



RETURN BIDS TO :

**RETOURNER LES
SOUSSIONS À:**

Bid Receiving Shared Services Canada |
Services partagés Canada
180 Kent Street
Ottawa, Ontario
K1G 4A8
13th Floor

REQUEST FOR PROPOSAL

DEMANDE DE PROPOSITION

Proposal To: Shared 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 thereof.

Proposition aux: Services partagés Canada
Nous offrons par la présente de vendre à Sa Majesté la Reine du chef du Canada, aux conditions énoncées
Instructions : See Herein
ou incluses par référence dans la présente et aux annexes ci-jointes, les biens, services et construction
Instructions: Voir aux présentes
énumérés ici sur toute feuille ci-annexées, au(x) prix indiqué(s)

Comments - Commentaires

This document contains a Security Requirement

Vendor/Firm Name and address
Raison sociale et adresse du fournisseur/de l'entrepreneur

Issuing Office – Bureau de distribution

Shared Services Canada – SA Authority
Procurement and Vendor Relations
180 Kent Street
Ottawa, Ontario
K1G 4A8

Title – Sujet Professional Services Strategic and Advisory Services	
Solicitation No. – N° de l'invitation 2BOKB-18-4081	Date February 23, 2018
Client Reference No. – N° référence du client 14081	
Buy & Sell Reference No. – N° de reference de SEAG 2BOKB-18-4081	
File No. – N° de dossier 2BOKB-18-4081	
Solicitation Closes – L'invitation prend fin at – à 2 :00 PM on – le 09-Apr-2018	
Time Zone Fuseau horaire Daylight Saving Time DST	
F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input type="checkbox"/> Other-Autre: <input type="checkbox"/>	
Address Inquiries to : - Adresser toutes questions à: Julie Watson-Bampton	Buyer Id – Id de l'acheteur C09
Telephone No. – N° de téléphone : 613-790-5915	FAX No. – N° de FAX 613-948-0990
Destination – of Goods, Services, and Construction: Destination – des biens, services et construction : See Herein	

Delivery required - Livraison exigée See Herein	Delivered Offered – Livraison proposée
Vendor/firm Name and address Raison sociale et adresse du fournisseur/de l'entrepreneur	
Facsimile No. – N° de télécopieur Telephone No. – N° de téléphone	
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 _____



REQUEST FOR PROPOSAL
STRATEGIC AND ADVISORY SERVICES FOR
SHARED SERVICES CANADA

TABLE OF CONTENTS

		Page #
PART 1 GENERAL INFORMATION		
1.1	Introduction	5
1.2	Summary	5
1.3	Conflict of Interest	5
1.4	Debriefings	6
PART 2 BIDDER INSTRUCTIONS		
2.1	Standard Instructions, Clauses and Conditions	8
2.2	Submission of Bids	8
2.3	Former Public Servant	9
2.4	Enquiries - Bid Solicitation	10
2.5	Applicable Laws	10
2.6	Improvement of Requirement During Solicitation Period	10
PART 3 BID PREPARATION INSTRUCTIONS		
3.1	Bid Preparation Instructions	11
3.2	Section I: Technical Bid	11
3.3	Section II: Financial Bid	12
3.4	Section III: Certifications	12
PART 4 EVALUATION PROCEDURES AND BASIS OF SELECTION		
4.1	Evaluation Procedures	13
4.2	Technical Evaluation	13
4.3	Financial Evaluation	14
4.4	Total Score of Bid	15
4.5	Basis of Selection	16
PART 5 CERTIFICATIONS		
5.1	Mandatory Certifications Required Precedent to Contract Award	17
PART 6 SECURITY and FINANCIAL REQUIREMENTS		
6.1	Security Requirement	20
6.2	Financial Capability	20
PART 7 RESULTING CONTRACT CLAUSES		
7.1	Requirement	21
7.2	Task Authorization	21
7.3	Standard Clauses and Conditions	21
7.4	General Conditions	22
7.5	Security Requirement	22
7.6	Contract Period	23
7.7	Authorities	23
7.8	Payment	24
7.9	Limitation of Expenditure	26



7.10	Time Verification	26
7.11	Invoicing Instructions	27
7.12	Certifications	27
7.13	Applicable Laws	27
7.14	Priority of Documents	28
7.15	Foreign Nationals (Canadian Contractor)	28
7.16	Insurance Requirements	28
7.17	Limitation of Liability	28
7.18	Professional Services - General	28
7.19	Safeguarding Electronic Media	30
7.20	Representations and Warranties	31
7.21	Conflict of Interest	31
7.22	Electronic Procurement Pay System	31
7.23	Transition Services of end of Contract Period	32
7.24	Termination for Convenience	32

List of Annexes to the Resulting Contract:

- Annex A Statement of Work
 - Appendix A to Annex A - Task Authorization Procedures
 - Appendix B to Annex A - Task Authorization Request and Acceptance Form
 - Appendix C to Annex A - Resource Assessment Criteria and Response Tables
 - Appendix D to Annex A - Certifications at the Task Authorization Stage
- Annex B Basis of Payment
- Annex C Security Requirements Check List
- Annex D Federal Contractors Program for Employment Equity – Certification
- Annex E Insurance Requirements

List of Attachments to Part 3 (Bid Preparation Instructions):

Attachment 3.1: Pricing Tables

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

Attachment 4.1: Technical Criteria

Forms:

- Form 1 - Bid Submission Form
- Form 2 - Client Reference Verification Form for Mandatory Technical Criteria
- Form 3 - Client Reference Verification Form for Point-Rated Technical Criteria
- Form 4 - Substantiation of Technical Compliance Form
- Form 5 - Code of Conduct Certification Form



PART 1 GENERAL INFORMATION

1.1 Introduction

The bid solicitation is divided into seven parts plus attachments and annexes, as follows:

- Part 1 General Information: provides a general description of the requirement;
- Part 2 Bidder Instructions: provides the instructions, clauses and conditions applicable to the bid solicitation;
- Part 3 Bid Preparation Instructions: provides Bidders with instructions on how to prepare their bid;
- Part 4 Evaluation Procedures and Basis of Selection: indicates how the evaluation will be conducted, the evaluation criteria that must be addressed in the bid, if applicable, and the basis of selection;
- Part 5 Certifications: includes the certifications to be provided;
- Part 6 Security and Financial 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 its appendices, Basis of Payment, Security Requirements Checklist, Federal Contractors Program for Employment Equity – Certification, and Insurance Requirements.

1.2 Summary

This bid solicitation is being issued by SSC.

Shared Services Canada (SSC) requires industry expertise and services to support IT strategic modernization and planning, IT service strategy, evolution and sourcing strategies and benchmarking activities and to achieve the best value for the crown.

The objective of this requirement is to award one contract to acquire expert advice and related services to support various SSC initiatives on an as and when requested basis.

There is a security requirement associated with this requirement. For additional information, see Part 6 – Security and Financial Requirements, and Part 7 - Resulting Contract Clauses. Bidders should consult the “Security Requirements on PWGSC Bid Solicitations - Instructions for Bidders” document on the Departmental Standard Procurement Documents (<http://www.pwgsc.gc.ca/acquisitions/text/plain/plain-e.html#top>) Website.

On July 12, 2012, the Government of Canada announced on the Government Electronic Tendering Service that it had invoked the National Security Exception under the trade agreements in respect of procurements related to email, networks and data centres for Shared Services Canada. As a result, this requirement is subject to the National Security Exception.

Bidders must provide a list of names, or other related information as needed, pursuant to section 01 of the Standard Instructions 2003

For services requirements, Bidders in receipt of a pension or a lump sum payment must provide the required information as detailed in article 3 of Part 2 of the bid solicitation.

There is a Federal Contractors Program (FCP) for employment equity requirement associated with this procurement; see Part 5 – Certifications, Part 7 – Resulting Contract Clauses and the annex named Federal Contractors Program for Employment Equity – Certification



1.3 Conflict of Interest – Unfair Advantage

In order to protect the integrity of the procurement process, bidders are advised that Canada may reject a bid in the following circumstances:

- (a) if the Bidder, any of its subcontractors, any of their respective employees or former employees was involved in any manner in the preparation of the bid solicitation or in any situation of conflict of interest or appearance of conflict of interest;
- (b) if the Bidder, any of its subcontractors, any of their respective employees or former employees had access to information related to the bid solicitation that was not available to other bidders and that would, in Canada's opinion, give or appear to give the Bidder an unfair advantage.

The experience acquired by a bidder who is providing or has provided the goods and services described in the bid solicitation (or similar goods or services) will not, in itself, be considered by Canada as conferring an unfair advantage or creating a conflict of interest. This bidder remains however subject to the criteria established above.

Where Canada intends to reject a bid under this section, the Contracting Authority will inform the Bidder and provide the Bidder an opportunity to make representations before making a final decision. Bidders who are in doubt about a particular situation should contact the Contracting Authority before bid closing. By submitting a bid, the Bidder represents that it does not consider itself to be in conflict of interest nor to have an unfair advantage. The Bidder acknowledges that it is within Canada's sole discretion to determine whether a conflict of interest, unfair advantage or an appearance of conflict of interest or unfair advantage exists.

1.4 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 of 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.
- (c) The 2003 (2016-04-04) Standard Instructions - Goods or Services - Competitive Requirements are incorporated by reference into and form part of the bid solicitation. If there is a conflict between the provisions of 2003 and this document, this document prevails. All references to PWGSC contained within the Standard Instructions will be interpreted as a reference to SSC. All references to joint venture contained within the Standard Instructions are deleted.
- (d) Section 3 of the Standard Instructions – Goods and Services – Competitive Requirements 2003 is amended as follows: delete “Pursuant to the *Department of Public Works and Government Services Act*, S.C. 1996, c.16”
- (e) Subsection 5(4) of 2003, Standard Instructions - Goods or Services - Competitive Requirements is amended as follows:
 - Delete: sixty (60) days
 - Insert: one hundred and eighty days (180) days
- (f) Section 7 is replaced by the following:
 - 1. A bid delivered to the specified address after the closing date and time but before the contract award date may be considered, provided the bidder can prove the delay is due solely to a delay in delivery that can be attributed to a Delivery Service Company. Delivery Company means an incorporated courier company, Canada Post Corporation, or a national equivalent of a foreign country). The only pieces of evidence relating to a delay that are acceptable are:
 - a) a cancellation date stamp; or
 - b) a courier bill of lading; or
 - c) a date stamped labelthat clearly indicates that the bid was received by the Delivery Company before the bid closing date.
 - 2. Postage meter imprints, whether imprinted by the Bidder or the Delivery Company are not acceptable as proof of timely mailing.
 - (a) Section 17 of the Standard Instructions – Goods and Services – Competitive Requirements 2003 is deleted in its entirety.
 - (b) For purposes of this procurement the PWGSC policies referenced within the Standard Acquisitions Clauses and Conditions Manual are adopted as SSC policies.

2.2 Submission of Bids

- (a) Bids must be submitted to Shared Services Canada by the date, time and place indicated on page one (1) of the bid solicitation.
- (b) Due to the nature of the RFP solicitation, responses delivered by facsimile or electronically will not be accepted.



- (c) Vendors intending to submit a bid are requested to notify the Contracting Authority by email (email address can be found on page 1 of the solicitation document), prior to the bid closing date, indicating their intention to submit a bid.

2.3 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 with FPS, bidders must provide the information required below before contract award.

(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:

- a. an individual;
- b. an individual who has incorporated;
- c. a partnership made of former public servants; or
- d. 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 FPS in receipt of a pension, as applicable:

- a. name of former public servant;
- b. 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:

- a. name of former public servant;



- b. conditions of the lump sum payment incentive;
- c. date of termination of employment;
- d. amount of lump sum payment;
- e. rate of pay on which lump sum payment is based;
- f. period of lump sum payment including start date, end date and number of weeks;
- g. 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.

2.4 Enquiries - Bid Solicitation

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

2.5 Applicable Laws

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: A Bidder may, at its 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

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



PART 3 BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

(a) Canada requests that Bidders provide their bid in separately bound sections as follows:

- (i) Section I: Technical Bid (3 hard copies and 3 soft copies on CDs or DVDs)
- (ii) Section II: Financial Bid (1 hard copy and 1 soft copy on CD or DVD)
- (iii) Section III: Certifications (1 hard copy and 1 soft copy on CD or DVD)

Prices must appear in the financial bid only. No prices must be indicated in any other section of the bid.

In the event of a discrepancy between the wording of the electronic version and the paper version, the wording of the paper version will take precedence over the wording of the electronic version

(b) Multiple bids from the same Bidder (or a bid from a Bidder and another bid from any of its affiliates) are not permitted in response to this bid solicitation. Each Bidder must submit only a single bid. For the purpose of this bid solicitation, individual members of a joint venture cannot participate in another bid, either by submitting a bid alone or by participating in another joint venture. If any Bidder submits more than one bid (or an affiliate also submits a bid), either on its own or as part of a joint venture, Canada will choose in its discretion which bid to consider.

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, the Bidder's Procurement Business Number, the Bidder's status under the Federal Contractors Program for Employment Equity, etc. Using the form to provide this information is not mandatory, but it is recommended. If Canada determines that the information required by the Bid Submission Form is incomplete or requires correction, Canada will provide the Bidder with an opportunity to do so.
- (ii) **Substantiation of Technical Compliance:** The Technical Bid must substantiate the compliance with the specific Attachment form 2, which is the requested format for providing the substantiation. The substantiation must not simply be a repetition of the requirement(s), but must explain and demonstrate how the Bidder will meet the requirements and carry out the required Work. Simply stating that the Bidder complies 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 form 2, where bidders are requested to indicate where in their bid the reference material can be found, including the title of the document, and the page and paragraph numbers; where the reference is not sufficiently precise, Canada may request that the Bidder direct Canada to the appropriate location in the documentation.
- (iii) **Customer Reference Contact Information:** The Bidder must provide customer references who must each confirm if requested by SSC that Bidder meets mandatory criteria, as specified in Section 4.2 Technical Evaluation.

