



**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

OR THROUGH EPOST

Gatineau

Québec

K1A 0S5

Bid Fax: (819) 997-9776

**REQUEST FOR PROPOSAL
DEMANDE DE PROPOSITION**

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

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

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

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

Comments - Commentaires

Vendor/Firm Name and Address

Raison sociale et adresse du

fournisseur/de l'entrepreneur

Issuing Office - Bureau de distribution

Informatics Professional Services - EL Division/Services
professionnels en informatique - division EL
4C2, Place du Portage

Gatineau

Québec

K1A 0S5

Title - Sujet Operational support Services-TBIPS		
Solicitation No. - N° de l'invitation EP296-173257/A		Date 2018-02-05
Client Reference No. - N° de référence du client 20173257		
GETS Reference No. - N° de référence de SEAG PW-\$\$EL-618-32166		
File No. - N° de dossier 618el.EP296-173257	CCC No./N° CCC - FMS No./N° VME	
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2018-02-26		Time Zone Fuseau horaire Eastern Standard Time EST
F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input checked="" type="checkbox"/> Other-Autre: <input type="checkbox"/>		
Address Enquiries to: - Adresser toutes questions à: Laassouli(EL DIV.), Hicham		Buyer Id - Id de l'acheteur 618el
Telephone No. - N° de téléphone (613) 858-9817 ()		FAX No. - N° de FAX () -
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction: TPSGC/PWGSC National Capital Area 2720 Riverside Drive Ottawa, Ontario K1A 0M2		

Instructions: See Herein

Instructions: Voir aux présentes

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

BID SOLICITATION

**FOR CONTRACTS AGAINST A SUPPLY ARRANGEMENT FOR TASK-
BASED INFORMATICS PROFESSIONAL SERVICES (TBIPS) – TIER 2
VARIOUS CATEGORIES**

FOR

**PUBLIC WORKS AND GOVERNMENT SERVICES
CANADA (PWGSC) - REAL PROPERTY BRANCH (RPB)**

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List of Annexes to the Resulting Contract:

Annex A Statement of Work
Annex B Basis of Payment
Annex C Security Requirements Check List

Appendix A to Annex A - Tasking Assessment Procedure
Appendix B to Annex A - Task Authorization Form
Appendix C to Annex A – Resource Assessment Criteria
Appendix D to Annex A – Certifications at the TA stage

List of Attachments:

Attachment 1: Bid Submission Form
Attachment 2: Bid Evaluation Criteria
Attachment 3: Pricing Schedule

List of Attachments to Part 5:

Attachment 5.1: Federal Contractors Program for Employment Equity – Certification

PART 1 - GENERAL INFORMATION

1.1 Introduction

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

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

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

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

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

Part 5 Certifications 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 Real Property Branch (RPB) of Public Works and Government Services (PWGSC) (the "Client") for Task-Based Informatics Professional Services (TBIPS) under the TBIPS Supply Arrangement (SA) method of supply.
- (b) It is intended to result in the award of 1 contract for 1 year plus 4 one-year irrevocable options allowing Canada to extend the term of the contract.
- (c) There are security requirements associated with this requirement. For additional information, consult Part 6 - Security, Financial and Other Requirements, and Part 7 – Resulting Contract Clauses. For more information on personnel and organization security screening or security clauses, Bidders should refer to the Contract Security Program of Public Works and Government Services Canada (<http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>) website.
- (d) The requirement is subject to the provisions of the World Trade Organization Agreement on Government Procurement (WTO-AGP), the North American Free Trade Agreement (NAFTA), the Canada-Chile Free Trade Agreement (CCFTA), the Canada-Peru Free Trade Agreement (CPFTA), the Canada-Colombia Free Trade Agreement (CColFTA), the Canada-Panama Free Trade Agreement (CPanFTA), the Canada-European Union Comprehensive Economic and Trade Agreement (CETA), and the Canadian Free Trade Agreement (CFTA).
- (e) The Federal Contractor's Program (FCP) for employment equity applies to this procurement; see Part 5 – Certifications and Additional Information, Part 7 – Resulting Contract Clauses and the attachment titled "Federal Contractors Program for Employment Equity – Certification."
- (f) This bid solicitation is to establish a contract with task authorizations for the delivery of the requirement detailed in the bid solicitation across Canada, excluding locations within Yukon, Northwest Territories, Nunavut, Quebec, and Labrador that are subject to Comprehensive Land Claims Agreements (CLCAs). Any requirement for deliveries within CLCAs areas within Yukon, Northwest Territories, Nunavut, Quebec, or Labrador will be treated as a separate procurement, outside the resulting contract.

- (g) Only TBIPS SA Holders currently holding a TBIPS SA for Tier 2, in all the Resource Categories listed below and 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
Business Consultant	3	2
Business Consultant	2	2
Business Systems Analyst	3	6
Business Systems Analyst	2	2
Help Desk Specialist	3	1
Help Desk Specialist	2	1
IM Architect	2	1
GIS Application Analyst	3	1
GIS System Architect	3	1
Enterprise Architect	3	1
Project Leader	3	2
Project Leader	2	2

- (j) 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.

1.3 Debriefings

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.

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:

Subsection 3.a) of Section 01, Integrity Provisions - Bid of Standard Instructions 2003 incorporated by reference above is deleted in its entirety and replaced with the following:

- a. at the time of submitting an arrangement under the Request for Supply Arrangement (RFSA), the Bidder has already provided a list of names, as requested under the *Ineligibility and Suspension Policy*. During this procurement process, the Bidder must immediately inform Canada in writing of any changes affecting the list of names.
- (e) Section 5, entitled Submission of bids, is amended as follows:
- (f) 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.
- (g) 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;
- (h) 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,
- (i) Subsection 4 is amended as follows:
 - (i) Delete: 60 days
 - (ii) Insert: 180 days
- (j) Section 6, 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.

- (k) Section 07, entitled Delayed bids, is amended as follows:
- 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."
- (l) Section 8, 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).
 - 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. 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) Bids must be submitted only to the Public Works and Government Services Canada (PWGSC) Bid Receiving Unit by the date, time and at the PWGSC address indicated on page one of the bid solicitation or through ePost Connect if the Bidder wishes to use this service.
- (b) Due to the nature of the bid solicitation, bids transmitted by facsimile or electronic mail to PWGSC will not be accepted.

2.3 Enquiries - Bid Solicitation

- (a) All enquiries must be submitted in writing to the Contracting Authority no later than 5 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 question(s) or may request that the Bidder do so, so that the proprietary nature of the question(s) is eliminated, and the enquiry can be answered with copies to all Bidders. Enquiries not submitted in a form that can be distributed to all Bidders may not be answered by Canada.

2.4 Former Public Servant

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

- (b) **Definitions**

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

- (i). an individual;

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

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

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

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

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

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

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

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

(d) **Work Force Adjustment Directive**

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

If so, the Bidder must provide the following information:

- (i). name of former public servant;
- (ii). conditions of the lump sum payment incentive;
- (iii). date of termination of employment;
- (iv). amount of lump sum payment;
- (v). rate of pay on which lump sum payment is based;
- (vi). period of lump sum payment including start date, end date and number of weeks;

- (vii). number and amount (professional fees) of other contracts subject to the restrictions of a work force adjustment program.

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

2.5 Applicable Laws

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

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

2.6 Improvement of Requirement During Solicitation Period

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

2.7 Volumetric Data

The estimated number of resources required per 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.

PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

- (a) 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.

The bid must be gathered per section and separated as follows:

Section I: Technical Bid

Section II: Financial Bid

Section III: Certifications

If the Bidder is simultaneously providing a hard copy of the bid using another acceptable delivery method, 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.

- (b) If the Bidder chooses to submit its bid in hard copies, Canada requests that the Bidder submits its bid in separately bound sections as follows:

Section I: Technical Bid (4 hard copies)

Section II: Financial Bid (2 hard copies)

Section III: Certifications (1 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 1 with their bids. It provides a common form in which bidders can provide information required for evaluation and contract award, such as a contact name and the Bidder's Procurement Business Number, etc. Using the form to provide this information is

not mandatory, but it is recommended. If Canada determines that the information required by the Bid Submission Form is incomplete or requires correction, Canada will provide the Bidder with an opportunity to do so.

- (ii) **Security Clearance:** Bidders are requested to submit the following security information for each of the proposed resources with their bids on or before the bid closing date:

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

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

- (iii) **Substantiation of Technical Compliance:** The technical bid must substantiate the compliance with the specific articles of Attachment 2, which is the requested format for providing the substantiation. The substantiation must not simply be a repetition of the requirements, 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 resources comply is not sufficient. Where Canada determines that the substantiation is not complete, the Bidder will be considered non-responsive and disqualified. The substantiation may refer to additional documentation submitted with the bid - this information can be referenced in the "Bidder's Response" column of Attachment 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) **Previous Similar Projects:** Where the bid must include a description of previous similar projects: (i) a project must have been completed by the Bidder itself (and cannot include the experience of any proposed subcontractor or any affiliate of the Bidder); (ii) a project must have been completed by the bid closing date; (iii) each project description must include, at minimum, the name and either the telephone number or e-mail address of a customer reference; and (iv) if more similar projects are provided than requested, Canada will decide in its discretion which projects will be evaluated. A project will be considered "similar" to the Work to be performed under any resulting contract if the project was for the performance of work that closely matches the TBIPS descriptions of the Resource Categories identified in Annex A. Work will be considered to "closely match" if the work in the provided project is described in at least 50% of the points of responsibility listed in the description of the given Resource Category.
- (v) **For Proposed Resources:** The technical bid must include résumés for the resources as identified in Attachment 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).
 - (B) For educational requirements for a particular degree, designation or certificate, PWGSC will only consider educational programs that were successfully completed by the resource by the time of bid closing. If the degree, designation or certification was issued by an educational institution outside of Canada, the Bidder must provide a copy of the results of the academic credential assessment and qualification recognition service issued by an agency or organization recognized by the Canadian Information Centre for International Credentials (CICIC).
 - (C) For requirements relating to professional designation or membership, the resource must have the required designation or membership by the time of bid closing and must continue, where applicable, to be a member in good standing of the profession or membership throughout the evaluation period and Contract Period. Where the designation or membership must be demonstrated through a certification, diploma or degree, such document must be current, valid and issued by the entity specified in this solicitation. If the entity is not specified, the issuer must have been an accredited or otherwise recognized body, institution or entity at the time the document was issued. If the degree, diploma or certification was issued by an educational institution outside of Canada, the Bidder must provide a copy of the results of the academic credential assessment and qualification recognition service issued by an agency or organization recognized by the Canadian Information Centre for International Credentials (CICIC).
 - (D) For work experience, PWGSC will not consider experience gained as part of an educational program, except for experience gained through a formal co-operative program at a post-secondary institution.
 - (E) For any requirements that specify a particular time period (e.g., 2 years) of work experience, PWGSC will disregard any information about experience if the technical bid does not include the relevant dates (month and year) for the experience claimed (i.e., the start date and end date). Canada will evaluate only the duration that the resource actually worked on a project or projects (from his or her start date to end date), instead of the overall start and end date of a project or a combination of projects in which a resource has participated.
 - (F) For work experience to be considered by Canada, the technical bid must not simply indicate the title of the individual's position, but must demonstrate that the resource has the required work experience by explaining the responsibilities and work performed by the individual while in that position. Only listing experience without providing any supporting data to describe responsibilities, duties and relevance to the requirement, or reusing the same wording as the qualification requirements, will not be considered "demonstrated" for the purposes of the assessment. The Contractor should provide complete details as to where, when, month and year, and how, through which activities/responsibilities, the stated qualifications / experience were obtained. In situations in which a proposed resource worked at the same time on more than one project, the duration of any overlapping time period will be counted only once toward any requirements that relate to the individual's length of experience.
- (vi) **Customer Reference Contact Information:**
- (A) In conducting its evaluation of the bids, Canada may, but will have no obligation to request that a bidder provide customer references. If Canada sends such a written request, the bidder will have 2 working days to provide the necessary information to Canada. Failure to meet this deadline will result in the bid being

declared non-responsive. These customer references must each confirm if requested by PWGSC, the facts identified in the Bidder's bid, as required by Attachment 2.

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

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

3.3 Section II: Financial Bid

- (a) **Pricing:** Bidders must submit their financial bid in accordance with The Pricing Schedule provided in Attachment 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) **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.
- (c) **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 and additional information identified under Part 5.

