.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ years	2 points 4 points 6 points 8 points		
RTC3	The proposed resource should clearly demonstrate experience with SQL and Relational Database Management Systems (RDBMS).	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ years	2 points 4 points 6 points 8 points		
RTC4	The proposed resource should clearly demonstrate experience as a Programmer Analyst using the PeopleSoft HRMS Version 8.9 or higher.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ years	2 points 4 points 6 points 8 points		
RTC5	The proposed resource should clearly demonstrate experience as a Programmer Analyst for a PeopleSoft Application Upgrade project to PeopleSoft HRMS Version 8.9 or higher.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ years	2 points 4 points 6 points 8 points		
RTC6	The proposed resource should clearly demonstrate experience as a Programmer Analyst for a PeopleSoft Upgrade project on at least one of the following database platforms: Sybase, Oracle or MS SQL Server.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ years	2 points 4 points 6 points 8 points		
Maximum Points Available:		48			
Minimum Points Required:		33			

**I.1 Data Conversion Specialist – PeopleSoft, Level 2**

1.1 Data Conversion Specialist – PeopleSoft, Level 2					
MTC#	Mandatory Technical Criteria	Met / Not Met	Contractor’s Response (Cross Reference to Résumé)		
MTC1	The proposed resource must clearly demonstrate at least 7 years of experience as a Data Conversion Specialist for IM/IT systems specializing in the PeopleSoft Application. The experience must come from at least 2 separate projects.				
1.1 Data Conversion Specialist – PeopleSoft, Level 2					
RTC#	Rated Technical Criteria	Years of experience	Point Rating	Score	Contractor’s Response (Cross Reference to Résumé)
RTC1	The proposed resource should clearly demonstrate experience completing mapping, interfaces, mock conversion work, enhancements, actual conversion and verifying completeness and accuracy of converted data.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ years	2 points 4 points 6 points 8 points		
RTC2	The proposed resource should clearly demonstrate experience establishing a strong working relationship with all clients, interacting effectively with all levels of client personnel and providing conversion support.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ years	2 points 4 points 6 points 8 points		
RTC3	The proposed resource should clearly demonstrate experience with SQL and Relational Database Management Systems (RDBMS).	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ years	2 points 4 points 6 points 8 points		
RTC4	The proposed resource should clearly demonstrate experience as a Data Conversion Specialist using the PeopleSoft HRMS Version 8.9 or higher.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ years	2 points 4 points 6 points 8 points		
RTC5	The proposed resource should clearly demonstrate experience as a Data Conversion Specialist for a PeopleSoft Application Upgrade project to PeopleSoft HRMS Version 8.9 or higher.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ years	2 points 4 points 6 points 8 points		
RTC6	The proposed resource should clearly demonstrate experience as a Data Conversion Specialist for a PeopleSoft Upgrade project on at least one of the following database platforms: Sybase, Oracle or MS SQL Server.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ years	2 points 4 points 6 points 8 points		
Maximum Points Available:		48			
Minimum Points Required:		33			

**A.2 ERP Functional Analyst – PeopleSoft, Level 2**

A.2 ERP Functional Analyst – PeopleSoft, Level 2					
MTC#	Mandatory Technical Criteria			Met / Not Met	Contractor's Response (Cross Reference to Résumé)
MTC1	The proposed resource must clearly demonstrate at least 7 years of experience as an ERP Functional Analyst for IM/IT systems specializing in the PeopleSoft Application. The experience must come from at least 2 separate projects.				
A.2 ERP Functional Analyst – PeopleSoft, Level 2					
RTC#	Rated Technical Criteria	Years of experience	Point Rating	Score	Contractor's Response (Cross Reference to Résumé)
RTC1	The proposed resource should clearly demonstrate experience developing and documenting PeopleSoft functional business and system requirements.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ years	2 points 4 points 6 points 8 points		
RTC2	The proposed resource should clearly demonstrate experience in translating ERP business requirements into systems design and specifications.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ years	2 points 4 points 6 points 8 points		
RTC3	The proposed resource should clearly demonstrate experience in PeopleSoft system testing and implementation.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ years	2 points 4 points 6 points 8 points		
RTC4	The proposed resource should clearly demonstrate experience developing and documenting PeopleSoft functional, business, and / or system requirements specifications.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ years	2 points 4 points 6 points 8 points		
RTC5	The proposed resource should clearly demonstrate experience developing and documenting screen, report and interface requirements.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ years	2 points 4 points 6 points 8 points		
RTC6	The proposed resource should clearly demonstrate experience developing and documenting Business Process Models, System Use Cases and system requirements from detailed business requirements.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ years	2 points 4 points 6 points 8 points		
RTC7	The proposed resource should clearly demonstrate experience making Configuration changes to PeopleSoft as required for each module.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ years	2 points 4 points 6 points 8 points		
Maximum Points Available:		56			
Minimum Points Required:		39			

**Note to Bidders:** Attachments 4.1 – Mandatory Technical Criteria and 4.2 – Points-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.

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Print name of authorized individual & sign above

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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.

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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 the Contractor must, upon request from the Contracting Authority, provide the written confirmation, signed by the individual, of the permission that was given to the Contractor of his/her availability. Failure to comply with the request may result in a default under the Contract in accordance with the General Conditions.

---

Print name of authorized individual & sign above

---

Date



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**4. CERTIFICATION OF LANGUAGE**

- (a) 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

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

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

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

\_\_\_\_\_  
Date

## ANNEX B

### BASIS OF PAYMENT

#### INITIAL CONTRACT PERIOD

Initial Contract Period (Year 1)		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.1 Application / Software Architect – PeopleSoft Application Specialist	2	<i>To be inserted upon contract award</i>
A.1 Application / Software Architect – PeopleSoft Application Specialist	3	<i>To be inserted upon contract award</i>
A.1 Application / Software Architect – PeopleSoft Upgrade Specialist	2	<i>To be inserted upon contract award</i>
A.1 Application / Software Architect – PeopleSoft Upgrade Specialist	3	<i>To be inserted upon contract award</i>
A.3 ERP Programmer Analyst - PeopleSoft	2	<i>To be inserted upon contract award</i>
I.1 Data Conversion Specialist - PeopleSoft	2	<i>To be inserted upon contract award</i>
I.1 Data Conversion Specialist - PeopleSoft	3	<i>To be inserted upon contract award</i>
A.2 ERP Functional Analyst – PeopleSoft	2	<i>To be inserted upon contract award</i>
A.2 ERP Functional Analyst – PeopleSoft	3	<i>To be inserted upon contract award</i>