The Reference Project Verification Form for Mandatory Technical Criteria (Form 2) and Reference Project Verification Form for Point Rated Technical Criteria (Form 3) should be used to request confirmation from customer references.



For each customer reference, the Bidder must, at a minimum, provide the name and email address for a contact person. Bidders are also requested to include the title of the contact person. It is the sole responsibility of the Bidder to ensure that it provides a contact who is knowledgeable about the services the Bidder has provided to its customer and who is willing to act as a customer reference.

Crown references will be accepted.

3.3 Section II: Financial Bid

- (a) **Pricing:** Bidders must submit their financial bid in accordance with Attachment 3.1: Pricing Tables. The total amount of Goods and Services Tax or Harmonized Sales Tax must be shown separately, if applicable. Unless otherwise indicated, all prices must be firm, all inclusive prices.
- (b) **Variation in Professional Services Resource Rates from Year to Year:** If the Bidder proposes different rates for resources for different years of the resulting contract, including option years, the difference from one year to the following year must be no more than 5%.
- (c) **All Costs to be Included:** The financial bid must include all costs for the requirement described in the bid solicitation for the entire Contract Period, including any option periods. The identification of all necessary equipment, software, peripherals, cabling and components required to meet the requirements of the bid solicitation and the associated costs of these items is the sole responsibility of the Bidder.
- (d) **Blank Prices:** Bidders are requested to insert "\$0.00" for any item for which it does not intend to charge or for items that are already included in other prices set out in the tables. If the Bidder leaves any price blank, Canada will treat the price as "\$0.00" for evaluation purposes and may request that the Bidder confirm that the price is, in fact, \$0.00. No Bidder will be permitted to add or change a price as part of this confirmation. Any Bidder who does not confirm that the price for a blank item is \$0.00 will be declared non-responsive.

3.4 Section III: Certifications

Bidders must submit the certifications required 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 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 Canada will evaluate the bids. 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:
 - 4.1.c.1 **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.
 - 4.1.c.2 **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:
 - 4.1.c.2.1 verify any or all information provided by the Bidder in its bid; OR
 - 4.1.c.2.2 contact any or all references supplied by the Bidder (e.g., references named in the résumés of individual resources) to verify and validate any information submitted by the Bidder,

the Bidder must provide the information requested by Canada within 2 working days of a request by the Contracting Authority.
 - 4.1.c.3 **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) For the Technical Criteria below, where References are required, GC clients can be used as References. Canada will use the same process for verifying Reference information from GC References as for private sector or other public sector references used by the Bidder. Canada will not be responsible for obtaining the required Reference information from any GC client used as a Reference.
- (b) **Mandatory Technical Criteria:**
 - 4.2.b.1 Each bid will be reviewed to determine whether it meets the mandatory requirements of the bid solicitation. Any element of the bid solicitation identified 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.
 - 4.2.b.2 The mandatory requirements are described in Attachment 4.1 – Technical Criteria.
 - 4.2.b.3 **Corporate References**
 - 4.2.b.3.1 The Bidders must include client references for each of the Mandatory Technical Criteria M.1 to M.7. Bidders must include for each Reference a brief description of the project and how the reference met the specific mandatory criteria being claimed, each in 250 words or less, which substantiates the mandatory technical criteria being assessed. Any information provided may be verified by Canada should Canada perform any reference validations checks.



- 4.2.b.3.2 Bidders are requested to submit references for M.1 to M.7 using the Client Reference Verification Form for Mandatory Technical Criteria (Form 2).
- 4.2.b.3.3 Bidder should obtain signatures from the primary and backup contacts to confirm the mandatory technical criteria being assessed by signing the form. The SSC evaluation team may contact each reference to verify the information provided in the proposal and may ask additional questions.
- 4.2.b.3.4 If Bidders need to use multiple References, then Bidders must submit additional signed forms as part of their response. For example, if Reference A is used for M.1, and Reference B is used for M.2, they must be submitted on 2 separate Client Reference Verification Forms for Mandatory Technical Criteria (Form 2).
- 4.2.b.3.5 Canada reserves the right to contact the primary contact and, where applicable, the backup contact, in order to validate that the information on the signed Form 2 is accurate.
- 4.2.b.3.6 If Bidders cannot obtain signatures, an email attestation will be accepted. The email attestation must accompany the completed form(s) as an attachment and must include some text that is similar to the following statement in the email itself "As a Reference for the firm identified in the attachment, by providing this email, I confirm that I am a representative of the Client Organization identified in the attached and that I have read and understood the Mandatory Technical Criteria described in the attached page(s)."

4.2.b.4 Corporate Information and Methodologies

- 4.2.b.4.1 Bidders must substantiate for each Mandatory Technical Criteria M.7 to M.9 their claim that they fulfill the criteria by providing the required information as stated by the criteria. Bidders should provide sufficient detail to substantiate the extent to which its references satisfy the criteria.
- 4.2.b.4.2 Bidders are requested to provide the substantiations using Form 4 – Substantiation of Technical Compliance Form.

(c) Point-Rated Technical Criteria:

- 4.2.c.1 Bids that meet all the Mandatory Technical Criteria will then be evaluated and scored under the Point-Rated Technical Criteria.
- 4.2.c.2 Each bid will be rated by assigning a score to the rated requirements, which are identified in the bid solicitation by the word "rated" or by reference to a score. Bidders who fail to submit complete bids with all the information requested by this bid solicitation will be rated accordingly.
- 4.2.c.3 The rated requirements are described in Attachment 4.1 – Technical Criteria.

4.2.c.4 Client References

- 4.2.c.4.1 The Bidders should include client references for each of the Point Rated Technical Criteria R.1 to R.4. Bidders must include for each Reference a brief description of the project and how the reference met the specific mandatory criteria being claimed, both in 250 words or less, which substantiates the point rated technical criteria being assessed. Any information provided may be verified by Canada should Canada perform any reference validation checks.
- 4.2.c.4.2 Bidders are requested to submit references for R.1 to R.4 using the Client Reference Verification Form for Point Rated Technical Criteria (Form 3).
- 4.2.c.4.3 Bidder should obtain signatures from the primary and backup contacts to confirm the point rated technical criteria being assessed by signing the form. The SSC evaluation team may contact each reference to verify the information provided in the proposal and may ask additional questions.



- 4.2.c.4.4 If Bidders need to use multiple References, then Bidders must submit additional signed forms as part of their response. For example, if Reference A is used for R.1, and Reference B is used for R.2, they must be submitted on 2 separate Client Reference Verification Forms for Point-Rated Technical Criteria (Form 3).
- 4.2.c.4.5 Canada reserves the right to contact the primary contact and, where applicable, the backup contact, in order to validate that the information on the signed Form 3 is accurate.
- 4.2.c.4.6 If Bidders cannot obtain signatures, an email attestation will be accepted. The email attestation must accompany the completed form(s) as an attachment and must include some text that is similar to the following statement in the email itself “As a Reference for the firm identified in the attachment, by providing this email, I confirm that I am a representative of the Client Organization identified in the attached and that I have read and understood the Point-Rated Technical Criteria described in the attached page(s).”
- 4.2.c.5 Corporate Information**
- 4.2.c.5.1 Bidders should substantiate for Point-Rated Technical Criterion R.6 their claim that they fulfill the criteria by providing the required information as stated by the criteria. Bidders should provide sufficient detail to substantiate the extent to which its references satisfy the criteria.
- 4.2.c.5.2 Bidders are requested to provide the substantiation using Form 4 – Substantiation of Technical Compliance Form.
- 4.2.c.6 The Total Technical Score of a bid = sum of the score obtained for each Point-Rated Technical Criteria for the bid.
- 4.2.c.7 The Maximum Total Technical Score that can be allocated for the Point-Rated Technical Criteria is 900 points.
- 4.2.c.8 The Evaluated Technical Score of a bid = the Total Technical Score of a bid divided by the Maximum Total Technical Score multiplied by 100%.
- (d) **Reference Validation Checks:**
- 4.2.d.1 For reference validation checks, Canada will conduct the reference validation check in writing by email. Canada will send all email reference validation check requests to contacts supplied by all the Bidders using the email address provided in the bid. Canada will not award any points nor consider a mandatory criterion met unless the response is received within 5 working days of the date that Canada's e-mail was sent.
- 4.2.d.2 On the third working day after sending out the reference validation check request, if Canada has not received a response, Canada will notify the Bidder by email, to allow the Bidder to contact its reference directly to ensure that it responds to Canada within 5 working days.
- 4.2.d.3 If during reference validation by Canada it becomes apparent that the address, telephone number, or email address for any of the references is incorrect or missing, the Bidder will be permitted to provide the correct contact address, telephone number, or email address. If the individual named by a Bidder for the primary contact is unavailable when required during the evaluation period, Canada will contact the backup contact for the reference from the same client organization. Bidders will only be provided with this opportunity once for each customer, and only if the primary contact is unavailable to respond (i.e., Canada will not contact the backup contact if the primary contact person indicates that he or she is unwilling or unable to respond). The 5 working days will not be extended to provide additional time for the backup contact to respond.
- 4.2.d.4 Where Canada does not receive confirmation from either the primary contact or backup contact for the reference for the Mandatory Technical Criteria, the Bidder will be deemed non-responsive.



4.2.d.5 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.

4.2.d.6 Points will not be allocated and/or a bidder will not meet the mandatory experience requirement (as applicable) if (1) the customer reference 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.

4.2.d.7 Whether or not to conduct reference checks is discretionary. However, if SSC chooses to conduct reference checks for any given mandatory requirement, it will check the references for that requirement for all Bidders who have not, at that point, been found non-responsive.

- (e) **Number of Resources Evaluated:** Resources will only be assessed after contract award once specific tasks are requested of then Contractor. After contract award, the Task Authorization process will be in accordance with Part 7 – Resulting Contract Clauses, the Article 7.3 “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.
- (f) **Technically Responsive Bid:** A technically responsive bid is one that complies with the mandatory requirements of this bid solicitation and meets all mandatory evaluation criteria.

4.3 Financial Evaluation

- (a) The financial evaluation will be conducted by calculating the Evaluated Financial Score using the Pricing Tables completed by the bidders in Attachment 3.1 Pricing Tables.

STEP 1

Weighted Per diem rate = Per diem rate x the weight of the Level

STEP 2

For each Service Line:

Service Line Evaluated Price = the sum of the Weighted Per diem rates for each Service Line (Junior, Intermediate, Senior)

STEP 3

For each Service Line:

Ranked Evaluated Score = Lowest Service Line Evaluated price / Bidder's Service Line Evaluated price x 100%

where the Lowest Service Line Evaluated Price is the lowest value for the Service Line Evaluated Price from all bids.

STEP 4

For each Service Line:

Weighted Evaluation Score = Ranked Evaluated Score x the weight of the Service Line

STEP 5

Evaluated Financial Score = the sum of the Weighted Evaluation Score

- (b) Points allocated under steps 3, 4, and 5 for each Service line, will be rounded to two decimal places.
- (c) The price of the bid will be evaluated in Canadian dollars, the Goods and Services Tax or the Harmonized Sales Tax excluded, FOB destination, Canadian customs duties and excise taxes included.



(d) Substantiation of Professional Services Rates

In Canada's experience, bidders will from time to time propose rates at the time of bidding for one or more categories of resources that they later refuse to honour, on the basis that these rates do not allow them to recover their own costs and/or make a profit. When evaluating the rates bid for professional services, Canada may, but will have no obligation to, require price support in accordance with this Article. If Canada requests price support, it will be requested from all otherwise responsive bidders who have proposed a rate that is at least 15% lower than the median rate bid by all responsive bidders for the relevant resource category or categories. If Canada requests price support, the following information is required:

- (e) 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 twelve months before the bid solicitation closing date, and the fees charged were equal to or less than the rate offered to Canada;
- (f) in relation to the invoice in (4.3.5.1), 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);
- (g) 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
- (h) the name, telephone number and, if available, email address of a contact person at the customer who received each invoice submitted under (4.3.5.1), 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.

4.4 Total Score of Bid

The total possible *Final Technical Score* is 80 while the total possible *Final Financial Score* is 30.

- (a) Calculation of Final Technical Score: The Final Technical Score will be computed for each technically responsive bid by converting the Evaluated Technical Score obtained for the point-rated technical criteria using the following formula, rounded to 2 decimal places:

$$\text{Evaluated Technical Score} \quad \times \quad 70\% \quad = \quad \text{Final Technical Score}$$



(b) Calculation of Final Financial Score: The Final Financial Score will be computed for each technically responsive bid by converting the Evaluated Financial Score obtained for the financial evaluation using the following formula rounded to 2 decimal places:

$$\text{Evaluated Financial Score} \times 30\% = \text{Final Financial Score}$$

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

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

4.5 Basis of Selection

A bid must comply with the requirements of the bid solicitation and meet all mandatory evaluation criteria to be declared responsive. The responsive bid that obtains the highest Total Bidder Score will be recommended for award of a contract.

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.

In the event of identical Total Bidder Scores, then the bid with the highest Final Financial Score will be recommended for award of a contract.