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

- (a) Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria. There are several steps in the evaluation process, which are described below. Even though the evaluation and selection will be conducted in steps, the fact that Canada has proceeded to a later step does not mean that Canada has conclusively determined that the Bidder has successfully passed all the previous steps. Canada may conduct steps of the evaluation in parallel.
- (b) An evaluation team composed of representatives of the Client and 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 3 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 2.
- (b) **Number of Resources Evaluated:**

Only a certain number of resources per Resource Category will be evaluated as part of this bid solicitation as identified in Attachment 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.

(c) **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 that requirement for all bidders who have not, at that point, been found non-responsive.
- (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 within a 48-hour period 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) If Canada does not receive a response from the contact person within the 5 working days, Canada will not contact the Bidder and will not permit the substitution of an alternate contact person.
- (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

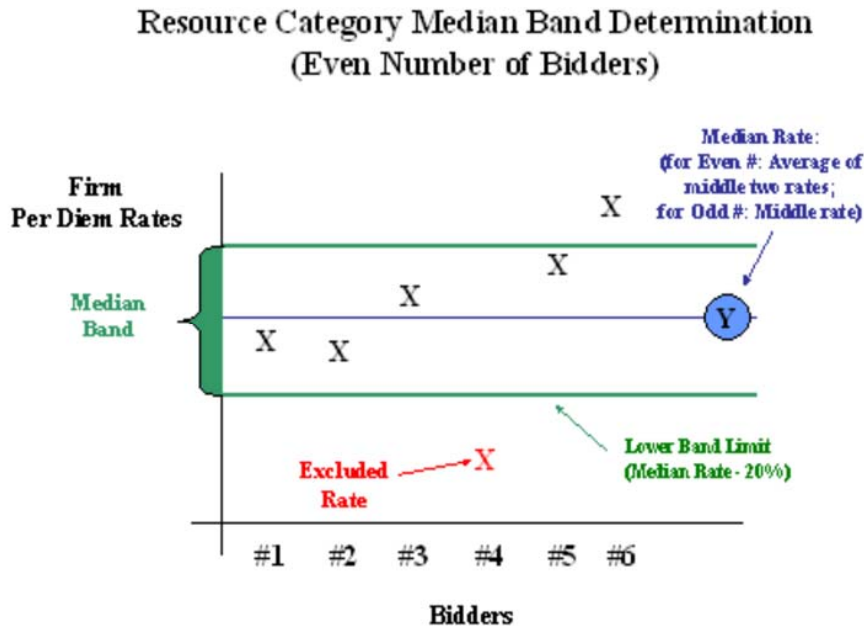
- (a) **Calculation of Total Bid Price:** The financial evaluation will be conducted by calculating the Total Bid Price using the pricing tables completed by the Bidders. The Total Bid Price will be determined for each Bidder by multiplying its firm per diem rates for the Initial Contract Period and the option period(s) (or the Lower Median Band Limit, whichever is higher) with the estimated number of days of work for each period, for all the Resource Categories stated in Attachment 3 – Pricing Schedule. The sum of such rates will constitute the Total Bid Price for that Bidder.

(b) **Firm Per Diem Median Rate Evaluation Method**

In conducting the financial evaluation, with respect to the professional services rates proposed, a firm per diem rate median evaluation method will be used, as follows:

- (i) **Use of Method:** The firm per diem rate median 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 that is lower than the Lower Median 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.
- (ii) **Calculation for both the Initial Contract Period and the Option Period medians:** Using the per diem rate proposed for each individual resource a median rate will be determined for each Resource Category. A median will be used to calculate a median band against which each Bidders' per diem rate will be established for the Initial Contract Period, and another median will be established for each of the option period(s). For each Resource Category, the median band will be calculated using the median function in Microsoft Excel and will represent a range that encompasses the median rate to a value of minus (-) 20% of the median. The Lower Median Band Limit for each Resource Category is set at 80% of the median. If a Bidder bids a firm per diem rate for a Resource Category that is lower than the Lower Median Band Limit, that Bidder's financial evaluation will be conducted using a per diem rate equal to the Lower Median Band Limit for that Resource Category.

- (iii) **Example:** The following diagram is a representation of the calculation of the median band for a single Resource Category. This diagram identifies the median band and the included and excluded resource per diem rates.



In this example Resource Category using the firm per diem median rate calculation approach, if the median rate identified as (Y) is \$591.50, then the median band limit would be minus (-) 20% of \$591.50, or \$473.20. The figure \$473.20 would be the Lower Median Band Limit for this Resource Category.

If a Bidder quotes a firm per diem rate for this Resource Category that is lower than \$473.20, the per diem rate of \$473.20 will be used to evaluate that Bidder's bid for this Resource Category.

If that Bidder quoted a firm per diem rate of \$400.00 for that Resource Category, and it is determined to be the winning Contractor, the firm per diem rate of \$400.00 which was quoted originally by the Bidder will be included in the resulting contract.

(c) **Substantiation of Professional Services Rates**

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

- (i) an invoice (referencing a contract serial number or other unique contract identifier) that shows that the Bidder has provided and invoiced a customer (with whom the Bidder deals at arm's length) for services performed for that customer similar to the services that would be provided in the relevant resource category, where those services were provided for at least three months within the eighteen months before the 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) in respect of each contract for which an invoice is submitted as substantiation, a résumé for the resource that provided the services under that contract that demonstrates that, in relation to the resource category for which the rates are being substantiated, the resource would meet the mandatory requirements and achieve any required pass mark for any rated criteria; and
- (iv) 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.

(d) **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

- (a) A bid must comply with the requirements of the bid solicitation and meet all mandatory evaluation criteria to be declared responsive. The responsive bid with the lowest Total Bid Price will be recommended for award of a contract.
- (b) One contract may be awarded in total as a result of this bid solicitation.
- (c) 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.
- (d) If more than one Bidder is ranked first because of identical overall scores, then the names of all such first ranked Bidders will be placed in a hat and the winner will be the first name drawn from it. All first ranked Bidders will be invited to witness the event.

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. Unless specified otherwise, Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.

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

5.1 Certifications Precedent to Contract Award and Additional Information

(a) Federal Contractors Program for Employment Equity - Bid Certification

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "[FCP Limited Eligibility to Bid](http://www.esdc.gc.ca/en-jobs-workplace-human_rights/employment_equity/federal_contractor_program.page?&_ga=1.229006812.1158694905.1413548969#afed)" list available at the bottom of the page of the Employment and Social Development Canada (ESDC) - Labour's website. (http://www.esdc.gc.ca/en-jobs-workplace-human_rights/employment_equity/federal_contractor_program.page?&_ga=1.229006812.1158694905.1413548969#afed).

Canada will have the right to declare a bid non-responsive if the Bidder, or any member of the Bidder if the Bidder is a Joint Venture, appears on the "[FCP Limited Eligibility to Bid](http://www.esdc.gc.ca/en-jobs-workplace-human_rights/employment_equity/federal_contractor_program.page?&_ga=1.229006812.1158694905.1413548969#afed)" list at the time of contract award.

Canada will also have the right to terminate the Contract for default if a Contractor, or any member of the Contractor if the Contractor is a Joint Venture, appears on the "[FCP Limited Eligibility to Bid](http://www.esdc.gc.ca/en-jobs-workplace-human_rights/employment_equity/federal_contractor_program.page?&_ga=1.229006812.1158694905.1413548969#afed)" list during the period of the Contract.

The Bidder must provide the Contracting Authority with a completed Attachment E, 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 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) **Certification of Language**

By submitting a bid, the Bidder certifies that, should it be awarded a contract as result of the bid solicitation, every individual proposed in its bid, based on language requirements in section 8 under Annex A – Statement of Work, will be:

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

(c) **Submission of Only One Bid**

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

PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS

6.1 Security Requirement

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

6.2 Financial Capability

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

PART 7 - RESULTING CONTRACT CLAUSES

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

7.1 Requirement

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

7.2 Task Authorization

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

- (E) the start and completion dates;
 - (F) milestone dates for deliverables and payments (if applicable);
 - (G) the number of person-days of effort required;
 - (H) whether the work requires on-site activities and the location;
 - (I) the language profile of the resources required;
 - (J) the level of security clearance required of resources;
 - (K) the price payable to the Contractor for performing the task, with an indication of whether it is a firm price or a maximum TA price (and, for maximum price task authorizations, the TA must indicate how the final amount payable will be determined; where the TA does not indicate how the final amount payable will be determined, the amount payable is the amount, up to the maximum, that the Contractor demonstrates was actually worked on the project, by submitting time sheets filled in at the time of the work by the individual resources to support the charges); and
 - (L) any other constraints that might affect the completion of the task.
- (d) **Contractor's Response to Draft Task Authorization:** The Contractor must provide to the Technical Authority, within 3 working days of receiving the draft Task Authorization (or within any longer time period specified in the draft TA), the proposed total price for performing the task and a breakdown of that cost, established in accordance with the Basis of Payment specified in the Contract. The Contractor's quotation must be based on the rates set out in the Contract. The Contractor will not be paid for preparing or providing its response or for providing other information required to prepare and validly issue the TA.
- (e) **Task Authorization Limit and Authorities for Validly Issuing Task Authorizations:**
To be validly issued, a TA must include the following signatures:
- (i) for any TA, inclusive of revisions, with a value less than or equal to \$250,000.00 (excluding Applicable Taxes), the TA must be signed by the Technical Authority.
 - (ii) for any TA, inclusive of revisions, with a value greater than this amount, a TA must be signed by the Technical Authority and the Contracting Authority.
- Any TA that does not bear the appropriate signatures is not validly issued by Canada. Any work performed by the Contractor without receiving a validly issued TA is done at the Contractor's own risk. If the Contractor receives a TA that is not appropriately signed, the Contractor must notify the Contracting Authority. By providing written notice to the Contractor, the Contracting Authority may suspend the Client's ability to issue TA's at any time, or reduce the dollar value threshold described in subarticle (A) above; any suspension or reduction notice is effective upon receipt.
- (f) **Periodic Usage Reports:**
- (i) The Contractor must compile and maintain records on its provision of services to the federal government under Task Authorizations validly issued under the Contract. The Contractor must provide this data to Canada in accordance with the reporting requirements detailed below. If some data is not available, the reason must be indicated. If services are not provided during a given period, the Contractor must still provide a "NIL" report. The data must be submitted on a quarterly basis to the Contracting Authority. From time to time, the Contracting Authority may also require an interim report during a reporting period.
 - (ii) The quarterly periods are defined as follows:
 - (A) 1st quarter: April 1 to June 30;

- (B) 2nd quarter: July 1 to September 30;
- (C) 3rd quarter: October 1 to December 31; and
- (D) 4th quarter: January 1 to March 31.

The data must be submitted to the Contracting Authority no later than 20 calendar days after the end of the reporting period.

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

7.3 Minimum Work Guarantee

- (a) In this clause,
 - (i) **"Maximum Contract Value"** means the amount specified in the **"Limitation of Expenditure"** clause set out in the Contract; and
 - (ii) **"Minimum Contract Value"** means \$20,000.00.
- (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.

7.4 Standard Clauses and Conditions

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

(a) **General Conditions:**

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

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

- 4. The total of the amounts, to which the Contractor is entitled to be paid under this section, together with any amounts paid, due or becoming due to the Contractor must not exceed the Contract Price.
- 5. Where the Contracting Authority terminates the entire Contract and the Articles of Agreement include a Minimum Work Guarantee, the total amount to be paid to the Contractor under the Contract will not exceed the greater of:
 - (a) the total amount the Contractor may be paid under this section, together with any amounts paid, becoming due other than payable under the Minimum Work 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) 4002 (2010-08-16), Supplemental General Conditions - Software Development or Modification Services;
- (ii) 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 requirements (SRCL #6 and related clauses provided by the Contract Security Program) 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 Designated Organization Screening (DOS), issued by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC).
- (b) The Contractor personnel requiring access to PROTECTED information, assets or sensitive work site(s) must EACH hold a valid RELIABILITY STATUS, granted or approved by CISD/PWGSC.
- (c) The Contractor MUST NOT remove any PROTECTED information or assets 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 1 year 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 4 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:

Name: Hicham Laassouli

Title: Supply Specialist

Public Works and Government Services Canada

Acquisitions Branch

Directorate: Space, Innovation, and Informatics Projects Directorate

Address: 10 Wellington, Gatineau, Québec

Telephone: 613-858-9817

E-mail address: hicham.laassouli@tpsgc-pwgsc.gc.ca

The Contracting Authority is responsible for the management of the Contract and any changes to the Contract must be authorized in writing by the Contracting Authority. The Contractor must not perform work in excess of or outside the scope of the Contract based on verbal or written requests or instructions from anybody other than the Contracting Authority.