Initial Contract Period (Year 2)		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.1 Application / Software Architect – PeopleSoft Application Specialist	2	<i>To be inserted upon contract award</i>
A.1 Application / Software Architect – PeopleSoft Application Specialist	3	<i>To be inserted upon contract award</i>
A.1 Application / Software Architect – PeopleSoft Upgrade Specialist	2	<i>To be inserted upon contract award</i>
A.1 Application / Software Architect – PeopleSoft Upgrade Specialist	3	<i>To be inserted upon contract award</i>
A.3 ERP Programmer Analyst - PeopleSoft	2	<i>To be inserted upon contract award</i>
I.1 Data Conversion Specialist - PeopleSoft	2	<i>To be inserted upon contract award</i>
I.1 Data Conversion Specialist - PeopleSoft	3	<i>To be inserted upon contract award</i>
A.2 ERP Functional Analyst – PeopleSoft	2	<i>To be inserted upon contract award</i>
A.2 ERP Functional Analyst – PeopleSoft	3	<i>To be inserted upon contract award</i>

#### OPTION PERIODS:

Option Period 1 (Year 3)		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.1 Application / Software Architect – PeopleSoft Application Specialist	2	<i>To be inserted upon contract award</i>
A.1 Application / Software Architect – PeopleSoft Application Specialist	3	<i>To be inserted upon contract award</i>
A.1 Application / Software Architect – PeopleSoft Upgrade Specialist	2	<i>To be inserted upon contract award</i>
A.1 Application / Software Architect – PeopleSoft Upgrade Specialist	3	<i>To be inserted upon contract award</i>
A.3 ERP Programmer Analyst - PeopleSoft	2	<i>To be inserted upon contract award</i>
I.1 Data Conversion Specialist - PeopleSoft	2	<i>To be inserted upon contract award</i>
I.1 Data Conversion Specialist - PeopleSoft	3	<i>To be inserted upon contract award</i>
A.2 ERP Functional Analyst – PeopleSoft	2	<i>To be inserted upon contract award</i>
A.2 ERP Functional Analyst – PeopleSoft	3	<i>To be inserted upon contract award</i>

Option Period 2 (Year 4)		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.1 Application / Software Architect – PeopleSoft Application Specialist	2	<i>To be inserted upon contract award</i>
A.1 Application / Software Architect – PeopleSoft Application Specialist	3	<i>To be inserted upon contract award</i>
A.1 Application / Software Architect – PeopleSoft Upgrade Specialist	2	<i>To be inserted upon contract award</i>
A.1 Application / Software Architect – PeopleSoft Upgrade Specialist	3	<i>To be inserted upon contract award</i>
A.3 ERP Programmer Analyst - PeopleSoft	2	<i>To be inserted upon contract award</i>
I.1 Data Conversion Specialist - PeopleSoft	2	<i>To be inserted upon contract award</i>
I.1 Data Conversion Specialist - PeopleSoft	3	<i>To be inserted upon contract award</i>
A.2 ERP Functional Analyst – PeopleSoft	2	<i>To be inserted upon contract award</i>
A.2 ERP Functional Analyst – PeopleSoft	3	<i>To be inserted upon contract award</i>

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Option Period 3 (Year 5)		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.1 Application / Software Architect – PeopleSoft Application Specialist	2	<i>To be inserted upon contract award</i>
A.1 Application / Software Architect – PeopleSoft Application Specialist	3	<i>To be inserted upon contract award</i>
A.1 Application / Software Architect – PeopleSoft Upgrade Specialist	2	<i>To be inserted upon contract award</i>
A.1 Application / Software Architect – PeopleSoft Upgrade Specialist	3	<i>To be inserted upon contract award</i>
A.3 ERP Programmer Analyst - PeopleSoft	2	<i>To be inserted upon contract award</i>
I.1 Data Conversion Specialist - PeopleSoft	2	<i>To be inserted upon contract award</i>
I.1 Data Conversion Specialist - PeopleSoft	3	<i>To be inserted upon contract award</i>
A.2 ERP Functional Analyst – PeopleSoft	2	<i>To be inserted upon contract award</i>
A.2 ERP Functional Analyst – PeopleSoft	3	<i>To be inserted upon contract award</i>