PART 5 - CERTIFICATIONS

Bidders must provide the required certifications to be awarded a contract. Canada will declare a bid non-responsive if the required certifications are not completed and submitted as requested.

Compliance with the certifications bidders provide to Canada is subject to verification by Canada during the bid evaluation period (before award of a contract) and after award of a contract. The Contracting Authority will have the right to ask for additional information to verify bidders' compliance with the certifications before award of a contract. The bid will be declared non-responsive if any certification made by the Bidder is untrue, whether made knowingly or unknowingly. Failure to comply with the certifications or to comply with the request of the Contracting Authority for additional information will also render the bid non-responsive.

Certifications Required with the Bid

The certifications listed below should be completed and submitted with the bid but may be submitted afterwards. If any of these required certifications is not completed and submitted as requested, the Contracting Authority will so inform the Bidder and provide the Bidder 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 that time period will render the bid non-responsive.

Federal Contractors Program - Certification

- (a) The Federal Contractors Program for Employment Equity (FCP) requires that some suppliers bidding for federal government contracts, valued at \$200,000 or more (including all applicable taxes), make a formal commitment to implement employment equity. This is a condition precedent to contract award. If the Bidder is subject to the FCP, evidence of its commitment must be provided before the award of the Contract.
- (b) Suppliers who have been declared ineligible contractors by Human Resources and Skills Development Canada (HRSDC) are no longer eligible to receive government contracts over the threshold for solicitation of bids as set out in the *Government Contract Regulations*. Suppliers may be declared ineligible contractors either as a result of a finding of non-compliance by HRSDC, or following their voluntary withdrawal from the FCP for a reason other than the reduction of their workforce to fewer than 100 employees. Any bids from ineligible contractors will be declared non-responsive.
- (c) If the Bidder does not fall within the exceptions enumerated in (d)(i) or (ii) below, or does not have a valid certificate number confirming its adherence to the FCP, the Bidder must fax (819-953-8768) a copy of the signed form LAB 1168, Certificate of Commitment to Implement Employment Equity to the Labour Branch of HRSDC.
- (d) Each bidder is requested to indicate in its bid whether it is:
 - (i) not subject to FCP, having a workforce of fewer than 100 permanent full or part-time employees in Canada;
 - (ii) not subject to FCP, being a regulated employer under the *Employment Equity Act*, S.C. 1995, c. 44;
 - (iii) subject to the requirements of FCP, because it has a workforce of 100 or more permanent full or part-time employees in Canada, but it has not previously obtained a certificate number from HRSD (because it has not bid before on requirements of \$200,000 or more), in which case a duly signed certificate of commitment is required from the Bidder; or
 - (iv) subject to FCP-EE, and has a valid certification number (i.e., has not been declared an ineligible contractor by HRSDC).
- (e) Further information on the FCP-EE is available on the following HRSDC Website:
<http://www.hrsdc.gc.ca/en/gateways/topics/wzp-gxr.shtml>.

5.2 Former Public Servant Certification



- (a) Contracts with 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 spending public funds. In order to comply with Treasury Board policies and directives on contracts with FPS, bidders must provide the information required below.
- (b) For the purposes of this clause,
- (i) **"former public servant"** means a 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 and includes:
 - (A) an individual;
 - (B) an individual who has incorporated;
 - (C) a partnership made of former public servants; or
 - (D) a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.
 - (ii) **"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 Public Service. The lump sum payment period does not include the period of severance pay, which is measured in a like manner.
 - (iii) **"pension"** means, in the context of the fee abatement formula, 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 *Canadian Pension Plan Act*, R.S., 1985, c. C-8.
- (c) If the Bidder is an FPS in receipt of a pension as defined above, the Bidder must provide the following information:
- (i) name of former public servant;
 - (ii) date of termination of employment or retirement from the Public Service.
- (d) If the Bidder is an FPS who received a lump sum payment pursuant to the terms of a work force reduction program, 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; and
 - (vii) number and amount (professional fees) of other contracts subject to the restrictions of a work force reduction program.
- (e) For all contracts awarded during the lump sum payment period, the total amount of fee that may be paid to a FPS who received a lump sum payment is \$5,000, including the Goods and Services Tax or Harmonized Sales Tax.
- (f) By submitting a bid, the Bidder certifies that the information submitted by the Bidder in response to the above requirements is accurate and complete.

5.3 Status and Availability of Resources



- (a) By submitting a bid, the Bidder certifies that, should it be awarded a contract as a result of the bid solicitation, every individual proposed in its response to Task Authorizations will be available to perform the Work as required by Canada's representatives and at the time specified in the TA or as agreed to with Canada's representatives. If for reasons beyond its control, the Bidder is unable to provide the services of an individual named in the TA, the Bidder may propose a substitute with similar qualifications and experience. The Bidder must advise the Contracting Authority of the reason for the substitution and provide the name, qualifications and experience of the proposed replacement. For the purposes of this clause, only the following reasons will be considered as beyond the control of the Bidder: death, sickness, retirement, resignation, dismissal for cause or termination of an agreement for default.
- (b) If the 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.

5.4 Education and Experience

- (a) 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.
- (b) All of the resources proposed must meet the minimum experience requirements detailed in the Supply Arrangement for the Category of Personnel for which they are being proposed. The SA Holder acknowledges that the Department of Public Works and Government Services Canada reserves the right to verify this certification prior to contract award or during contract performance and that untrue statements may result in the proposal being declared non-responsive or any other action which the Minister may consider appropriate.

5.5 Code of Conduct and Certifications

By submitting a bid, the Bidder certifies, for himself and his affiliates, to be in compliance with the Code of Conduct and Certifications clause of the Standard instructions. The related documentation hereinafter mentioned will help Canada in confirming that the certifications are true. By submitting a bid, the Bidder certifies that it is aware, and that its affiliates are aware, that Canada may request additional information, certifications, consent forms and other evidentiary elements proving identity or eligibility. Canada may also verify the information provided by the Bidder, including the information relating to the acts or convictions specified herein, through independent research, use of any government resources or by contacting third parties. Canada will declare non-responsive any bid in respect of which the information requested is missing or inaccurate, or in respect of which the information contained in the certifications is found to be untrue, in any respect, by Canada. The Bidder and any of the Bidder's affiliates, will also be required to remain free and clear of any acts or convictions specified herein during the period of any contract arising from this bid solicitation.

Bidders who are incorporated, including those bidding as a joint venture, must provide with their bid a complete list of names of all individuals who are currently directors of the Bidder ([See Annex D](#)). Bidders bidding as sole proprietorship, including those bidding as a joint venture, must provide the name of the owner with their bid. Bidders bidding as societies, firms, partnerships or associations of persons do not need to provide lists of names. If the required names 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 will render the bid non-responsive. Providing the required names is a mandatory requirement for contract award.



Canada may, at any time, request that a Bidder provide properly completed and Signed Consent Forms (Consent to a Criminal Record Verification Form - PWGSC -TPSGC 229) (<http://www.tpsgc-pwgsc.gc.ca/app-acq/forms/229-eng.html>) for any or all individuals aforementioned within the time specified. Failure to provide such Consent Forms within the time period provided will result in the bid being declared non-responsive.

PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS

6.1 Security Requirement

At the date of bid closing, the following conditions must be met:

- (a) the Bidder must hold a valid organization security clearance as indicated in Part 7 - Resulting Contract Clauses;
- (b) the Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work site(s) must meet the security requirement as indicated in Part 7 - Resulting Contract Clauses;
- (c) the Bidder must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites.

6.2 For additional information on security requirements, bidders should consult the "[Security Requirements for PWGSC Bid Solicitations - Instructions for Bidders](http://www.tpsgc-pwgsc.gc.ca/app-acq/lc-pl/lc-pl-eng.html#a31)" (<http://www.tpsgc-pwgsc.gc.ca/app-acq/lc-pl/lc-pl-eng.html#a31>) document on the Departmental Standard Procurement Documents Web site.



PART 7 - RESULTING CONTRACT CLAUSES

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

Requirement

_____ (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.

7.2 Task Authorization (TA)

- (a) **Purpose of a TA:** Services to be provided under the Contract on an as-and-when-requested basis will be ordered by Canada using Appendix D to Annex A - Task Authorization Request and Acceptance Form (“TA Form”).
- (b) **TA Procedures:** The procedures for issuing, responding to, assessing and approving Task Authorizations are described in Appendix C to Annex A.
- (c) **Authority to Issue a TA:** The Contracting Authority will be the only authority to issue tasks authorizations.
- (d) **Charges for Work under a TA:** The Contractor must not charge Canada anything more than the price set out in the TA unless Canada has issued a TA amendment authorizing the increased expenditure. Canada will not pay the Contractor for any design changes, modifications or interpretations of the Work unless they have been approved, in writing, by the Contracting Authority before being incorporated into the Work.
- (e) **Task Authorization Quotations:** The Contractor is required to submit a responsive quotation in response to every TA Form issued to it by Canada. In addition to Canada’s other rights to terminate the Contract, Canada may immediately, and without further notice, terminate the Contract for default if during the Contract Period the Contractor in at least three instances has either not responded or has not submitted responsive quotations when issued a TA Form. A responsive quotation is one that is submitted within the time stated in the TA Form and meets all requirements of the TA issued, including quoting the required number of resources that meet the minimum experience and other requirements of the Categories of Personnel identified in the TA at pricing not exceeding the rates of Annex B.
- (f) **Consolidation of TAs for Administrative Purposes:** The Contract may be amended from time to time to reflect all TAs issued and approved by Canada to date, to document the Work performed under those TAs for administrative purposes.
- (g) **TA Reports:** The Contractor must submit to the Contracting Authority a TA report on a quarterly basis that identifies each TA issued during that quarter and its dollar value.
- (h) **Period of Services:** No Task Authorizations may be entered into after the expiry date of the Contract.

7.3 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](http://ccua-sacc.tpsgc-pwgsc.gc.ca/pub/acho-eng.jsp) (http://ccua-sacc.tpsgc-pwgsc.gc.ca/pub/acho-eng.jsp) Manual issued by Public Works and Government Services Canada.

7.4 General Conditions



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

The text under Subsection 04 of Section 41 – Code of Conduct and Certifications, of General Conditions 2035 referenced above is replaced by:

During the entire period of the Contract, the Contractor must diligently update, by written notice to the Contracting Authority, the list of names of all individuals who are directors of the Contractor whenever there is a change. As well, whenever requested by Canada, the Contractor must provide the corresponding Consent Forms.

With respect to Section 30 - Termination for Convenience, of General Conditions 2003, unless already present, Subsection 04 is deleted and replaced with the following Subsections 04, 05 and 06:

4. The total of the amounts, to which the Contractor is entitled to be paid under this section, together with any amounts paid, due or becoming due to the Contractor must not exceed the Contract Price.

5. Where the Contracting Authority terminates the entire Contract and the Articles of Agreement include a Minimum Work Guarantee, the total amount to be paid to the Contractor under the Contract will not exceed the greater of

(a) the total amount the Contractor may be paid under this section, together with any amounts paid, becoming due other than payable under the Minimum Revenue Guarantee, or due to the Contractor as of the date of termination, or

(b) the amount payable under the Minimum Work Guarantee, less any amounts paid, due or otherwise becoming due to the Contractor as of the date of termination.

6. The Contractor will have no claim for damages, compensation, loss of profit, allowance arising out of any termination notice given by Canada under this section except to the extent that this section expressly provides. The Contractor agrees to repay immediately to Canada the portion of any advance payment that is unliquidated at the date of the termination.

Supplemental General Conditions

4006 2010-08-16, apply to and form part of the Contract.

7.5 Security Requirement

SECURITY REQUIREMENT FOR CANADIAN SUPPLIER: SRCL#14081

SECURITY Clauses

The contractor and/or its employees must EACH maintain a valid SECRET level security clearance, granted by Canada and approved by Shared Services Canada.

The contractor and/or its employees MUST NOT remove any PROTECTED or CLASSIFIED information or assets from the identified work site(s).

The contractor and/or its employees MUST NOT use its IT systems to electronically process, produce or store PROTECTED and/or CLASSIFIED information or data.



Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of Shared Services Canada.

The contractor and its employees must comply with the provisions of the:

- a) Justice Canada – Security of Information Act (Latest Edition);
- b) Industrial Security Manual (Latest Edition).

7.6 Term of Contract

7.6. Period of the Contract

- 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 three years later; and
 - ii. the period during which the Contract is extended, if Canada chooses to exercise any options set out in the Contract.
- b. **Option to Extend the Contract** :

The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to two (2) additional one year option 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.

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 formal contract amendment

7.7 Authorities

(a) Contracting Authority

The Contracting Authority for the Contract is:

Name: Julie Bampton
Title: Manager, Procurement Operations
Shared Services Canada
Procurement and Vendor Relations
Directorate: Procurement Operations
Address: 180 Kent Street, 8th Floor, Ottawa, Ontario K1G 4A8
Telephone: 613-790-5915
Facsimile: 613-948-0990
E-mail address: julie.bampton@canada.ca

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



(b) Technical Authority

The Technical Authority for the Contract is: **(Will be provided at contract award)**

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

The Technical Authority named above 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
(Will be provided at contract award)**

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

7.8. 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 an approved 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, GST/HST extra. The per diem rate is based on a 7.5 hour workday exclusive of meal breaks. Partial days will be prorated based on actual hours worked. When actual time worked in a day is in excess of 7.5 hours, all time worked in excess of 7.5 hours will be paid based on the prorated per diem rate, for actual hours worked when written authorization from the Technical Authority or delegate was obtained before performing the work.