(b) **Technical Authority** (*contact information will be identified at the time of contract award*)

The Technical Authority for the Contract is:

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

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

(c) **Contractor's Representative** (*contact information will be identified at the time of contract award*)

Name: _____
Title: _____
Telephone: _____
E-mail address: _____

7.8 Proactive Disclosure of Contracts with Former Public Servants

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

7.9 Payment

(a) **Basis of Payment**

- (i) **Professional Services provided under a Task Authorization with a Maximum Price:** For professional services requested by Canada, in accordance with a validly issued Task Authorization, Canada will pay the Contractor, in arrears, up to the Maximum Price for the TA, for actual time worked and any resulting deliverables in accordance with the firm all-inclusive per diem rates set out in Annex B, Basis of Payment, Applicable Taxes extra. Partial days will be prorated based on actual hours worked based on a 7.5-hour workday.
- (ii) **Professional Services provided under a Task Authorization with a Firm Price:** For professional services requested by Canada, in accordance with a validly issued Task Authorization, Canada will pay the Contractor the firm price set out in the Task Authorization (based on the firm, all-inclusive per diem rates set out in Annex B, Applicable Taxes extra.
- (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 excluded 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.
- (i) If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority a written estimate for the additional funds required. Providing this information does not increase Canada's liability.

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

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

(d) **Method of Payment for Task Authorizations with a Firm Price - Lump Sum Payment on Completion:** Canada will pay the Contractor upon completion and delivery of all the Work associated with the validly issued Task Authorization in accordance with the payment provisions of the Contract if:

- (i) an accurate and complete invoice and any other documents required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- (ii) all such documents have been verified by Canada; and

(iii) the Work delivered has been accepted by Canada.

(e) **Electronic Payment of Invoices – Contract**

The Contractor accepts to be paid using any of the following Electronic Payment Instrument(s):

- (i) Visa Acquisition Card;
- (ii) MasterCard Acquisition Card;
- (iii) Direct Deposit (Domestic and International);
- (iv) Electronic Data Interchange (EDI);
- (v) Wire Transfer (International Only);
- (vi) Large Value Transfer System (LVTS) (Over \$25M)

(f) **Time Verification**

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

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

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

7.10 Invoicing Instructions

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

7.11 Certifications and Additional Information

- (a) Unless specified otherwise, the continuous compliance with the certifications provided by the Contractor in its bid or precedent to contract award, any TA quotation and the ongoing cooperation in providing additional information are conditions of the Contract and failure to comply will constitute the Contractor in default. Certifications are subject to verification by Canada during the entire Contract Period.

7.12 Federal Contractors Program for Employment Equity - Default by Contractor

The Contractor understands and agrees that, when an Agreement to Implement Employment Equity (AIEE) exists between the Contractor and Employment and Social Development Canada (ESDC)-Labour,

the AIEE must remain valid during the entire period of the Contract. If the AIEE becomes invalid, the name of the Contractor will be added to the "[FCP Limited Eligibility to Bid](#)" list. The imposition of such a sanction by ESDC will constitute the Contractor in default as per the terms of the Contract.

7.13 Applicable Laws

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

7.14 Priority of Documents

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

- (a) these Articles of Agreement, including any individual SACC clauses incorporated by reference in these Articles of Agreement;
- (b) Supplemental General Conditions, in the following order:
 - (i) 4002 (2010-08-16), Supplemental General Conditions - Software Development or Modification Services;
 - (ii) 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;
 - (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 - Resources Assessment Criteria
 - (iv) Appendix D to Annex A - Certifications at the TA stage
- (e) Annex B, Basis of Payment;
- (f) Annex C, Security Requirements Check List;
- (g) the validly issued Task Authorizations and any required certifications
- (h) the Contractor's bid dated _____, as clarified on _____ "or" as amended _____

7.15 Foreign Nationals (Canadian Contractor)

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

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

7.16 Foreign Nationals (Foreign Contractor)

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

7.17 Insurance Requirements

(a) Compliance with Insurance Requirements

- (i) The Contractor must comply with the insurance requirements specified in this Article. The Contractor must maintain the required insurance coverage for the duration of the Contract. Compliance with the insurance requirements does not release the Contractor from or reduce its liability under the Contract.

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

(b) **Commercial General Liability Insurance**

- (i) The Contractor must obtain Commercial General Liability Insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature, but for not less than \$2,000,000 per accident or occurrence and in the annual aggregate.
- (ii) The Commercial General Liability policy must include the following:
 - (A) Additional Insured: Canada is added as an additional insured, but only with respect to liability arising out of the Contractor's performance of the Contract. The interest of Canada should read as follows: Canada, as represented by Public 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.
- (b) **First Party Liability:**
 - (i) The Contractor is fully liable for all damages to Canada, including indirect, special or consequential damages, caused by the Contractor's performance or failure to perform the Contract that relate to:
 - (A) any infringement of intellectual property rights to the extent the Contractor breaches the section of the General Conditions entitled "Intellectual Property Infringement and Royalties";
 - (B) physical injury, including death.
 - (ii) The Contractor is liable for all direct damages caused by the Contractor's performance or failure to perform the Contract affecting real or tangible personal property owned, possessed, or occupied by Canada.
 - (iii) Each of the Parties is liable for all direct damages resulting from any breach of confidentiality under the Contract. Each of the Parties is also liable for all indirect, special or consequential damages in respect of any unauthorized disclosure of the other Party's

trade secrets (or trade secrets of a third party provided by one Party to another under the Contract) relating to information technology.

- (iv) The Contractor is liable for all direct damages relating to any encumbrance or claim relating to any portion of the Work for which Canada has made any payment. This does not apply to encumbrances or claims relating to intellectual property rights, which are addressed under (i)(A) above.
- (v) The Contractor is also liable for any other direct damages to Canada caused by the Contractor's performance or failure to perform the Contract that relate to:
 - (A) any breach of the warranty obligations under the Contract, up to the total amount paid by Canada (including any applicable taxes) for the goods and services affected by the breach of warranty; and
 - (B) Any other direct damages, including all identifiable direct costs to Canada associated with re-procuring the Work from another party if the Contract is terminated either in whole or in part for default, up to an aggregate maximum for this subparagraph (B) of the greater of .75 times the total estimated cost (meaning the dollar amount shown on the first page of the Contract in the cell titled "Total Estimated Cost" or shown on each call-up, purchase order or other document used to order goods or services under this instrument), or \$1,000,000.00.

In any case, the total liability of the Contractor under subparagraph (v) will not exceed the total estimated cost (as defined above) for the Contract or \$1,000,000.00, whichever is more.
- (vi) If Canada's records or data are harmed as a result of the Contractor's negligence or willful act, the Contractor's only liability is, at the Contractor's own expense, to restore Canada's records and data using the most recent back-up kept by Canada. Canada is responsible for maintaining an adequate back-up of its records and data.

(c) **Third Party Claims:**

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

7.19 Joint Venture Contractor

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

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

7.20 Professional Services - General

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

Replacement of Specific Individuals

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

- (A) the name, qualifications and experience of a proposed replacement immediately available for Work; and
- (B) security information on the proposed replacement as specified by Canada, if applicable.

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

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

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

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

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

7.21 Safeguarding Electronic Media

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

7.22 Representations and Warranties

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

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 Identification Protocol Responsibilities

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

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

ANNEX A

STATEMENT OF WORK

1. Title

Operational Support Services – Task-Based Informatics Professional Services (TBIPS).

2. Background

Real Property Branch (RPB) of Public Works and Government Services Canada (PWGSC) is a common services provider and administrator of \$7.0 billion of federal real property. RPB offers a full range of real property services to other government departments and manages one of the largest inventories of office space in Canada, providing accommodation for approximately 257,000 federal employees in 98 departments and agencies in 1,647 locations across Canada.

RPB has a proud history of delivering high quality services to its Government of Canada clients.

Real property professionals include office accommodation specialists, architects, engineers, real estate experts and advisors, as well as asset, property and facility managers. Work in delivering real property services is equally diverse: it spans from the preparation of investment strategies and plans to the design, construction and rental of facilities, to the operation, maintenance, repair and disposal of real property assets.

The Knowledge Management & Systems directorate (KM&S), within Strategic Planning, Administration and Renewal (SPAR) Sector, currently manages a number of Real Property Business Systems that support the real property business lines and their associated functions. These systems are a mixture of in-house developed, Commercial of the Shelf (COTS) products and enterprise systems such as SAP.

3. KM&S' Mandate

The KM&S directorate provides RPB and client organizations with knowledge management tools, reporting, processes and information to manage their real estate portfolio of assets to assist in making sound financial decisions.

In addition to managing a number of RPB business systems, its mandate includes:

- Information Technology (IT) Asset Management: manages the IT assets for the branch, e.g. printers, desktop, software licenses, Office Systems Service Request Online (OSSRO) requests and mobile devices;
- Records Management: as the lead for Information Management (IM) in RPB, its responsibility is to coordinate the implementation of the federal government's content management solution (GCDOCS), Open Data, Digitization as well as the development of policies and guidelines for Records Management within the branch; and
- Enterprise Management and Strategic Planning: manages the strategic coordination of IM/IT Initiatives, Information Architecture; Quality Control on services rendered and received, IM/IT security, data quality management, and Chief of Information Branch (CIOB) agreements.

4. Requirement

The KM&S directorate requires informatics professional services to build a flexible and skilled team of resources to meet the demands of the RPB service lines.

These services will be provided under the Task-Based Informatics Professional Services (TBIPS) Supply Arrangement (SA) and will be initiated through validly issued Task Authorizations (TAs), on an “as-and-when-requested” basis.

5. Scope

The Contractor must provide qualified informatics professional services resources to provide operational support services to existing and new IM/IT systems, ensuring full integration of the Service Management lifecycle and ensuring the alignment and provision of associated IT enabling products and services.

The Contractor resources may also be required to provide operational support to:

- a. future real property contracts with the private sector and other real property service management mechanisms that may be developed and their respective inter-linkages to IT solutions (which include maintenance and enhancements to existing applications. It also includes, but not limited to: building custom IT solutions; purchasing IT solutions);
- b. RP Business Processes, IM/IT data exchanges and ensure reporting protocols are aligned with transformation objectives and supported by existing or new IT solutions associated with RPB mandate to support future real property business requirements as they evolve; and,
- c. the RPB transformation agenda for new service offerings, ensuring full integration of the Service Management lifecycle.

5.1. Deliverables

Deliverables will be fully detailed in each Task Authorization. At a minimum, each of the Contractor resources must submit a monthly status report at the end of each month.

All deliverables must be approved by the Technical Authority and provided by the Contractor in the following formats:

- a. Text documents or presentations: Microsoft Office (Word, PowerPoint, Excel or Access);
- b. Diagrams and flowcharts: Microsoft Visio;
- c. Project plans and schedules: Microsoft Project; and
- d. No Contractor marking or insignia is to appear on any of the deliverables.

The Contractor must request approval from the Technical Authority to submit documents in other softcopy formats; this must be expressly authorized in writing and in advance by the Technical Authority. Approval is at Canada's sole discretion.

5.2. Reporting

5.2.1. Task Authorization

For any authorized Task Authorizations, each contracted resource must provide a Task Authorization Status Report on a monthly basis incorporating the following information. The Contractor is not asked to provide the deliverable in the exact format presented below, but the same template must be used by each contracted resource. The template must provide all the following information, unless otherwise specified by the Technical Authority:

- a. Monthly Time Sheets showing the hours worked on a daily basis;
- b. Work completed last reporting period;
- c. Work projected for the next reporting period;
- d. New risks that have arisen since the last reporting period;
- e. Risks that are in danger of coming due;
- f. Status of risk mitigation plans in place;
- g. Recovery plans for any work that is off schedule;
- h. Knowledge transfer activities.

5.3. Working Location and Hours

The majority of the Work will be performed at PWGSC facilities located in the National Capital Region (NCR). Access to facilities, materials and computer systems is available between the normal business hours of 07:00 a.m. and 6:00 p.m. Monday to Friday. The Contractor's resources may be required to work outside of these normal business hours in order to minimize negative impacts on Transformation Initiative milestones.

Any Work performed outside of normal business hours must be pre-approved in writing by the Technical Authority. In addition, approval must be obtained in writing prior to the completion of any work that exceeds the 7.5 hours per day. Overtime per diem rates do not apply.

For Contractor resources not located within the NCR, travel and living expenses to the NCR are the responsibility of the Contractor as well as the required work equipment.