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## ANNEX C

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

 <b>Gouvernement du Canada</b>		COMMON-PS-SRCL#19 <b>B8987-180005</b>	
		Contract Number / Numéro du contrat <b>PR 147565</b>	
		Security Classification / Classification de sécurité UNCLASSIFIED	
<b>SECURITY REQUIREMENTS CHECK LIST (SRCL) LISTE DE VÉRIFICATION DES EXIGENCES RELATIVES À LA SÉCURITÉ (LVERS)</b>			
<b>PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE</b>			
1. Originating Government Department or Organization / <i>Ministère ou organisme gouvernemental d'origine</i> <b>Immigration Canada CIC</b>		2. Branch or Directorate / <i>Direction générale ou Direction</i> <b>Solutions and Information Management</b>	
3. a) Subcontract Number / <i>Numéro du contrat de sous-traitance</i>		3. b) Name and Address of Subcontractor / <i>Nom et adresse du sous-traitant</i>	
4. Brief Description of Work / <i>Breve description du travail</i> <b>PeopleSoft Application Services - maintain and support RCC's Human Resources Management System implementation of PeopleSoft, support Phoenix and onboard to MyGCHC</b>			
5. a) Will the supplier require access to Controlled Goods? <i>Le fournisseur aura-t-il accès à des marchandises contrôlées?</i>		<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes <i>Non Oui</i>	
5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? <i>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?</i>		<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes <i>Non Oui</i>	
6. Indicate the type of access required / <i>Indiquer le type d'accès requis</i>			
6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? <i>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)</i>		<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes <i>Non Oui</i>	
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. <i>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.</i>		<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes <i>Non Oui</i>	
6. c) Is this a commercial courier or delivery requirement with no overnight storage? <i>S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit?</i>		<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes <i>Non Oui</i>	
7. a) Indicate the type of information that the supplier will be required to access / <i>Indiquer le type d'information auquel le fournisseur devra avoir accès</i>			
Canada <input type="checkbox"/>		NATO / OTAN <input type="checkbox"/>	
Foreign / <i>Étranger</i> <input type="checkbox"/>			
7. b) Release restrictions / <i>Restrictions relatives à la diffusion</i>			
No release restrictions / <i>Aucune restriction relative à la diffusion</i> <input type="checkbox"/>		All NATO countries / <i>Tous les pays de l'OTAN</i> <input type="checkbox"/>	
Not releasable / <i>À ne pas diffuser</i> <input type="checkbox"/>			
Restricted to: / <i>Limité à:</i> <input type="checkbox"/>		Restricted to: / <i>Limité à:</i> <input type="checkbox"/>	
Specify country(ies) / <i>Préciser le(s) pays:</i>		Specify country(ies) / <i>Préciser le(s) pays:</i>	
7. c) Level of information / <i>Niveau d'information</i>			
PROTECTED A / <i>PROTÉGÉ A</i> <input checked="" type="checkbox"/>		NATO UNCLASSIFIED / <i>NATO NON CLASSIFIÉ</i> <input type="checkbox"/>	
PROTECTED B / <i>PROTÉGÉ B</i> <input checked="" type="checkbox"/>		NATO RESTRICTED / <i>NATO DIFFUSION RESTREINTE</i> <input type="checkbox"/>	
PROTECTED C / <i>PROTÉGÉ C</i> <input checked="" type="checkbox"/>		NATO CONFIDENTIAL / <i>NATO CONFIDENTIEL</i> <input type="checkbox"/>	
CONFIDENTIAL / <i>CONFIDENTIEL</i> <input checked="" type="checkbox"/>		NATO SECRET / <i>NATO SECRET</i> <input type="checkbox"/>	
SECRET / <i>SECRET</i> <input checked="" type="checkbox"/>		COSMIC TOP SECRET / <i>COSMIC TRÈS SECRET</i> <input type="checkbox"/>	
TOP SECRET / <i>TRÈS SECRET</i> <input type="checkbox"/>			
TOP SECRET (SIGINT) / <i>TRÈS SECRET (SIGINT)</i> <input type="checkbox"/>			
		PROTECTED A / <i>PROTÉGÉ A</i> <input type="checkbox"/>	
		PROTECTED B / <i>PROTÉGÉ B</i> <input type="checkbox"/>	
		PROTECTED C / <i>PROTÉGÉ C</i> <input type="checkbox"/>	
		CONFIDENTIAL / <i>CONFIDENTIEL</i> <input type="checkbox"/>	
		SECRET / <i>SECRET</i> <input type="checkbox"/>	
		TOP SECRET / <i>TRÈS SECRET</i> <input type="checkbox"/>	
		TOP SECRET (SIGINT) / <i>TRÈS SECRET (SIGINT)</i> <input type="checkbox"/>	

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Security Classification / Classification de sécurité  
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of Canada

Gouvernement  
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<b>PART A (continued) / PARTIE A (suite)</b>	
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? If Yes, indicate the level of sensitivity: Dans l'affirmative, indiquer le niveau de sensibilité :	<input checked="" type="checkbox"/> No Non
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? Short Title(s) of material / Titre(s) abrégé(s) du matériel : Document Number / Numéro du document :	<input checked="" type="checkbox"/> No Non
<b>PART B - PERSONNEL (SUPPLIER) / PARTIE B - PERSONNEL (FOURNISSEUR)</b>	
10. a) Personnel security screening level required / Niveau de contrôle de la sécurité du personnel requis	
<input checked="" type="checkbox"/> RELIABILITY STATUS COTE DE FIABILITÉ	<input checked="" type="checkbox"/> CONFIDENTIAL CONFIDENTIEL
<input type="checkbox"/> TOP SECRET - SIGINT TRÈS SECRET - SIGINT	<input type="checkbox"/> NATO CONFIDENTIAL NATO CONFIDENTIEL
<input type="checkbox"/> SITE ACCESS ACCÈS AUX EMPLACEMENTS	<input type="checkbox"/> NATO SECRET NATO SECRET
<input type="checkbox"/> TOP SECRET TRÈS SECRET	
<input type="checkbox"/> COSMIC TOP SECRET COSMIC TRÈS SECRET	
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? If Yes, will unscreened personnel be escorted? Dans l'affirmative, le personnel en question sera-t-il escorté?	
<input checked="" type="checkbox"/> No Non	
<input checked="" type="checkbox"/> No Non	
<b>PART C - SAFEGUARDS (SUPPLIER) / PARTIE C - MESURES DE PROTECTION (FOURNISSEUR)</b>	
<b>INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS</b>	
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?	
<input checked="" type="checkbox"/> No Non	
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?	
<input checked="" type="checkbox"/> No Non	
<b>PRODUCTION</b>	
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?	
<input checked="" type="checkbox"/> No Non	
<b>INFORMATION TECHNOLOGY (IT) MEDIA / SUPPORT RELATIF À LA TECHNOLOGIE DE L'INFORMATION (TI)</b>	
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?	
<input checked="" type="checkbox"/> No Non	
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?	
<input checked="" type="checkbox"/> No Non	

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Gouvernement du Canada

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**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 PROTÉGÉE			CLASSIFIED CLASSIFIÉE			NATO					COMSEC				
	A	B	C	CONFIDENTIAL	SECRET	TOP SECRET	NATO RESTRICTED	NATO CONFIDENTIAL	NATO SECRET	COMSEC TOP SECRET COMSEC TRIS SECRET	PROTECTED PROTÉGÉE			CONFIDENTIAL	SECRET	TOP SECRET
				CONFIDENTIEL		TRIS SECRET		NATO DIFFUSION RESTREINTE	NATO CONFIDENTIEL			A	B	C	CONFIDENTIEL	
Information / Assets Renseignements / Biens																
Production																
IT Media / Support TI																
IT Link / Lien électronique																

12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED?  
La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE?

☒ No  
Non

☐ Yes  
Oui

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

12. b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED?  
La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE?

☒ No  
Non

☐ Yes  
Oui

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



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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 to assist CIC with Information Management Services 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.