(ii) Pre-Authorized Travel and Living Expenses: Canada will reimburse the Contractor for its pre-authorized travel and living expenses reasonably and properly incurred in the performance of the Work (outside of the National Capital Area), at cost, without any allowance for profit and/or administrative overhead, in accordance with the meal, private vehicle and incidental expenses provided in Appendices B,C and D of the Treasury Board Travel Directive, and with other provisions of the directive referring to “travelers”, rather than those referring to “employees”. All travel must have the prior authorization of the Technical Authority All payments are subject to government audit. The Contractor will be able to charge for time spent travelling.

(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 (or proposes instead to provide someone from an alternate category at a different rate), whether or not Canada terminates the Contract as a whole, Canada may impose sanctions or take other measures in accordance with the PWGSC Vendor Performance Policy (or equivalent) then in effect, which 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.

(v) Purpose of Estimates : All estimated costs contained in the Contract are included solely for the administrative purposes of Canada and do not represent a commitment on the part of Canada to purchase services in these amounts. Any commitment to purchase specific amounts or values of services are described elsewhere in the Contract.

(viii) Applicable Taxes :

Estimated Cost : [\$_____]

7.9 Limitation of Expenditure

1. Canada's total liability to the Contractor under the Contract must not exceed \$ _____ and Goods and Services Tax or Harmonized Sales Tax is extra, if applicable.
2. No increase in the total liability of Canada or in the price of the Work resulting from any design changes, modifications or interpretations of the Work, will be authorized or paid to the Contractor unless these design changes, modifications or interpretations have been approved, in writing, by the Contracting Authority before their incorporation into the Work. The Contractor must not perform any work or provide any service that would result in Canada's total liability being exceeded before obtaining the written approval of the Contracting Authority. 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. four (4) months before the contract expiry date, or
 - c. as soon as the Contractor considers that the contract funds provided are inadequate for the completion of the Work,

whichever comes first.
3. If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority a written estimate for the additional funds required. Provision of such information by the Contractor does not increase Canada's liability.

7.10 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.

7.11 Invoicing Instructions

1. The Contractor must submit invoices in accordance with the section entitled "Invoice Submission" of the general conditions. Invoices cannot be submitted until all work identified in the invoice is completed.
2. The Contractor's invoice must include a separate line item for each subparagraph in the Basis of Payment Provision.
3. By submitting invoices, the Contractor is certifying that the goods and services have been delivered and the all charges are in accordance with the Basis of Payment provision of the Contract, including any charges for work performed by subcontractors.
4. The Contractor must provide the original of each invoice to the Technical Authority. On request, the contractor must provide a copy of any invoices requested by the Contracting Authority.
5. In the event that Canada is entitled to a Service Credit due to any Non-Conformity, the Service Credit will be applied to the invoices to be issued to Canada in respect of the Work in question in an amount as set out in Appendix B to Annex A, In-Service & Service implantation liquidated damages from the time of the Contractor's receipt of Canada's notification of such Non-Conformity
6. The Contractor must include adjustments for Service Credits owing to Canada in the invoice that follows the month after the month in which the Service Credits accrue.
7. Each invoice must be supported by:
 - a. a copy of time sheets to support the time claimed;
 - b. a copy of the release document and any other documents as specified in the Contract;
 - c. a copy of the invoices, receipts, vouchers for all direct expenses, and all travel and living expenses;
 - d. a copy of the monthly progress report.
8. Invoices must be distributed as follows:

The original and one (1) copy must be forwarded to the address shown on page 1 of the Contract for certification and payment.

7.12 Certifications

Compliance with the certifications provided by the Contractor in its bid is a condition of the Contract and subject to verification by Canada during the term of the Contract. If the Contractor does not comply with any certification or it is determined that any certification made by the



Contractor in its bid is untrue, whether made knowingly or unknowingly, Canada has the right, pursuant to the default provision of the Contract, to terminate the Contract for default.

7.13 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 list, the wording of the document that first appears on the list has priority over the wording of any document that subsequently appears on the list.

- (a) the Articles of Agreement;
- (b) the general conditions 2035 2014-09-25, General Conditions - Higher Complexity - Services;
- (c) Annex A, Statement of Work;
- (d) Annex B, Basis of Payment;
- (e) Annex C, Security Requirements Check List
- (g) the Contractor's bid dated _____ (insert date of bid)

7.15 Foreign Nationals (Canadian Contractor)

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

7.16 Insurance Requirements

The Contractor is responsible for deciding if insurance coverage is necessary to fulfill its obligation under the Contract and to ensure compliance with any applicable law. Any insurance acquired or maintained by the Contractor is at its own expense and for its own benefit and protection. It does not release the Contractor from or reduce its liability under the Contract.

7.17 Limitation of Liability

1. This section applies despite any other provision of the Contract and replaces the section of the general conditions entitled "Liability". Any reference in this section to damages caused by the Contractor also includes damages caused by its employees, as well as its subcontractors, agents, and representatives, and any of their employees. This section applies regardless of whether the claim is based in contract, tort, or another cause of action. The Contractor is not liable to Canada with respect to the performance of or failure to perform the Contract, except as described in this section and in any section of the Contract pre-establishing any liquidated damages. The Contractor is only liable for indirect, special or consequential damages to the extent described in this section, even if it has been made aware of the potential for those damages.
2. First Party Liability:
 - a. The Contractor is fully liable for all damages to Canada, including indirect, special or consequential damages, caused by the Contractor's performance or failure to perform the Contract that relate to:
 - i. any infringement of intellectual property rights to the extent the Contractor breaches the section of the general conditions entitled "Intellectual Property Infringement and Royalties";
 - ii. physical injury, including death.



- b. The Contractor is liable for all direct damages caused by the Contractor's performance or failure to perform the Contract affecting real or tangible personal property owned, possessed, or occupied by Canada.
 - c. Each of the Parties is liable for all direct damages resulting from its breach of confidentiality under the Contract. Each of the Parties is also liable for all indirect, special or consequential damages in respect of its unauthorized disclosure of the other Party's trade secrets (or trade secrets of a third party provided by one Party to another under the Contract) relating to information technology.
 - d. The Contractor is liable for all direct damages relating to any encumbrance or claim relating to any portion of the Work for which Canada has made any payment. This does not apply to encumbrances or claims relating to intellectual property rights, which are addressed under (a) above.
 - e. The Contractor is also liable for any other direct damages to Canada caused by the Contractor's performance or failure to perform the Contract that relate to:
 - i. any breach of the warranty obligations under the Contract, up to the total amount paid by Canada (including any applicable taxes) for the goods and services affected by the breach of warranty; and
 - ii. any other direct damages, including all identifiable direct costs to Canada associated with re-procuring the Work from another party if the Contract is terminated either in whole or in part for default, up to an aggregate maximum for this subparagraph (ii) of the greater of .75 times the total estimated cost (meaning the dollar amount shown on the first page of the Contract in the block titled "Total Estimated Cost" or shown on each call-up, purchase order or other document used to order goods or services under this instrument), or \$1,000,000.00.
 - iii. In any case, the total liability of the Contractor under paragraph (e) will not exceed the total estimated cost (as defined above) for the Contract or \$1,000,000.00, whichever is more.
 - f. If Canada's records or data are harmed as a result of the Contractor's negligence or willful act, the Contractor's only liability is, at the Contractor's own expense, to restore Canada's records and data using the most recent back-up kept by Canada. Canada is responsible for maintaining an adequate back-up of its records and data.
3. Third Party Claims:
- a. Regardless of whether a third party makes its claim against Canada or the Contractor, each Party agrees that it is liable for any damages that it causes to any third party in connection with the Contract as set out in a settlement agreement or as finally determined by a court of competent jurisdiction, where the court determines that the Parties are jointly and severally liable or that one Party is solely and directly liable to the third party. The amount of the liability will be the amount set out in the settlement agreement or determined by the court to have been the Party's portion of the damages to the third party. No settlement agreement is binding on a Party unless its authorized representative has approved the agreement in writing.
 - b. If Canada is required, as a result of joint and several liability, to pay a third party in respect of damages caused by the Contractor, the Contractor must reimburse Canada by the amount finally determined by a court of competent jurisdiction to be the Contractor's portion of the damages to the third party. However, despite paragraph (a), with respect to special, indirect, and consequential damages of third parties covered by this section, the Contractor is only liable for reimbursing Canada for the Contractor's portion of those damages that Canada is required by a court to pay to a third party as a result of joint and several liability that relate to the infringement of



a third party's intellectual property rights; physical injury of a third party, including death; damages affecting a third party's real or tangible personal property; liens or encumbrances on any portion of the Work; or breach of confidentiality.

- c. The Parties are only liable to one another for damages to third parties to the extent described in this paragraph 3.

7.18 Professional Services – General

- a. The Contractor must provide professional services on request as specified in this Contract. Where in the Contract a specific individual is identified as required to perform the Work, the Contractor must make such person available to perform the work within 10 working days of the issuance of the Contract or the TA (whichever first contains instructions from Canada for that individual to report to the Work site). Where such a specific individual is unavailable to perform the Work, Canada may elect to either (i) exercise its rights or remedies under the Contract or at law (including terminating the Contract for default), or (ii) Canada may require the Contractor to propose the replacement of the specific individual in accordance with the Article titled, "Replacement of Specific Individuals" in the General Conditions 2035. This obligation applies despite any changes that Canada may have made to any hardware, software or any other aspect of the Client's operating environment. In respect of any given Category of Personnel, any replacement resource must be rated by the Technical Authority and the score obtained must be equal or superior.
- c. If there must be a change in a resource performing work under the Contract (which must in any case comply with the requirements in the section of the General Conditions entitled "Replacement of Specific Individuals"), the Contractor must make the replacement available for work within 10 working days of the departure of the existing resource (or, if Canada has requested the replacement, within 15 working days of Canada's notice of the requirement for a replacement).
- d. All resources provided by the Contractor must meet the qualifications described in the Contract (including those relating to previous experience, professional designation, education, and language proficiency) and must be competent to provide the required services by any delivery dates described in the Contract. The resource must be approved by Canada prior to the replacement at the Work site.
- e. The Contractor must monitor its employees to ensure satisfactory performance and that progress of the Work is maintained to Canada's satisfaction. A Contractor representative must meet with the Technical Authority on a regular basis (as specified by Canada) to discuss the performance of its resources and to resolve any issues at hand.
- e. If the Contractor fails to meet any of its obligations under this Article, or fails to deliver any deliverable 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 10 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.

7.19 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.

7.20 Representations and Warranties

The Contractor made statements regarding its and its proposed resources experience and expertise in its bid that resulted in the award of the Contract and 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 must have, the skills, qualifications, expertise and experience necessary to perform and manage the Work in accordance with the Contract, and that the Contractor (and any resources or subcontractors it uses) has previously performed similar services for other customers.

7.21 Conflict of Interest - Unfair Advantage

1. In order to protect the integrity of the procurement process, bidders are advised that Canada may reject a bid in the following circumstances:
 - a. if the Bidder, any of its subcontractors, any of their respective employees or former employees was involved in any manner in the preparation of the bid solicitation or in any situation of conflict of interest or appearance of conflict of interest;
 - b. if the Bidder, any of its subcontractors, any of their respective employees or former employees had access to information related to the bid solicitation that was not available to other bidders and that would, in Canada's opinion, give or appear to give the Bidder an unfair advantage.
2. The experience acquired by a bidder who is providing or has provided the goods and services described in the bid solicitation (or similar goods or services) will not, in itself, be considered by Canada as conferring an unfair advantage or creating a conflict of interest. This bidder remains however subject to the criteria established above.
3. Where Canada intends to reject a bid under this section, the Contracting Authority will inform the Bidder and provide the Bidder an opportunity to make representations before making a final decision. Bidders who are in doubt about a particular situation should contact the Contracting Authority before bid closing. By submitting a bid, the Bidder represents that it does not consider itself to be in conflict of interest nor to have an unfair advantage. The Bidder acknowledges that it is within Canada's sole discretion to determine whether a conflict of interest, unfair advantage or an appearance of conflict of interest or unfair advantage exists.

7.22 Electronic Procurement & Payment Support

Electronic Procurements and Payment (EPP) System

- (a) SSC is working on an initiative that is expected to provide it with e-functionality from procurement through payment (the "EPP system"). SSC's suppliers will be required to interface with that functionality.



- (b) Because the functionality will not be ready at the time of contract award, if Canada wishes for the Contractor to interface with the EPP system during the Contract Period, Canada will issue a Request for Quotation regarding the work required for the Contractor to interface with the EPP system. The Contractor's Quotation Response will not be subject to a Service Delivery Interval. The Quotation Response must include, at a minimum:
- 4.3.b.1 Per diem rates for any resources who would perform the work and the level of effort required; and
 - 4.3.b.2 Any costs for hardware or software that will be required, including development costs to be performed by third parties.
- (c) The Parties agree to work cooperatively to determine the work involved and a reasonable ceiling price for that work. If the Parties agree to proceed with that work, Canada will issue a Contract Amendment documenting the ceiling price associated with the work. The Contractor will be required to submit a Service Design for approval by Canada and the work associated with the development of any EPP system interfaces will be treated as a Service Project.
- (d) Canada will pay the Contractor, in arrears, up to the ceiling price established in the contract amendment, for actual time worked and any resulting deliverables in accordance with firm, all-inclusive per diem rates set out in the relevant contract amendment, with GST/HST extra. Partial days will be prorated based on actual hours worked based on a 7.5-hour workday. When submitting its invoices, the Contractor must show the actual time worked by each resource, and/or the amount paid to any subcontractor. With respect to any expenses, the Contractor will be required to demonstrate the out-of-pocket amount spent and will be reimbursed without the addition of any overhead.