5.4. Travel

The Contractor's resources may have to travel outside of the NCR. In such cases, and with the prior written authorization of the Technical Authority, travel and living expenses may be reimbursed to the Contractor. All travel and living expenses are subject to the Treasury Board (TB) Travel Directive.

5.5. Kick-Off Meeting

A Kick-Off meeting will take place at a PWGSC facility in the NCR between the Contractor and the Technical Authority as an initial contact to acquaint the Contractor with the environment and arrange for the commencement of Work.

5.6. Constraints

The use of external drives is not accepted.

6. Technical Environment

All deliverables provided by the Contractor will become integrated within KM&S's technical and operational environment as specified by KM&S.

The technical environment at KM&S includes several technologies including but not limited to:

- Windows 7
- SAP
- BPWin
- Oracle CASE
- Rational Rose
- Rational Unified Process (RUP)
- Cognos Tools
- Golden
- AVS Import
- Archibus
- AutoCAD
- Adobe (technical communications and design tools, including FrameMaker, Captivate, Robohelp, DreamWeaver,
- Photoshop, and Acrobat Pro)
- Microsoft (Office Suite, Outlook, Ms Project, Ms Visio, and other standard business software)

7. Tasks

Tasks may include, but are not limited to, those identified under each Resource Category below. Specific tasks within the Scope of this requirement will be identified in each Task Authorization.

7.1. B.3 - Business Consultant, Level 3 and level 2

- Analyze, evaluate, develop business processes (financial, operational, systems);
- Identify organizational and/or project business opportunities for improvement and streamlining of business processes;
- Identify and evaluate critical success parameters, factors and performance measurements.
- Assist other stakeholders in development and implementation of business improvement processes and programs;
- Identify organizational issues and provide solutions and recommendations to solve them;
- Review feedback and comments from business stakeholders;
- Provide senior management briefing materials; and
- Support requirements analysis for continuous improvement.
- Knowledge transfer activities

7.2. B.6 - Business Systems Analyst, Level 3 and Level 2

- Develop and document a detailed statement of requirements for the proposed alternative recommended in the preliminary analysis report;
- Perform business analyses of functional requirements to identify information, procedures, and decision flows;
- Evaluate existing procedures and methods, identify and document items such as database content, structure, application subsystems, and develop data dictionary;
- Define and document interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems;
- Identify candidate business processes for re-design, prototype potential solutions, provide trade- off information and suggest a recommended course of action. Identify the modifications to the automated processes;

- Define tests conditions, develop accurate and complete test plans, and conduct testing according to plan; and
- Support and use the selected departmental methodologies.
- Knowledge transfer activities

7.3. B.10 - Help Desk Specialist, Level 3 and Level 2

- Perform a variety of network problem analysis and monitoring tasks, monitor network management systems and respond appropriately to user requests and problems;
- Perform initial problem analysis and triage problem to other Contractor's resources when appropriate;
- Maintain liaison with network users and technical staff to communicate the status of problem resolution to network users; log and track requests for assistance;
- Develop, implement, and participate in the preparation of procedure manuals and documentation for help desk use; conduct periodic user satisfaction surveys and track user problem trends; make recommendations for improvements to the network systems and create reports based on information provided from user surveys and trends;
- Develop, implement, and participate in the distribution of network related information to users to include information such as help desk procedures and network handbooks;
- Participate in the development of a comprehensive training plan for help desk procedures; assist in training personnel providing backup coverage; and
- Participate in on-site installations of network systems for users.
- Knowledge transfer activities

7.4. I.5 - IM Architect, Level 2

- Analyze existing capabilities and requirements, develop redesigned frameworks and recommend areas for improved capability and integration. Develop and document detailed statements of requirements;
- Evaluate existing procedures and methods, identify and document database content, structure, and application subsystems, and develop data dictionary;
- Define and document interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems;
- Prototype potential solutions, provide tradeoff information and suggest recommended courses of action;
- Perform information modelling in support of Business Process Reengineering (BPR) implementation.
- Knowledge transfer activities conducted
- Perform cost/benefit analysis of implementing new processes and solutions;
- Provide advice in developing and integrating process and information models between business processes to eliminate information and process redundancies; and
- Provide advice in defining new requirements and opportunities for applying efficient and effective solutions; identify and provide preliminary costs of potential options.
- Knowledge transfer activities

7.5. G.3 - GIS Application Analyst, Level 3

- Develops and documents detailed statements of requirement.
- Analyzes functional requirements to identify information, procedures and decision flows.

- Evaluates existing procedures and methods, identifies and documents database content, structure and application sub-systems, and develops data dictionary.
- Defines and documents interfaces of manual to automated operations within sub-systems, to external systems and between new and existing systems.
- Defines input/output sources, including a detailed plan for technical design phase, and obtains approval of same.
- Designs and documents in detail all system components, their interfaces and operational environment.
- Designs data structures and files, sub-systems and modules, programs, batch, on line, and production monitoring procedures, testing strategy and systems.
- Documents system design, concepts and facilities, presents and obtains approval of detailed system design.
- Produces an operational system including all forms, manuals, programs, data files and procedures.
- Performs manual code changes.
- Performs screen and report changes.
- Gathers and analyzes data for the conduct of studies to establish the technical and economic feasibility of proposed computer systems, and for the development of functional and system design specifications.
- Designs methods and procedures for small computer systems and sub-systems of larger systems.
- Develops, tests and implements small systems and sub-systems of larger systems.
- Produces forms, manuals, programs, data files and procedures.
- Provides advice on Geographic Information System (GIS) technology and its application.
- Designs and implements functional prototypes.
- Performs analysis and modeling.
- Creates, updates, revises and documents GIS data sets.
- Interprets project objectives and creates appropriate data, analysis and output products.
- Restructures data from various sources and in diverse formats.
- Creates and updates metadata.
- Creates, updates and maintains procedures and standards.
- Designs and writes GIS-related programs.
- Knowledge transfer activities

7.6. G. 9 - GIS System Architect, Level 3

- Designing the overall target architecture of the IT system to meet the formally established requirements (functional and non-functional) of a project.
- Monitoring and supporting the development of the system to ensure it is compliant with the target architecture and refining the target architecture as required.
- Ensuring the integration of the system's component architectures – data, application, infrastructure, etc., into the overall target system architecture.
- Ensuring the integration of the system architecture into the sponsoring organization's enterprise architecture.
- Establishing phased project plans that lead to a completed target architecture.
- Leading the development of architecture Guiding Principles and architecture blueprints.
- Ensuring the systems overall viability throughout the systems development and implementation phases;
- Ensuring the solution and the scope is compliant with the stated requirements (quality control).
- Balancing trade-offs between requirements and costs for the system and communicating the issues to the Technical Authority.

- Surveying emerging developments, new technologies, standards and methodologies that will have a positive impact on the system architecture, and incorporating these into the system architecture.
- Managing the System Architecture team to achieve these goals.

7.7. P. 2 - Enterprise Architect, Level 3

- Evaluate the enterprise's business/information and communications technology (ICT) architecture, determine its consistency and integration with the organization's business/ICT strategies, assess the degree of its alignment with Treasury Board CIO Business Transformation Enablement Program (BTEP) and Federated Architecture Program (FAP) and recommend changes to the business/ICT architecture to improve its alignment with these external factors.
- Identify future business/ICT requirements against the current enterprise architecture, perform gaps analyses, develop Requirements for Technology Architectures (RTA), and prepare migration strategies.
- Assess the feasibility of migrating from the current state to the target business architecture and enabling technologies and identify the risks associated with migrating to the target business architecture and technologies and make recommendations for risk mitigation.
- Identify business and technology trends that create opportunities for business improvement, advise business and ICT Senior Executives on ICT trends and emerging technologies and the impact on the organization's and government ICT architectures and business strategies, model "What if" scenarios and recommend appropriate changes to the existing architecture and ICT infrastructure, and recommend alternative solutions, methodologies and strategies.
- Produce an architectural evolution plan, recommend prioritization of architecture evolution initiatives, and develop and/or implement an architecture evolution plan.
- Manage the development and implementation of an architectural improvement plan.
- Coach, mentor and train the organization to perform any of the above.
- Knowledge transfer activities

7.8. P. 8 - Project Leader, Level 2 and Level 3

- Specify the general requirements of the system, develop broad system alternatives and identify their administrative, economic and technical feasibility and practicality as well as associated policy and organizational change requirements.
- Analyze and evaluate each alternative based on make/buy, impact and cost/benefit considerations, and propose, justify, plan and cost the implementation of the selected alternative.
- Produce overall plan, a detailed plan for the functional analysis phase, and obtain approval of preliminary analysis.
- Plan, direct and control the activities of a system development team within scheduled time and cost parameters.
- Evaluate proposed computer applications to determine technical, operational and economic feasibility.
- Design and test systems to ensure that the objectives of the system are met and that the outputs produced are in accordance with client requirements.
- Monitor the design, implementation and operations start-up of the proposed system against established goals, objectives and milestones.
- Knowledge transfer activities

8. Language requirement

All services under the Contract must be delivered in English or bilingual as specified in the TAs.

TBIPS Resource Category / Level	Language Requirement
Business Consultant, Level 3	English or Bilingual
Business Consultant, Level 2	English
Business Systems Analyst, Level 3	English or Bilingual
Business Systems Analyst, Level 2	English
Help Desk Specialist, Level 3	English or Bilingual
Help Desk Specialist, Level 2	English or Bilingual
IM Architect, Level 2	English
GIS Application Analyst, Level 3	English
GIS System Architect, Level 3	English
Enterprise Architect, Level 3	English
Project Leader, Level 3	English or Bilingual
Project Leader, Level 2	English

ANNEX B

BASIS OF PAYMENT

Initial Contract Period		
Resource Category	Level of Expertise	Firm Per Diem Rate
Business Consultant	3	\$ TBD
Business Consultant	2	\$ TBD
Business Systems Analyst	3	\$ TBD
Business Systems Analyst	2	\$ TBD
Help Desk Specialist	3	\$ TBD
Help Desk Specialist	2	\$ TBD
IM Architect	2	\$ TBD
GIS Application Analyst	3	\$ TBD
GIS System Architect	3	\$ TBD
Enterprise Architect	3	\$ TBD
Project Leader	3	\$ TBD
Project Leader	2	\$ TBD

Option Period 1		
Resource Category	Level of Expertise	Firm Per Diem Rate
Business Consultant	3	\$ TBD
Business Consultant	2	\$ TBD
Business Systems Analyst	3	\$ TBD
Business Systems Analyst	2	\$ TBD
Help Desk Specialist	3	\$ TBD
Help Desk Specialist	2	\$ TBD
IM Architect	2	\$ TBD
GIS Application Analyst	3	\$ TBD
GIS System Architect	3	\$ TBD
Enterprise Architect	3	\$ TBD
Project Leader	3	\$ TBD
Project Leader	2	\$ TBD

Option Period 2		
Resource Category	Level of Expertise	Firm Per Diem Rate
Business Consultant	3	\$ TBD
Business Consultant	2	\$ TBD
Business Systems Analyst	3	\$ TBD
Business Systems Analyst	2	\$ TBD
Help Desk Specialist	3	\$ TBD
Help Desk Specialist	2	\$ TBD
IM Architect	2	\$ TBD
GIS Application Analyst	3	\$ TBD
GIS System Architect	3	\$ TBD
Enterprise Architect	3	\$ TBD
Project Leader	3	\$ TBD
Project Leader	2	\$ TBD

Option Period 3		
Resource Category	Level of Expertise	Firm Per Diem Rate
Business Consultant	3	\$ TBD
Business Consultant	2	\$ TBD
Business Systems Analyst	3	\$ TBD
Business Systems Analyst	2	\$ TBD
Help Desk Specialist	3	\$ TBD
Help Desk Specialist	2	\$ TBD
IM Architect	2	\$ TBD
GIS Application Analyst	3	\$ TBD
GIS System Architect	3	\$ TBD
Enterprise Architect	3	\$ TBD
Project Leader	3	\$ TBD
Project Leader	2	\$ TBD

Option Period 4		
Resource Category	Level of Expertise	Firm Per Diem Rate
Business Consultant	3	\$ TBD
Business Consultant	2	\$ TBD
Business Systems Analyst	3	\$ TBD
Business Systems Analyst	2	\$ TBD
Help Desk Specialist	3	\$ TBD
Help Desk Specialist	2	\$ TBD
IM Architect	2	\$ TBD
GIS Application Analyst	3	\$ TBD
GIS System Architect	3	\$ TBD
Enterprise Architect	3	\$ TBD
Project Leader	3	\$ TBD
Project Leader	2	\$ TBD

ANNEX C
SECURITY REQUIREMENTS CHECK LIST
(SEE ATTACHED HERETO)

ATTACHMENT 1

BID SUBMISSION FORM

BID SUBMISSION FORM		
Bidder's full legal name		
Authorized Representative of Bidder for evaluation purposes (e.g., clarifications)	Name	
	Title	
	Address	
	Telephone #	
	Fax #	
	Email	
Bidder's Procurement Business Number (PBN) [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.]		
Jurisdiction of Contract: Province or territory in Canada the Bidder wishes to be the legal jurisdiction applicable to any resulting contract (if other than as specified in solicitation)		
Former Public Servants See the Article in Part 2 of the bid solicitation entitled Former Public Servant for a definition of "Former Public Servant".	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"	
Security Clearance Level of Bidder [include both the level and the date it was granted] [Note to Bidders: Please ensure that the security clearance matches the legal name of the Bidder.]		