#### PeopleSoft Application Services

Resource Category	Level	Minimum Security Clearance
A.1 Application / Software Architect – PeopleSoft Application Specialist	2	Reliability Status
A.1 Application / Software Architect – PeopleSoft Application Specialist	3	Reliability Status
A.1 Application / Software Architect – PeopleSoft Upgrade Specialist	2	Reliability Status
A.1 Application / Software Architect – PeopleSoft Upgrade Specialist	3	Reliability Status
A.3 ERP Programmer Analyst - PeopleSoft	2	Reliability Status
I.1 Data Conversion Specialist - PeopleSoft	2	Reliability Status
I.1 Data Conversion Specialist - PeopleSoft	3	Reliability Status
A.2 ERP Functional Analyst – PeopleSoft	2	Reliability Status
A.2 ERP Functional Analyst – PeopleSoft	3	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		
<b>Bidder's full legal name</b>		
<b>Authorized Representative of Bidder for evaluation purposes (e.g., clarifications)</b>	Name	
	Title	
	Address	
	Telephone #	
	Fax #	
	Email	
<b>Number of the Supply Arrangement (SA)</b> [Note to Bidders: Please ensure to provide your Supply Arrangement number.]		
<b>Bidder's Procurement Business Number (PBN)</b> [see the Standard Instructions 2003]  [Note to Bidders: Please ensure that the PBN you provide matches the legal name under which you have submitted your bid. If it does not, the Bidder will be determined based on the legal name provided, not based on the PBN, and the Bidder will be required to submit the PBN that matches the legal name of the Bidder.]		
<b>Jurisdiction of Contract:</b> Province or territory in Canada the Bidder wishes to be the legal jurisdiction applicable to any resulting contract (if other than as specified in solicitation)		
<b>Former Public Servants</b>  See the Article in Part 2 of the bid solicitation entitled Former Public Servant for a definition of "Former Public Servant".	Is the Bidder a FPS in receipt of a pension as defined in the bid solicitation? Yes ____ No ____  If yes, provide the information required by the Article in Part 2 entitled "Former Public Servant"	
	Is the Bidder a FPS who received a lump sum payment under the terms of the Work Force Adjustment Directive? Yes ____ No ____  If yes, provide the information required by the Article in Part 2 entitled "Former Public Servant"	

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

## ATTACHMENT 4.1 MANDATORY TECHNICAL CRITERIA

*Note to Bidders: A Word version of this document is available by sending a request by email to [carole.holden@tpsgc-pwgsc.gc.ca](mailto:carole.holden@tpsgc-pwgsc.gc.ca)*

### 1.0 THE BIDDER

MTC#	Mandatory Technical Criteria	Bidder's Response (Reference to Substantiating Materials included in Bid)
MTC1	<p><b>Corporate Capacity:</b> (See Note to Bidder below)</p> <p>1. Using only one reference contract, the Bidder must demonstrate experience providing PeopleSoft Application Services. A copy of the entire contract must be provided. These services must have been provided within the past five years (as of bid closing date). The Contract identified must:</p> <ul style="list-style-type: none"><li>a) Have been with a single client;</li><li>b) Have an initial minimum value of \$2,000,000 (CDN) excluding applicable taxes, not including amendments;</li><li>c) Have an initial minimum contract period of one year;</li><li>d) Have been completed in the last five years (as of bid closing date) or has been ongoing for a minimum of six months (as of bid closing date); and</li><li>e) Have included the provision of the services in at least two of the following same or similar categories listed in Section 5 of the Statement of Work of this bid solicitation<ul style="list-style-type: none"><li>(i) A.1 Application / Software Architect – PeopleSoft Application Specialist, Level 2 or Level 3;</li><li>(ii) A.1 Application / Software Architect – PeopleSoft Upgrade Specialist, Level 2 or Level 3;</li><li>(iii) A.3 ERP Programmer Analyst – PeopleSoft, Level 2;</li><li>(iv) I.1 Data Conversion Specialist – PeopleSoft, Level 2 or Level 3;</li><li>(v) A.2 ERP Functional Analyst – PeopleSoft, Level 2 or Level 3.</li></ul></li></ul> <p>A copy of the Contract Statement of Work and/or Task Authorization Statement of Work must be submitted to substantiate the services provided by the proposed category.</p> <p>If the Bidder's reference contract does not have a Statement of Work with a list of detailed tasks, the Bidder</p>	

	<p>must provide a list of tasks performed under the reference contract that can be confirmed and validated by the Client for the reference contract. The list of tasks provided by the Bidder must clearly demonstrate that they are the same or similar to the tasks listed in Section 5 of the Statement of Work of this bid solicitation; and</p> <p>f) Have a minimum total invoiced amount of:</p> <p>(i) If the Contract was completed in the last 5 years (as of bid closing date):</p> <p>(a) 60% of the value (excluding applicable taxes) of the Initial Contract Period, not including amendments; or</p> <p>(b) at least \$2M (excluding applicable taxes) of the Initial Contract Period, not including amendments; <b>or</b></p> <p>(ii) If the Contract is on-going in the last 5 years (as of bid closing date):</p> <p>(a) 50% of the value (excluding applicable taxes) of the Initial Contract Period; or</p> <p>(b) at least \$2M (excluding applicable taxes) of the Initial Contract Period, not including amendments; <b>or</b></p> <p>(iii) If the Contract was awarded in the last six months (as of the bid closing date):</p> <p>(a) 10% of the initial value of the Contract (excluding applicable taxes), not including amendments.</p> <p>2. The Bidder must provide:</p> <ul style="list-style-type: none"><li>▪ the name of the client organization;</li><li>▪ the name of the client;</li><li>▪ the client's title;</li><li>▪ the client's telephone number;</li><li>▪ the client's email address;</li><li>▪ the contract number;</li><li>▪ the completion or on-going date of the contract;</li><li>▪ the start and end dates for the Initial Contract Period, not including amendments;</li><li>▪ the total value (excluding applicable taxes) of the Initial Contract Period, not including amendments; and</li><li>▪ the total invoiced amount (excluding applicable taxes) for the Initial Contract Period, not including amendments.</li></ul> <p>The information listed above should be submitted with the bid using Form 1 – Bidder Corporate Capacity Form. If any of the information is not submitted, the Contracting Authority will inform the Bidder of a time frame within which to provide the information. Failure to provide the information listed above within the time frame provided will render the bid non-responsive.</p>	
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	<p><b>Note to Bidder:</b> The reference contract must have been contracted with the Bidder submitting a bid for this requirement. "Bidder" means the person or entity (or, in the case of a joint venture, the persons or entities) submitting a bid to perform a contract for goods, services or both. It does not include the parent, subsidiaries or other affiliates of the Bidder, or its subcontractors. The Government of Canada is not considered a single client. An individual department, agency or Crown Corporation is considered a single client.</p>	
MTC2	<p><b>Client Manager.</b> The Bidder must identify by name and position title an individual that will be designated as the CIC Client Manager responsible for the resource and contract management associated with the resulting contract.</p> <p>A copy of the Client Manager's résumé must be provided with the bid.</p>	
MTC3	<p><b>Proposed Resources.</b> The Bidder must propose a total of 4 resources, one for each of the following categories:</p> <ol style="list-style-type: none"> <li>1. A.1 Application / Software Architect – PeopleSoft Application Specialist, Level 3</li> <li>2. A.1 Application / Software Architect – PeopleSoft Upgrade Specialist, Level 3</li> <li>3. I.1 Data Conversion Specialist – PeopleSoft, Level 3</li> <li>4. A.2 ERP Functional Analyst – PeopleSoft, Level 3</li> </ol> <p>The Bidder must provide with its bid a résumé for each of the proposed resources.</p> <p>A resource must not be proposed more than once.</p>	
MTC4	<p><b>Risk Mitigation Strategy</b></p> <p>The Bidder must describe its proposed Risk Mitigation strategy, including the approach and or measures it proposes to undertake to ensure its ability to propose fully qualified resources to CIC within 2 working days of receipt of a TA Request.</p> <p>The Bidder must demonstrate its ability to supply, manage and retain large groups of resources in support of a single client/project within the region of delivery.</p>	
MTC5	<p><b>Contract Management Plan</b></p> <p>The Bidder must provide a plan as to how the resulting contract will be managed.</p> <p>The Bidder must describe its proposed Contract Management Plan specifically addressing measures it proposes to undertake to manage the resulting contract including all of the following elements:</p> <ol style="list-style-type: none"> <li>1. Identify, select and deploy the appropriate resource in a timely manner;</li> </ol>	

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	<ol style="list-style-type: none"><li>2. Manage the process of transitioning between existing contracted resources and the new contract;</li><li>3. Manage the process of transitioning between contract resources during the term of the contract;</li><li>4. Manage quality assurance practices in providing resources for tasking;</li><li>5. Manage contingency plans/practices to ensure resource availability and resource replacement.</li></ol>	
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## 2. RESOURCES

### 2.1 A.1 Application / Software Architect – PeopleSoft Application Specialist, Level 3

<i>Resource #1: A.1 Application / Software Architect – PeopleSoft Application Specialist, Level 3</i>		
MTC#	Mandatory Technical Criteria	Bidder's Response (Reference to Substantiating Materials included in Bid)
MTC6	The proposed resource must clearly demonstrate at least 12 years of experience as an Application/Software Architect working within an IM/IT environment specializing in the PeopleSoft Application. The experience must come from at least 3 separate projects.	

### 2.2 A.1 Application / Software Architect – PeopleSoft Upgrade Specialist, Level 3

<i>Resource #2: A.1 Application / Software Architect – PeopleSoft Upgrade Specialist, Level 3</i>		
MTC#	Mandatory Technical Criteria	Bidder's Response (Reference to Substantiating Materials included in Bid)
MTC7	The proposed resource must clearly demonstrate at least 12 years of experience as an Application / Software Architect for IM/IT systems specializing in PeopleSoft upgrades. The experience must come from at least 3 separate projects.	

### 2.3 I.1 Data Conversion Specialist – PeopleSoft, Level 3

<i>Resource #3: I.1 Data Conversion Specialist – PeopleSoft, Level 3</i>		
MTC#	Mandatory Technical Criteria	Bidder's Response (Reference to Substantiating Materials included in Bid)
MTC8	The proposed resource must clearly demonstrate at least 12 years of experience as a Data Conversion Specialist for IM/IT systems specializing in the PeopleSoft Application. The experience must come from at least 3 separate projects.	

### 2.4 A.2 ERP Functional Analyst – PeopleSoft, Level 3

<i>Resource #4: A.2 ERP Functional Analyst – PeopleSoft, Level 3</i>		
MTC#	Mandatory Technical Criteria	Bidder's Response (Reference to Substantiating Materials included in Bid)
MTC9	The proposed resource must clearly demonstrate at least 12 years of experience as an ERP Functional Analyst for IM/IT systems specializing in the PeopleSoft Application. The experience must come from at least 3 separate projects.	

## ATTACHMENT 4.2

### POINT-RATED TECHNICAL CRITERIA

*Note to Bidders: A Word version of this document is available by sending a request by email to [carole.holden@tpsgc-pwgsc.gc.ca](mailto:carole.holden@tpsgc-pwgsc.gc.ca)*

#### 1. THE BIDDER

RTC#	Rated Technical Criteria	Maximum Points	Point Scales	Bidder's Response (Reference to Substantiating Materials included in Bid)
RTC1	<p><b>Client Manager.</b> The Bidder should demonstrate the following:</p> <ol style="list-style-type: none"> <li>The number of years of experience serving as a Client Manager.</li> <li>The number of resources simultaneously managed under any contract(s) within the last five years (as of bid closing date), including the following for each contract: <ul style="list-style-type: none"> <li>the organization name;</li> <li>the start and end dates for the contract(s);</li> <li>the contract numbers; and</li> <li>the number of resources managed per contract.</li> </ul> </li> </ol>	<p>5</p> <p>10</p>	<p>1 point for each year of experience exceeding three years serving as a Client Manager on contracts (up to a maximum of 5 points).</p> <p>over 40 resources - 10 points 31 to 40 resources - 8 points 21 to 30 resources - 6 points 11 to 20 resources - 4 points 5 to 10 resources - 2 points</p>	
RTC2	<p><b>Resource Categories.</b> The Bidder should demonstrate the number of the following same or similar categories where resources have been provided on one or more contracts, within the last five years (as of bid closing date).</p> <ol style="list-style-type: none"> <li>A.1 Application / Software Architect – PeopleSoft Application Specialist, Level 2 or Level 3;</li> <li>A.1 Application / Software Architect – PeopleSoft Upgrade Specialist, Level 2 or Level 3;</li> <li>A.3 ERP Programmer Analyst – PeopleSoft, Level 2;</li> <li>I.1 Data Conversion Specialist – PeopleSoft, Level 2 or Level 3;</li> </ol>	10	<p>5 categories - 10 points 4 categories – 8 points 3 categories - 6 points 2 categories - 4 points 1 category - 2 points</p>	

	<p>e. A.2 ERP Functional Analyst – PeopleSoft, Level 2 or Level 3</p> <p>A copy of the Contract Statement of Work and/or Task Authorization Statement of Work should be submitted with the bid to substantiate that the services provided by the proposed category are the same or similar to the tasks listed in Section 5 of the Statement of Work of this bid solicitation.</p> <p>If the Bidder's reference contract(s) does not have a Statement of Work with a list of detailed tasks, the Bidder should provide a list of tasks performed under the reference contract(s) that can be confirmed and validated by the Client for the reference contract(s). The list of tasks provided by the Bidder should clearly demonstrate that they are the same or similar to the tasks listed in Section 5 of the Statement of Work of this bid solicitation.</p> <p>The following information should be provided for each category:</p> <ul style="list-style-type: none"><li>• Resource name;</li><li>• Category as detailed in Annex A, Statement of Work;</li><li>• Client contact name;</li><li>• Client's title;</li><li>• Client organization;</li><li>• Client's telephone number;</li><li>• Client's email address;</li><li>• Contract numbers; and</li><li>• Contract start and end dates.</li></ul> <p>The information listed above should be submitted with the bid using the Form 2 – Resource Category Form. If any of the information is not submitted, the Contracting Authority will inform the Bidder of a time frame within which to provide the information. Failure to provide the information listed above within the time frame provided will render the bid non-responsive.</p>			
Maximum Points Available:		25		
Minimum Points Required:		17		

## 2.0 RESOURCES

### 2.1 A.1 Application / Software Architect – PeopleSoft Application Specialist, Level 3

<i>Resource #1 – A.1 Application / Software Architect – PeopleSoft Application Specialist, Level 3</i>				
RTC#	Rated Technical Criteria	Years of experience	Point Rating	Bidder's Response (Reference to Substantiating Materials included in Bid)
RTC1	The proposed resource should clearly demonstrate experience leading the development of technical architectures, frameworks and strategies for an organization.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ to 9 years 9+ years	2 points 4 points 6 points 8 points 10 points	
RTC2	The proposed resource should clearly demonstrate experience leading the evaluation of existing procedures and methods, identifying and documenting database content, structure, and applications sub-systems and developing a data dictionary.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ to 9 years 9+ years	2 points 4 points 6 points 8 points 10 points	
RTC3	The proposed resource should clearly demonstrate experience with SQL and Relational Database Management Systems (RDBMS).	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ to 9 years 9+ years	2 points 4 points 6 points 8 points 10 points	
RTC4	The proposed resource should clearly demonstrate experience as an Application Architect using the PeopleSoft HRMS Version 8.9 or higher.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ to 9 years 9+ years	2 points 4 points 6 points 8 points 10 points	
RTC5	The proposed resource should clearly demonstrate experience as an Application Architect for a PeopleSoft Application Upgrade project to PeopleSoft HRMS Version 8.9 or higher.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ to 9 years 9+ years	2 points 4 points 6 points 8 points 10 points	
RTC6	The proposed resource should clearly demonstrate experience as an Application Architect for a PeopleSoft Upgrade project on at least one of the following database platforms: Sybase, Oracle or MS SQL Server.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ to 9 years 9+ years	2 points 4 points 6 points 8 points 10 points	
<b>Maximum Points Available:</b>		<b>60</b>		
<b>Minimum Points Required:</b>		<b>42</b>		

## 2.2 A.1 Application / Software Architect – PeopleSoft Upgrade Specialist, Level 3

<i>Resource #2 – A.1 Application / Software Architect – PeopleSoft Upgrade Specialist, Level 3</i>				
<b>RTC#</b>	<b>Rated Technical Criteria</b>	<b>Years of experience</b>	<b>Point Rating</b>	<b>Bidder's Response (Reference to Substantiating Materials included in Bid)</b>
<b>RTC7</b>	The proposed resource should clearly demonstrate experience leading the development of technical architectures, frameworks and strategies for an organization.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ to 9 years 9+ years	2 points 4 points 6 points 8 points 10 points	
<b>RTC8</b>	The proposed resource should clearly demonstrate experience leading the evaluation of existing procedures and methods, identifying and documenting database content, structure, and applications sub-systems and developing a data dictionary.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ to 9 years 9+ years	2 points 4 points 6 points 8 points 10 points	
<b>RTC9</b>	The proposed resource should clearly demonstrate experience with SQL and Relational Database Management Systems (RDBMS).	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ to 9 years 9+ years	2 points 4 points 6 points 8 points 10 points	
<b>RTC10</b>	The proposed resource should clearly demonstrate experience as a Technical Lead or Upgrade Specialist using the version of PeopleSoft HRMS Version 8.9 or higher.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ to 9 years 9+ years	2 points 4 points 6 points 8 points 10 points	
<b>RTC11</b>	The proposed resource should clearly demonstrate experience as a Technical Lead or Upgrade Specialist for a PeopleSoft Application Upgrade project to PeopleSoft HRMS Version 8.9 or higher.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ to 9 years 9+ years	2 points 4 points 6 points 8 points 10 points	
<b>RTC12</b>	The proposed resource should clearly demonstrate experience as a Technical Lead or Upgrade Specialist for a PeopleSoft Upgrade on at least one of the following database platforms: Sybase, Oracle or MS SQL Server.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ to 9 years 9+ years	2 points 4 points 6 points 8 points 10 points	
<b>Maximum Points Available:</b>		<b>60</b>		
<b>Minimum Points Required:</b>		<b>42</b>		

## 2.3 I.1 Data Conversion Specialist – PeopleSoft, Level 3

<i>Resource #3 – I.1 Data Conversion Specialist – PeopleSoft, Level 3</i>				
RTC#	Rated Technical Criteria	Years of experience	Point Rating	Bidder's Response (Reference to Substantiating Materials included in Bid)
RTC13	The proposed resource should clearly demonstrate experience leading the completion of the mapping, interfaces, mock conversion work, enhancements, actual conversion and verifying completeness and accuracy of converted data.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ to 9 years 9+ years	2 points 4 points 6 points 8 points 10 points	
RTC14	The proposed resource should clearly demonstrate experience establishing a working relationship with clients, at various organizational levels and providing data conversion support.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ to 9 years 9+ years	2 points 4 points 6 points 8 points 10 points	
RTC15	The proposed resource should clearly demonstrate experience with SQL and Relational Database Management Systems (RDBMS).	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ to 9 years 9+ years	2 points 4 points 6 points 8 points 10 points	
RTC16	The proposed resource should clearly demonstrate experience as a Data Conversion Specialist using the PeopleSoft HRMS Version 8.9 or higher.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ to 9 years 9+ years	2 points 4 points 6 points 8 points 10 points	
RTC17	The proposed resource should clearly demonstrate experience as a Data Conversion Specialist for a PeopleSoft Application Upgrade project to PeopleSoft HRMS Version 8.9 or higher.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ to 9 years 9+ years	2 points 4 points 6 points 8 points 10 points	
RTC18	The proposed resource should clearly demonstrate experience as a Data Conversion Specialist for a PeopleSoft Upgrade project on at least one of the following database platforms: Sybase, Oracle or MS SQL Server.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ to 9 years 9+ years	2 points 4 points 6 points 8 points 10 points	
<b>Maximum Points Available:</b>		<b>60</b>		
<b>Minimum Points Required:</b>		<b>42</b>		