7.23 Transition Services at end of Contract Period

The Contractor agrees that, in the period leading up to the end of the Contract Period, it will make all reasonable efforts to assist Canada in the transition from the Contract to a new contract with another supplier. The Contractor agrees that there will be no charge for these services.

7.24 Termination for Convenience

With respect to Section 30 of General Conditions 2035, if applicable, subsection 4 is deleted and replaced with the following subsections 4, 5 and 6:

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

ANNEX A STATEMENT OF WORK

1. Objective

Shared Services Canada (SSC) requires industry expertise and services to support IT strategic modernization and planning, IT service strategy, evolution and sourcing strategies and benchmarking activities and to achieve the best value for the crown.

The objective of this requirement is to award one contract to acquire expert advice and related services to support various SSC initiatives on an as and when requested basis.

2. Background

Shared Services Canada's (SSC) strategic outcome of a "modern, reliable, secure, timely and cost-effective information technology (IT) infrastructure services to support government priorities and program delivery" will directly support the Government of Canada IT Strategic Plan 2016–2020, which has set out the direction for IT in the federal government over the next four years.

In responding to government priorities and current challenges, the Government of Canada IT Strategic Plan 2016–2020 has charted the path forward for IT from a whole-of-government perspective and has positioned the government to manage and use IT as a strategic asset in innovative ways. This will result in the ability to provide better programs and services to end-users, and ultimately to deliver greater value to Canadians. In support of this strategic outcome, four priorities have been identified and specific departmental initiatives have been developed to achieve these priorities. These initiatives have been designed to respond to feedback and recommendations from departments, auditors, parliamentary committees and Canadians.

Priority 1: Improve the delivery of IT infrastructure services

Priority 2: Consolidate and modernize the Government of Canada's IT infrastructure

Priority 3: Secure the Government of Canada's data and technology assets

Priority 4: Increase the efficiency and effectiveness of internal services

For additional information, please review Shared Services Canada's 2017-18 Departmental Plan at:

<https://www.canada.ca/en/shared-services/corporate/publications/2017-18-departmental-plan.html>

3. Requirement

The Contractor that is successful in this solicitation will have experience providing services to national governments or other large public or private sector organizations using a proven, standard consulting practice. The Contractor will specialize in the development, delivery, and execution of strategic modernization and planning, IT service strategy, evolution and sourcing strategies, and IT benchmarking activities designed to optimize supply, improve IT productivity, and improve



value proposition. Expertise and/or resources are to be provided on an as-and-when-requested basis.

The Contractor will be an organization with significant depth and breadth of experience in the following key areas:

- a. the development of IT strategic modernization and planning, IT service strategy and evolution, and sourcing strategies; and
- b. the benchmarking of IT services.

These services will be undertaken in support of SSC strategic priorities to deliver modern, reliable, secure, timely and cost-effective information technology (IT) infrastructure services.

The Contractor will support SSC in the development of IT strategic modernization and planning, IT service strategy, evolution and sourcing strategy, acquisition of goods and services in the IT space. The Contractor must be able to provide experienced individuals who understand the complexities of end-to-end sourcing supply chain from component and circuit board manufacturing through to assembly, delivery and logistics. This is especially important to SSC, given its mandate to ensure the integrity of the GC's core IT infrastructure supply chain.

- The Contractor will have demonstrated ability in developing IT strategic modernization and planning, IT service strategy and evolution.
- The Contractor will have demonstrated ability to develop sourcing strategies and options and providing advice on sourcing strategies for IT infrastructure (hardware components, software, etc.) and services.
- The Contractor will have demonstrated a revenue stream from IT strategic modernization and planning; IT service strategy and evolution; and sourcing advice.
- The Contractor will have a well-developed and trusted practice of IT services benchmarking.

The Contractor, including any sub-contractors, must attain Secret level security clearance prior to commencement of contract. Specific Task Authorizations will indicate required Security Level by resource.

4. Constraints

4.1. National Security Exception

The procurement related to this Statement of Work is subject to National Security Exception and is, therefore, excluded from all of the obligations of the trade agreements.

4.2. Restriction for Future Related Work

The Contractor selected through this procurement will support the planning and development of subsequent competitive procurements for SSC, as outlined above. As a result, this Contractor will be given information during the completion of the Contract which would give them an unfair advantage for subsequent competitive procurements.

To remove any possibility for future conflict of interests, the Contractor, parent and affiliated companies, and subcontractors will be disqualified from any competitive solicitation(s) which are developed under the scope of the resulting Contract.



5. Scope of Work

This requirement deals with the:

- development of IT strategic modernization and planning.
- development of IT service strategy, evolution and sourcing strategies,
- providing benchmarking of IT services.

The following describes a range of work that the Contractor may be required to perform. Specific tasks and associated deliverables will be identified in subsequent Task Authorizations which will be issued by SSC on an "as and when requested" basis. The work will require the Contractor to:

- (a) Understand and support SSC's plans to modernize the Government of Canada's information technology systems;
- (b) Share lessons learned in the execution of similar modernization initiatives with other clients;
- (c) Develop IT strategic modernization and planning-related expertise documents;
- (d) Develop IT service strategy evolutions and documents;
- (e) Provide expert advice on sourcing strategies to achieve the desired outcomes of SSC's objectives and mandate;
- (f) Provide expert guidance and advice on modernization and benchmarking activities; and
- (g) Provide support and expertise for the transition of the sourcing agreements.

5.1. IT Strategic Modernization, Planning and IT Service Strategy and Evolution

The Contractor will provide IT strategic modernization and planning and/or IT service strategy and evolution advice. These activities include, but are not limited to the following activities:

- (a) Analyze GC IT plan and directives, SSC mandate strategy, plan, available resources and capabilities, partner requirements and demand to identify strategic modernization and planning drivers
- (b) Conduct research on industry trends, best practices and service strategies, SSC historical service demand's potential future IT suppliers and the industry structure associated with each service;
- (c) Conduct research and analysis of government policy to identify potential constraints or impacts to the analysis;
- (d) Conduct research and analysis of case studies regarding other government IT modernization strategies and plans and service strategies and evolution, and sourcing strategies;
- (e) Analyze research findings to formulate recommendations; and
- (f) Transfer of knowledge to SSC staff as applicable.

5.2. IT Sourcing Advice and Strategies

The Contractor will provide Sourcing advice that will ultimately assist with the determination of who and how goods and/or services will be provided in support of SSC. These activities include, but are not limited to the following activities:

- (a) Provision of market and vendor intelligence;
- (b) Development of sourcing strategies, approaches and options;
- (c) Development of procurement options and strategies for acquisition including but not limited to hardware, software, professional services, managed services, and outsourced services, taking into consideration emerging technologies, GC core competencies, maturity of markets, maximization of vendor opportunities, packaging and services;



- (d) Analysis to support the assessment of services at fair market prices, with service levels available;
- (e) Review of requirements documentation throughout the procurement process with a view to ensuring that documentation has been prepared in a manner conducive to achieving the best value for the GC;
- (f) Support for the development of procurement materials and processes, to include but not limited to Statements of Requirements, Statements of Work, Evaluation Process and Criteria, and Contract Terms and Conditions for the acquisition of the goods and services; and
- (g) Support for transition of sourcing agreements to assist SSC in dealing with unplanned / unexpected events, dispute resolution, risk mitigation, and other transition related activities; and
- (h) Transfer of knowledge to SSC staff as applicable.

5.3. IT Benchmarking Specialist

The Contractor will provide IT Benchmarking advice that will assist SSC in studying industry practices and determining how to measure and assess performance and efficiency. This includes but is not limited to the following activities:

- (a) Analysis of SSC IT modernization strategies, architecture, service delivery, performance metrics, service management, procurement strategies and approaches;
- (b) Preparation of reports that assess SSC IT modernization strategies, architecture, service delivery, performance metrics, service management, procurement strategies and approaches to comparable public and private organizations;
- (c) Development of consumption metrics and service levels;
- (d) Utilization of a proven internal knowledge base of market intelligence;
- (e) Analysis of the competitiveness of the SSC's current service standards and fees for IT services in relation to the general Canadian marketplace;
- (f) Development of qualitative metrics in relation to vendor agility, innovation, simplification and flexibility;
- (g) Preparation of information and reports to demonstrate the value for services received and the alignment of service with emerging technologies and SSC's vision, using a database consisting of current metrics for public and private organizations comparable to the GC and its IT services; and
- (i) Transfer of knowledge to SSC staff as applicable.



6. Categories of Personnel

Completion of the Work described will require the Contractor to provide resources on an as-and-when requested basis. This will be accomplished through the use of Task Authorizations to call up the specific Contractor identified categories of personnel.

The following categories of personnel may be required on an as and when requested basis:

- a. Senior and Intermediate IT Strategic Modernization and Planning, and IT Service Strategy and Evolution Specialists
- b. Senior, Intermediate and Junior IT Sourcing Advice and Strategy Specialists
- c. Senior, Intermediate and Junior IT Benchmarking Specialists

7. Language of Work

The Contractor will provide the Work in the official language, either English or French, in accordance with an approved Task Authorization Form. The work may be conducted in either English or French, depending on the Location of Work.

8. Location of Work

The Contractor may be required to attend meetings, briefings and conduct research at various locations throughout the National Capital Region, in the general area including Ottawa, Ontario and Gatineau, Quebec. In situations where the nature of the work requires access to the SSC network in order to perform their specified tasks, SSC will provide the Contractor's personnel with any required desktop computing devices.

There may be requirements to conduct work outside of the National Capital Region. In these cases, the Location of Work will be stipulated on the Task Authorization Form and subject to the Travel requirements defined below.

9. Travel Requirements

The Contractor must be able to travel and provide Work across Canada as requested in an approved Task Authorization Form. Canada will not pay the Contractor for any travel and/or living expenses associated with performing the Work in the Primary Location of Work (the National Capital Region).

Canada will reimburse the Contractor for its pre-authorized travel and living expenses reasonably and properly incurred in the performance of the Work outside the National Capital Area, at cost, without any allowance for profit and/or administrative overhead, in accordance with the meal, private vehicle and incidental expenses provided in Appendices B, C and D of the Treasury Board Travel Directive, and with the other provisions of the directive referring to "travellers", rather than those referring to "employees". All travel must have the prior authorization of both the Technical Authority and Contracting Authority. All payments are subject to government audit. The Contractor will not be able to charge for time spent travelling at the per diem rates set out in the Contract.

<https://www.canada.ca/en/treasury-board-secretariat/services/travel-relocation/travel-government-business.html>

10. Deliverables

Deliverables will be identified in individual Task Authorizations as described in Appendix A – Task Authorization Process.



APPENDIX A TO ANNEX A TASK AUTHORIZATION PROCEDURES (Upon Contract Award)

1. TA Request

- (a) Where a requirement for a specific task has been identified and a TA is to be provided to the Contractor in accordance with the allocation methodology described in the Contract Article titled "Task Authorization", a TA Form, as attached at Appendix B to Annex B, will be prepared by the Technical Authority and sent to the Contractor.
- (b) A TA Form will contain the following information, if applicable:
 - (i) a task number;
 - (ii) the details of any financial coding to be used;
 - (iii) the date by which the Contractor's response must be received by the Contract Authority;
 - (iv) a brief statement of work for the task identifying the resource category(ies), level and specialty required and describing the activities to be performed including any deliverables;
 - (v) the interval during which the task is to be carried out (beginning and end dates);
 - (vi) the number of person-days of effort required;
 - (vii) the specific work location; and
 - (viii) any other constraints that might affect the completion of the task.

2. TA Quotation

- (a) Once it receives the TA Form, the Contractor must submit a quotation to the Contract Authority, identifying its proposed resources and detailing the cost and time to complete the task(s). The quotation must be based on the rate(s) set out in the Contract. The Contractor will not be paid for providing the quotation or for providing other information required to prepare and issue the TA. The Contractor must provide any information requested by Canada in relation to the preparation of a TA within 5 working days of the request.
- (b) For each proposed resource the Contractor must supply:
 - (i) A resume and completed Appendix C to Annex A for the Category(ies) of Personnel and level(s) identified in the TA Form. The Contractor's quotation must demonstrate that each proposed resource meets the mandatory 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 Contractor or employees of a subcontractor, or these individuals may be independent contractors to whom the Contractor would subcontract a portion of the Work.
 - (B) For educational requirements for a particular degree, designation or certificate, Canada will only consider educational programmes that were successfully completed by the resource by the time of bid closing. For post secondary education, Canada will only accept credentials from institutions recognized by the Department of Education of any Canadian province, or for those obtained in a foreign country, by either of the credential assessment organizations listed on the Website: <http://www.cicic.ca/>
 - (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's governing body throughout the evaluation and Contract Period.



- (D) 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.
 - (E) For any requirements that specify a particular time period (e.g., 2 years) of work experience, Canada will disregard any information about experience if the individual's resume does not include the relevant dates for the experience claimed (i.e., the start date and end date).
 - (F) For work experience to be considered by Canada, the Contractor's response must not simply indicate the title of the individual's position, but must demonstrate that the resource has the required work experience by explaining the responsibilities and work performed by the individual while in that position. In situations in which a proposed resource worked at the same time on more than one project, only one project will be counted toward any requirements that relate to the individual's length of experience.
- (ii) The following security information:

SECURITY INFORMATION	CONTRACTOR TO INSERT DATA
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	

- (iii) Certifications at Appendix D to Annex A (as applicable).
- (c) The quotation must be submitted to the Contract Authority within the time for response identified in the TA Form. The Contractor will be given a minimum of 48 hours turnaround time to submit a quotation.