If it does not, the security clearance is not valid for the Bidder.]		
<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">1. The Bidder considers itself and its proposed resources able to meet all the mandatory requirements described in the bid solicitation;2. This bid is valid for the period requested in the bid solicitation;3. All the information provided in the bid is complete, true and accurate; and4. If the Bidder is awarded a contract, it will accept all the terms and conditions set out in the resulting contract clauses included in the bid solicitation.		
Signature of Authorized Representative of Bidder		

ATTACHMENT 2

BID EVALUATION CRITERIA

1. CORPORATE CRITERIA

Criteria	Mandatory Criteria	Bidder's Response
M1	<p>The Bidder must have been awarded 2 contracts to provide Information Management, Information Technology (IM/IT) operational support (ensuring full integration of the Service Management Lifecycle and ensuring the alignment and provision of associated IT enabling products and services) to a large* Government (Federal, Provincial, Municipal, Crown Corporation) client or a large* commercial client.</p> <p>For each referenced contract:</p> <ol style="list-style-type: none"> the contract value must be at least \$3,000,000 CND (applicable taxes included); the contract must have been awarded within the last ten years prior to the posting date of this bid solicitation; the contract must have been in performance at least two years within the last ten years; and the Bidder must have provided the services of at least 10 resources simultaneously for a period of at least 12 consecutive months within the last ten years. <p>*Large is defined as an organization of at least 1,500 employees.</p> <p>To demonstrate its compliance with this criterion, the Bidder must provide the following information for each of its two referenced contracts:</p> <ol style="list-style-type: none"> the name of the client organization; the number of employees it supports; start and end dates of 10 resources that were provided simultaneously for a period of at least 12 consecutive months. <p>Notes to the Bidder:</p> <ol style="list-style-type: none"> It is the Bidder's responsibility to ensure it has obtained permissions to divulge required information about referenced Resources in its bid. The Bidder must have been the prime contractor, rather than a subcontractor, for both referenced Contracts. This means that the Bidder was contracted the services directly by the client organization. If the Bidder's contract was to perform work which another entity had itself first contracted to perform, the Bidder will not be considered the prime contractor. For example, Z (customer) contracted with Y for services. Y, in turn, entered into a contract with X to provide all or part of these services to Z. In this example, Y is a prime contractor and X is a subcontractor. 	

	<p>3. A Supply Arrangement or Standing Offer is not a contract and therefore any reference to this type of document will not be accepted for the purpose of evaluating contract experience. For example if the Bidder references it's TBIPS SA number such as EN578-055605/XXX/EL for the purpose of demonstrating experience under the evaluation criteria, Canada will disregard this experience because it does not relate to a specific contract.</p>	
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2. RESOURCE EVALUATION CRITERIA

(a) Business Consultant Level 3

ID	Requirement	Bidder's Response (name of proposed Resource:.....)
BC3-M1	<p>The Bidder must demonstrate that its proposed resource has a minimum of ten combined years' experience performing all of the following activities:</p> <ol style="list-style-type: none"> 1. Analyze, evaluate, develop business processes (financial, operational, systems, etc.). 2. Identify organizational and/or project business opportunities for improvement and streamlining of business processes. 3. Identify and evaluate critical success parameters, factors and performance measurements. 4. Assist other stakeholders in development and implementation of business improvement processes and programs. <p>The Bidder must include the following information for each referenced project:</p> <ol style="list-style-type: none"> (a) The project name and/or number; (b) The name of the client organization; (c) The project dates (start and end) and duration; and (d) A brief project description, including the proposed resource's role. 	
BC3-M2	<p>The Bidder must demonstrate that its proposed resource has a minimum of seven years' experience developing target operating business models for client organizations, including key functions (input methods, workflow, data processing and reporting), processes, and governance.</p> <p>Each project must have:</p> <ol style="list-style-type: none"> 1. A minimum duration of 12 months; 	

	<ol style="list-style-type: none">2. Affected 500 or more employees within the client organization; and3. Been completed within the last 15 years. <p>The Bidder must include the following information for each referenced project:</p> <ol style="list-style-type: none">(a) The project name and/or number;(b) The name of the client organization;(c) The project dates (start and end) and duration; and(d) A brief project description, including the proposed resource's role.	
BC3-M3	<p>The Bidder must demonstrate that its proposed resource has experience conducting seven distinct negotiations with one or more client organizations.</p> <p>Each negotiation must have:</p> <ol style="list-style-type: none">1. Been in support of an organizational transformation project; and2. Led to an agreement between the parties. <p>The Bidder must include the following information for each referenced project:</p> <ol style="list-style-type: none">(a) The project name and/or number;(b) The name of the client organization;(c) The project dates (start and end) and duration; and(d) A brief project description, including the proposed resource's role.	

(b) Business System Analyst Level 3

ID	Requirement	Bidder's Response (name of proposed Resource:.....)
BSA3-M1	<p>The Bidder must demonstrate that its proposed resource has a minimum of ten combined years' experience performing at least three of the following activities:</p> <ol style="list-style-type: none"> 1. Develop and document a detailed statement of requirements based upon a known or defined business problem. 2. Perform business analyses of functional requirements to identify information, procedures, and decision flows. 3. Evaluate existing procedures and methods, identify and document items such as database content, structure, application subsystems, and develop data dictionary. 4. Define and document interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems. 5. Identify candidate business processes for re-design, prototype potential solutions, provide trade-off information and suggest a recommended course of action. 6. Identify the modifications to the automated processes. <p>The Bidder must include the following information for each referenced project:</p> <ol style="list-style-type: none"> (a) The project name and/or number; (b) The name of the client organization; (c) The project dates (start and end) and duration; and (d) A brief project description, including the proposed resource's role. 	
BSA3-M2	<p>The Bidder must demonstrate that its proposed resource has a minimum of seven combined years' experience performing the following activities for client organizations:</p> <ol style="list-style-type: none"> 1. Writing at least one test case for User Acceptance Testing (UAT); 2. Performing one or more UATs; 3. Performing system test(s); and 4. Documenting the results of one or more UAT test cases. <p>Each project must include all four activities, and must have been completed within the last 15 years.</p> <p>The Bidder must include the following information for each referenced project:</p>	

	<p>(a) The project name and/or number;</p> <p>(b) The name of the client organization;</p> <p>(c) The project dates (start and end) and duration; and</p> <p>(d) A brief project description, including the proposed resource's role</p>	
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(c) Enterprise Architect Level 3

ID	Requirement	Bidder's Response (name of proposed Resource:.....)
EA3-M1	<p>The Bidder must demonstrate that its proposed resource has a minimum of ten combined years' experience performing four of the following activities:</p> <ol style="list-style-type: none"> 1. Evaluate the enterprise's business architecture, determine its consistency and integration with the organization's business strategies and recommend changes to the business architecture to improve its alignment with these strategies. 2. Identify future business/ICT requirements against the current enterprise architecture, perform gaps analyses, develop Requirements for Technology Architectures (RTA), and prepare migration strategies. 3. Assess the feasibility of migrating from the current state to the target business architecture and enabling technologies and identify the risks associated with migrating to the target business architecture and technologies and make recommendations for risk mitigation. 4. Identify business and technology trends that create opportunities for business improvement, advise business and ICT Senior Executives on ICT trends and emerging technologies and the impact on the organization's and government ICT architectures and business strategies, model "What if" scenarios and recommend appropriate changes to the existing architecture and ICT infrastructure, and recommend alternative solutions, methodologies and strategies. 5. Produce an architectural evolution plan, recommend prioritization of architecture evolution initiatives, and develop and/or implement an architecture evolution plan. 6. Manage the development and implementation of an architectural improvement plan. 7. Train the organization to perform any of the above. <p>The Bidder must include the following information for each referenced project:</p> <p>(a) The project name and/or number;</p>	

	<p>(b) The name of the client organization;</p> <p>(c) The project dates (start and end) and duration; and</p> <p>(d) A brief project description, including the proposed resource's role.</p>	
EA3-M2	<p>The Bidder must demonstrate that its proposed resource has a minimum of seven combined years' experience performing the following activities for client organizations:</p> <ol style="list-style-type: none"> 1. Developing the technical architectures, frameworks and strategies; 2. Analyzing and evaluating alternative technology solutions; 3. Providing impact analysis of technology changes; and 4. Integration of solutions. <p>All four of these activities must be included in each referenced project, and must have been completed within the last 15 years.</p> <p>The Bidder must include the following information for each referenced project:</p> <ol style="list-style-type: none"> (a) The project name and/or number; (b) The name of the client organization; (c) The project dates (start and end) and duration; and (d) A brief project description, including the proposed resource's role 	

(d) Project Leader Level 3

ID	Requirement	Bidder's Response (name of proposed Resource:.....)
PL3-M1	<p>The Bidder must demonstrate that its proposed resource has a minimum of ten combined years' experience performing four of the following activities:</p> <ol style="list-style-type: none"> 1. Specify the general requirements of the system, develop broad system alternatives and identify their administrative, economic and technical feasibility and practicality as well as associated policy and organizational change requirements. 2. Analyze and evaluate each alternative based on make or buy, impact and cost-benefit considerations, and propose, justify, plan and cost the implementation of the selected alternative. 3. Produce overall plan, a detailed plan for the functional analysis phase, and obtain approval of preliminary analysis. 	

	<ol style="list-style-type: none">4. Plan, direct and control the activities of a system development team within scheduled time and cost parameters.5. Evaluate proposed computer applications to determine technical, operational and economic feasibility.6. Design and test systems to ensure that the objectives of the system are met and that the outputs produced are in accordance with client requirements.7. Monitor the design, implementation and operations start-up of the proposed system against established goals, objectives and milestones. <p>The Bidder must include the following information for each referenced project:</p> <ol style="list-style-type: none">(a) The project name and/or number;(b) The name of the client organization;(c) The project dates (start and end) and duration; and(d) A brief project description, including the proposed resource's role.	
PL3-M2	<p>The Bidder must demonstrate that its proposed resource has a minimum of seven combined years' experience performing the following activities for client organizations:</p> <ol style="list-style-type: none">1. Developing project plans; and2. Executing and controlling project activities within scheduled time and cost parameters. <p>All four of these activities must be included in each referenced project, and must have been completed within the last 15 years.</p> <p>The Bidder must include the following information for each referenced project:</p> <ol style="list-style-type: none">(a) The project name and/or number;(b) The name of the client organization;(c) The project dates (start and end) and duration; and(d) A brief project description, including the proposed resource's role	

ATTACHMENT 3 PRICING SCHEDULE

In respect of the “Estimated Number of Days” listed below in (C*) 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				
(A)	(B)	(C)	(D)	(E)
Resource Category	Level of Expertise	Estimated Number of Days	Firm Per Diem Rate or Median Rate (if applicable)	Total Cost (C x D)
Business Consultant	3	440	\$	\$
Business Consultant	2	440	\$	\$
Business Systems Analyst	3	1320	\$	\$
Business Systems Analyst	2	440	\$	\$
Help Desk Specialist	3	220	\$	\$
Help Desk Specialist	2	220	\$	\$
IM Architect	2	220	\$	\$
GIS Application Analyst	3	220	\$	\$
GIS System Architect	3	220	\$	\$
Enterprise Architect	3	220	\$	\$
Project Leader	3	440	\$	\$
Project Leader	2	440	\$	\$
Total Price Initial Contract Period				\$ <TBD>

Option Period 1				
(A)	(B)	(C)	(D)	(E)
Resource Category	Level of Expertise	Estimated Number of Days	Firm Per Diem Rate or Median Rate (if applicable)	Total Cost (C x D)
Business Consultant	3	440	\$	\$
Business Consultant	2	440	\$	\$
Business Systems Analyst	3	1320	\$	\$
Business Systems Analyst	2	440	\$	\$
Help Desk Specialist	3	220	\$	\$