## 2.4 A.2 ERP Functional Analyst – PeopleSoft, Level 3

<i>Resource #4 – A.2 ERP Functional Analyst – PeopleSoft, Level 3</i>				
RTC#	Rated Technical Criteria	Years of experience	Point Rating	Bidder's Response (Reference to Substantiating Materials included in Bid)
RTC19	The proposed resource should clearly demonstrate experience leading the development and documentation of PeopleSoft functional business and system requirements.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ to 9 years 9+ years	2 points 4 points 6 points 8 points 10 points	
RTC20	The proposed resource should clearly demonstrate experience in leading the translation of ERP business requirements into systems design and specifications.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ to 9 years 9+ years	2 points 4 points 6 points 8 points 10 points	
RTC21	The proposed resource should clearly demonstrate experience leading the ERP business requirements in PeopleSoft system testing and implementation.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ to 9 years 9+ years	2 points 4 points 6 points 8 points 10 points	
RTC22	The proposed resource should clearly demonstrate experience leading the development and documentation of PeopleSoft functional, or business, or system requirements specifications.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ to 9 years 9+ years	2 points 4 points 6 points 8 points 10 points	
RTC23	The proposed resource should clearly demonstrate experience developing and documenting screen, report and interface requirements.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ to 9 years 9+ years	2 points 4 points 6 points 8 points 10 points	
RTC24	The proposed resource should clearly demonstrate experience developing and documenting Business Process Models, System Use Cases and system requirements from detailed business requirements.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ to 9 years 9+ years	2 points 4 points 6 points 8 points 10 points	
RTC25	The proposed resource should clearly demonstrate experience making Configuration changes to PeopleSoft as required for each module.	1 to 3 years 3+ to 5 years 5+ to 7 years 7+ to 9 years 9+ years	2 points 4 points 6 points 8 points 10 points	
<b>Maximum Points Available:</b>		<b>70</b>		
<b>Minimum Points Required:</b>		<b>49</b>		



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#### Rated Technical Criteria - Points Summary

Item	Reference	Maximum Points Available	Minimum Points Required
1.	Bidder	25	17
2.1	Resource #1 – A.1 Application / Software Architect – PeopleSoft Application Specialist, Level 3	60	42
2.2	Resource #2 – A.1 Application / Software Architect – PeopleSoft Upgrade Specialist, Level 3	60	42
2.3	Resource #3 – I.1 Data Conversion Specialist – PeopleSoft, Level 3	60	42
2.4	Resource #4 - A.2 ERP Functional Analyst – PeopleSoft, Level 3	70	49
	Maximum Points Available - Total:	275	
	Minimum Points Required - Total:		192

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### ATTACHMENT 4.3 PRICING SCHEDULE

In respect of the "Number of Days" listed below in (D), the estimated number of days is for evaluation purposes only during the solicitation process and does not represent a commitment of the future usage.

#### INITIAL CONTRACT PERIOD:

Contract Period - Year 1					
(A)	(B)	(C)	(D)	(E)	(F)
Resource Category	Level of Expertise	Estimated Number of Resources	Estimated Number of Days per Resource	Firm Per Diem Rate or Median Rate (if applicable)	Total Cost (Cx Dx E)
A.1 Application / Software Architect – PeopleSoft Application Specialist	2	1	240	\$	\$
A.1 Application / Software Architect – PeopleSoft Application Specialist	3	2	240	\$	\$
A.1 Application / Software Architect – PeopleSoft Upgrade Specialist	2	1	240	\$	\$
A.1 Application / Software Architect – PeopleSoft Upgrade Specialist	3	2	240	\$	\$
A.3 ERP Programmer Analyst - PeopleSoft	2	1	240	\$	\$
I.1 Data Conversion Specialist - PeopleSoft	2	1	240	\$	\$
I.1 Data Conversion Specialist - PeopleSoft	3	2	240	\$	\$
A.2 ERP Functional Analyst – PeopleSoft	2	3	240	\$	\$
A.2 ERP Functional Analyst – PeopleSoft	3	2	240	\$	\$
Total Price (Contract Period - Year 1):				\$(To be determined)	

Contract Period - Year 2					
(A)	(B)	(C)	(D)	(E)	(F)
Resource Category	Level of Expertise	Estimated Number of Resources	Estimated Number of Days per Resource	Firm Per Diem Rate or Median Rate (if applicable)	Total Cost (Cx Dx E)
A.1 Application / Software Architect – PeopleSoft Application Specialist	2	1	240	\$	\$
A.1 Application / Software Architect – PeopleSoft Application Specialist	3	2	240	\$	\$
A.1 Application / Software Architect – PeopleSoft Upgrade Specialist	2	1	240	\$	\$
A.1 Application / Software Architect – PeopleSoft Upgrade Specialist	3	2	240	\$	\$

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A.3 ERP Programmer Analyst - PeopleSoft	2	1	240	\$	\$
I.1 Data Conversion Specialist - PeopleSoft	2	1	240	\$	\$
I.1 Data Conversion Specialist - PeopleSoft	3	2	240	\$	\$
A.2 ERP Functional Analyst – PeopleSoft	2	3	240	\$	\$
A.2 ERP Functional Analyst – PeopleSoft	3	2	240	\$	\$
<b>Total Price (Contract Period - Year 2):</b>				\$(To be determined)	

**OPTION PERIODS:**

<b>Option Period - Year 3</b>					
(A)	(B)	(C)	(D)	(E)	(F)
Resource Category	Level of Expertise	Estimated Number of Resources	Estimated Number of Days per Resource	Firm Per Diem Rate or Median Rate (if applicable)	Total Cost (Cx Dx E)
A.1 Application / Software Architect – PeopleSoft Application Specialist	2	1	240	\$	\$
A.1 Application / Software Architect – PeopleSoft Application Specialist	3	2	240	\$	\$
A.1 Application / Software Architect – PeopleSoft Upgrade Specialist	2	1	240	\$	\$
A.1 Application / Software Architect – PeopleSoft Upgrade Specialist	3	2	240	\$	\$
A.3 ERP Programmer Analyst - PeopleSoft	2	1	240	\$	\$
I.1 Data Conversion Specialist - PeopleSoft	2	1	240	\$	\$
I.1 Data Conversion Specialist - PeopleSoft	3	2	240	\$	\$
A.2 ERP Functional Analyst – PeopleSoft	2	3	240	\$	\$
A.2 ERP Functional Analyst – PeopleSoft	3	2	240	\$	\$
<b>Total Price (Option Period - Year 3):</b>				\$(To be determined)	

<b>Option Period – Year 4</b>					
(A)	(B)	(C)	(D)	(E)	(F)
Resource Category	Level of Expertise	Estimated Number of Resources	Estimated Number of Days per Resource	Firm Per Diem Rate or Median Rate (if applicable)	Total Cost (Cx Dx E)
A.1 Application / Software Architect – PeopleSoft Application Specialist	2	1	240	\$	\$
A.1 Application / Software Architect – PeopleSoft Application Specialist	3	2	240	\$	\$

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A.1 Application / Software Architect – PeopleSoft Upgrade Specialist	2	1	240	\$	\$
A.1 Application / Software Architect – PeopleSoft Upgrade Specialist	3	2	240	\$	\$
A.3 ERP Programmer Analyst - PeopleSoft	2	1	240	\$	\$
I.1 Data Conversion Specialist - PeopleSoft	2	1	240	\$	\$
I.1 Data Conversion Specialist - PeopleSoft	3	2	240	\$	\$
A.2 ERP Functional Analyst – PeopleSoft	2	3	240	\$	\$
A.2 ERP Functional Analyst – PeopleSoft	3	2	240	\$	\$
<b>Total Price (Option Period – Year 4):</b>					\$(To be determined)

<b>Option Period - Year 5</b>					
<b>(A)</b>	<b>(B)</b>	<b>(C)</b>	<b>(D)</b>	<b>(E)</b>	<b>(F)</b>
<b>Resource Category</b>	<b>Level of Expertise</b>	<b>Estimated Number of Resources</b>	<b>Estimated Number of Days per Resource</b>	<b>Firm Per Diem Rate or Median Rate (if applicable)</b>	<b>Total Cost (Cx Dx E)</b>
A.1 Application / Software Architect – PeopleSoft Application Specialist	2	1	240	\$	\$
A.1 Application / Software Architect – PeopleSoft Application Specialist	3	2	240	\$	\$
A.1 Application / Software Architect – PeopleSoft Upgrade Specialist	2	1	240	\$	\$
A.1 Application / Software Architect – PeopleSoft Upgrade Specialist	3	2	240	\$	\$
A.3 ERP Programmer Analyst - PeopleSoft	2	1	240	\$	\$
I.1 Data Conversion Specialist - PeopleSoft	2	1	240	\$	\$
I.1 Data Conversion Specialist - PeopleSoft	3	2	240	\$	\$
A.2 ERP Functional Analyst – PeopleSoft	2	3	240	\$	\$
A.2 ERP Functional Analyst – PeopleSoft	3	2	240	\$	\$
<b>Total Price (Option Period - Year 5):</b>					\$(To be determined)

<b>Total Bid Price</b>	
Total Initial Contract Period (Year 1+Year 2) + Option Periods (Year 3, Year 4, and Year 5)	\$ <u>&lt;TBD&gt;</u>

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## ATTACHMENT 5.1

### FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY - CERTIFICATION

I, the Bidder, by submitting the present information to the Contracting Authority, certify that the information provided is true as of the date indicated below. The certifications provided to Canada are subject to verification at all times. I understand that Canada will declare a bid non-responsive, or will declare a contractor in default, if a certification is found to be untrue, whether during the bid evaluation period or during the contract period. Canada will have the right to ask for additional information to verify the Bidder's certifications. Failure to comply with such request by Canada will also render the bid non-responsive or will 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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**FORM 1**  
**BIDDER CORPORATE CAPACITY FORM**

**Customer Reference Contact Information:**

Name of client organization: \_\_\_\_\_

Name of client: \_\_\_\_\_

Client's title: \_\_\_\_\_

Client telephone n°. \_\_\_\_\_

Email address: \_\_\_\_\_

**Contract Information:** *The Bidder must provide with this Form an entire copy of the reference contract.*

Contract number: \_\_\_\_\_

Contract completion date: \_\_\_\_\_ or Contract on-going date to: \_\_\_\_\_

**Initial Contract Period (not including amendments):**

Start date for the initial Contract Period: \_\_\_\_\_ End date for the initial Contract Period: \_\_\_\_\_

**Initial Contract Period (not including amendments):**

Total contract value for the Initial Contract Period (excluding Applicable Taxes): \_\_\_\_\_

**Initial Contract Period (not including amendments):**

Total invoiced amount for the Initial Contract Period (excluding Applicable Taxes): \_\_\_\_\_

By signing below, the Bidder certifies that the information provided in this Form is accurate.

**Signature of authorized representative of  
the Bidder:**

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

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**FORM 2**  
**RESOURCE CATEGORY FORM**

**Resource Information:**

Name of resource: \_\_\_\_\_

Category (as detailed in the Annex A - Statement of Work) : \_\_\_\_\_

**Client Information:**

Name of client: \_\_\_\_\_

Client's title: \_\_\_\_\_

Name of client organization: \_\_\_\_\_

Client telephone n°. \_\_\_\_\_

Email address: \_\_\_\_\_

**Contract Information:** *The Bidder should provide with this Form a copy of the Statement of Work of the Contract and/or Task Authorization Statement of Work.*

Contract n°: \_\_\_\_\_

Contract Start date: \_\_\_\_\_ End date: \_\_\_\_\_

By signing below, the Bidder certifies that the information provided in this Form is accurate.

**Signature of authorized representative of  
the Bidder:**

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_