3. Resource Assessment

- (a) Each proposed resource will be assessed for compliance with the mandatory requirements identified in Appendix C to Annex B applicable to that Category of Personnel. Proposed resources that do not comply with each and every mandatory criteria will not be accepted.
- (b) Canada reserves the right to request references from the Contractor to conduct a reference check to verify the accuracy of the information provided. If references are requested, Canada will conduct the reference check in writing by e-mail (unless the contact at the reference is only available by telephone). A Contractor will not be responsive to a mandatory requirement unless the response is received to an e-mail reference check request 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 evaluated. The mandatory requirement will not be considered met if the reference customer is not a customer of the Contractor itself (for example, the customer cannot be the customer of an affiliate of the Contractor). Nor will the mandatory requirement be 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. TA Acceptance

- (a) Once the Contractor's quotation has been accepted by the Technical Authority, the TA Form will be signed by Canada and provided to the Contractor for signature. Whether or not to approve or issue a TA is entirely within Canada's discretion.
- (b) The TA Form must be appropriately signed by Canada prior to commencement of any work. The Contractor must not commence work until a fully signed TA Form has been received, and any work performed in its absence is done at the Contractor's own risk.



APPENDIX B TO ANNEX A
EXAMPLE: Task Authorization Request and Acceptance Form
Sigma/P2P Task Authorization form will be accepted as well.

TASK AUTHORIZATION (TA) FORM					
CONTRACTOR		CONTRACT NUMBER:			
COMMITMENT		FINANCIAL CODING:			
TASK NUMBER		ISSUE DATE:		RESPONSE REQUIRED BY:	
1. STATEMENT OF WORK (WORK ACTIVITIES AND DELIVERABLES):					
SEE ATTACHED FOR STATEMENT OF WORK AND CERTIFICATIONS REQUIRED.					
2. PERIOD OF SERVICES:		FROM (DATE):		TO (DATE):	
3. WORK LOCATION:					
4. TRAVEL REQUIREMENTS:					
5. LANGUAGE REQUIREMENTS:					
6. OTHER CONDITIONS/CONSTRAINTS:					
7. LEVEL OF SECURITY CLEARANCE REQUIRED FOR THE CONTRACTOR' PERSONNEL:					
RESOURCE CATEGORY	NAME OF PROPOSED RESOURCE	PWGSC SECURITY FILE NUMBER	PER DIEM RATE	ESTIMATED # OF DAYS	TOTAL COST
ESTIMATED COST					
GST					
TOTAL LABOUR COST					
ESTIMATED TRAVEL COST (IN ACCORDANCE WITH					
TOTAL ESTIMATED COST					
8. SIGNING AUTHORITIES:					
Name, Title and Signature of Individual Authorized to Sign on Behalf of Contractor		Contractor (signature)		Date:	
Name, Title and Signature of Individual Authorized to Sign on Behalf of SSC – PVR (Technical Authority)		SSC-PVR (signature)		Date:	
You are requested to sell to her Majesty The Queen in Right of Canada, in accordance with the terms and conditions set out herein, referred to herein, or attached hereto, the services listed herein and in any attached sheets at the price set out thereof.					



APPENDIX C TO ANNEX A

RESOURCE ASSESSMENT CRITERIA AND RESPONSE TEMPLATES

(TO BE USED WHEN THE CONTRACT IS AWARDED)

D1.0 Task Authorization (TA) Initiation

Where a requirement for a specific task has been identified a TA will be provided to the Contractor. The qualifications and experience of the proposed resources will be assessed against the requirements set out in the below tables to determine each proposed resources compliance with the criteria identified in Section D.2 of this Annex.

D1.1 Assessment

The qualifications and experience of the proposed resources will be assessed against the requirements set out in the appropriate category and level below.

D.1.2 Acceptance

Once the TA Technical Authority has accepted the quotation, the TA will be signed by the Contracting Authority and provided to the Contractor for signature. All TA Forms will be signed by the Contracting authority final approval.

D2.0 RESOURCES ASSESSMENT CRITERIA AND RESPONSE TABLES

Resource Assessment Criteria and Response Tables

1. IT Strategic Modernization, Planning and IT Service Strategy and Evolution Specialist

<p>Name of proposed resource: _____</p> <p>The Contractor MUST demonstrate with examples that the proposed IT Strategic Modernization and Planning and/or IT Service Strategy and Evolution Specialist has:</p> <p>* Not a mandatory requirement being assessed. ** Extensive means more than 10 years. *** Significant means more than 5 years.</p>				
Category	Requirement		Contractor's Response	
	Senior	Intermediate	Demonstrated Experience	Insert Page # of Resume
Criteria	A minimum number of 10 years of experience as an IT Strategic Modernization and Planning and/or IT Service Strategy and Evolution Advisor providing advice, support and consultation in relation to IT service provider organizational	A minimum number of 6 years of experience as an IT Strategic Modernization and Planning and/or IT Service Strategy and Evolution Advisor providing advice, support and consultation in relation to IT service provider organizational		



	<p>and service-specific modernization, planning, evolution, which include at a minimum the following activities:</p> <ul style="list-style-type: none"> - Preparation of current state analysis for IT service provider organizations or IT service including identification of IT and business drivers, financial and other metrics to determine baseline and document historical; - Conducting research and analysis regarding governmental policies and strategies (both business and IT-related), industry trends and benchmarks, business cases, use cases, and lessons learned; - Preparation of proposed modernization and implementation planning for IT service provider organizations or specific IT services. This includes researching policy development of various options, analysis of those options and selection of a recommended option. This could include long-term planning of the evolution of the IT strategy or IT services to meet anticipated requirements and policy, business and technological evolution; - Preparation of proposed financial; requirements and budgets including supporting rationale to support IT strategic modernization and planning and/or IT service strategy and evolution. <p>10+ years of applied experience providing at least 50% of the Work identified in SOW Section 5.1.</p>	<p>and service-specific modernization, planning, evolution, which include at a minimum the following activities:</p> <ul style="list-style-type: none"> - Preparation of current state analysis for IT service provider organizations or IT service including identification of IT and business drivers, financial and other metrics to determine baseline and document historical; - Conducting research and analysis regarding governmental policies and strategies (both business and IT-related), industry trends and benchmarks, business cases, use cases, and lessons learned; - Preparation of proposed modernization and implementation planning for IT service provider organizations or specific IT services. This includes researching policy development of various options, analysis of those options and selection of a recommended option. This could include long-term planning of the evolution of the IT strategy or IT services to meet anticipated requirements and policy, business and technological evolution; - Preparation of proposed financial; requirements and budgets including supporting rationale to support IT strategic modernization and planning and/or IT service strategy and evolution. <p>5+ years of applied experience providing at least 50% of the Work identified in SOW Section 5.1.</p>		
Education	Master's degree in a field related to the SOW	Master's or Bachelor degree in a field related to the SOW		
Experience	More than ten (10) years experience conducting economic/financial research, data collection and analysis.	Five (5) to ten (10) years experience conducting economic/financial research, data collection and analysis.		



	More than ten (10) years experience in IT industry providing strategy and planning including IT service strategy and evolution, financial and economical modeling and analysis.	Five (5) to ten (10) years' experience in economic/financial modeling and analysis.		
Skills	Demonstrated analytical, writing, and communication skills in dealing with client management as well as internal stakeholders.	Demonstrated analytical, writing, and communication skills in dealing with client management as well as internal stakeholders.		

2. IT Sourcing Advice and Strategy Specialist

Name of proposed resource: _____					
The Contractor MUST demonstrate with examples that the proposed IT Sourcing Advice and Strategy Specialist has:					
Category	Requirement			Contractor's Response	
	Senior	Intermediate	Junior	Demonstrated Experience	Insert Page # of Resume
Criteria	<p>A minimum number of 10 years of experience as an IT Sourcing Advice and Strategy Specialist providing advice, support and consultation in relation to the development of sourcing strategies, which include at a minimum the following activities:</p> <ul style="list-style-type: none"> - Analysis of current state organizational structure, delivery model, and asset inventory; - Determine requirements - Analysis of sourcing options, covering at least scope, cost, and risk elements; 	<p>A minimum number of 6 years of experience as an IT Sourcing Advice and Strategy Specialist providing advice, support and consultation in relation to the development of sourcing strategies, which include at a minimum the following activities:</p> <ul style="list-style-type: none"> - Analysis of current state organizational structure, delivery model, and asset inventory; - Determine requirements - Analysis of sourcing options, covering at least scope, cost, and risk elements; 	<p>A minimum number of 3 years of experience as an IT Sourcing Advice and Strategy Specialist providing advice, support and consultation in relation to the development of sourcing strategies, which include at a minimum the following activities:</p> <ul style="list-style-type: none"> - Analysis of current state organizational structure, delivery model, and asset inventory; - Determine requirements - Analysis of sourcing options, covering at least scope, cost, and risk elements; 		



	<ul style="list-style-type: none"> - Development of detailed sourcing strategies as an outcome of options analysis; - Defining delivery models and incorporating new sourcing strategies; - Development of transition plans to support the sourcing strategies; and - Elaboration of business cases to support sourcing strategies. <p>10 years of applied experience providing at least 50% of the Work identified in SOW Section 5.2.</p>	<ul style="list-style-type: none"> - Development of detailed sourcing strategies as an outcome of options analysis; - Defining delivery models and incorporating new sourcing strategies; Development of transition plans to support the sourcing strategies; and - Elaboration of business cases to support sourcing strategies. <p>6 years of applied experience providing at least 50% of the Work identified in SOW Section 5.2.</p>	<ul style="list-style-type: none"> - Development of detailed sourcing strategies as an outcome of options analysis; - Defining delivery models and incorporating new sourcing strategies; Development of transition plans to support the sourcing strategies; and - Elaboration of business cases to support sourcing strategies. <p>3 years of applied experience providing at least 50% of the Work identified in SOW Section 5.2.</p>		
Education	<p>Master's or bachelor's degree in fields of supply chain, engineering, or manufacturing, or sciences with an emphasis in Supply Management or Operations.</p> <p>* Master of Business Administration preferred in alternative to the above requirement</p>	<p>Bachelor's degree in field related to the Task Authorization Statement of Work</p>	<p>Bachelor or college degree</p>		
Experience	<p>10 years of experience in the development of sourcing strategies and activities including contract negotiations, commodity based materials management, project management, and commercial analysis, involving multiple</p>	<p>6 years of experience in the development of sourcing strategies and activities including contract negotiations, commodity based materials management, project management, and commercial analysis, involving multiple</p>	<p>3 years of experience in the development of sourcing strategies and activities including contract negotiations, commodity based materials management, project management, and commercial analysis, involving multiple</p>		



	stakeholders and suppliers.	stakeholders and suppliers.	stakeholders and suppliers.		
Skills	Demonstrated negotiation, relationship and analytical skills in dealing with client management as well as internal stakeholders	Demonstrated negotiation, relationship and analytical skills in dealing with client management as well as internal stakeholders	Demonstrated negotiation, relationship and analytical skills in dealing with client management as well as internal stakeholders		

3. IT Benchmarking Specialist

<p>Name of proposed resource: _____</p> <p>The Contractor MUST demonstrate with examples that the proposed IT Benchmarking Specialist has:</p> <p>* Not a mandatory requirement being assessed. ** Extensive means more than 10 years. *** Significant means more than 5 years.</p>					
Category	Requirement			Contractor's Response	
	Senior	Intermediate	Junior	Demonstrated Experience	Insert Page # of Resume
Criteria	<p>A minimum number of 10 years of experience as an IT Benchmarking Specialist providing advice, support and consultation in relation to analysing, determining, measuring, and assessing metrics in relation to service delivery, which include at a minimum the following activities:</p> <ul style="list-style-type: none"> - Comparison of human resource, asset, and service delivery costs and metrics to comparable industry benchmarks in the field of IT infrastructure service delivery; - Development of specific comparable case studies, with 	<p>A minimum number of 6 years of experience as an IT Benchmarking Specialist providing advice, support and consultation in relation analysing, determining, measuring, and assessing metrics in relation to service delivery, which include at a minimum the following activities:</p> <ul style="list-style-type: none"> - Comparison of human resource, asset, and service delivery costs and metrics to comparable industry benchmarks in the field of IT infrastructure service delivery; - Development of specific comparable case studies, with 	<p>A minimum number of 3 years of experience as an IT Benchmarking Specialist providing advice, support and consultation in relation to analysing, determining, measuring, and assessing metrics in relation to service delivery, which include at a minimum the following activities:</p> <ul style="list-style-type: none"> - Comparison of human resource, asset, and service delivery costs and metrics to comparable industry benchmarks in the field of IT infrastructure service delivery; - Development of specific comparable case 		



	<p>emphasis on comparing human resource, asset, and service delivery costs and metrics; and</p> <ul style="list-style-type: none"> - Analysis of trends and forecasts in the field of IT infrastructure pricing. <p>10 years of applied experience providing at least 50% of the Work identified in SOW Section 5.3.</p>	<p>emphasis on comparing human resource, asset, and service delivery costs and metrics; and</p> <ul style="list-style-type: none"> - Analysis of trends and forecasts in the field of IT infrastructure pricing. <p>6 years of applied experience providing at least 50% of the Work identified in SOW Section 5.3.</p>	<p>studies, with emphasis on comparing human resource, asset, and service delivery costs and metrics; and</p> <ul style="list-style-type: none"> - Analysis of trends and forecasts in the field of IT infrastructure pricing. <p>3 years of applied experience providing at least 50% of the Work identified in SOW Section 5.3.</p>		
Education	<p>Master's or bachelor's degree in fields of supply chain, engineering, or manufacturing, or sciences with an emphasis in Supply Management or Operations.</p> <p>* Master of Business Administration preferred in alternative to the above requirement</p>	<p>Bachelor's degree in field related to the Task Authorization Statement of Work</p>	<p>Bachelor or college degree</p>		
Experience	<p>10 years' experience in benchmarking of IT infrastructure.</p>	<p>6 years' experience in benchmarking of IT infrastructure.</p>	<p>3 years' experience in benchmarking of IT infrastructure.</p>		
Skills	<p>Demonstrated ability to understand IT cost metrics, and synthesize them into comparable units.</p>	<p>Demonstrated ability to understand IT cost metrics, and synthesize them into comparable units.</p>	<p>Demonstrated ability to understand IT cost metrics, and synthesize them into comparable units.</p>		



**APPENDIX D TO ANNEX A
CERTIFICATIONS AT THE TASK AUTHORIZATION STAGE**

1. Education and Experience

The Contractor certifies that all the information provided in the resume(s) and supporting material submitted, 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 the individual(s) proposed is capable of performing the Work described in the Contract. Canada reserves the right to verify any information provided in this regard, and untrue statements may result in the TA response being declared non-responsive or another action the Minister may consider appropriate.