Help Desk Specialist	2	220	\$	\$
IM Architect	2	220	\$	\$
GIS Application Analyst	3	220	\$	\$
GIS System Architect	3	220	\$	\$
Enterprise Architect	3	220	\$	\$
Project Leader	3	440	\$	\$
Project Leader	2	440	\$	\$
Total Price Option Period 1				\$ <TBD>

Option Period 2				
(A)	(B)	(C)	(D)	(E)
Resource Category	Level of Expertise	Estimated Number of Days	Firm Per Diem Rate or Median Rate (if applicable)	Total Cost (C x D)
Business Consultant	3	440	\$	\$
Business Consultant	2	440	\$	\$
Business Systems Analyst	3	1320	\$	\$
Business Systems Analyst	2	440	\$	\$
Help Desk Specialist	3	220	\$	\$
Help Desk Specialist	2	220	\$	\$
IM Architect	2	220	\$	\$
GIS Application Analyst	3	220	\$	\$
GIS System Architect	3	220	\$	\$
Enterprise Architect	3	220	\$	\$
Project Leader	3	440	\$	\$
Project Leader	2	440	\$	\$
Total Price Option Period 2				\$ <TBD>

Option Period 3				
(A)	(B)	(C)	(D)	(E)
Resource Category	Level of Expertise	Estimated Number of Days	Firm Per Diem Rate or Median Rate (if applicable)	Total Cost (C x D)
Business Consultant	3	440	\$	\$
Business Consultant	2	440	\$	\$
Business Systems Analyst	3	1320	\$	\$

Business Systems Analyst	2	440	\$	\$
Help Desk Specialist	3	220	\$	\$
Help Desk Specialist	2	220	\$	\$
IM Architect	2	220	\$	\$
GIS Application Analyst	3	220	\$	\$
GIS System Architect	3	220	\$	\$
Enterprise Architect	3	220	\$	\$
Project Leader	3	440	\$	\$
Project Leader	2	440	\$	\$
Total Price Option Period 3				\$ <TBD>

Option Period 4				
(A)	(B)	(C)	(D)	(E)
Resource Category	Level of Expertise	Estimated Number of Days	Firm Per Diem Rate or Median Rate (if applicable)	Total Cost (C x D)
Business Consultant	3	440	\$	\$
Business Consultant	2	440	\$	\$
Business Systems Analyst	3	1320	\$	\$
Business Systems Analyst	2	440	\$	\$
Help Desk Specialist	3	220	\$	\$
Help Desk Specialist	2	220	\$	\$
IM Architect	2	220	\$	\$
GIS Application Analyst	3	220	\$	\$
GIS System Architect	3	220	\$	\$
Enterprise Architect	3	220	\$	\$
Project Leader	3	440	\$	\$
Project Leader	2	440	\$	\$
Total Price Option Period 4				\$ <TBD>

Total Bid Price	
(Initial Contract Period + Option Period 1 + Option Period 2 + Option Period 3 + Option Period 4)	\$ <TBD>

APPENDIX A TO ANNEX A

TASKING ASSESSMENT PROCEDURE

1. Where a requirement for a specific task is identified, a draft Task Authorization Form (TA Form) as attached at Appendix B to Annex A will be provided to the Contractor. Once a draft TA Form is received, the Contractor must submit to the Technical Authority a quotation of rates to supply the requested Resource Categories based on the information identified in the TA Form. The quotation must be signed and submitted to Canada within the time for response identified in the TA Form. The Contractor will be given a minimum of 72 hours turnaround time to submit a quotation.
2. For each proposed resource the Contractor must supply a résumé, the requested security clearance information and must complete the Response Tables at Appendix C of Annex A applicable to the Resource Categories identified in the draft TA. The same individual must not be proposed for more than one Resource Category. The résumés must demonstrate that each proposed individual meets the qualification requirements described (including any educational requirements, work experience requirements, and professional designation or membership requirements). With respect to the proposed resources:
 - (i) Proposed resources may be employees of the Contractor or employees of a subcontractor, or these individuals may be independent contractors to whom the Contractor would subcontract a portion of the Work. (Refer to Appendix D to Annex A, Certifications).
 - (ii) For educational requirements for a particular degree, designation or certificate, Canada will only consider educational programmes that were successfully completed by the resource before the date the draft TA was first issued to the Contractor.
 - (iii) For requirements relating to professional designation or membership, the resource must have the required designation or membership by the time of draft TA issuance and must continue, where applicable, to be a member in good standing of the profession or membership throughout the assessment period and Contract Period. Where the designation or membership must be demonstrated through a certification, diploma or degree, such document must be current, valid and issued by the entity specified in this Contract or if the entity is not specified, the issuer must have been an accredited or otherwise recognized body, institution or entity at the time the document was issued.
 - (iv) For work experience, Canada will not consider experience gained as part of an educational programme, except for experience gained through a formal co-operative programme at a post-secondary institution.
 - (v) For any requirements that specify a particular time period (e.g., 2 years) of work experience, Canada will disregard any information about experience if the résumé does not include the relevant dates (month and year) for the experience claimed (i.e., the start date and end date). Canada will evaluate only the duration that the resource actually worked on a project or projects (from his or her start date to end date), instead of the overall start and end date of a project or a combination of projects in which a resource has participated.
 - (vi) A résumé must not simply indicate the title of the individual's position, but must demonstrate that the resource has the required work experience by explaining the responsibilities and work performed by the individual while in that position. Only listing experience without providing any supporting data to describe responsibilities, duties and relevance to the requirement, or reusing the same wording as the TA Form, will not be considered "demonstrated" for the purposes of the assessment. The Contractor should provide complete details as to where, when, month and year, and how, through which 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 consider a mandatory criterion met unless the response is received within 5 working days. On the third working day after sending out the e-mails, if Canada has not received a response, Canada will notify the Contractor by e-mail, to allow the Contractor to contact its reference directly to ensure that it responds to Canada within 5 working days. Wherever information provided by a reference differs from the information supplied by the Contractor, the information supplied by the reference will be the information assessed. Mandatory criteria will not be 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). A mandatory criteria will not be considered as met if the customer is itself an affiliate or other entity that does not deal at arm's length with the Contractor. Crown references will be accepted.
4. During the assessment of the resources proposed, should the references for two or more resources required under that TA either be unavailable or fail to substantiate the required qualifications of the proposed resources to perform the required services, the Contracting Authority may find the quotation to be non-responsive.
5. Only quotations that meet all of the mandatory criteria will be considered for assessment of the point rated criteria. Each resource proposed must attain the required minimum score for the point rated criteria for the applicable Resource Category. If the minimum score for any proposed resource is less than what is required, the Contractor's quotation will be found to be non-responsive.
6. Once the quotation has been accepted by the Technical Authority, the TA Form will be signed by Canada and provided to the Contractor for signature. The TA Form must be appropriately signed by Canada prior to commencement of any work. The Contractor must not commence work until a validly issued TA Form (the Task Authorization) has been received, and any work performed in its absence is done at the Contractor's own risk.

**APPENDIX B TO ANNEX A
TASK AUTHORIZATION FORM**

(SEE ATTACHED HERETO)

APPENDIX C TO ANNEX A

RESOURCE ASSESSMENT CRITERIA

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

(a) Business Consultant Level 3

ID	Requirement	Contractor's Response
BC3-M1	<p>The Contractor must demonstrate that its proposed resource has a minimum of ten combined years' experience performing all of the following activities:</p> <ol style="list-style-type: none"> 1. Analyze, evaluate, develop business processes (financial, operational, systems, etc.). 2. Identify organizational and/or project business opportunities for improvement and streamlining of business processes. 3. Identify and evaluate critical success parameters, factors and performance measurements. 4. Assist other stakeholders in development and implementation of business improvement processes and programs. <p>The Contractor must include the following information for each referenced project:</p> <ol style="list-style-type: none"> (a) The project name and/or number; (b) The name of the client organization; (c) The project dates (start and end) and duration; and (d) A brief project description, including the proposed resource's role. 	
BC3-M2	<p>The Contractor must demonstrate that its proposed resource has a minimum of seven years' experience developing target operating business models for client organizations, including key functions (input methods, workflow, data processing and reporting), processes, and governance.</p> <p>Each project must have:</p> <ol style="list-style-type: none"> 1. A minimum duration of 12 months; 2. Affected 500 or more employees within the client organization; and 	

	<p>3. Been completed within the last 15 years.</p> <p>The Contractor must include the following information for each referenced project:</p> <ul style="list-style-type: none">(a) The project name and/or number;(b) The name of the client organization;(c) The project dates (start and end) and duration; and(d) A brief project description, including the proposed resource's role.	
BC3-M3	<p>The Contractor must demonstrate that its proposed resource has experience conducting seven distinct negotiations with one or more client organizations.</p> <p>Each negotiation must have:</p> <ul style="list-style-type: none">1. Been in support of an organizational transformation project; and2. Led to an agreement between the parties. <p>The Contractor must include the following information for each referenced project:</p> <ul style="list-style-type: none">(a) The project name and/or number;(b) The name of the client organization;(c) The project dates (start and end) and duration; and(d) A brief project description, including the proposed resource's role.	

(b) Business Consultant Level 2

ID	Requirement	Contractor's Response
BC2-M1	<p>The Contractor must demonstrate that its proposed resource has a minimum of seven combined years' experience performing at least two of the following activities:</p> <ol style="list-style-type: none"> 1. Analyze, evaluate, develop business processes (financial, operational, systems, etc.). 2. Identify organizational and/or project business opportunities for improvement and streamlining of business processes. 3. Identify and evaluate critical success parameters, factors and performance measurements. 4. Assist other stakeholders in development and implementation of business improvement processes and programs. <p>The Contractor must include the following information for each referenced project:</p> <ol style="list-style-type: none"> (a) The project name and/or number; (b) The name of the client organization; (c) The project dates (start and end) and duration; and (d) A brief project description, including the proposed resource's role. 	
BC2-M2	<p>The Contractor must demonstrate that its proposed resource has a minimum of five years' experience developing target operating business models for client organizations, including key functions, processes, and governance.</p> <p>The project must have:</p> <ol style="list-style-type: none"> 1. A minimum duration of 8 months; 2. Affected 500 or more employees within the client organization; and 3. Been completed within the last 10 years. <p>The Contractor must include the following information for the referenced project:</p> <ol style="list-style-type: none"> (a) The project name and/or number; (b) The name of the client organization; (c) The project dates (start and end) and duration; and (d) A brief project description, including the proposed resource's role. 	

BC2-M3	<p>The Contractor must demonstrate that its proposed resource has experience conducting three distinct negotiations with one or more client organizations.</p> <p>Each negotiation must have:</p> <ol style="list-style-type: none"> 1. been in support of an organizational transformation project; and 2. led to an agreement between the parties. <p>The Contractor must include the following information for each referenced project:</p> <ol style="list-style-type: none"> (a) The project name and/or number; (b) The name of the client organization; (c) The project dates (start and end) and duration; and (d) A brief project description, including the proposed resource's role. 	
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(c) Business System Analyst Level 3

ID	Requirement	Contractor's Response
BSA3-M1	<p>The Contractor must demonstrate that its proposed resource has a minimum of ten combined years' experience performing at least three of the following activities:</p> <ol style="list-style-type: none"> 1. Develop and document a detailed statement of requirements based upon a known or defined business problem. 2. Perform business analyses of functional requirements to identify information, procedures, and decision flows. 3. Evaluate existing procedures and methods, identify and document items such as database content, structure, application subsystems, and develop data dictionary. 4. Define and document interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems. 5. Identify candidate business processes for re-design, prototype potential solutions, provide trade-off information and suggest a recommended course of action. Identify the modifications to the automated processes. <p>The Contractor must include the following information for each referenced project:</p> <ol style="list-style-type: none"> (a) The project name and/or number; (b) The name of the client organization; (c) The project dates (start and end) and duration; and 	

	(d) A brief project description, including the proposed resource's role.	
BSA3-M2	<p>The Contractor must demonstrate that its proposed resource has a minimum of seven combined years' experience performing the following activities for client organizations:</p> <ol style="list-style-type: none"> 1. Writing at least one or more test cases for User Acceptance Testing (UAT); 2. Performing one or more UATs; 3. Performing system test(s); and 4. Documenting the results of one or more UAT test cases. <p>Each project must include all four activities, and must have been completed within the last 15 years.</p> <p>The Contractor must include the following information for each referenced project:</p> <ol style="list-style-type: none"> (a) The project name and/or number; (b) The name of the client organization; (c) The project dates (start and end) and duration; and (d) A brief project description, including the proposed resource's role 	

(d) Business System Analyst Level 2

ID	Requirement	Contractor's Response
BSA2-M1	<p>The Contractor must demonstrate that its proposed resource has a minimum of seven combined years' experience performing three of the following activities:</p> <ol style="list-style-type: none"> 1. Develop and document a detailed statement of requirements. 2. Perform business analyses of functional requirements to identify information, procedures, and decision flows. 3. Evaluate existing procedures and methods, identify and document items such as database content, structure, application subsystems, and develop data dictionary. 4. Define and document interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems. 5. Identify candidate business processes for re-design, prototype potential solutions, provide trade-off information and suggest a recommended course of action. 	

	<p>6. Identify the modifications to the automated processes.</p> <p>The Contractor must include the following information for each referenced project:</p> <ul style="list-style-type: none"> (a) The project name and/or number; (b) The name of the client organization; (c) The project dates (start and end) and duration; and (d) A brief project description, including the proposed resource's role. 	
BSA2-M2	<p>The Contractor must demonstrate that its proposed resource has a minimum of five combined years' experience performing the following activities for client organizations:</p> <ul style="list-style-type: none"> 1. Writing one or more test cases for User Acceptance Testing (UAT); 2. Performing one or more UATs; 3. Performing system tests; and 4. Documenting the results of one or more UAT test cases. <p>Each project must include all four activities, and must have been completed within the last 10 years.</p> <p>The Contractor must include the following information for each referenced project:</p> <ul style="list-style-type: none"> (a) The project name and/or number; (b) The name of the client organization; (c) The project dates (start and end) and duration; and (d) A brief project description, including the proposed resource's role 	

(e) Help Desk Specialist Level 3

ID	Requirement	Contractor's Response
HD3-M1	<p>The Contractor must demonstrate that its proposed resource has a minimum of ten combined years' experience performing at least four of the following activities:</p> <ul style="list-style-type: none"> 1. Perform network problem analysis and monitoring tasks, monitor network management systems and respond to user requests and problems 2. Perform initial problem analysis and triage. 	

	<ol style="list-style-type: none"> 3. Maintain liaison with network users and technical staff to communicate the status of problem resolution to network users; log and track requests for assistance. 4. Develop, implement, and/or participate in the preparation of procedure manuals and documentation for help desk use; conduct periodic user satisfaction surveys and track user problem trends; make recommendations for improvements to the network systems and create reports based on information provided from user surveys and trends. 5. Develop, implement, and/or participate in the distribution of network related information to users to include information such as help desk procedures and network handbooks. 6. Participate in the development of a comprehensive training plan for help desk procedures; assist in training personnel providing backup coverage. 7. Participate in on-site installations of network systems for users. <p>The Contractor must include the following information for each referenced project:</p> <ol style="list-style-type: none"> (a) The project name and/or number; (b) The name of the client organization; (c) The project dates (start and end) and duration; and (d) A brief project description, including the proposed resource's role. 	
HD3-M2	<p>The Contractor must demonstrate that its proposed resource has a minimum of seven combined years' experience performing the following activities for client organizations:</p> <ol style="list-style-type: none"> 1. Maintaining records of client requests; 2. Conducting client follow-ups; and 3. Creating reports. <p>Each project must include all three activities, and must have been completed within the last 15 years.</p> <p>The Contractor must include the following information for each referenced project:</p> <ol style="list-style-type: none"> (a) The project name and/or number; (b) The name of the client organization; (c) The project dates (start and end) and duration; and (d) A brief project description, including the proposed resource's role 	

(f) Help Desk Specialist Level 2

ID	Requirement	Contractor's Response
HD2-M1	<p>The Contractor must demonstrate that its proposed resource has a minimum of seven combined years' experience performing four or more of the following activities:</p> <ol style="list-style-type: none"> 1. Perform a variety of network problem analysis and monitoring tasks, monitor network management systems and respond to user requests and problems 2. Perform initial problem analysis and triage. 3. Maintain liaison with network users and technical staff to communicate the status of problem resolution to network users; log and track requests for assistance. 4. Develop, implement, and/or participate in the preparation of procedure manuals and documentation for help desk use; conduct periodic user satisfaction surveys and track user problem trends; make recommendations for improvements to the network systems and create reports based on information provided from user surveys and trends. 5. Develop, implement, and/or participate in the distribution of network related information to users to include information such as help desk procedures and network handbooks. 6. Participate in the development of a comprehensive training plan for help desk procedures; assist in training personnel providing backup coverage. 7. Participate in on-site installations of network systems for users. <p>The Contractor must include the following information for each referenced project:</p> <ol style="list-style-type: none"> (a) The project name and/or number; (b) The name of the client organization; (c) The project dates (start and end) and duration; and (d) A brief project description, including the proposed resource's role. 	
HD2-M2	<p>The Contractor must demonstrate that its proposed resource has a minimum of five combined years' experience performing the following activities for client organizations:</p> <ol style="list-style-type: none"> 1. Maintaining records of client requests; 2. Conducting client follow-ups; and 3. Creating reports. <p>Each project must include all three activities, and must have been completed within the last 10 years.</p>	

	<p>The Contractor must include the following information for each referenced project:</p> <ul style="list-style-type: none"> (a) The project name and/or number; (b) The name of the client organization; (c) The project dates (start and end) and duration; and (d) A brief project description, including the proposed resource's role 	
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(g) Information Architect Level 2

ID	Requirement	Contractor's Response
IA2-M1	<p>The Contractor must demonstrate that its proposed resource has a minimum of seven combined years' experience performing at least four of the following activities:</p> <ol style="list-style-type: none"> 1. Analyze existing capabilities and requirements, develop redesigned frameworks and recommend areas for improved capability and integration. 2. Develop and document detailed statements of requirements. 3. Evaluate existing procedures and methods, identify and document database content, structure, and application subsystems, and develop data dictionary. 4. Define and document interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems. 5. Prototype potential solutions, provide tradeoff information and suggest recommended courses of action. 6. Perform information modelling in support of Business Process Re-engineering (BPR) implementation. 7. Perform cost-benefit analysis of implementing new processes and solutions. 8. Provide advice in developing and integrating process and information models between business processes to eliminate information and process redundancies. <p>Each project must have been completed within the last 10 years.</p> <p>The Contractor must include the following information for each referenced project:</p> <ul style="list-style-type: none"> (a) The project name and/or number; (b) The name of the client organization; (c) The project dates (start and end) and duration; and 	

	(d) A brief project description, including the proposed resource's role.	
IA2-M2	<p>The Contractor must demonstrate that its proposed resource has a minimum of five years' experience defining and documenting:</p> <ol style="list-style-type: none"> 1. System landscape diagrams; OR 2. Data integration models; OR 3. System interfaces, <p>for client organizations.</p> <p>Each referenced project must have been completed within the last 10 years.</p> <p>The Contractor must include the following information for each referenced project:</p> <ol style="list-style-type: none"> (a) The project name and/or number; (b) The name of the client organization; (c) The project dates (start and end) and duration; and (d) A brief project description, including the proposed resource's role. 	
IA2-M3	<p>The Contractor must demonstrate that its proposed resource has a minimum of five years' experience defining and documenting system interfaces.</p> <p>Each referenced project must have been completed within the last 10 years.</p> <p>The Contractor must include the following information for each referenced project:</p> <ol style="list-style-type: none"> (a) The project name and/or number; (b) The name of the client organization; (c) The project dates (start and end) and duration; and (d) A brief project description, including the proposed resource's role. 	
IA2-M4	<p>The Contractor must demonstrate that its proposed resource has a minimum of five years' experience developing information Management (IM) architectures of business systems for client organizations, including associated security documentation.</p> <p>Each referenced project must have been completed within the last 10.</p> <p>The Contractor must include the following information for each referenced project:</p> <ol style="list-style-type: none"> (e) The project name and/or number; (f) The name of the client organization; 	

	(g) The project dates (start and end) and duration; and (h) A brief project description, including the proposed resource's role.	
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(h) Enterprise Architect Level 3

ID	Requirement	Contractor's Response
EA3-M1	<p>The Contractor must demonstrate that its proposed resource has ten combined years' experience performing four of the following activities:</p> <ol style="list-style-type: none"> 1. Evaluate the enterprise's business architecture, determine its consistency and integration with the organization's business strategies and recommend changes to the business architecture to improve its alignment with these strategies. 2. Identify future business/ICT requirements against the current enterprise architecture, perform gaps analyses, develop Requirements for Technology Architectures (RTA), and prepare migration strategies. 3. Assess the feasibility of migrating from the current state to the target business architecture and enabling technologies and identify the risks associated with migrating to the target business architecture and technologies and make recommendations for risk mitigation. 4. Identify business and technology trends that create opportunities for business improvement, advise business and ICT Senior Executives on ICT trends and emerging technologies and the impact on the organization's and government ICT architectures and business strategies, model "What if" scenarios and recommend appropriate changes to the existing architecture and ICT infrastructure, and recommend alternative solutions, methodologies and strategies. 5. Produce an architectural evolution plan, recommend prioritization of architecture evolution initiatives, and develop and/or implement an architecture evolution plan. 6. Manage the development and implementation of an architectural improvement plan. 7. Train the organization to perform any of the above. <p>The Contractor must include the following information for each referenced project:</p> <ol style="list-style-type: none"> (a) The project name and/or number; (b) The name of the client organization; (c) The project dates (start and end) and duration; and (d) A brief project description, including the proposed resource's role. 	

EA3-M2	<p>The Contractor must demonstrate that its proposed resource has a minimum of seven combined years' experience performing the following activities for client organizations:</p> <ol style="list-style-type: none"> 1. Developing the technical architectures, frameworks and strategies; 2. Analyzing and evaluating alternative technology solutions; 3. Providing impact analysis of technology changes; and 4. Integration of solutions. <p>Each project must include all four activities, and must have been completed within the last 15 years.</p> <p>The Contractor must include the following information for each referenced project:</p> <ol style="list-style-type: none"> (e) The project name and/or number; (f) The name of the client organization; (g) The project dates (start and end) and duration; and (h) A brief project description, including the proposed resource's role 	
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(i) Project Leader Level 3

ID	Requirement	Contractor's Response
PL3-M1	<p>The Contractor must demonstrate that its proposed resource has a minimum of ten combined years' experience performing four of the following activities:</p> <ol style="list-style-type: none"> 1. Specify the general requirements of the system, develop broad system alternatives and identify their administrative, economic and technical feasibility and practicality as well as associated policy and organizational change requirements. 2. Analyse and evaluate each alternative based on make or buy, impact and cost-benefit considerations, and propose, justify, plan and cost the implementation of the selected alternative. 3. Produce overall plan, a detailed plan for the functional analysis phase, and obtain approval of preliminary analysis. 4. Plan, direct and control the activities of a system development team within scheduled time and cost parameters. 5. Evaluate proposed computer applications to determine technical, operational and economic feasibility. 6. Design and test systems to ensure that the objectives of the system are met and that the outputs produced are in accordance with client requirements. 7. Monitor the design, implementation and operations start-up of the proposed system against established goals, objectives and milestones. 	

	<p>The Contractor must include the following information for each referenced project:</p> <ul style="list-style-type: none"> (a) The project name and/or number; (b) The name of the client organization; (c) The project dates (start and end) and duration; and (d) A brief project description, including the proposed resource's role. 	
PL3-M2	<p>The Contractor must demonstrate that its proposed resource has a minimum of seven combined years' experience performing the following activities for client organizations:</p> <ul style="list-style-type: none"> 1. Developing project plans; and 2. Executing and controlling project activities within scheduled time and cost parameters. <p>Each project must include both activities, and must have been completed within the last 15 years.</p> <p>The Contractor must include the following information for each referenced project:</p> <ul style="list-style-type: none"> (i) The project name and/or number; (j) The name of the client organization; (k) The project dates (start and end) and duration; and (l) A brief project description, including the proposed resource's role 	

(j) Project Leader Level 2

ID	Requirement	Contractor's Response
PL2-M1	<p>The Contractor must demonstrate that its proposed resource has a minimum of seven combined years' experience performing four of the following activities:</p> <ul style="list-style-type: none"> 1. Specify the general requirements of the system, develop broad system alternatives and identify their administrative, economic and technical feasibility and practicality as well as associated policy and organizational change requirements. 2. Analyse and evaluate each alternative based on make/buy, impact and cost-benefit considerations, and propose, justify, plan and cost the implementation of the selected alternative. 3. Produce overall plan, a detailed plan for the functional analysis phase, and obtain approval of preliminary analysis. 4. Plan, direct and control the activities of a system development team within scheduled time and cost parameters. 5. Evaluate proposed computer applications to determine technical, operational and economic feasibility. 	

	<p>6. Design and test systems to ensure that the objectives of the system are met and that the outputs produced are in accordance with client requirements.</p> <p>7. Monitor the design, implementation and operations start-up of the proposed system against established goals, objectives and milestones.</p> <p>The Contractor must include the following information for each referenced project:</p> <ul style="list-style-type: none"> (a) The project name and/or number; (b) The name of the client organization; (c) The project dates (start and end) and duration; and (d) A brief project description, including the proposed resource's role. 	
PL2-M2	<p>The Contractor must demonstrate that its proposed resource has a minimum of five combined years' experience performing the following activities for client organizations:</p> <ul style="list-style-type: none"> 1. Developing project plans; and 2. Executing and controlling project activities within scheduled time and cost parameters. <p>Each project must include both activities, and must have been completed within the last 10 years.</p> <p>The Contractor must include the following information for each referenced project:</p> <ul style="list-style-type: none"> (a) The project name and/or number; (b) The name of the client organization; (c) The project dates (start and end) and duration; and (a) A brief project description, including the proposed resource's role. 	

(k) GIS Applications Analyst Level 3

ID	Requirement	Contractor's Response
GAA3-M1	<p>The Contractor must demonstrate that its proposed resource has a minimum of ten years' experience developing business requirements for one or more geospatial projects for a client organization.</p> <p>Each project must have been completed within the last 15 years.</p> <p>The Contractor must include the following information for each referenced project:</p>	

	<ul style="list-style-type: none">(a) The project name and/or number;(b) The name of the client organization;(c) The project dates (start and end) and duration; and(d) A brief project description, including the proposed resource's role.	
GAA3-M2	<p>The Contractor must demonstrate that its proposed resource has a minimum of ten years' experience providing recommendations on:</p> <ul style="list-style-type: none">1. Strategic planning; OR2. Best practices; OR3. Standards or policies, <p>for geospatial projects for client organizations.</p> <p>Each project must have been completed within the last 15 years.</p> <p>The Contractor must include the following information for each referenced project:</p> <ul style="list-style-type: none">(a) The project name and/or number;(b) The name of the client organization;(c) The project dates (start and end) and duration; and(d) A brief project description, including the proposed resource's role.	
GAA3-M3	<p>The Bidder must demonstrate that its proposed resources have a minimum of ten years' experience conducting requirements analysis for geospatial projects or initiatives.</p> <p>The Contractor must include the following information for each referenced project:</p> <ul style="list-style-type: none">(a) The project name and/or number;(b) The name of the client organization;(c) The project dates (start and end) and duration; and(d) A brief project description, including the proposed resource's role.	

(I) GIS System Architect Level 3

ID	Requirement	Contractor's Response
GAA3-M1	<p>The Contractor must demonstrate that its proposed resource has a minimum of ten years' experience monitoring and supporting the development of geospatial systems to ensure compliance with target system architecture.</p> <p>Each project must have been completed within the last 15 years.</p> <p>The Contractor must include the following information for each referenced project:</p> <ul style="list-style-type: none"> (e) The project name and/or number; (f) The name of the client organization; (g) The project dates (start and end) and duration; and (h) A brief project description, including the proposed resource's role. 	
GAA3-M2	<p>The Bidder must demonstrate that its proposed resources have a minimum of ten years' experience conducting requirements analysis for geospatial projects or initiatives.</p> <p>The Contractor must include the following information for each referenced project:</p> <ul style="list-style-type: none"> (a) The project name and/or number; (b) The name of the client organization; (c) The project dates (start and end) and duration; and (d) A brief project description, including the proposed resource's role. 	
GAA3-M2	<p>The Contractor must demonstrate that its proposed resources has a minimum of ten years' experience negotiating with stakeholders to develop geospatial standards or policies.</p> <p>The Contractor must include the following information for each referenced project:</p> <ul style="list-style-type: none"> (a) The project name and/or number; (b) The name of the client organization; (c) The project dates (start and end) and duration; and (d) A brief project description, including the proposed resource's role. 	

APPENDIX D TO ANNEX A CERTIFICATIONS AT THE TA STAGE

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

1. CERTIFICATION OF EDUCATION AND EXPERIENCE

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

Print name of authorized individual & sign above

Date

2. CERTIFICATION OF AVAILABILITY OF PERSONNEL

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

Print name of authorized individual & sign above

Date

3. CERTIFICATION OF STATUS OF PERSONNEL

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

Print name of authorized individual & sign above

Date

4. CERTIFICATION OF LANGUAGE

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

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

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

Print name of authorized individual & sign above

Date

ATTACHMENT 5.1

FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY - CERTIFICATION

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

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

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

Complete both A and B.

A. Check only one of the following:

- ☐ A1. The Bidder certifies having no work force in Canada.
 - ☐ A2. The Bidder certifies being a public sector employer.
 - ☐ A3. The Bidder certifies being a federally regulated employer being subject to the [Employment Equity Act](#).
 - ☐ A4. The Bidder certifies having a combined work force in Canada of less than 100 permanent full-time and/or permanent part-time employees.
- 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).


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

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



PART A (continued) / PARTIE A (suite)

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

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

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

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

Special comments:

Commentaires spéciaux :

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

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

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

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

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

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

PRODUCTION

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

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

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



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

For users completing the form **manually** use the summary chart below to indicate the category(ies) and level(s) of safeguarding required at the supplier's site(s) or premises.

Les utilisateurs qui remplissent le formulaire **manuellement** doivent utiliser le tableau récapitulatif ci-dessous pour indiquer, pour chaque catégorie, les niveaux de sauvegarde requis aux installations du fournisseur.

For users completing the form **online** (via the Internet), the summary chart is automatically populated by your responses to previous questions.

Dans le cas des utilisateurs qui remplissent le formulaire **en ligne** (par Internet), les réponses aux questions précédentes sont automatiquement saisies dans le tableau récapitulatif.

SUMMARY CHART / TABLEAU RÉCAPITULATIF

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

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

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

☒ No
Non ☐ Yes
Oui

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

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

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

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

☒ No
Non ☐ Yes
Oui

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

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



Government of Canada
Gouvernement du Canada

Contract Number / Numéro du contrat

EP296-173257

Security Classification / Classification de sécurité
UNCLASSIFIED

PART D - AUTHORIZATION / PARTIE D - AUTORISATION

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

Name (print) - Nom (en lettres moulées)

Christine Feeny

Title - Titre

Director, IT Enablement,
Real Property Services

Signature

Christine Feeny

Telephone No. - N° de téléphone
613-889-7912

Facsimile No. - N° de télécopieur

E-mail address - Adresse courriel
Christine.Feeny@tpsgc-pwgsc.gc.ca

Date
March 30, 2017

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

Name (print) - Nom (en lettres moulées)

Chantal Dagenais

Title - Titre

SO

Signature

Chantal Dagenais

Telephone No. - N° de téléphone
819-956-7726

Facsimile No. - N° de télécopieur

E-mail address - Adresse courriel
Chantal.Dagenais@TPSGC-PWGSC.GC.CA

Date

3/10/2017

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

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

☐ No

☐ Yes

☐ Non

☐ Oui

16. Procurement Officer / Agent d'approvisionnement

Name (print) - Nom (en lettres moulées)

Hicham Laassouli

Title - Titre

Procurement Specialist

Signature

laassouli, hicham

Digitally signed by laassouli, hicham
DN: c=CA, o=GC, ou=PWGSC-TPSGC, cn=laassouli,
hicham
Date: 2018.02.02 14:40:43 -05'00'

Telephone No. - N° de téléphone

Facsimile No. - N° de télécopieur

E-mail address - Adresse courriel

Date

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

Name (print) - Nom (en lettres moulées)

Title - Titre

Signature

Danica Zuger

Telephone No. - N° de téléphone

Facsimile No. - N° de télécopieur

E-mail address - Adresse courriel

Date

23-06-2016

Danica Zuger

Quality Control Officer/Agente contrôle de la qualité

Contracts Security Division/Division des contrats sécurité

Danica.zuger@tpsgc-pwgsc.gc.ca

Tel/Tél 613-948-1670 Fax/Télec 613-954-4171



TASK AUTHORIZATION FORM FORMULAIRE D'AUTORISATION DE TÂCHES

PART 1 (completed by the Technical/Project Authority) / PARTIE 1 (complété par le Responsable technique / Chargé du projet)

A. General Information / Informations générales

Contract Number / Numéro du contrat :				
Contractor Name / Nom du Contracteur :				
Task Authorization (TA) No. / N° de l'autorisation de tâches (AT) :	Commitment No. / N° de l'engagement :	Financial Coding / Code financier :	Date of Issuance / Date d'émission :	Response required by / Réponse requise par :

B. For Amendments Only / Aux fins de modification seulement

Amendment No. / N° de la modification :	
Reason for the Amendment / Raison pour la modification :	

C. TA Requirements / Exigences relatives à l'AT

Required Resource(s) / Ressource(s) requise(s)

Category / Catégorie	Level / Niveau	Estimated Level of Effort (days) / Niveau d'effort estimatif (jours)	Linguistic Profile / Profile linguistique	Required Level(s) of Security / Niveau(x) de sécurité requis

Statement of Work (tasks, deliverables, reports, etc.) / Énoncé des travaux (tâches, livrables, rapports, etc.)

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Period of Services / Période de service:

Initial Start Date / Date de début initiale :		Initial End Date / Date de fin initiale :	
Extended End Date (See Reason for the Amendment) / Date de fin prolongée (voir Raison pour la modification) :			
<input type="checkbox"/> Option To Extend Initial End Date / Option pour prolonger la date de fin initiale			

Travel Requirement(s) / Exigence(s) de voyage :	
Work Location(s) / Lieu(x) de travail :	

PART 2 (completed by the Contractor and/or the Technical/Project Authority) / PARTIE 2 (complété par le Contracteur et/ou le Responsable technique / Chargé du projet)

A. Contractor Resource(s) / Ressource(s) du Contracteur

Note: once approved, only the following resources may provide services under this TA. / Nota : une fois approuvée, seules les ressources suivantes peuvent fournir des services sous la présente AT.



TASK AUTHORIZATION FORM

FORMULAIRE D'AUTORISATION DE TÂCHES

Name / Nom	Category / Catégorie	Level / Niveau	Linguistic Profile / Profil linguistique	Level of Security / Niveau de sécurité	PWGSC Security File No. / N° du dossier de sécurité TPSGC	
						<div>+ -</div>

B. Estimated Cost / Coût estimatif

Category / Catégorie	Level / Niveau	Per Diem Rate / Taux journalier	Estimated Level of Effort (days) / Niveau d'effort estimatif (jours)	Total Cost / Coût estimatif
Estimated Cost / Coût estimatif				
Total Estimated Travel and Living Cost / Estimé des frais de déplacement et de subsistance				\$0.00
Taxe rate applied / Taux d'imposition appliqué (%)		Applicable Taxes / Taxes applicables		\$0.00
Total Estimated Cost / Coût total estimatif				\$0.00

PART 3 - TA APPROVAL BY CANADA / PARTIE 3 - APPROBATION DE L'AT PAR LE CANADA

By signing this TA, the authorized client authority and/or the PWGSC Contracting Authority certify(ies) that the content of this TA is in accordance with the conditions of the Contract.

En apposant sa signature sur l'AT, le client autorisé et/ou l'autorité contractante de TPSGC atteste(nt) que le contenu de cette AT est conforme aux conditions du contrat.

The client's authorization limit is . When the value of a TA and its amendments (including GST/HST) is in excess of this limit, the TA must be signed by the authorized client and forwarded to the PWGSC Contracting Authority for authorization.

La limite d'autorisation du client est . Lorsque la valeur de l'AT et ses modifications (incluant la TPS/TVH) dépasse cette limite, l'AT doit être signée par le client autorisé et transmise à l'autorité contractante de TPSGC pour autorisation.

Name of Authorized Client / Nom du client autorisé _____ Date _____

Name of Contracting Authority / Nom de l'autorité contractante _____ Date _____

Signature _____

Signature _____

PART 4 - CONTRACTOR SIGNATURE / PARTIE 4 - SIGNATURE DU CONTRACTEUR

Name and Title of individual authorized to sign on behalf of the Contractor / Nom et titre de la personne autorisée à signer au nom de l'entrepreneur _____

Signature _____ Date _____