Print name of authorized individual & sign above

Date

2. Status of Personnel

If the Contractor has proposed any individual in fulfillment of this Contract who is not an employee of the Contractor, the Contractor hereby certifies that it has written permission from such person (or the employer of such person) to propose the services of such person in relation to the work performed in fulfillment of this Contract and to submit such person's resume to Canada. The Contractor must, upon request from the Contracting Authority, provide a written confirmation, signed by the individual, of the permission given to the Contractor.

Print name of authorized individual & sign above

Date

3. Availability of Personnel

The Contractor certifies that, should it be authorized to provide the services under any TA resulting from this Contract, the resource(s) proposed in the TA response will be available to commence performance of the Work within a reasonable time from the date of acceptance of the 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

4. Certification of Language

The Contractor certifies that the proposed resource(s) in response to this TA is/are fluent in English. The individual(s) proposed is/are able to communicate orally and in writing without any assistance and with minimal errors in English.

Print name of authorized individual & sign above

Date



ANNEX B

BASIS OF PAYMENT

For the provision of Professional Services, as and when requested by Canada through a validly issued Task Authorization, and in consideration of the Contractor satisfactorily completing all of its obligations in accordance with the Contract, the Contractor will be paid the following Firm All Inclusive Per Diem rates for work performed pursuant to this Contract, Applicable Taxes extra. The Firm All Inclusive Per Diem Rate will be pro-rated for partial days.

CATEGORY OF PERSONNEL

FIRM ALL INCLUSIVE PER DIEM RATE FOR THE CONTRACT PERIOD		
Service Line	Level	Per Diem Rate
IT Strategic Modernization, Planning and IT Service Strategy and Evolution Specialist	Intermediate	
	Senior	
IT Sourcing Advice and Strategy Specialist	Junior	
	Intermediate	
	Senior	
IT Benchmarking Specialist	Junior	
	Intermediate	
	Senior	

FIRM ALL INCLUSIVE PER DIEM RATE FOR OPTION PERIOD 1		
Service Line	Level	Per Diem Rate
IT Strategic Modernization, Planning and IT Service Strategy and Evolution Specialist	Intermediate	
	Senior	
IT Sourcing Advice and Strategy Specialist	Junior	
	Intermediate	
	Senior	
IT Benchmarking Specialist	Junior	
	Intermediate	
	Senior	



FIRM ALL INCLUSIVE PER DIEM RATE FOR OPTION PERIOD 2		
Service Line	Level	Per Diem Rate
IT Strategic Modernization, Planning and IT Service Strategy and Evolution Specialist	Intermediate	
	Senior	
IT Sourcing Advice and Strategy Specialist	Junior	
	Intermediate	
	Senior	
IT Benchmarking Specialist	Junior	
	Intermediate	
	Senior	



ANNEX C SECURITY REQUIREMENTS CHECK LIST

Government of Canada / Gouvernement du Canada

Contract Number / Numéro du contrat P2P 14081
Security Classification / Classification de sécurité Unclass

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

PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE		
1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine Shared Services Canada (SSC)	2. Branch or Directorate / Direction générale ou Direction Strategy	
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 Sourcing and benchmarking advisory services from a service provider on an "as and when requested" basis to support SSC program areas.		
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"/>	
Not releasable / À ne pas diffuser <input type="checkbox"/>	No release restrictions / Aucune restriction relative à la diffusion <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:	
7. c) Level of information / Niveau d'information		
PROTECTED A / PROTÉGÉ A <input checked="" type="checkbox"/>	NATO UNCLASSIFIED / NATO NON CLASSIFIÉ <input type="checkbox"/>	PROTECTED A / PROTÉGÉ A <input type="checkbox"/>
PROTECTED B / PROTÉGÉ B <input checked="" type="checkbox"/>	NATO RESTRICTED / NATO DIFFUSION RESTREINTE <input type="checkbox"/>	PROTECTED B / PROTÉGÉ B <input type="checkbox"/>
PROTECTED C / PROTÉGÉ C <input checked="" type="checkbox"/>	NATO CONFIDENTIAL / NATO CONFIDENTIEL <input type="checkbox"/>	PROTECTED C / PROTÉGÉ C <input type="checkbox"/>
CONFIDENTIAL / CONFIDENTIEL <input checked="" type="checkbox"/>	NATO SECRET / NATO SECRET <input type="checkbox"/>	CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>
SECRET / SECRET <input checked="" type="checkbox"/>	COSMIC TOP SECRET / COSMIC TRÈS SECRET <input type="checkbox"/>	SECRET / SECRET <input type="checkbox"/>
TOP SECRET / TRÈS SECRET <input type="checkbox"/>		TOP SECRET / TRÈS SECRET <input type="checkbox"/>
TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>		TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité
Unclass





Government of Canada / Gouvernement du Canada

Contract Number / Numéro du contrat <i>P2P14081</i>
Security Classification / Classification de sécurité <i>Unclass</i>

PART A (continued) / PARTIE A (suite)

8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS? No / Non Yes / Oui
If Yes, indicate the level of sensitivity:
Dans l'affirmative, indiquer le niveau de sensibilité :

9. Will the supplier require access to extremely sensitive INFOSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate? No / Non Yes / Oui

Short Title(s) of material / Titre(s) abrégé(s) du matériel :
Document Number / Numéro du document :

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

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

<input checked="" type="checkbox"/> RELIABILITY STATUS COTE DE FIABILITÉ	<input checked="" type="checkbox"/> CONFIDENTIAL CONFIDENTIEL	<input checked="" 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 / Non Yes / Oui
If Yes, will unscreened personnel be escorted?
Dans l'affirmative, le personnel en question sera-t-il escorté? No / Non Yes / Oui

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

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

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

11. b) Will the supplier be required to safeguard COMSEC information or assets?
Le fournisseur sera-t-il tenu de protéger des renseignements ou des biens COMSEC? No / Non Yes / Oui

PRODUCTION

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

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

11. d) Will the supplier be required to use its IT systems to electronically process, produce or store PROTECTED and/or CLASSIFIED information or data?
Le fournisseur sera-t-il tenu d'utiliser ses propres systèmes informatiques pour traiter, produire ou stocker électroniquement des renseignements ou des données PROTÉGÉS et/ou CLASSIFIÉS? No / Non Yes / Oui

11. e) Will there be an electronic link between the supplier's IT systems and the government department or agency?
Disposera-t-on d'un lien électronique entre le système informatique du fournisseur et celui du ministère ou de l'agence gouvernementale? No / Non Yes / Oui

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité <i>Unclass</i>
--





Government of Canada
Gouvernement du Canada

Contract Number / Numéro du contrat

P2P 14081

Security Classification / Classification de sécurité

Unclass

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 CONFIDENTIEL	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 indiquer 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 <i>P2P 14081</i>
Security Classification / Classification de sécurité <i>Unclass</i>

PART D - AUTHORIZATION / PARTIE D - AUTORISATION			
13. Organization Project Authority / Chargé de projet de l'organisme			
Name (print) - Nom (en lettres moulées) Gilles Dufour	Title - Titre Director General - AB&TPO	Signature <i>Gilles Dufour</i>	
Telephone No. - N° de téléphone 615-302-6514	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel gilles.dufour@canada.ca	Date
14. Organization Security Authority / Responsable de la sécurité de l'organisme			
Name (print) - Nom (en lettres moulées) <i>Jeanne Dufour</i>	Title - Titre <i>Manager Security Ops</i>	Signature <i>Jeanne Dufour</i>	
Telephone No. - N° de téléphone <i>613-960-7443</i>	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel <i>jeanne.dufour@canada.ca</i>	Date <i>JUL 12 2017</i>
15. Are there additional instructions (e.g. Security Guide, Security Classification Guide) attached? Des instructions supplémentaires (p. ex. Guide de sécurité, Guide de classification de la sécurité) sont-elles jointes?			<input checked="" type="checkbox"/> No / <input type="checkbox"/> Yes / <input type="checkbox"/> Oui
16. Procurement Officer / Agent d'approvisionnement			
Name (print) - Nom (en lettres moulées)	Title - Titre	Signature	
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date
17. Contracting Security Authority / Autorité contractante en matière de sécurité			
Name (print) - Nom (en lettres moulées)	Title - Titre	Signature	
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité <i>Unclass</i>
--

Mtd
12 July 2017

Canada



ANNEX D

FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY - CERTIFICATION

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

For further information on the Federal Contractors Program for Employment Equity visit HRSDC-Labour's website.

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

Complete both A and B.

A. Check only one of the following:

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

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

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

OR

- A5.2. The Bidder certifies having submitted the Agreement to Implement Employment Equity (LAB1168) to HRSDC-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 HRSDC-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)



ANNEX E

INSURANCE REQUIREMENTS

1. 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.
2. 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. Non-Owned Automobile Liability - Coverage for suits against the Contractor resulting from the use of hired or non-owned vehicles.
 - n. Litigation Rights: Pursuant to subsection 5(d) of the [Department of Justice Act](#), S.C. 1993, c. J-2, s.1, if a suit is instituted for or against Canada which the Insurer would, but for this clause, have the right to pursue or defend on behalf of Canada as an Additional Named Insured under the insurance policy, the Insurer must promptly contact the Attorney General of Canada to agree on the legal strategies by sending a letter, by registered mail or by courier, with an acknowledgement of receipt.

For the province of Quebec, send to:

Director Business Law Directorate,
Quebec Regional Office (Ottawa),
Department of Justice,
284 Wellington Street, Room SAT-6042,
Ottawa, Ontario, K1A 0H8

For other provinces and territories, send to:



Senior General Counsel,
Civil Litigation Section,
Department of Justice
234 Wellington Street, East Tower
Ottawa, Ontario K1A 0H8

A copy of the letter must be sent to the Contracting Authority. Canada reserves the right to co-defend any action brought against Canada. All expenses incurred by Canada to co-defend such actions will be at Canada's expense. If Canada decides to co-defend any action brought against it, and Canada does not agree to a proposed settlement agreed to by the Contractor's insurer and the plaintiff(s) that would result in the settlement or dismissal of the action against Canada, then Canada will be responsible to the Contractor's insurer for any difference between the proposed settlement amount and the amount finally awarded or paid to the plaintiffs (inclusive of costs and interest) on behalf of Canada.



ATTACHMENT 3.1 – PRICING TABLES

Bidders are required to complete the following pricing tables.

FIRM ALL INCLUSIVE PER DIEM RATE FOR THE CONTRACT PERIOD				
Service Line	Weight	Level	Weight	Per Diem Rate
IT Strategic Modernization, Planning and IT Service Strategy and Evolution Specialist	40%	Intermediate	60%	
		Senior	40%	
IT Sourcing Advice and Strategy Specialist	30%	Junior	30%	
		Intermediate	40%	
		Senior	30%	
IT Benchmarking Specialist	30%	Junior	30%	
		Intermediate	40%	
		Senior	30%	



ATTACHMENT 4.1 – TECHNICAL CRITERIA

1.1 Technical Evaluation

1. 1.1.1a Mandatory Technical Criteria - CORPORATE

The Bidder must comply with the Mandatory Requirements specified below.

This list of qualifications is essential and must be met by the contractor to perform the required tasks and produce deliverables outlined in the Statement of Work. The information provided about the proposed contractor must clearly describe how each of the qualifications in the list is met. Failure to adequately describe how a qualification is met will be determined as “not met”. If requested, the contractor must provide examples and reference information (may be checked) of their experience in the following:

To facilitate bid preparation and evaluation, Bidders must prepare and submit their proposal using the tables provided. When completing the grids, the specific information which demonstrates the requested criteria and reference to the page number of the bid should be incorporated so that the evaluator can verify this information.

Note to Bidders: Read all of the following criteria in relation to size, scope and complexity of the work requirements described in Annex A – Statement of Work.

Only references of the Bidder themselves will be used for evaluation.

Unless otherwise indicated, client references provided for each technical criterion may be used in a separate technical criterion. For example, if References A, B, and C are used on M.1, they can also be used for M.2.

1. Mandatory Requirements

Note that failure to provide the required information will result in non-compliant proposal.

1.1 Client References

Wherever a client reference is requested in the mandatory requirements, the proposal **must** include client references. The Shared Services Canada (SSC) evaluation team may contact each reference to verify the information provided in the proposal and may ask additional questions.

Criteria ID	Criteria	Met / Not Met
M.1	<p>A separate client reference for three (3) individual projects, i.e. three (3) client references, completed within the last seven (7) years which substantiates the Bidder’s delivery of advisory services in support of the planning, designing and execution of IT strategic modernization and planning and/or IT service strategy and evolution.</p> <p>For the purposes of this requirement, each client reference must be from an organization with a minimum of 500 employees.</p>	



Criteria ID	Criteria	Met / Not Met
M.2	<p>A separate client reference for three (3) individual projects, i.e. three (3) client references, completed within the last seven (7) years which substantiates the Bidder's delivery of advisory services in support of the planning, designing and execution of information technology (IT) sourcing strategies.</p> <p>For the purposes of this requirement, each client reference must be from an organization with a minimum of 500 employees.</p>	
M.3	<p>A separate client reference for three (3) individual projects, i.e. three (3) client references, completed within the last seven (7) years which substantiates the Bidder's delivery of advisory services in support of the planning, designing and execution of IT benchmarking activities.</p> <p>For the purposes of this requirement, each client reference must be from an organization with a minimum of 500 employees.</p>	
M.4	<p>A separate client reference for three (3) individual projects, i.e. three (3) client references, completed within the last seven (7) years which substantiates the Bidder's delivery of IT benchmarking activities.</p> <p>For the purposes of this requirement, each project must be valued greater than \$150,000.</p>	
M.5	<p>A separate client reference for two (2) individual projects, i.e. two (2) client references, completed within the last seven (7) years which substantiates that the Bidder has completed the preparation of competitive procurement materials specific to at least 3 of the following 5 items for Sourcing Agreements:</p> <ul style="list-style-type: none"> a. Statement of Work/Requirements for Sourcing Agreement; b. Technical Evaluation Criteria and Process for Sourcing Agreement; c. Financial Evaluation Criteria and Process for Sourcing Agreement; d. Terms and Conditions of Sourcing Agreement; and e. Support for negotiation of contracts with prospective suppliers, including software contracts. <p>For the purposes of this requirement, each client reference must be from an organization with a minimum of 500 employees.</p>	



1.2 Corporate Information and Methodologies

The proposal **must** include information from the Bidder which substantiates the following requirements. The Bidder must provide sufficient detail to substantiate the extent to which its references satisfy the criteria.

Criteria ID	Criteria	Bidder's Response	
		Substantiation of Technical Compliance	Reference to Additional Documentation within the Bid
M.6	A separate client reference for three (3) individual projects, i.e. three (3) client references, completed within the last seven (7) years which substantiates the Bidder's delivery of IT consulting services to national or provincial or state governments.		
M.7	<p>The Bidder must demonstrate a corporate approach to tools, methodology (explanation below) and the existence of a vendor/market intelligence database used in the development and delivery of sourcing strategies and benchmarking activities.</p> <p>The proposal must provide a description with sufficient detail to substantiate the extent to which the Bidder's methodology and approach addresses the following elements:</p> <ul style="list-style-type: none"> a. Sources of information and best practices; b. Regular updating of price information related to IT benchmarking knowledge base; and c. Acquisition of information and best practices from a "practitioner" vs. a "research" point of view. 		



1.1.2 Point Rated Technical Criteria - Corporate

In this section, details should be provided regarding the qualifications, relevant experience and expertise. The experience of each bidder must be clearly identified by providing a summary/description of the previous projects worked on and indicating when the work was carried out, and the client. A minimum of 70% must be achieved to be considered compliant.

Client References

Wherever a client reference is requested in the point rated requirements, the proposal **should** provide the following information for **each** client reference. The SSC evaluation team may contact each reference to verify the information provided in the proposal and may ask additional questions.

Note that failure to provide the required information will result in a score of zero.

Criteria ID	Criteria	Maximum Points Available
R.1	<p>The Bidder should provide client references for IT consulting engagements completed within the last seven (7) years where each individual IT consulting engagement had a value of greater than \$1 million.</p> <p>The value of the engagement refers to the “contract value” of the engagement between the Bidder and its client, and not the value of the project that was undertaken by the Bidder.</p> <p>Twenty (20) points will be awarded for each completed engagement up to a maximum of five (5) engagements.</p>	100
R.2	<p>The Bidder should provide client references for IT sourcing engagements completed within the last seven (7) years where the services were provided for organizations with more than 500 employees.</p> <p>Ten (10) points will be awarded for each completed engagement up to a maximum of ten (10) engagements.</p>	100
R.3	<p>The Bidder should provide client references for IT benchmarking engagements completed within the last seven (7) years where the services were provided for organizations with more than 1,000 employees.</p> <p>Ten (10) points will be awarded for each completed engagement up to a maximum of ten (10) engagements.</p>	100
R.4	<p>The Bidder should include client references for IT consulting engagements completed within the last seven (7) years in addition to any previously stated references in the Mandatory Requirements where the value of each engagement was greater than \$5 million.</p> <p>The client reference must be different from those provided in response to any Mandatory or Point-Rated Requirements.</p>	100



Criteria ID	Criteria	Maximum Points Available
	<p>The value of the engagement refers to the “contract value” of the engagement between the Bidder and its client, and not the value of the project that was undertaken by the Bidder.</p> <p>Twenty (20) points will be awarded for each completed engagement up to a maximum of five (5) engagements.</p>	

1.3 Corporate Information

The proposal **should** include information from the Bidder which substantiates the following requirements. The Bidder should provide sufficient detail to substantiate the extent to which its references satisfy the criteria.

Criteria ID	Criteria	Maximum Points Available	Bidder’s Response	
			Substantiation of Technical Compliance	Reference to Additional Documentation within the Bid
R.5	<p>The Bidder should demonstrate that the vendor has provided IT sourcing and/or benchmarking services completed within the last seven (7) years in support of various IT technical areas including:</p> <ul style="list-style-type: none"> a) Data Centre Services b) Midrange Computing c) Mainframe Computing d) Email e) Network and Telecommunication Services f) IT Security g) Workplace and Technology Services h) IT Service Management <p>One hundred (100) points will be awarded for each project up to a maximum of five (5) projects.</p>	500		



FORM 1

BID SUBMISSION FORM

BID SUBMISSION FORM	
Bidder's full legal name <i>[Note to Bidders: Bidders who are part of a corporate group should take care to identify the correct corporation as the Bidder.]</i>	
Authorized Representative of Bidder for evaluation purposes (e.g., clarifications)	Name
	Title
	Address
	Telephone #
	Fax #
	Email
Bidder's Procurement Business Number (PBN) <i>[see the Standard Instructions 2003]</i> <i>[Note to Bidders: Please ensure that the PBN you provide matches the legal name under which you have submitted your bid. If it does not, the Bidder will be determined based on the legal name provided, not based on the PBN, and the Bidder will be required to submit the PBN that matches the legal name of the Bidder.]</i>	
Jurisdiction of Contract: Province 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 a work force adjustment directive? Yes ____ No ____ If yes, provide the information required by the Article in Part 2 entitled "Former Public Servant"
Number of FTEs [Bidders are requested to indicate, the total number of full-time-equivalent positions that would be created and maintained by the Bidder if it were awarded the Contract. This information is for information purposes only and will not be evaluated.]	
Security Clearance Level of Bidder <i>[include both the level and the date it was granted]</i> <i>[Note to Bidders: Please ensure that the security clearance matches the legal name of</i>	



<i>the Bidder. If it does not, the security clearance is not valid for the Bidder.]</i>	
<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 products 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	



FORM 2

**CLIENT REFERENCE VERIFICATION FORM
FOR MANDATORY TECHNICAL CRITERIA**

Bidder	Name:
	Address:

As a Reference for the firm identified above, by signing below, I confirm that I am a representative of the Organization identified below and that I have read and understood the Mandatory Technical Criteria described in the bid solicitation.

An email attestation from the primary or backup contact will be accepted. The email attestation must accompany the completed form(s) as an attachment and should include a statement in the email itself similar to the following: "As a Reference for the firm identified in the attached, by providing this email, I confirm that I am a representative of the Organization identified in the attached and that I have read and understood the Mandatory Technical Criteria described in the attached page(s)."

The Contact should enter "Yes" or "No" or "UR", where "UR" means Unable to Respond, for each Mandatory Technical Criterion (M.1 to M.5) in the table below. If the Contact does not enter "Yes" or "No" or "UR" for a Mandatory Technical Criterion, the response will be deemed to be "No" for that Mandatory Technical Criterion.

By responding "Yes" in the table below to a Mandatory Technical Criterion, the Contact agrees that the Bidder named above has delivered all of the services in the quantities and/or durations specified for the Mandatory Technical Criterion under the contract referenced below.

By responding "No" in the table below to a Mandatory Technical Criterion, the Contact agrees that the Bidder named above has not delivered all of the services in the quantities and/or durations specified for the Mandatory Technical Criterion under the contract referenced below.

By responding "Unable to Respond" ("UR") in the table below to a Mandatory Technical Criterion, the Contact agrees that it is unwilling or unable to provide any information about whether the Bidder named above has delivered all of the services in the quantities and/or durations specified for the Mandatory Technical Criterion under the contract referenced below. So that Canada can ensure this process is fair to all the Bidders, if the Contact chooses a response that indicates "Unable to Respond" for any of the Mandatory Technical Criteria in the table below, it will be treated as a "No" response.

Mandatory Technical Criteria:
(Client reference to complete)

	Yes	No	UR
M.1			
M.2			
M.3			
M.4			
M.5			

(Bidder to complete):



Client Organization Name: _____	
Client Contract Number for Reference Project (if applicable): _____	
Name of Project Authority / Executive:	
Project Name:	
Project Start and End Dates:	
Brief Project Description: (maximum of 250 words)	
Relevance to Evaluation Criteria: (maximum of 250 words)	
<i>(Client reference to complete):</i>	
Primary Contact Information	Name: Title: Phone: Email: Signature: Date:
Backup Contact Information from the same organization	Name: Title: Phone: Email: Signature: Date:



FORM 3

**CLIENT REFERENCE VERIFICATION FORM
FOR POINT RATED TECHNICAL CRITERIA**

Bidder	Name:
	Address:

As a Reference for the firm identified above, by signing below, I confirm that I am a representative of the Organization identified below and that I have read and understood the Point Rated Technical Criteria described in the bid solicitation.

An email attestation from the primary or backup contact will be accepted. The email attestation must accompany the completed form(s) as an attachment and should include a statement in the email itself similar to the following: "As a Reference for the firm identified in the attached, by providing this email, I confirm that I am a representative of the Organization identified in the attached and that I have read and understood the Point Rated Technical Criteria described in the attached page(s)."

The Contact should enter "Yes" or "No" or "UR", where "UR" means Unable to Respond, for each Point Rated Technical Criterion (R.1 to R.4) in the table below. If the Contact does not enter "Yes" or "No" or "UR" for a Point Rated Technical Criterion, the response will be deemed to be "No" for that Point Rated Technical Criterion.

By responding "Yes" in the table below to a Point Rated Technical Criterion, the Contact agrees that the Bidder named above has delivered all of the services in the quantities and/or durations specified for the Point Rated Technical Criterion under the contract referenced below.

By responding "No" in the table below to a Point Rated Technical Criterion, the Contact agrees that the Bidder named above has not delivered all of the services in the quantities and/or durations specified for the Point Rated Technical Criterion under the contract referenced below.

By responding "Unable to Respond" ("UR") in the table below to a Point Rated Technical Criterion, the Contact agrees that it is unwilling or unable to provide any information about whether the Bidder named above has delivered all of the services in the quantities and/or durations specified for the Point Rated Technical Criterion under the contract referenced below. So that Canada can ensure this process is fair to all the Bidders, if the Contact chooses a response that indicates "Unable to Respond" for any of the Point Rated Technical Criteria in the table below, it will be treated as a "No" response.

Point Rated Technical Criteria:
(Client reference to complete)

	Yes	No	UR
R.1			
R.2			
R.3			
R.4			

(Bidder to complete):



Client Organization Name: _____

Client Contract Number for Reference Project (if applicable): _____

Name of Project Authority / Executive:	
Project Name:	
Project Start and End Dates:	
Brief Project Description: (maximum of 250 words)	
Relevance to Evaluation Criteria: (maximum of 250 words)	

(Client reference to complete):

Primary Contact Information	Name: Title: Role in the Project: Phone: Email: Signature: Date:
Backup Contact Information from the same organization	Name: Title: Role in the Project: Phone: Email: Signature: Date:



SUBSTANTIATION OF TECHNICAL COMPLIANCE FORM

Mandatory Technical Criteria that requires substantiation by the Bidder	Bidder Substantiation	Reference to additional Substantiating Materials included in Bid
M-1		
M-2		
M-3		
M.4		
M.5		
M.6		
M.7		
Point-Rated Technical Criteria that requires substantiation by the Bidder	Bidder Substantiation	Reference to additional Substantiating Materials included in Bid
R-1		
R-2		
R-3		
R-4		
R-5		



FORM 5

CODE OF CONDUCT CERTIFICATION FORM

Adresse de courriel /E-mail Address:
Ministère/Department:
Dénomination sociale complète du fournisseur / Complete Legal Name of Supplier
Adresse du fournisseur / Supplier Address
NEA du fournisseur / Supplier PBN
Numéro de la demande de proposition Request for Proposal Number
Membres du conseil d'administration (Utilisez le format - Prénom Nom) Board of Directors (Use format - first name last name)
1. Membre / Director
2. Membre / Director
3. Membre / Director
Autres Membres/ Additional Directors: