



**RETURN BIDS TO:**

**RETOURNER LES SOUMISSIONS À:**

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

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

**Place du Portage, Phase III**

**Core 0B2 / Noyau 0B2**

**or via ePost Connect**

**Gatineau**

**Québec**

**K1A 0S5**

**SOLICITATION AMENDMENT**

**MODIFICATION DE L'INVITATION**

The referenced document is hereby revised; unless otherwise indicated, all other terms and conditions of the Solicitation remain the same.

Ce document est par la présente révisé; sauf indication contraire, les modalités de l'invitation demeurent les mêmes.

**Comments - Commentaires**

**Vendor/Firm Name and Address**

**Raison sociale et adresse du  
fournisseur/de l'entrepreneur**

**Issuing Office - Bureau de distribution**

Informatics Professional Services - EL Division/Services

professionnels en informatique - division EL

Terrasses de la Chaudière 4th Floor

10 Wellington Street

Gatineau

Québec

K1A 0S5

<b>Title - Sujet</b> Professional Services - TBIPS 2	
<b>Solicitation No. - N° de l'invitation</b> EP597-180057/A	<b>Amendment No. - N° modif.</b> 003
<b>Client Reference No. - N° de référence du client</b> 20180057	<b>Date</b> 2018-04-03
<b>GETS Reference No. - N° de référence de SEAG</b> PW-\$\$EL-618-32294	
<b>File No. - N° de dossier</b> 618el.EP597-180057	<b>CCC No./N° CCC - FMS No./N° VME</b>
<b>Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2018-04-19</b>	<b>Time Zone</b> Fuseau horaire Eastern Daylight Saving Time EDT
<b>F.O.B. - F.A.B.</b> <b>Plant-Usine:</b> <input type="checkbox"/> <b>Destination:</b> <input checked="" type="checkbox"/> <b>Other-Autre:</b> <input type="checkbox"/>	
<b>Address Enquiries to: - Adresser toutes questions à:</b> Laassouli(EL DIV.), Hicham	<b>Buyer Id - Id de l'acheteur</b> 618el
<b>Telephone No. - N° de téléphone</b> (613) 858-9817 ( )	<b>FAX No. - N° de FAX</b> ( ) -
<b>Destination - of Goods, Services, and Construction:</b> <b>Destination - des biens, services et construction:</b> DEPARTMENT OF PUBLIC WORKS AND GOVERNMENT SERVICES CANADA SSI-DIRECTOR GENERAL'S OFFICE (DGO) KENT SQUARE BUILDING 2ND FL., 270 ALBERT ST. OTTAWA Ontario K1A 0S5 Canada	

**Instructions: See Herein**

**Instructions: Voir aux présentes**

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

**The Request for Proposal (RFP) Amendment 003 is raised to answer questions received from Bidders and amend the RFP accordingly.**

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## **QUESTIONS AND ANSWERS**

**Question 9:** Bench Strength for All Streams: Despite the fact that the resources to be presented will not be contracted, the RFP is requesting that a Bidder complete full grids for all resources to show bench strength. This is not only unusual to TBIPS – where Bidders have already qualified for the categories – but it engenders a very significant undertaking for resources that will not be contracted. Instead, we respectfully request that, instead of full grids, the Bidder be allowed to present a table that summarizes resource name, category, client, contract, duration and number of days billed to demonstrate bench strength. Per the RFP, PSPC can request further details and references on any selected engagement. This approach is less work to compile and review and saves all involved significant cost and effort that can be otherwise directed to ensuring the quality of the Solicitation.

**Answer 9:** The RFP has been amended to reduce the level of effort associated with Bidders demonstrating the “Minimum experience in the resource category”. See RFP changes no. 4 & 5 below – also find attached the revised RFP in track changes.

**Question 10:** Regarding the first requirement for all identified resources in all Workstreams (Appendix 1 to Attachment 2, Bidder Response Table, Attachment 2-X.1) where section “a)” asks for “a minimum of ten years of cumulative experience within the twelve years preceding the issuance date of this RFP, working as a XXXXXXXX”. As we are instructed not to provide résumés in our submission, and section “b)” deals with demonstration of the actual tasks, can the client please clarify what it will allow as demonstration of section “a)” for each identified resource within the response table?”

For instance, would either of the following be acceptable:

- i. A statement detailing how many years of relevant cumulative experience the resource has within the last 12 years?
- ii. A list of all projects performed by the resource within the last 12 years, including client name, project name (if applicable), job title and project duration with start and end months that demonstrate at least 10 years?

**Answer 10:** See RFP changes no. 4 & 5 below - also find attached the revised RFP in track changes.

**Question 11:** Regarding: Defining 6-Month Period: the first requirement for all identified resources in all Workstreams (Appendix 1 to Attachment 2, Bidder Response Table, Attachment 2-X.3) which states “The identified resource must have previously been contracted by the Bidder for a minimum period of six months within the last two years.” Considering that the due dates often change for large RFPs like this please confirm that this requirement should be interpreted as “within the last 2 years from the release of the RFP” so that bidders can properly identify the most ideal resources for their proposals. Otherwise Bidders will have to rework their resources and grids EACH time the due date changes.

**Answer 11:** The RFP should read [...within two years preceding the issuance date of this RFP]. See RFP change no. 6 below - also find attached the revised RFP in track changes.

**Question 12:** Stream 3 CRM: R-5 Bench Strength Criteria reads [...expertise in SAP ECC Financial Systems by identifying an additional six resources.]

- a. Please confirm this should refer to CRM not SAP
- b. The chart indicates 8 resources yet the total shows 6. Please confirm the correct number.

**Answer 12:** Yes, Workstream 3 of the RFP should reference Dynamics CRM and up to 8 additional resources, See RFP change no.7 below - also find attached the revised RFP in track changes.

**Question 13:** Stream 3, R-5 requires that the resource "...must have been previously contracted by the Bidder...". We have contracted with a consultant for specific, complementary expertise in the development of an in-house MS Dynamics CRM system. This consultant is part of our bench as we have contracted with and have access to this resource. Please confirm this is acceptable to satisfy the R-5 criteria. Please note this was an acceptable approach under CFIA RFP #F0362- TBIPS SA: Dynamics CRM Professional Services Resources (Released 10-Nov-17)

**Answer 13:** Yes this is acceptable.

**Question 14:** Regarding Stream 3 CRM R-3.1 and R-3.2, we are trying to understand why, for TBIPS solicitation, PSPC is assessing capabilities that are more relevant to SBIPS. Bidders who deliver services under TBIPS are doing so under Task Authorizations where the contractor is required to provide services not solutions per se. To have 200 points for criteria that is about methods and solutions is not in keeping with the intent and design of the TBIPS vehicle nor is it assessed in any other stream. This criteria is not tied to specific outcomes, service levels or deliverables which makes it a very subjective criteria (difficult to judge merit and fairly compare one Bidder to the next). PSPC is already requiring that a Bidder be either Silver or Gold certified which in and of itself is a strong, fair (3rd party) standard/measure in the market. Accordingly, we request that PSPC remove R-3.1 and R-3.2.

**Answer 14:** The RFP has been amended to reduce the weight from 200 to 100 points for this criterion, however Canada believes this is a relevant criteria. See RFP change no.10 below - also find attached the revised RFP in track changes.

**Question 15:** Stream 4 has the highest number of resources but the revenues required for M-1 are only \$1Million. Should this not be at the very least aligned with the other streams and require as cumulative billing of at least \$5Million to qualify? Considering there will only be 2 contracts awarded and up to 55 resources required, it stands to reason that a higher experience/revenue level would be more aligned with the SOW.

**Answer 15:** Canada has established the minimum thresholds for each workstream separately. The request has been reviewed, the Requirement remains unchanged.

**Question 16:** We believe there is a typo in 2 PeopleSoft streams in the corporated reated crteria. In both WorkStream 1 and Workstream 2, R-1.2 & R-1.6 both refer to [...the integration of SAP Financials systems with any of the following...]. We believe this should read [...the integration of PeopleSoft HCM systems with any of the following...]

**Answer 16:** Yes, Workstreams 1 and 2 of the RFP should reference PeopleSoft, the RFP has been amended. See RFP changes no. 8 & 9 below- also find attached the revised RFP in track changes.

**Question 17:** Regarding the criteria entitled "Previously contracted by the Bidder" for all identified resources in all Workstreams (Appendix 1 to Attachment 2, Bidder Response Table, Attachment 2-X.3) which states "the identified resource must have previously been contracted by the Bidder for a minimum period of six months within the last two years". Please confirm that this means that the Client must have contracted directly with the Bidder for the services of any resource presented and that the Bidder was not a subcontractor to another firm who holds the contract with the client.

**Answer 17:** To clarify, the Bidder must have provided the services of the resource directly to an end client or to another contractor that, in turn, contracted the resource to a client.

**Question 18:** Due to the number of grids and resources involved for each stream we respectfully request a three week extension in order to provide PSPC with a complete and high quality offer.

**Answer 18:** Canada has reduced the submission requirements (see RFP changes no. 4 & 5 below) and the RFP closing date has been extended to April 19, 2018.

**Question 19:** In stream 5 R1.3 Data Conversion, the Crown is requesting "The work delivered by the bidder under the contract included data conversion migration from a legacy SAP ECC or FreeBalance application to SAP S/4 HANA." Given some net new installs of S/4HANA would not have an ECC6 footprint, but would require migrating data from their legacy finance system, which may not be FreeBalance, would the crown please amend to requirement to any legacy Financial system vs limiting it to a FreeBalance legacy system.

**Answer 19:** Canada anticipates future requirements under the resulting contract for migration from legacy FreeBalance and SAP ECC. The requirement remains unchanged.

**Question 20:** Stream 4 M-1 does not line up with the other streams as it only requires a cumulative bid value of \$ 1,000,000.00 which is the second lowest threshold in the bid for the stream with the highest number of resources. To align the criteria Streams 1, 2 and 5 (all of which indicate fewer resources) we believe the following is a more realistic requirement and better reflects the RFP SOW:

The Bidder must provide two Customer Reference Contracts, with a cumulative billed value of \$5,000,000.00 (Canadian, including taxes) within the last five years of the issuance date of this RFP, where the Bidder was contracted to design and implement solutions based on OpenText Content Server (version 10.0 or more recent).

Of the two Customer Reference Contracts provided, at least one contract must have had a minimum billed value of \$2,000,000.00 (Canadian, including taxes) as of the issuance date of this RFP (Canadian including taxes), within a consecutive twelve-month period, under the contract.

Otherwise we believe that the GC DOCS Bidders are not being judged on an equal footing with the other work streams nor does the criteria adequately test the experience of the GC DOCS Bidders given the size and scope of the stated business requirements.

**Answer 20:** See answer #15.

## RFP AMENDMENT

4. At Attachment 2 Bid Evaluation Criteria, Appendix 1 to Attachment 2, Bidder Response Table (Identified Resources, WS\_).

For each Bidder Response Table, WS1 to WS 5 inclusive, at Minimum experience in the resource category, under Demonstrated Experience

**DELETE:** Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.

**INSERT: Bidder Certification:**

The Bidder hereby certifies that the identified resource meets the "Minimum Experience in the resource category" as detailed under Evaluation Criteria #2-1.1. The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period

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Name and signature of Authorized Representative

5. At Attachment 2 Bid Evaluation Criteria, Appendix 1 to Attachment 2, Bidder Response Table (Identified Resources, WS\_).

For each Bidder Response Table, WS1 to WS 5 inclusive, at Minimum experience with .....[workstream technology specific criteria], under Demonstrated Experience

**INSERT:** Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.

6. At Attachment 2 Bid Evaluation Criteria, Appendix 1 to Attachment 2, Bidder Response Table (Identified Resources, WS\_).

For each Bidder Response Table, WS1 to WS 5 inclusive, at Previously Contracted by the Bidder

**DELETE:** [.....for a minimum period of six months within the last two years.]

**INSERT:** [.....for a minimum period of six months within the two years preceding the issuance date of this RFP.]

7. At Attachment 2 Bid Evaluation Criteria, Workstream 3 Case Management Professional Services, R-5 Bench Strength

**DELETE:** The Bidder should further demonstrate its capacity to provide resources with expertise in SAP ECC Financial System by identifying up to six additional resources, over and beyond the six resources identified in response to #M-2, as set out in the table below.

<b>Total # Resources</b>	<b>6</b>
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**INSERT:** The Bidder should further demonstrate its capacity to provide resources with expertise in Dynamics CRM by identifying up to eight additional resources, over and beyond the eight resources identified in response to #M-2, as set out in the table below.

<b>Total # Resources</b>	<b>8</b>
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8. At Attachment 2 Bid Evaluation Criteria, Workstream 1 PeopleSoft ERP System Technical Professional Services, criteria R-1 Corporate Reference Contracts

**DELETE:** R-1.2 & R-1.6 in its entirety.

**INSERT:**

<b>R-1.2</b>	Application Integration	<b>70</b>	<b>Up to 70 points</b> – The work delivered by the Bidder under the contract included application integration of the <u>PeopleSoft HCM</u> system with any of the following external systems: <ul style="list-style-type: none"> <li>• SAP Payroll = <b>20 points</b></li> <li>• Database systems = <b>15 points</b></li> <li>• BI/Data Warehouse systems = <b>15 points</b></li> <li>• Enterprise Service Bus = <b>20 points</b></li> </ul>
<b>R-1.6</b>	Application Integration	<b>70</b>	<b>Up to 70 points</b> – The work delivered by the Bidder under the contract included application integration of the <u>PeopleSoft HCM</u> system with any of the following external systems: <ul style="list-style-type: none"> <li>• PeopleSoft Payroll = <b>20 points</b></li> <li>• Database systems = <b>15 points</b></li> <li>• BI/Data Warehouse systems = <b>15 points</b></li> <li>• Enterprise Service Bus = <b>20 points</b></li> </ul>

9. At Attachment 2 Bid Evaluation Criteria, Workstream 2 PeopleSoft ERP System Functional Professional Services, criteria R-1 Corporate Reference Contracts

**DELETE:** R-1.2 & R-1.6 in its entirety.

**INSERT:**

<b>R-1.2</b>	Application Integration	<b>70</b>	<b>Up to 70 points</b> – The work delivered by the Bidder under the contract included application integration of the PeopleSoft HCM system with any of the following external systems: <ul style="list-style-type: none"> <li>• SAP Payroll = <b>20 points</b></li> <li>• Database systems = <b>15 points</b></li> <li>• BI/Data Warehouse systems = <b>15 points</b></li> <li>• Enterprise Service Bus = <b>20 points</b></li> </ul>
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<b>R-1.6</b>	Application Integration	<b>70</b>	<b>Up to 70 points</b> – The work delivered by the Bidder under the contract included application integration of the PeopleSoft HCM system with any of the following external systems: <ul style="list-style-type: none"> <li>• PeopleSoft Payroll = <b>20 points</b></li> <li>• Database systems = <b>15 points</b></li> <li>• BI/Data Warehouse systems = <b>15 points</b></li> <li>• Enterprise Service Bus = <b>20 points</b></li> </ul>
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10. At Attachment 2 Bid Evaluation Criteria, Workstream 3 Case Management Professional Services, section 1. Evaluation summary (Workstream 3)

**DELETE:**

<b>R-3</b>	<b>Corporate Dynamics Practice</b>	200	<b>200</b>	R-3 Corporate Dynamics Practice
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**INSERT:**

<b>R-3</b>	<b>Corporate Dynamics Practice</b>	100	<b>100</b>	R-3 Corporate Dynamics Practice
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**DELETE:**

<b>Overall Maximum Points</b>	<b>940</b>
<b>Pass Mark</b> (70% of Overall Maximum Points)	<b>470</b>

**INSERT:**

<b>Overall Maximum Points</b>	<b>840</b>
<b>Pass Mark</b> (50% of Overall Maximum Points)	<b>420</b>

11. At Attachment 2 Bid Evaluation Criteria, Workstream 3 Case Management Professional Services,

**DELETE:** R-13 Corporate Dynamics Practice, in its entirety.

**INSERT:**

The Bidder will be awarded up to **100 points** in accordance with the evaluation criteria contained in the table below. If the Bidder does not demonstrate experience for rated criteria they will get 0 points, no partial points will be awarded.

<b>R-3 Corporate Dynamics Practice</b>				
<b>Item</b>	<b>Point-rated Criteria</b>	<b>Max. Points</b>	<b>Evaluation Criteria</b>	<b>Demonstrated Experience</b> (Bidder to Insert Data)
<b>R-3.1</b>	<p>The Bidder should demonstrate the extent to which it has formally established a corporate practice in the area of Dynamics solutions.</p> <p>Examples of establishing a corporate practice include, but are not limited to, the implementation of a formal Dynamics implementation methodology; the documentation of formal processes that are routinely applied to deliver Dynamics services; the establishment of a Dynamics community of practice to provide a forum for practitioners to share tips and best practices, ask questions of their colleagues, and provide support for each other; formal training or mentoring programs to ensure all resource are knowledgeable and adhere to corporate methods; or other initiatives the Bidder has implemented to develop corporate knowledge and expertise in Dynamics and ensure that Dynamics -related</p>	<b>30</b>	<p><b>Up to 30 points</b> - The extent to which the Bidder has clearly described its Dynamics practice:</p> <ul style="list-style-type: none"> <li>• <b>30 points</b> - Dynamics Practice is clearly described and includes complete details of robust methods and activities that have been implemented to develop corporate knowledge and expertise in Dynamics and ensure that CRM-related professional services delivered to clients reflect best practices;</li> <li>• <b>20 points</b> – Dynamics Practice is adequately described with some detail of established methods and activities;</li> <li>• <b>10 points</b> - Dynamics Practice is poorly described with few details; or</li> <li>• <b>0 points</b> – A Dynamics Practice is not described.</li> </ul>	
		<b>30</b>	<p><b>Up to 30 points</b> - The Maturity of Bidder's Dynamics:</p> <ul style="list-style-type: none"> <li>• <b>30 points</b> - Response clearly demonstrates an established and robust Dynamics practice which includes a proven methodology and processes and formal training or mentoring programs to ensure all resource are knowledgeable and adhere to corporate methods;</li> <li>• <b>20 points</b> - Response demonstrates an established Dynamics practice but lacking some features/functions of a more robust practice;</li> <li>• <b>10 points</b> - Response demonstrates a Dynamics practice which is still in early development; or</li> </ul>	



R-3 Corporate Dynamics Practice				
Item	Point-rated Criteria	Max. Points	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
	professional services delivered to clients reflect best practices.		<ul style="list-style-type: none"> <li><b>0 points</b> – Bidder does not have an established Dynamics practice.</li> </ul>	
<b>R-3.2</b>	The Bidder should provide up to two Customer Reference Projects where it has utilized specific assets from its' Dynamics Practice (describe above) to deliver services to support a Dynamics solution implementation project	<b>40</b>	<p><b>Up to 40 points</b> – Each Customer Reference Project (maximum 2 projects):</p> <ul style="list-style-type: none"> <li><b>20 points</b> – The Bidder has clearly demonstrated how it utilized specific assets from its' Dynamics Practice to deliver the referenced Dynamics project.</li> </ul>	
<b>Total Maximum Points</b>		<b>100</b>		
<b>Points Achieved</b>				

**ALL OTHER TERMS AND CONDITIONS REMAIN UNCHANGED.**

**BID SOLICITATION**

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

**FOR**

**PUBLIC WORKS AND GOVERNMENT SERVICES  
CANADA (PWGSC) - INTEGRATED SERVICES BRANCH (ISB)**

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**List of Annexes to the Resulting Contract:**

Annex A Statement of Work

Annex B Basis of Payment

Annex C Security Requirements Check List

Appendix A to Annex A - Tasking Assessment Procedure

Appendix B to Annex A - Task Authorization Form

Appendix C to Annex A – Resource Assessment Criteria

Appendix D to Annex A – Certifications at the TA stage

Solicitation Number: EP597-180057

Amendment Number:

Buyer ID: 618EL

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**List of Attachments:**

Attachment 1: Bid Submission Form  
Attachment 2: Bid Evaluation Criteria  
Attachment 3: Pricing Schedule  
Attachment 4: Electronic Payment Instruments

**List of Attachments to Part 5:**

Attachment 5.1: Federal Contractors Program for Employment Equity – Certification

## PART 1 - GENERAL INFORMATION

### 1.1 Introduction

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

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

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

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

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

Part 5 Certifications and Additional Information: includes the certifications and additional information to be provided;

Part 6 Security, Financial and Other Requirements: includes specific requirements that must be addressed by Bidders; and

Part 7 Resulting Contract Clauses: includes the clauses and conditions that will apply to any resulting contract.

The annexes include the Statement of Work and any other annexes.

### 1.2 Summary

- (a) This bid solicitation is being issued to satisfy the requirement of The Integrated Services Branch (ISB) of Public Works and Government Services (PWGSC) (the "**Client**") for Task-Based Informatics Professional Services (TBIPS) under the TBIPS Supply Arrangement (SA) method of supply.
- (b) It is intended to result in the award of up to 2 contracts in each of the 5 Workstreams, with each contract purchasing Work from only one Workstream. Each contract will be for 1 year plus 2 one-year irrevocable options allowing Canada to extend the term of the contract.
- (c) There are security requirements associated with this requirement. For additional information, consult Part 6 - Security, Financial and Other Requirements, and Part 7 – Resulting Contract Clauses. For more information on personnel and organization security screening or security clauses, Bidders should refer to the Contract Security Program of Public Works and Government Services Canada (<http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>) website.
- (d) The requirement is subject to the provisions of the World Trade Organization Agreement on Government Procurement (WTO-AGP), the North American Free Trade Agreement (NAFTA), the Canada-Chile Free Trade Agreement (CCFTA), the Canada-Peru Free Trade Agreement (CPFTA), the Canada-Colombia Free Trade Agreement (CColFTA), the Canada-Panama Free Trade Agreement (CPanFTA), the Canada-European Union Comprehensive Economic and Trade Agreement (CETA), and the Canadian Free Trade Agreement (CFTA).
- (e) The Federal Contractor's Program (FCP) for employment equity applies to this procurement; see Part 5 – Certifications and Additional Information, Part 7 – Resulting Contract Clauses and the attachment titled "Federal Contractors Program for Employment Equity – Certification."
- (f) Only TBIPS SA Holders currently holding a TBIPS SA for Tier 2, in one or all the Workstreams and in the National Capital Region under the EN578-170432 series of SAs are eligible to compete. The TBIPS SA EN578-170432 is incorporated by reference and forms part of this bid solicitation, as though expressly set out in it, subject to any express terms and conditions

contained in this bid solicitation. The capitalized terms not defined in this bid solicitation have the meaning given to them in the TBIPS SA.

- (g) SA Holders that are invited to compete as a joint venture must submit a bid as that joint venture SA Holder, forming no other joint venture to bid. Any joint venture must be already qualified under the SA #EN578-170432 as that joint venture at the time of bid closing in order to submit a bid.
- (h) For each Workstream, the Resource Categories described below are required on an as and when requested basis in accordance with the TBIPS SA Annex "A":

**Note:** Resources may be required, in each Workstream (1-5), throughout the period of the contract in any of the categories and levels identified in the tables below as applicable. The estimated number of resources required in each Workstream reflects the anticipated requirements, however over the life of the contract the resource requirements may fluctuate. The initial number of resources required in each Workstream and category will be confirmed following contract award via the issuance of approved TAs.

#### WORKSTREAM 1 - PEOPLESFT ERP SYSTEMS TECHNICAL PROFESSIONAL SERVICES

RESOURCE CATEGORY	LEVEL OF EXPERTISE	ESTIMATED NUMBER OF RESOURCES REQUIRED
A.1 Application/Software Architect	Level 3	1
A.4 ERP System Analyst	Level 2	1
A.4 ERP System Analyst	Level 3	3
A.5 ERP Technical Analyst	Level 2	1
A.5 ERP Technical Analyst	Level 3	11
A.7 Programmer/Analyst	Level 2	1
A.7 Programmer/Analyst	Level 3	1
A.11 Tester	Level 2	1
A.11 Tester	Level 3	1
I.1 Data Conversion Specialist	Level 2	1
I.1 Data Conversion Specialist	Level 3	1
P.2 Enterprise Architect	Level 3	1

**WORKSTREAM 2 - PEOPLESFT ERP SYSTEMS FUNCTIONAL PROFESSIONAL SERVICES**

RESOURCE CATEGORY	LEVEL OF EXPERTISE	ESTIMATED NUMBER OF RESOURCES REQUIRED
A.2 ERP Functional Analyst	Level 2	1
A.2 ERP Functional Analyst	Level 3	11
B.1 Business Analyst	Level 2	1
B.1 Business Analyst	Level 3	1
B.2 Business Architect	Level 3	1
B.5 Business Process Re-engineering (BPR) Consultant	Level 3	1
B.6 Business System Analyst	Level 2	1
B.6 Business System Analyst	Level 3	1
B.7 Business Transformation Architect	Level 3	2
B.9 Courseware Developer	Level 2	1
B.9 Courseware Developer	Level 3	2
B.10 Help Desk Specialist	Level 2	1
B.10 Help Desk Specialist	Level 3	1
B.14 Technical Writer	Level 2	1
P.1 Change Management Consultant	Level 3	1
P.7 Project Coordinator	Level 2	1
P.7 Project Coordinator	Level 3	1
P.9 Project Manager	Level 2	1
P.9 Project Manager	Level 3	2
P.11 Quality Assurance Specialist/Analyst	Level 2	1
P.11 Quality Assurance Specialist/Analyst	Level 3	1
P.12 Risk Management Specialist	Level 3	1



**WORKSTREAM 3 - CASE MANAGEMENT SYSTEM PROFESSIONAL SERVICES**

RESOURCE CATEGORY	LEVEL OF EXPERTISE	ESTIMATED NUMBER OF RESOURCES REQUIRED
A.1 Application/Software Architect	Level 3	2
A.7 Programmer/Analyst	Level 2	2
A.7 Programmer/Analyst	Level 3	2
A.8 System Analyst	Level 2	1
A.8 System Analyst	Level 3	1
A.11 Tester	Level 2	1
A.11 Tester	Level 3	2
A.15 Web Graphics Designer	Level 2	1
A.15 Web Graphics Designer	Level 3	1
I.1 Data Conversion Specialist	Level 2	1
I.1 Data Conversion Specialist	Level 3	1
B.1 Business Analyst	Level 2	5
B.1 Business Analyst	Level 3	2
B.2 Business Architect	Level 3	3
B.7 Business Transformation Architect	Level 3	4
B.9 Courseware Developer	Level 2	1
B.9 Courseware Developer	Level 3	1
P.1 Change Management Consultant	Level 3	1
P.2 Enterprise Architect	Level 3	2
P.9 Project Manager	Level 2	1
P.9 Project Manager	Level 3	1

**WORKSTREAM 4 - GCDOCS SYSTEM PROFESSIONAL SERVICES**

RESOURCE CATEGORY	LEVEL OF EXPERTISE	ESTIMATED NUMBER OF RESOURCES REQUIRED
A.1 Application/Software Architect	Level 3	1
A.7 Programmer/Analyst`	Level 2	1
A.7 Programmer/Analyst	Level 3	1
A.8 System Analyst	Level 2	1
A.8 System Analyst	Level 3	1
A.11 Tester	Level 2	1
A.11 Tester	Level 3	1
I.5 IM Architect	Level 3	1
I.1 Data Conversion Specialist	Level 2	1
I.1 Data Conversion Specialist	Level 3	1
B.1 Business Analyst	Level 2	1
B.1 Business Analyst	Level 3	23
B.5 Business Process Re-engineering (BPR) Consultant	Level 3	1
B.7 Business Transformation Architect	Level 3	1
B.9 Courseware Developer	Level 2	1
B.9 Courseware Developer	Level 3	1
B.14 Technical Writer	Level 2	1
B.14 Technical Writer	Level 3	1
P.1 Change Management Consultant	Level 3	1
P.2 Enterprise Architect	Level 3	1
P.7 Project Coordinator	Level 2	1
P.7 Project Coordinator	Level 3	1
P.9 Project Manager	Level 2	1
P.9 Project Manager	Level 3	7

P.11 Quality Assurance Specialist/Analyst	Level 2	1
P.11 Quality Assurance Specialist/Analyst	Level 3	1
P.12 Risk Management Specialist	Level 3	1

**WORKSTREAM 5 - FINANCIAL SYSTEMS PROFESSIONAL SERVICES**

RESOURCE CATEGORY	LEVEL OF EXPERTISE	ESTIMATED NUMBER OF RESOURCES REQUIRED
A.1 Application/Software Architect	Level 3	1
A.2 ERP Functional Analyst	Level 2	1
A.2 ERP Functional Analyst	Level 3	14
A.4 ERP System Analyst	Level 2	1
A.4 ERP System Analyst	Level 3	1
A.5 ERP Technical Analyst	Level 3	3
A.7 Programmer/Analyst	Level 3	1
I.1 Data Conversion Specialist	Level 3	2
B.1 Business Analyst	Level 2	1
B.1 Business Analyst	Level 3	1
B.9 Courseware Developer (Financial Systems)	Level 3	1
B.9 Courseware Developer	Level 2	1
B.9 Courseware Developer (uPerform)	Level 3	1
P.1 Change Management Consultant	Level 3	1
P.2 Enterprise Architect	Level 3	1
P.7 Project Coordinator	Level 2	1
P.7 Project Coordinator	Level 3	1
P.9 Project Manager	Level 2	1
P.9 Project Manager	Level 3	2
P.11 Quality Assurance Specialist/Analyst	Level 3	1

P.12 Risk Management Specialist	Level 3	1
A.11 Tester	Level 2	1
A.11 Tester	Level 3	1
B.14 Technical Writer	Level 2	1
B.14 Technical Writer	Level 3	1

- (i) This bid solicitation allows bidders to use the epost Connect service provided by Canada Post Corporation for bid submission. Bidders must refer to Part 2 of the bid solicitation entitled Instructions to bidders for further information.

### 1.3 Debriefings

Bidders may request a debriefing on the results of the bid solicitation process. Bidders should make the request to the Contracting Authority within 15 working days from receipt of the results of the bid solicitation process. The debriefing may be provided in writing, by telephone or in person.

## PART 2 - BIDDER INSTRUCTIONS

### 2.1 Standard Instructions, Clauses and Conditions

- (a) All instructions, clauses and conditions identified in the bid solicitation by number, date and title are set out in the *Standard Acquisition Clauses and Conditions Manual* (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.
- (b) Bidders who submit a bid agree to be bound by the instructions, clauses and conditions of the bid solicitation and accept the clauses and conditions of the resulting contract(s).
- (c) The 2003 (2017-04-27) Standard Instructions - Goods or Services - Competitive Requirements are incorporated by reference into and form part of the bid solicitation. If there is a conflict between the provisions of 2003 and this document, this document prevails.
- (d) The 2003 Standard Instructions is amended as follows:

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

  - a. at the time of submitting an arrangement under the Request for Supply Arrangement (RFSA), the Bidder has already provided a list of names, as requested under the *Ineligibility and Suspension Policy*. During this procurement process, the Bidder must immediately inform Canada in writing of any changes affecting the list of names.
- (e) Section 5, entitled Submission of bids, is amended as follows:
- (f) Subsection 1 is deleted entirely and replaced with the following: Canada requires that each bid, at solicitation closing date and time or upon request from the Contracting Authority, for example in the case of epost Connect service, be signed by the Bidder or by an authorized representative of the Bidder. If a bid is submitted by a joint venture, it must be in accordance with the section entitled Joint venture.
- (g) Subsection 2.d is deleted entirely and replaced with the following: send its bid only to the specified Bid Receiving Unit of Public Works and Government Services Canada (PWGSC) identified in the bid solicitation, or to the address specified in the bid solicitation, as applicable;
- (h) Subsection 2.e is deleted entirely and replaced with the following: ensure that the Bidder's name, return address and procurement business number, bid solicitation number, and solicitation closing date and time are clearly visible on the bid; and,
- (i) Subsection 4 is amended as follows:
  - (i) Delete: 60 days
  - (ii) Insert: 180 days
- (j) Section 6, entitled Late bids, is deleted entirely and replaced with the following: PWGSC will return bids delivered after the stipulated solicitation closing date and time, unless they qualify as a delayed bid as described in the section entitled Delayed bids. For bids submitted using means other than the Canada Post Corporation's epost Connect service, the bid will be returned. For bids submitted using Canada Post Corporation's epost Connect service, conversations initiated by the Bid Receiving Unit via the epost Connect service that contain access, records and information pertaining to a late bid will be deleted.

- (k) Section 07, entitled Delayed bids, is amended as follows:
- Subsection 1 is amended to add the following piece of evidence: "d. a CPC epost Connect service date and time record indicated in the epost Connect conversation activity."
- (l) Section 8, entitled Transmission by facsimile, is deleted and replaced by the following:  
Transmission by facsimile or by epost Connect
1. Facsimile
    - a. Unless specified otherwise in the bid solicitation, bids may be submitted by facsimile. The only acceptable facsimile number for responses to bid solicitations issued by PWGSC headquarters is 819-997-9776 or, if applicable, the facsimile number identified in the bid solicitation. The facsimile number for responses to bid solicitations issued by PWGSC regional offices is identified in the bid solicitation.
    - b. For bids transmitted by facsimile, Canada will not be responsible for any failure attributable to the transmission or receipt of the faxed bid including, but not limited to, the following:
      - i. receipt of garbled or incomplete bid;
      - ii. availability or condition of the receiving facsimile equipment;
      - iii. incompatibility between the sending and receiving equipment;
      - iv. delay in transmission or receipt of the bid;
      - v. failure of the Bidder to properly identify the bid;
      - vi. illegibility of the bid; or
      - vii. security of bid data.
    - c. A bid transmitted by facsimile constitutes the formal bid of the Bidder and must be submitted in accordance with the section entitled Submission of bids.
  2. ePost Connect
    - a. Unless specified otherwise in the bid solicitation, bids may be submitted by using the epost Connect service provided by Canada Post Corporation ([https://www.canadapost.ca/web/en/products/details.page?article=epost\\_connect\\_send\\_a](https://www.canadapost.ca/web/en/products/details.page?article=epost_connect_send_a)).
    - b. To submit a bid using epost Connect service, the Bidder must either:
      - i. send directly its bid only to the specified PWGSC Bid Receiving Unit, using its own licensing agreement for epost Connect provided by Canada Post Corporation; or
      - ii. send as early as possible, and in any case, at least six business days prior to the solicitation closing date and time, an email that includes the bid solicitation number to the specified PWGSC Bid Receiving Unit requesting to open an epost Connect conversation. Requests to open an epost Connect conversation received after that time may not be answered.
    - c. If the Bidder is sending an email to the Bid Receiving Unit, the Bid Receiving Unit will then initiate an epost Connect conversation which will allow the Bidder to transmit its bid afterward at any time prior to the solicitation closing date and time. The epost Connect conversation will create an email notification from Canada Post Corporation prompting the Bidder to access the message within the conversation, and the Bidder can reply to the email notification by transmitting its bid.
    - d. If the Bidder is using its own licensing agreement to send its bid, the Bidder must keep the epost Connect conversation open until at least 30 business days after solicitation closing date and time.
    - e. The email address of PWGSC Bid Receiving Unit in Headquarters is: [TPSGC.DGAreceptiondessoumissions-ABBidReceiving.PWGSC@tpsgc-pwgsc.gc.ca](mailto:TPSGC.DGAreceptiondessoumissions-ABBidReceiving.PWGSC@tpsgc-pwgsc.gc.ca). The solicitation number must be identified in the epost Connect message field of all electronic transfers.
    - f. It should be noted that the use of epost Connect service requires a Canadian mailing address. Should a bidder not have a Canadian address, they may use the Bid Receiving Unit address specified on page 1 of the solicitation in order to register for the epost Connect service.

- g. For bids transmitted by epost Connect service, Canada will not be responsible for any failure attributable to the transmission or receipt of the bid including, but not limited to, the following:
- i. receipt of a garbled or incomplete bid;
  - ii. availability or condition of the epost Connect service;
  - iii. incompatibility between the sending and receiving equipment;
  - iv. delay in transmission or receipt of the bid;
  - v. failure of the Bidder to properly identify the bid;
  - vi. illegibility of the bid;
  - vii. security of bid data; or
  - viii. inability to create an electronic conversation through the epost Connect service.
- h. A bid transmitted by epost Connect service constitutes the formal bid of the Bidder and must be submitted in accordance with the section entitled Submission of bids.

## 2.2 Submission of Bids

- (a) Bids must be submitted only to the Public Works and Government Services Canada (PWGSC) Bid Receiving Unit by the date, time and at the PWGSC address indicated on page one of the bid solicitation or through ePost Connect if the Bidder wishes to use this service.
- (b) Due to the nature of the bid solicitation, bids transmitted by facsimile or electronic mail to PWGSC will not be accepted.

## 2.3 Enquiries - Bid Solicitation

- (a) All enquiries must be submitted in writing to the Contracting Authority no later than 5 calendar days before the bid closing date. Enquiries received after that time may not be answered.
- (b) Bidders should reference as accurately as possible the numbered item of the bid solicitation to which the enquiry relates. Care should be taken by Bidders to explain each question in sufficient detail in order to enable Canada to provide an accurate answer. Technical enquiries that are of a proprietary nature must be clearly marked "proprietary" at each relevant item. Items identified as "proprietary" will be treated as such except where Canada determines that the enquiry is not of a proprietary nature. Canada may edit the question(s) or may request that the Bidder do so, so that the proprietary nature of the question(s) is eliminated, and the enquiry can be answered with copies to all Bidders. Enquiries not submitted in a form that can be distributed to all Bidders may not be answered by Canada.

## 2.4 Former Public Servant

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

### (b) Definitions

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

- (i). an individual;

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

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

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

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

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

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

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

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

(d) **Work Force Adjustment Directive**

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

If so, the Bidder must provide the following information:

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



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

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

## 2.5 Applicable Laws

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

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

## 2.6 Improvement of Requirement During Solicitation Period

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

## 2.7 Volumetric Data

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

**PART 3 - BID PREPARATION INSTRUCTIONS****3.1 Bid Preparation Instructions**

- (a) If the Bidder chooses to submit its bid electronically, Canada requests that the Bidder submits its bid in accordance with section 8 of the 2003 standard instructions and as amended in Part 2 - Bidder Instructions, Article 2.1 Standard Instructions, Clauses and Conditions. Bidders are required to provide their bid in a single transmission. The epost Connect service has the capacity to receive multiple documents, up to 1GB per individual attachment.

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

Section I: Technical Bid

Section II: Financial Bid

Section III: Certifications

If the Bidder is simultaneously providing a hard copy of the bid using another acceptable delivery method, and if there is a discrepancy between the wording of the soft copy and the hard copy, the wording of the soft copy will have priority over the wording of the hard copy.

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

Section I: Technical Bid (4 hard copies per Workstream)

Section II: Financial Bid (2 hard copies)

Section III: Certifications (1 hard copy)

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

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

- (i) A Bidder, including related entities, will be permitted to submit only one bid in response to this bid solicitation. If a Bidder or any related entities participate in more than one bid (participating means being part of the Bidder, not being a subcontractor), Canada will provide those Bidders with 2 working days to identify the single bid to be considered by Canada. Failure to meet this deadline will result in all the affected bids being disqualified.
- (ii) For the purposes of this Article, regardless of the jurisdiction where any of the entities concerned is incorporated or otherwise formed as a matter of law (whether that entity is a natural person, corporation, partnership, etc), an entity will be considered to be "**related**" to a Bidder if:
- (A) they are the same legal entity (i.e., the same natural person, corporation, partnership, limited liability partnership, etc.);
  - (B) they are "related persons" or "affiliated persons" according to the Canada Income Tax Act;
  - (C) the entities have now or in the two years before bid closing had a fiduciary relationship with one another (either as a result of an agency arrangement or any other form of fiduciary relationship); or
  - (D) the entities otherwise do not deal with one another at arm's length, or each of them does not deal at arm's length with the same third party.

- (iii) Individual members of a joint venture cannot participate in another bid, either by submitting a bid alone or by participating in another joint venture. .

(d) **Joint Venture Experience:**

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

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

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

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

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

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

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

That show in total 100 billable days.

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

### 3.2 Section I: Technical Bid

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

- (i) **Bid Submission Form:** Bidders are requested to include the Bid Submission Form - Attachment "1" with their bids. It provides a common form in which bidders can provide information required for evaluation and contract award, such as a contact name and the Bidder's Procurement Business Number, etc. Using the form to provide this information is not mandatory, but it is recommended. If Canada determines that the information required by the Bid Submission Form is incomplete or requires correction, Canada will provide the Bidder with an opportunity to do so.

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

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

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

- (iii) **Substantiation of Technical Compliance:** The technical bid must substantiate the compliance with the specific articles of Attachment "2", which is the requested format for providing the substantiation. The substantiation must not simply be a repetition of the requirements, but must explain and demonstrate how the Bidder will meet the requirements and carry out the required Work. Simply stating that the Bidder or its proposed solution or resources comply is not sufficient. Where Canada determines that the substantiation is not complete, the Bidder will be considered non-responsive and disqualified. The substantiation may refer to additional documentation submitted with the bid - this information can be referenced in the "Bidder's Response" column of Attachment "2", where Bidders are requested to indicate where in the bid the reference material can be found, including the title of the document, and the page and paragraph numbers; where the reference is not sufficiently precise, Canada may request that the Bidder direct Canada to the appropriate location in the documentation.

- (iv) **Customer Reference Contact Information:**

- (A) In conducting its evaluation of the bids, Canada may, but will have no obligation to request that a bidder provide customer references. If Canada sends such a written request, the bidder will have 2 working days to provide the necessary information to Canada. Failure to meet this deadline will result in the bid being declared non-responsive. These customer references must each confirm if requested by PWGSC, the facts identified in the Bidder's bid, as required by Attachment 2.
- (B) The form of question to be used to request confirmation from customer references is as follows:
- "Has the Bidder provided your organization with [describe the services and, if applicable, describe any required time frame within which those services must have been provided]?"*

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

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

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

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

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

### 3.3 Section II: Financial Bid

- (a) **Pricing:** Bidders must submit their financial bid in accordance with the Pricing Schedule provided in Attachment 3. The total amount of Applicable Taxes must be shown separately, if applicable. Unless otherwise indicated, bidders must include a single, firm, all-inclusive per diem rate quoted in Canadian dollars in each cell requiring an entry in the pricing tables.
- (b) **All Costs to be Included:** The financial bid must include all costs for the requirement described in the bid solicitation for the entire Contract Period, including any option periods. The identification of all necessary equipment, software, peripherals, cabling and components required to meet the requirements of the bid solicitation and the associated costs of these items is the sole responsibility of the Bidder.
- (c) **Blank Prices:** Bidders are requested to insert "\$0.00" for any item for which it does not intend to charge or for items that are already included in other prices set out in the tables. If the Bidder leaves any price blank, Canada will treat the price as "\$0.00" for evaluation purposes and may request that the Bidder confirm that the price is, in fact, \$0.00. No bidder will be permitted to add or change a price as part of this confirmation. Any bidder who does not confirm that the price for a blank item is \$0.00 will be declared non-responsive.
- (d) **Electronic Payment of Invoices – Bid:** If you are willing to accept payment of invoices by Electronic Payment Instruments, complete Attachment 4 - Electronic Payment Instruments, to identify which ones are accepted. If Attachment 4 - Electronic Payment Instruments is not completed, it will be considered as if Electronic Payment Instruments are not being accepted for payment of invoices. Acceptance of Electronic Payment Instruments will not be considered as an evaluation criterion.

### 3.4 Section III: Certifications

It is a requirement that bidders submit the certifications and additional information identified under Part 5.

## PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

### 4.1 Evaluation Procedures

- (a) Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria. There are several steps in the evaluation process, which are described below. Even though the evaluation and selection will be conducted in steps, the fact that Canada has proceeded to a later step does not mean that Canada has conclusively determined that the Bidder has successfully passed all the previous steps. Canada may conduct steps of the evaluation in parallel.
- (b) An evaluation team composed of representatives of the Client and PWGSC will evaluate the bids on behalf of Canada. Canada may hire any independent consultant, or use any Government resources, to evaluate any bid. Not all members of the evaluation team will necessarily participate in all aspects of the evaluation.
- (c) In addition to any other time periods established in the bid solicitation:
  - (i) **Requests for Clarifications:** If Canada seeks clarification or verification from the Bidder about its bid, the Bidder will have 2 working days (or a longer period if specified in writing by the Contracting Authority) to provide the necessary information to Canada. Failure to meet this deadline will result in the bid being declared non-responsive.
  - (ii) **Requests for Further Information:** If Canada requires additional information in order to do any of the following pursuant to the Section entitled "Conduct of Evaluation" in 2003, Standard Instructions - Goods or Services - Competitive Requirements:
    - (A) verify any or all information provided by the Bidder in its bid; or
    - (B) contact any or all references supplied by the Bidder (e.g., references named in the résumés of individual resources) to verify and validate any information submitted by the Bidder,the Bidder must provide the information requested by Canada within 2 working days of a request by the Contracting Authority.
  - (iii) **Extension of Time:** If additional time is required by the Bidder, the Contracting Authority may grant an extension in his or her sole discretion.

### 4.2 Technical Evaluation

A separate technical evaluation will be conducted for each Workstream.

- (a) **Mandatory Technical Criteria:**
  - (i) Each bid will be reviewed for compliance with the mandatory requirements of the bid solicitation. Any element of the bid solicitation that is identified specifically with the words "must" or "mandatory" is a mandatory requirement. Bids that do not comply with each and every mandatory requirement will be declared non-responsive and be disqualified.
  - (ii) The mandatory technical criteria are described in Attachment 2.
- (b) **Point-Rated Technical Criteria:**
  - (i) Each bid will be rated by assigning a score to the rated requirements, which are identified in the bid solicitation by the word "rated" or by reference to a score. Bidders who fail to submit complete bids with all the information requested by this bid solicitation will be rated accordingly.
  - (ii) The rated requirements are described in Attachment 2.
- (c) **Number of Resources Evaluated:**

Resources will only be assessed after contract award once specific tasks are requested of the Contractor. After contract award, the Task Authorization process will be in accordance with Part

7 – Resulting Contract Clauses, the Article titled "Task Authorization". When a Task Authorization Form (TA Form) is issued, the Contractor will be requested to propose a resource to satisfy the specific requirement based on the TA Form's Statement of Work. The proposed resource will then be assessed against the criteria identified in the Contract's Statement of Work in accordance with Appendix C of Annex A.

(d) **Reference Checks:**

- (i) Whether or not to conduct reference checks is discretionary. However, if PWGSC chooses to conduct reference checks for any given rated or mandatory requirement, it will check the references for that requirement for all bidders who have not, at that point, been found non-responsive.
- (ii) For reference checks, Canada will conduct the reference check in writing by email. Canada will send all email reference check requests to contacts supplied by all the Bidders within a 48-hour period using the email address provided in the bid. Canada will not award any points and/or a bidder will not meet the mandatory experience requirement (as applicable) unless the response is received within 5 working days of the date that Canada's email was sent.
- (iii) On the third working day after sending out the reference check request, if Canada has not received a response, Canada will notify the Bidder by email, to allow the Bidder to contact its reference directly to ensure that it responds to Canada within 5 working days. If the individual named by a Bidder is unavailable when required during the evaluation period, the Bidder may provide the name and email address of an alternate contact person from the same customer. Bidders will only be provided with this opportunity once for each customer, and only if the originally named individual is unavailable to respond (i.e., the Bidder will not be provided with an opportunity to submit the name of an alternate contact person if the original contact person indicates that he or she is unwilling or unable to respond). The Bidder will have 1 working day to submit the name of a new contact. That contact will again be given 5 working days to respond once Canada sends its reference check request.
- (iv) Wherever information provided by a reference differs from the information supplied by the Bidder, the information supplied by the reference will be the information evaluated.
- (v) Points will not be allocated and/or a bidder will not meet the mandatory experience requirement (as applicable) if (1) the reference customer states he or she is unable or unwilling to provide the information requested, or (2) the customer reference is not a customer of the Bidder itself (for example, the customer cannot be the customer of an affiliate of the Bidder instead of being a customer of the Bidder itself). Nor will points be allocated or a mandatory met if the customer is itself an affiliate or other entity that does not deal at arm's length with the Bidder.

**4.3 Financial Evaluation**

- (a) The financial evaluation will be conducted using the firm per diem rates provided by the responsive bid(s). A separate financial evaluation will be conducted for each Workstream.
- (b) There are two possible financial evaluation methods for this requirement. The first method will be used if three or more bids are determined responsive (see (c) Financial Evaluation - Method A below). The second method will be used if fewer than three bids are determined responsive (see (d) Financial Evaluation - Method B below).
- (c) **Financial Evaluation - Method A:** The following financial evaluation method will be used if three or more bids are determined responsive:
  - (i) **STEP 1 - ESTABLISHING THE LOWER AND UPPER MEDIAN BAND LIMITS FOR EACH PERIOD AND EACH RESOURCE CATEGORY:** The Contracting Authority will establish, for each period and each Resource Category of each Workstream, the median band limits based on the firm per diem rates provided by the technically responsive bids.

For each such Resource Category the median will be calculated using the median function in Microsoft Excel and will represent a range that encompasses any rate to a value of minus (-) 20% of the median, and an upper median rate to a value of plus (+) 30% of the median. When an even number of technically responsive bids have been determined, an average of the middle two rates will be used to calculate the median band limits and for an odd number of technically responsive bids, the middle rate will be used.

- (ii) **STEP 2 - POINTS ALLOCATION:** For each period and each Resource Category of each Workstream points will be allocated as follows:

- (A) A Bidder's proposed firm per diem rate that is either lower than the established lower median band limit or higher than the established upper median band limit for that period and Resource Category will be allocated 0 points.
- (B) A Bidder's proposed firm per diem rate falling within the upper and lower median band limits, for that period and Resource Category, will be allocated points using the following calculation, which will be rounded to two decimal places:
- $$\frac{\text{Lowest proposed firm per diem rate within the median band limits}}{\text{Bidder's proposed firm per diem rate within the median band limits}} \times \text{Maximum Points Assigned at Table 1 below}$$
- (C) A Bidder's proposed firm per diem rate falling within the established median band limits which is the lowest proposed firm per diem rate will be allocated the applicable maximum points assigned at Table 1 below.

<b>TABLE 1 - MAXIMUM POINTS ASSIGNED WORKSTREAM 1</b>				
<b>RESOURCE CATEGORIES</b>	<b>INITIAL CONTRACT PERIOD</b>	<b>OPTION PERIOD 1</b>	<b>OPTION PERIOD 2</b>	<b>TOTAL POINTS</b>
A.1 Application/Software Architect – Level 3	50	50	50	150
A.4 ERP System Analyst – Level 2	50	50	50	150
A.4 ERP System Analyst – Level 3	100	100	100	300
A.5 ERP Technical Analyst – Level 2	50	50	50	150
A.5 ERP Technical Analyst – Level 3	100	100	100	300
A.7 Programmer/Analyst – Level 2	50	50	50	150
A.7 Programmer/Analyst – Level 3	50	50	50	150
A.11 Tester – Level 2	50	50	50	150
A.11 Tester – Level 3	50	50	50	150
I.1 Data Conversion Specialist – Level 2	50	50	50	150
I.1 Data Conversion Specialist – Level 3	50	50	50	150
P.2 Enterprise Architect – Level 3	50	50	50	150
<b>TOTAL</b>	<b>700</b>	<b>700</b>	<b>700</b>	<b>2100</b>



**TABLE 1 - MAXIMUM POINTS ASSIGNED  
WORKSTREAM 2**

RESOURCE CATEGORIES	INITIAL CONTRACT PERIOD	OPTION PERIOD 1	OPTION PERIOD 2	TOTAL POINTS
A.2 ERP Functional Analyst - Level 2	50	50	50	150
A.2 ERP Functional Analyst -Level 3	100	100	100	300
B.1 Business Analyst - Level 2	50	50	50	150
B.1 Business Analyst - Level 3	50	50	50	150
B.2 Business Architect - Level 3	50	50	50	150
B.5 BPR Consultant - Level 3	50	50	50	150
B.6 Business System Analyst - Level 2	50	50	50	150
B.6 Business System Analyst - Level 3	50	50	50	150
B.7 Bus Transformation Architect - Level 3	100	100	100	300
B.9 Courseware Developer - Level 2	50	50	50	150
B.9 Courseware Developer - Level 3	100	100	100	300
B.10 Help Desk Specialist - Level 2	50	50	50	150
B.10 Help Desk Specialist - Level 3	50	50	50	150
B.14 Technical Writer - Level 2	50	50	50	150
P.1 Change Management Consultant - Level 3	50	50	50	150
P.7 Project Coordinator - Level 2	100	100	100	300
P.7 Project Coordinator - Level 3	50	50	50	150
P.9 Project Manager - Level 2	100	100	100	300
P.9 Project Manager - Level 3	100	100	100	300
P.11 QA Specialist/Analyst - Level 2	50	50	50	150
P.11 QA Specialist/Analyst - Level 3	50	50	50	150
P.12 Risk Management Specialist - Level 3	50	50	50	150
<b>TOTAL</b>	<b>1400</b>	<b>1400</b>	<b>1400</b>	<b>4200</b>

**TABLE 1 - MAXIMUM POINTS ASSIGNED  
WORKSTREAM 3**

RESOURCE CATEGORIES	INITIAL CONTRACT PERIOD	OPTION PERIOD 1	OPTION PERIOD 2	TOTAL POINTS
A.1 Application/Software Architect - Level 3	100	100	100	300
A.7 Programmer/Analyst - Level 2	100	100	100	300
A.7 Programmer/Analyst - Level 3	100	100	100	300
A.8 System Analyst - Level 2	50	50	50	150
A.8 System Analyst - Level 3	100	100	100	300
A.11 Tester - Level 2	50	50	50	150
A.11 Tester - Level 3	100	100	100	300
A.15 Web Graphics Designer - Level 2	50	50	50	150
A.15 Web Graphics Designer - Level 3	50	50	50	150
I.1 Data Conversion Specialist - Level 2	50	50	50	150
I.1 Data Conversion Specialist - Level 3	100	100	100	300
B.1 Business Analyst - Level 2	100	100	100	300
B.1 Business Analyst - Level 3	100	100	100	300
B.2 Business Architect - Level 3	100	100	100	300
B.7 Bus Transformation Architect - Level 3	100	100	100	300
B.9 Courseware Developer - Level 2	50	50	50	150
B.9 Courseware Developer - Level 3	50	50	50	150

**TABLE 1 - MAXIMUM POINTS ASSIGNED  
WORKSTREAM 3**

RESOURCE CATEGORIES	INITIAL CONTRACT PERIOD	OPTION PERIOD 1	OPTION PERIOD 2	TOTAL POINTS
P.1 Change Management Consultant - Level 3	100	100	100	300
P.2 Enterprise Architect - Level 3	100	100	100	300
P.9 Project Manager - Level 2	50	50	50	150
P.9 Project Manager - Level 3	100	100	100	300
<b>TOTAL</b>	<b>1700</b>	<b>1700</b>	<b>1700</b>	<b>5100</b>

**TABLE 1 - MAXIMUM POINTS ASSIGNED  
WORKSTREAM 4**

RESOURCE CATEGORIES	INITIAL CONTRACT PERIOD	OPTION PERIOD 1	OPTION PERIOD 2	TOTAL POINTS
A.1 Application/Software Architect - Level 3	50	50	50	150
A.7 Programmer/Analyst - Level 2	50	50	50	150
A.7 Programmer/Analyst Level 3	50	50	50	150
A.8 System Analyst - Level 2	50	50	50	150
A.8 System Analyst - Level 3	50	50	50	150
A.11 Tester - Level 2	50	50	50	150
A.11 Tester - Level 3	50	50	50	150
I.5 IM Architect - Level 3	50	50	50	150
I.1 Data Conversion Specialist - Level 2	50	50	50	150
I.1 Data Conversion Specialist - Level 3	50	50	50	150
B.1 Business Analyst - Level 2	50	50	50	150
B.1 Business Analyst - Level 3	100	100	100	300
B.5 BPR Consultant - Level 3	50	50	50	150
B.7 Bus Transformation Architect - Level 3	50	50	50	150
B.9 Courseware Developer - Level 2	50	50	50	150
B.9 Courseware Developer - Level 3	50	50	50	150
B.14 Technical Writer Level - 2	50	50	50	150
B.14 Technical Writer Level - 3	50	50	50	150
P.1 Change Management Consultant - Level 3	50	50	50	150
P.2 Enterprise Architect Level - 3	50	50	50	150
P.7 Project Coordinator Level - 2	50	50	50	150
P.7 Project Coordinator Level - 3	50	50	50	150
P.9 Project Manager Level - 2	50	50	50	150
P.9 Project Manager Level - 3	100	100	100	300
P.11 QA Specialist/Analyst - Level 2	50	50	50	150
P.11 QA Specialist/Analyst - Level 3	50	50	50	150
P.12 Risk Management Specialist -Level 3	50	50	50	150
<b>TOTAL</b>	<b>1450</b>	<b>1450</b>	<b>1450</b>	<b>4350</b>

**TABLE 1 - MAXIMUM POINTS ASSIGNED  
WORKSTREAM 5**

RESOURCE CATEGORIES	INITIAL CONTRACT PERIOD	OPTION PERIOD 1	OPTION PERIOD 2	TOTAL POINTS
A.1 Application/Software Architect - Level 3	50	50	50	150
A.2 ERP Functional Analyst - Level 2	50	50	50	150
A.2 ERP Functional Analyst - Level 3	100	100	100	300
A.4 ERP System Analyst - Level 2	50	50	50	150
A.4 ERP System Analyst -Level 3	50	50	50	150
A.5 ERP Technical Analyst - Level 3	100	100	100	300
A.7 Programmer/Analyst - Level 3	50	50	50	150
I.1 Data Conversion Specialist - Level 3	100	100	100	300
B.1 Business Analyst - Level 2	50	50	50	150
B.1 Business Analyst - Level 3	100	100	100	300
B.9 Courseware Developer - Level 3 (Financial Systems)	100	100	100	300
B.9 Courseware Developer - Level 2	50	50	50	150
B.9 Courseware Developer - Level 3 (uPerform)	100	100	100	300
P.1 Change Management Consultant - Level 3	50	50	50	150
P.2 Enterprise Architect - Level 3	100	100	100	300
P.7 Project Coordinator - Level 2	50	50	50	150
P.7 Project Coordinator - Level 3	50	50	50	150
P.9 Project Manager - Level 2	50	50	50	150
P.9 Project Manager - Level 3	100	100	100	300
P.11 QA Specialist/Analyst - Level 3	50	50	50	150
P.12 Risk Management Specialist - Level 3	100	100	100	300
A.11 Tester - Level 2	50	50	50	150
A.11 Tester - Level 3	100	100	100	300
B.14 Technical Writer - Level 2	50	50	50	150
B.14 Technical Writer - Level 3	50	50	50	150
<b>TOTAL</b>	<b>1750</b>	<b>1750</b>	<b>1750</b>	<b>5250</b>

- (iii) **STEP 3 - FINANCIAL SCORE:** Points allocated under STEP 2 for each period and Resource Category of each Workstream will be added together and rounded to two decimal places to produce the Financial Score. Bidders will find below an example of a financial evaluation using Method A.

- (iv) **EXAMPLE OF A FINANCIAL EVALUATION USING METHOD A**

TABLE 2 - EXAMPLE OF A FINANCIAL EVALUATION USING METHOD A:							
Resource Category	Max. Points	Bidder 1		Bidder 2		Bidder 3	
		Year 1	Year 2	Year 1	Year 2	Year 1	Year 2
Programmer	150 (75 pts. per year)	\$400.00	\$400.00	\$420.00	\$450.00	\$450.00	\$450.00
Business Analyst	100 (50 pts. per year)	\$600.00	\$600.00	\$600.00	\$620.00	\$650.00	\$820.00
Project Manager	50 (25 pts. per year)	\$555.00	\$900.00	\$750.00	\$800.00	\$700.00	\$800.00
<b>TOTAL</b>	300						

STEP 1 - Establishing the lower and upper median band limits for each year and each resource category	
(Median 1)	For the Programmer Resource Category, the year 1 median would be \$420.00. The lower median band limit would be \$336.00 and higher median band limit would be \$546.00.
(Median 2)	For the Programmer Resource Category, the year 2 median would be \$450.00. The lower median band limit would be \$360.00 and higher median band limit would be \$585.00.
(Median 3)	For the Business Analyst Resource Category, the year 1 median would be \$600.00. The lower median band limit would be \$480.00 and higher median band limit would be \$780.00.
(Median 4)	For the Business Analyst Resource Category, the year 2 median would be \$620.00. The lower median band limit would be \$496.00 and higher median band limit would be \$806.00.
(Median 5)	For the Project Manager Resource Category, the year 1 median would be \$700.00. The lower median band limit would be \$560.00 and higher median band limit would be \$910.00.
(Median 6)	For the Project Manager Resource Category, the year 2 median would be \$800.00. The lower median band limit would be \$640.00 and higher median band limit would be \$1,040.00.
STEP 2 - Points Allocation:	
<b>Bidder 1:</b>	
Programmer Year 1 =	75 points (lowest rate within the lower and upper median band limits)
Programmer Year 2 =	75 points (lowest rate within the lower and upper median band limits)
Business Analyst Year 1 =	50 points (lowest rate within the lower and upper median band limits)
Business Analyst Year 2 =	50 points (lowest rate within the lower and upper median band limits)
Project Manager Year 1 =	0 points (outside the lower and higher median band limits)
Project Manager Year 2 =	22.22 points (based on the following calculation = (Lowest rate of \$800.00 / Bidder's proposed rate of \$900.00) Multiplied by 25 pts)
<b>Bidder 2:</b>	
Programmer Year 1 =	71.43 points (based on the following calculation = (Lowest rate of \$400.00 / Bidder's proposed rate of \$420.00) Multiplied by 75 pts)
Programmer Year 2 =	66.67 points (based on the following calculation = (Lowest rate of \$400.00 / Bidder's proposed rate of \$450.00) Multiplied by 75 pts)
Business Analyst Year 1 =	50 points (lowest price within the lower and upper median band limits)
Business Analyst Year 2 =	48.39 points (based on the following calculation = (Lowest rate of \$600.00 / Bidder's proposed rate of \$620.00) Multiplied by 50 pts)
Project Manager Year 1 =	23.33 points (based on the following calculation = (Lowest rate of \$700.00 / Bidder's proposed rate of \$750.00) Multiplied by 25 pts)
Project Manager Year 2 =	25 points (lowest price within the lower and upper median band limits)
<b>Bidder 3:</b>	
Programmer Year 1 =	66.67 points (based on the following calculation = (Lowest rate of \$400.00 / Bidder's proposed rate of \$450.00) Multiplied by 75 pts)
Programmer Year 2 =	66.67 points (based on the following calculation = (Lowest rate of \$400.00 / Bidder's proposed rate of \$450.00) Multiplied by 75 pts)
Business Analyst Year 1 =	46.15 points (based on the following calculation = (Lowest rate of \$600.00 / Bidder's proposed rate of \$650.00) Multiplied by 75 pts)
Business Analyst Year 2 =	0 points (outside the lower and higher median band limits)
Project Manager Year 1 =	25 points (lowest price within the lower and upper median band limits)
Project Manager Year 2 =	25 points (lowest price within the lower and upper median band limits)
STEP 3 - Financial Score:	
<b>Bidder 1:</b>	75 + 75 + 50 + 50 + 0 + 22.22 = Total Financial Score of 272.22 points out of a possible 300 points

<b>Bidder 2:</b>	$71.43 + 67.67 + 50 + 48.39 + 23.33 + 25 =$ Total Financial Score of 284.82 points out of a possible 300 points
<b>Bidder 3:</b>	$66.67 + 66.67 + 46.15 + 0 + 25 + 25 =$ Total Financial Score of 229.49 points out of a possible 300 points

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

- (i) **STEP 1 - AVERAGE COMPARISON:** If up to two contracts may be awarded per Workstream as a result of this bid solicitation, the following Step 1 will be part of the evaluation where there exist only two bids that are determined to be otherwise responsive. If there is only one bid, this step will not occur.

For each bid, the rates provided per Resource Category within a Workstream will be added together, and that total will be divided by the total number of Resource Categories, resulting in a Total Average Rate for each period. Once all the Total Average Rates are determined, Canada will determine the percentage difference between the two bids Total Average Rates (the Delta Percentage) for each given period using the following formula: Subtract the lower Total Average Rate from the higher Total Average Rate, then divide the result by the lower Total Average Rate (see example below).

**TABLE 3 - EXAMPLE OF THE AVERAGE COMPARISON IN METHOD B:**

<b>STEP 1</b>				
Resource Category	Bidder 1		Bidder 2	
	Year 1	Year 2	Year 1	Year 2
Programmer	\$800.00	\$800.00	\$850.00	\$900.00
Business Analyst	\$1,000.00	\$1,000.00	\$1,400.00	\$1,650.00
Project Manager	\$1,200.00	\$1,200.00	\$1,300.00	\$1,650.00
Total	\$3,000.00	\$3,000.00	\$3,550.00	\$4,200.00
Total Average Rate (Total divided by 3 Resource Categories)	\$1,000.00	\$1,000.00	\$1,183.33	\$1,400.00
lower	\$1,000.00	\$1,000.00		
higher			\$1,183.33	\$1,400.00
higher minus lower divided by lower equals a Delta Percentage			18.3%	40%
In the above example, Bidder 2 would be considered non-responsive because its bid contained a higher Total Average Rate that generated a Delta Percentage greater than 30%.				

- (ii) **STEP 2 - POINTS ALLOCATION:** For each period and each Resource Category of each Workstream points will be allocated as follows:

- (A) Points will be established based on the following calculation, with points rounded to two decimal places:

$$\frac{\text{Lowest proposed firm per diem rate}}{\text{Bidder's proposed firm per diem rate}} \times \text{Maximum Points Assigned at Table 4 below}$$

The Bidder with the lowest proposed firm per diem rate will be allocated the applicable maximum points assigned at Table 4 below.

**TABLE 4 - MAXIMUM POINTS ASSIGNED  
WORKSTREAM 1**

RESOURCE CATEGORIES	INITIAL CONTRACT PERIOD	OPTION PERIOD 1	OPTION PERIOD 2	TOTAL POINTS
A.1 Application/Software Architect – Level 3	50	50	50	150
A.4 ERP System Analyst – Level 2	50	50	50	150
A.4 ERP System Analyst – Level 3	100	100	100	300
A.5 ERP Technical Analyst – Level 2	50	50	50	150
A.5 ERP Technical Analyst – Level 3	100	100	100	300
A.7 Programmer/Analyst – Level 2	50	50	50	150
A.7 Programmer/Analyst – Level 3	50	50	50	150
A.11 Tester – Level 2	50	50	50	150
A.11 Tester – Level 3	50	50	50	150
I.1 Data Conversion Specialist – Level 2	50	50	50	150
I.1 Data Conversion Specialist – Level 3	50	50	50	150
P.2 Enterprise Architect – Level 3	50	50	50	150
<b>TOTAL</b>	<b>700</b>	<b>700</b>	<b>700</b>	<b>2100</b>

**TABLE 4 - MAXIMUM POINTS ASSIGNED  
WORKSTREAM 2**

RESOURCE CATEGORIES	INITIAL CONTRACT PERIOD	OPTION PERIOD 1	OPTION PERIOD 2	TOTAL POINTS
A.2 ERP Functional Analyst - Level 2	50	50	50	150
A.2 ERP Functional Analyst -Level 3	100	100	100	300
B.1 Business Analyst - Level 2	50	50	50	150
B.1 Business Analyst - Level 3	50	50	50	150
B.2 Business Architect - Level 3	50	50	50	150
B.5 BPR Consultant - Level 3	50	50	50	150
B.6 Business System Analyst - Level 2	50	50	50	150
B.6 Business System Analyst - Level 3	50	50	50	150
B.7 Bus Transformation Architect - Level 3	100	100	100	300
B.9 Courseware Developer - Level 2	50	50	50	150
B.9 Courseware Developer - Level 3	100	100	100	300
B.10 Help Desk Specialist - Level 2	50	50	50	150
B.10 Help Desk Specialist - Level 3	50	50	50	150
B.14 Technical Writer - Level 2	50	50	50	150
P.1 Change Management Consultant - Level 3	50	50	50	150
P.7 Project Coordinator - Level 2	100	100	100	300
P.7 Project Coordinator - Level 3	50	50	50	150
P.9 Project Manager - Level 2	100	100	100	300
P.9 Project Manager - Level 3	100	100	100	300
P.11 QA Specialist/Analyst - Level 2	50	50	50	150
P.11 QA Specialist/Analyst - Level 3	50	50	50	150
P.12 Risk Management Specialist - Level 3	50	50	50	150
<b>TOTAL</b>	<b>1400</b>	<b>1400</b>	<b>1400</b>	<b>4200</b>

**TABLE 4 - MAXIMUM POINTS ASSIGNED  
WORKSTREAM 3**

RESOURCE CATEGORIES	INITIAL CONTRACT PERIOD	OPTION PERIOD 1	OPTION PERIOD 2	TOTAL POINTS
A.1 Application/Software Architect - Level 3	100	100	100	300
A.7 Programmer/Analyst - Level 2	100	100	100	300
A.7 Programmer/Analyst - Level 3	100	100	100	300
A.8 System Analyst - Level 2	50	50	50	150
A.8 System Analyst - Level 3	100	100	100	300
A.11 Tester - Level 2	50	50	50	150
A.11 Tester - Level 3	100	100	100	300
A.15 Web Graphics Designer - Level 2	50	50	50	150
A.15 Web Graphics Designer - Level 3	50	50	50	150
I.1 Data Conversion Specialist - Level 2	50	50	50	150
I.1 Data Conversion Specialist - Level 3	100	100	100	300
B.1 Business Analyst - Level 2	100	100	100	300
B.1 Business Analyst - Level 3	100	100	100	300
B.2 Business Architect - Level 3	100	100	100	300
B.7 Bus Transformation Architect - Level 3	100	100	100	300
B.9 Courseware Developer - Level 2	50	50	50	150
B.9 Courseware Developer - Level 3	50	50	50	150
P.1 Change Management Consultant - Level 3	100	100	100	300
P.2 Enterprise Architect - Level 3	100	100	100	300
P.9 Project Manager - Level 2	50	50	50	150
P.9 Project Manager - Level 3	100	100	100	300
<b>TOTAL</b>	<b>1700</b>	<b>1700</b>	<b>1700</b>	<b>5100</b>

**TABLE 4 - MAXIMUM POINTS ASSIGNED  
WORKSTREAM 4**

RESOURCE CATEGORIES	INITIAL CONTRACT PERIOD	OPTION PERIOD 1	OPTION PERIOD 2	TOTAL POINTS
A.1 Application/Software Architect - Level 3	50	50	50	150
A.7 Programmer/Analyst - Level 2	50	50	50	150
A.7 Programmer/Analyst Level 3	50	50	50	150
A.8 System Analyst - Level 2	50	50	50	150
A.8 System Analyst - Level 3	50	50	50	150
A.11 Tester - Level 2	50	50	50	150
A.11 Tester - Level 3	50	50	50	150
I.5 IM Architect - Level 3	50	50	50	150
I.1 Data Conversion Specialist - Level 2	50	50	50	150
I.1 Data Conversion Specialist - Level 3	50	50	50	150
B.1 Business Analyst - Level 2	50	50	50	150
B.1 Business Analyst - Level 3	100	100	100	300
B.5 BPR Consultant - Level 3	50	50	50	150
B.7 Bus Transformation Architect - Level 3	50	50	50	150
B.9 Courseware Developer - Level 2	50	50	50	150
B.9 Courseware Developer - Level 3	50	50	50	150
B.14 Technical Writer Level - 2	50	50	50	150
B.14 Technical Writer Level - 3	50	50	50	150

**TABLE 4 - MAXIMUM POINTS ASSIGNED  
WORKSTREAM 4**

RESOURCE CATEGORIES	INITIAL CONTRACT PERIOD	OPTION PERIOD 1	OPTION PERIOD 2	TOTAL POINTS
P.1 Change Management Consultant - Level 3	50	50	50	150
P.2 Enterprise Architect Level - 3	50	50	50	150
P.7 Project Coordinator Level - 2	50	50	50	150
P.7 Project Coordinator Level - 3	50	50	50	150
P.9 Project Manager Level - 2	50	50	50	150
P.9 Project Manager Level - 3	100	100	100	300
P.11 QA Specialist/Analyst - Level 2	50	50	50	150
P.11 QA Specialist/Analyst - Level 3	50	50	50	150
P.12 Risk Management Specialist -Level 3	50	50	50	150
<b>TOTAL</b>	<b>1450</b>	<b>1450</b>	<b>1450</b>	<b>4350</b>

**TABLE 4 - MAXIMUM POINTS ASSIGNED  
WORKSTREAM 5**

RESOURCE CATEGORIES	INITIAL CONTRACT PERIOD	OPTION PERIOD 1	OPTION PERIOD 2	TOTAL POINTS
A.1 Application/Software Architect - Level 3	50	50	50	150
A.2 ERP Functional Analyst - Level 2	50	50	50	150
A.2 ERP Functional Analyst - Level 3	100	100	100	300
A.4 ERP System Analyst - Level 2	50	50	50	150
A.4 ERP System Analyst -Level 3	50	50	50	150
A.5 ERP Technical Analyst - Level 3	100	100	100	300
A.7 Programmer/Analyst - Level 3	50	50	50	150
I.1 Data Conversion Specialist - Level 3	100	100	100	300
B.1 Business Analyst - Level 2	50	50	50	150
B.1 Business Analyst - Level 3	100	100	100	300
B.9 Courseware Developer - Level 3 (Financial Systems)	100	100	100	300
B.9 Courseware Developer - Level 2	50	50	50	150
B.9 Courseware Developer - Level 3 (uPerform)	100	100	100	300
P.1 Change Management Consultant - Level 3	50	50	50	150
P.2 Enterprise Architect - Level 3	100	100	100	300
P.7 Project Coordinator - Level 2	50	50	50	150
P.7 Project Coordinator - Level 3	50	50	50	150
P.9 Project Manager - Level 2	50	50	50	150
P.9 Project Manager - Level 3	100	100	100	300
P.11 QA Specialist/Analyst - Level 3	50	50	50	150
P.12 Risk Management Specialist - Level 3	100	100	100	300
A.11 Tester - Level 2	50	50	50	150
A.11 Tester - Level 3	100	100	100	300
B.14 Technical Writer - Level 2	50	50	50	150
B.14 Technical Writer - Level 3	50	50	50	150
<b>TOTAL</b>	<b>1750</b>	<b>1750</b>	<b>1750</b>	<b>5250</b>



- (iii) **STEP 3 - FINANCIAL SCORE:** Points allocated under STEP 2, for each period and each Resource Category, will be added together and rounded to two decimal places to produce the Financial Score.

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

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

- (i) an invoice (referencing a contract serial number or other unique contract identifier) that shows that the Bidder has provided and invoiced a customer (with whom the Bidder deals at arm's length) for services performed for that customer similar to the services that would be provided in the relevant resource category, where those services were provided for at least three months within the eighteen months before the bid solicitation closing date, and the fees charged were equal to or less than the rate offered to Canada;
- (ii) in relation to the invoice in (i), evidence from the Bidder's customer that the services identified in the invoice include at least 50% of the tasks listed in the Statement of Work for the category of resource being assessed for an unreasonably low rate. This evidence must consist of either a copy of the contract (which must describe the services to be provided and demonstrate that at least 50% of the tasks to be performed are the same as those to be performed under the Statement of Work in this bid solicitation) or the customer's signed certification that the services subject to the charges in the invoice included at least 50% of the same tasks to be performed under the Statement of Work in this bid solicitation; and
- (iii) in respect of each contract for which an invoice is submitted as substantiation, a résumé for the resource that provided the services under that contract that demonstrates that, in relation to the resource category for which the rates are being substantiated, the resource would meet the mandatory requirements and achieve any required pass mark for any rated criteria; and
- (iv) the name, telephone number and, if available, e-mail address of a contact person at the customer who received each invoice submitted under (i), so that Canada may verify any information provided by the Bidder.

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

(f) **Formulae in Pricing Tables**

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

#### 4.4 Basis of Selection

(a) **Evaluation of Bid – Multiple Contracts Awarded for Multiple Workstreams**

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

- (i) A bid must comply with the requirements of the bid solicitation, meet all mandatory evaluation criteria and obtain the required pass marks for the point rated criteria identified in this bid solicitation to be declared responsive.
- (ii) The responsive bid that obtains the highest Total Bidder Score will be recommended for award of a contract. For any given Bidder, the greatest possible Total Technical Score is 70 while the greatest possible Total Financial Score is 30.
- (A) Calculation of Total Technical Score: For each Workstream the Total Technical Score will be computed for each responsive bid by converting the Technical Score obtained for the point-rated technical criteria using the following formula, rounded to two decimal places:
- $$\frac{\text{Technical Score}}{\text{Maximum Technical Points (Bidders, please refer to the maximum technical points for each Workstream at Attachment B)}} \times 70 = \text{Total Technical Score}$$
- (B) Calculation of Total Financial Score: For each Workstream the Total Financial Score will be computed for each responsive bid by converting the Financial Score obtained for the financial evaluation using the following formula rounded to two decimal places:
- $$\frac{\text{Financial Score}}{\text{Total Maximum Points Assigned (Bidders, please refer to the total maximum points assigned for each Workstream)}} \times 30 = \text{Total Financial Score}$$
- (C) Calculation of the Total Bidder Score: For each Workstream the Total Bidder Score will be computed for each responsive bid in accordance with the following formula:
- $$\text{Total Technical Score} + \text{Total Financial Score} = \text{Total Bidder Score}$$
- (iii) In the event of identical Total Bidder Scores occurring within a given Workstream, then the bid with the highest Total Technical Score will become the top-ranked bidder.
- (b) **Contract Funding Allocation:** Where for a Workstream more than one contract is awarded, each contract issued for that particular Workstream will be issued with an amount of funding specified in the article titled "Limitation of Expenditure" calculated based on the following:
- (i) when one contract is awarded, the amount of the Limitation of Expenditure will be determined at Canada's discretion;
- (ii) where two contracts are awarded, the amount of the Limitation of Expenditure of each contract will be determined in accordance with the following:
- (A) the Bidder with the highest Total Bidder Score will receive 55% of the funding initially allocated to that Workstream;
- (B) the Bidder with the next highest Total Bidder Score will receive 45% of the funding initially allocated for that Workstream; and
- (C) If the contractor to whom the draft TA is first sent either fails to respond on time or confirms in writing that it refuses to perform the task, the draft TA will then be forwarded to the contractor with the next-greatest balance remaining of allocated funding the value of the TA will be subtracted from the dollar value of the Contractor's Contract and may be re-allocated to the other contractor in that same Workstream subject to departmental authorities.

## PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

Bidders must provide the required certifications and additional information to be awarded a contract.

The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Unless specified otherwise, Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.

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

### 5.1 Certifications Precedent to Contract Award and Additional Information

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

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

Canada will have the right to declare a bid non-responsive if the Bidder, or any member of the Bidder if the Bidder is a Joint Venture, appears on the "[FCP Limited Eligibility to Bid](#)" list at the time of contract award.

Canada will also have the right to terminate the Contract for default if a Contractor, or any member of the Contractor if the Contractor is a Joint Venture, appears on the "[FCP Limited Eligibility to Bid](#)" list during the period of the Contract.

The Bidder must provide the Contracting Authority with a completed Attachment 5.1, Federal Contractors Program for Employment Equity - Certification, before contract award. If the Bidder is a Joint Venture, the Bidder must provide the Contracting Authority with a completed Attachment Federal Contractors Program for Employment Equity - Certification, for each member of the Joint Venture.

### 5.2 Additional Certifications Precedent to Contract Award

#### (a) Certification of Language

By submitting a bid, the Bidder certifies that, should it be awarded a contract as result of the bid solicitation, every individual proposed in its bid will be

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

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

#### (b) Submission of Only One Bid

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

**PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS****6.1 Security Requirement**

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

**6.2 Financial Capability**

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

## PART 7 - RESULTING CONTRACT CLAUSES

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

### 7.1 Requirement

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

### 7.2 Task Authorization

- (a) **As-and-when-requested Task Authorizations:** The Work or a portion of the Work to be performed under the Contract will be on an "as-and-when-requested basis" using a Task Authorization (TA). The Work described in the TA must be in accordance with the scope of the Contract. The Contractor must not commence work until a validly issued TA has been issued by Canada and received by the Contractor. The Contractor acknowledges that any work performed before such issuance and receipt will be done at the Contractor's own risk.
- (b) **Allocation of Task Authorizations:** More than one contract has been awarded for this requirement. As a result, the Task Authorizations issued under this series of contracts will be allocated in accordance with the following:
  - (i) At the time this series of contracts was awarded, each contractor was allocated an amount of funding as specified in the Limitation of Expenditure in respect of Task Authorizations based on the evaluation process described in the bid solicitation that resulted in the award of this series of contracts.
  - (ii) Canada will use a rotational method to allocate the draft Task Authorizations, where the rotation is based on the amount of funding remaining under each of the respective contracts.
  - (iii) Canada will send the first draft Task Authorization to the contractor with the greatest value of funding under its contract. If more than one contractor has the same value, it will be assigned to the contractor ranked first as determined under the evaluation process in the bid solicitation that resulted in the award of this series of contracts.

- (iv) The contractor sent a draft TA will have the time set out further below under the sub-paragraph entitled "Contractor's Response to Draft Task Authorization" to respond to the Contracting Authority.
- (v) If the contractor to whom the draft TA is first sent either fails to respond on time or confirms in writing that it refuses to perform the task, the draft TA will then be forwarded to the contractor with the next-greatest balance remaining of allocated funding. The value of the TA will be subtracted from the dollar value of the Contractor's Contract and may be re-allocated to the other contractor in that same Workstream subject to departmental authorities and depending on re-allocation of funds. In the event that Canada determines the proposed resource(s) does not meet the minimum experience or other requirements of the categories identified in the draft TA, Canada will send the draft TA to the contractor with the next greatest balance remaining of allocation funding.
- (vi) The process of sending out a draft TA to the contractor with the greatest balance remaining will continue until Canada either cancels the requirement for the task or it has been validly issued to one of the contractors. If none of the contractors can perform the task (in accordance with all the terms and conditions of this series of contracts), Canada may acquire the required Work by other means.
- (vii) Once the Task Authorization is issued, for the purposes of calculations for the allocation of Task Authorizations, the value of that Task Authorization (and the value of any subsequent amendment to that TA) will be subtracted from the funding allocated to that contractor.
- (viii) When the next requirement to perform a task is identified, it will be sent to the contractor with the greatest balance remaining of allocated funding. If more than one contractor has the greatest balance remaining of allocated funds (i.e., several contractors have equal amounts of allocated funding), the draft TA will be sent to the contractor among them that ranked highest under the bid solicitation evaluation process. If any contract in this series of contracts is amended to add funding for Task Authorizations, all the remaining contracts (i.e., all contracts that have not previously been terminated) will be amended to add funding in amounts proportionate to the funding initially provided under each contract for Task Authorizations (e.g., if three contracts were awarded with \$2M, \$1M and \$750,000 in funding for Task Authorizations respectively, and \$200,000 is added to the first contract, then \$100,000 will be added to the second contract and \$75,000 will be added to the third).
- (c) **Assessment of Resources Proposed at TA Stage:** Processes for issuing, responding to and assessing Task Authorizations are further detailed in Appendices A,B, C and D of Annex A.
- (d) **Form and Content of draft Task Authorization:**
  - (i) The Technical Authority will provide the Contractor with a description of the task in a draft Task Authorization using the form specified in Appendix B to Annex A.
  - (ii) The draft Task Authorization will contain the details of the activities to be performed, and must also contain the following information:
    - (A) the task number;
    - (B) The date by which the Contractor's response must be received (which will appear in the draft Task Authorization, but not the issued Task Authorization);
    - (C) the categories of resources and the number required;
    - (D) a description of the work for the task outlining the activities to be performed and identifying any deliverables (such as reports);
    - (E) the start and completion dates;
    - (F) milestone dates for deliverables and payments (if applicable);

- (G) the number of person-days of effort required;
  - (H) whether the work requires on-site activities and the location;
  - (I) the language profile of the resources required;
  - (J) the level of security clearance required of resources;
  - (K) the price payable to the Contractor for performing the task, with an indication of whether it is a firm price or a maximum TA price (and, for maximum price task authorizations, the TA must indicate how the final amount payable will be determined; where the TA does not indicate how the final amount payable will be determined, the amount payable is the amount, up to the maximum, that the Contractor demonstrates was actually worked on the project, by submitting time sheets filled in at the time of the work by the individual resources to support the charges); and
  - (L) any other constraints that might affect the completion of the task.
- (e) **Contractor's Response to Draft Task Authorization:** The Contractor must provide to the Technical Authority, within 5 working days of receiving the draft Task Authorization (or within any longer time period specified in the draft TA), the proposed total price for performing the task and a breakdown of that cost, established in accordance with the Basis of Payment specified in the Contract. The Contractor's quotation must be based on the rates set out in the Contract. The Contractor will not be paid for preparing or providing its response or for providing other information required to prepare and validly issue the TA.
- (f) **Task Authorization Limit and Authorities for Validly Issuing Task Authorizations:**  
To be validly issued, a TA must include the following signatures:
- (i) for any TA, inclusive of revisions, with a value less than or equal to \$ 300,000.00 (excluding Applicable Taxes), the TA must be signed by the Technical Authority; and
  - (ii) for any TA, inclusive of revisions, with a value greater than this amount, a TA must include the following signatures:
    - (1) the Technical Authority; and
    - (2) the Contracting Authority.
- Any TA that does not bear the appropriate signatures is not validly issued by Canada. Any work performed by the Contractor without receiving a validly issued TA is done at the Contractor's own risk. If the Contractor receives a TA that is not appropriately signed, the Contractor must notify the Contracting Authority. By providing written notice to the Contractor, the Contracting Authority may suspend the Client's ability to issue TA's at any time, or reduce the dollar value threshold described in subarticle (A) above; any suspension or reduction notice is effective upon receipt.
- (g) **Periodic Usage Reports:**
- (i) The Contractor must compile and maintain records on its provision of services to the federal government under Task Authorizations validly issued under the Contract. The Contractor must provide this data to Canada in accordance with the reporting requirements detailed below. If some data is not available, the reason must be indicated. If services are not provided during a given period, the Contractor must still provide a "NIL" report. The data must be submitted on a quarterly basis to the Contracting Authority. From time to time, the Contracting Authority may also require an interim report during a reporting period.
  - (ii) The quarterly periods are defined as follows:
    - (A) 1<sup>st</sup> quarter: April 1 to June 30;
    - (B) 2<sup>nd</sup> quarter: July 1 to September 30;

(C) 3<sup>rd</sup> quarter: October 1 to December 31; and

(D) 4<sup>th</sup> quarter: January 1 to March 31.

The data must be submitted to the Contracting Authority no later than 10 calendar days after the end of the reporting period.

(iii) Each report must contain the following information for each validly issued TA (as amended):

(A) the Task Authorization number and the Task Authorization Revision number(s), if applicable;

(B) a title or a brief description of each authorized task;

(C) the name, Resource category and level of each resource involved in performing the TA, as applicable;

(D) the total estimated cost specified in the validly issued TA of each task, exclusive of Applicable Taxes;

(E) the total amount, exclusive of Applicable Taxes, expended to date against each authorized task;

(F) the start and completion date for each authorized task; and

(G) the active status of each authorized task, as applicable (e.g., indicate whether work is in progress or if Canada has cancelled or suspended the TA, etc.).

(iv) Each report must also contain the following cumulative information for all the validly issued TA's (as amended):

(A) the amount, exclusive of Applicable Taxes, specified in the Contract (as last amended, as applicable) as Canada's total liability to the Contractor for all validly issued TA's; and

(B) the total amount, exclusive of Applicable Taxes, expended to date against all validly issued TA's.

(h) **Refusal of Task Authorizations or Submission of a Response which is not Valid:** The Contractor is not required to submit a response to every draft TA sent to it by Canada. However, in addition to Canada's other rights to terminate the Contract, Canada may immediately, and without further notice, terminate the Contract for default in accordance with the General Conditions if the Contractor in at least three instances has either not responded or has not submitted a valid response when sent a draft TA. For greater clarity, each draft TA, which is identifiable by its task number, will only count as one instance. A valid response is one that is submitted within the required time period and meets all requirements of the draft TA issued, including proposing the required number of resources who each meet the minimum experience and other requirements of the categories identified in the draft TA at pricing not exceeding the rates set out in Annex B. Each time the Contractor does not submit a valid response, the Contractor agrees Canada may at its option decrease the Minimum Contract Value in the clause titled "Minimum Work Guarantee" by 2%. This decrease will be evidenced for administrative purposes only through a contract amendment issued by the Contracting Authority (which does not require the agreement of the Contractor).

(i) **Consolidation of TA's for Administrative Purposes:** The Contract may be amended from time to time to reflect all validly issued Task Authorizations to date, to document the Work performed under those TA's for administrative purposes.

### 7.3 Minimum Work Guarantee

(a) In this clause,



- (i) **"Maximum Contract Value"** means the amount specified in the **"Limitation of Expenditure"** clause set out in the Contract; and
- (ii) **"Minimum Contract Value"** means \$20,000.00.
- (b) Canada's obligation under the Contract is to request Work in the amount of the Minimum Contract Value or, at Canada's option, to pay the Contractor at the end of the Contract in accordance with sub-article (c), subject to sub-article (d). In consideration of such obligation, the Contractor agrees to stand in readiness throughout the Contract Period to perform the Work described in the Contract. Canada's maximum liability for work performed under the Contract must not exceed the Maximum Contract Value, unless an increase is authorized in writing by the Contracting Authority.
- (c) In the event that Canada does not request work in the amount of the Minimum Contract Value during the Contract Period, Canada must pay the Contractor the difference between the Minimum Contract Value and the total cost of the Work requested.
- (d) Canada will have no obligation to the Contractor under this article if Canada terminates the entire Contract
  - (i) for default;
  - (ii) for convenience as a result of any decision or recommendation of a tribunal or court that the contract be cancelled, re-tendered or awarded to another supplier; or
  - (iii) for convenience within 10 business days of Contract award.

#### 7.4 Standard Clauses and Conditions

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

(a) **General Conditions:**

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

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

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

(b) **Supplemental General Conditions:**

The following Supplemental General Conditions:

- (i) 4002 (2010-08-16), Supplemental General Conditions - Software Development or Modification Services;
- (ii) 4006 (2010-08-16), Supplemental General Conditions - Contractor to Own Intellectual Property Rights in Foreground Information;

apply to and form part of the Contract.

#### 7.5 Security Requirement

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

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

#### 7.6 Contract Period

- (a) **Contract Period:** The "Contract Period" is the entire period of time during which the Contractor is obliged to perform the Work, which includes:
  - (i) The "**Initial Contract Period**", which begins on the date the Contract is awarded and ends 1 year later; and
  - (ii) The period during which the Contract is extended, if Canada chooses to exercise any options set out in the Contract.
- (b) **Option to Extend the Contract:**
  - (i) The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to 2 additional one-year periods under the same terms and conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions set out in the Basis of Payment.
  - (ii) Canada may exercise this option at any time by sending a written notice to the Contractor before the expiry date of the Contract. The option may only be exercised by the Contracting Authority, and will be evidenced, for administrative purposes only, through a contract amendment.

#### 7.7 Authorities

##### (a) Contracting Authority

The Contracting Authority for the Contract is:

Name: Hicham Laassouli  
Title: Supply Specialist  
Public Works and Government Services Canada  
Acquisitions Branch  
Directorate: Informatics and Telecommunications Systems Procurement Directorate  
Address: 10 Wellington, Gatineau, Québec  
Telephone: 613-858-9817  
E-mail address: [hicham.laassouli@tpsgc-pwgsc.gc.ca](mailto:hicham.laassouli@tpsgc-pwgsc.gc.ca)

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

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

The Technical Authority for the Contract is:

Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Organization: \_\_\_\_\_  
Address: \_\_\_\_\_  
Telephone: \_\_\_\_\_  
E-mail address: \_\_\_\_\_

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

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

Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Telephone: \_\_\_\_\_  
E-mail address: \_\_\_\_\_

## 7.8 Proactive Disclosure of Contracts with Former Public Servants

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

## 7.9 Payment

(a) **Basis of Payment**

- (i) **Professional Services provided under a Task Authorization with a Maximum Price:** For professional services requested by Canada, in accordance with a validly issued Task Authorization, Canada will pay the Contractor, in arrears, up to the Maximum Price for the TA, for actual time worked and any resulting deliverables in accordance with the firm all-inclusive per diem rates set out in Annex B, Basis of Payment, Applicable Taxes extra. Partial days will be prorated based on actual hours worked based on a 7.5-hour workday.
- (ii) **Professional Services provided under a Task Authorization with a Firm Price:** For professional services requested by Canada, in accordance with a validly issued Task Authorization, Canada will pay the Contractor the firm price set out in the Task

Authorization (based on the firm, all-inclusive per diem rates set out in Annex B),  
Applicable Taxes extra.

- (iii) **Travel and Living Expenses – National Joint Council Travel Directive:** The Contractor will be reimbursed its authorized travel and living expenses reasonably and properly incurred in the performance of the Work, at cost, without any allowance for profit and/or administrative overhead, in accordance with the meal and private vehicle expenses provided in Appendices B, C and D of the National Joint Council Travel Directive and with the other provisions of the directive referring to "travellers", rather than those referring to "employees". All travel must have the prior authorization of the Technical Authority. Travel requests will only be considered for a work location which is located more than 100 kilometers from the National Capital Region (NCR). The Contractor will be paid for actual time spent travelling in accordance with the firm per diem rate set out in Annex B which per diem is based on a 7.5-hour workday. All payments are subject to government audit.
  - (iv) **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.
  - (v) **Professional Services Rates:** In Canada's experience, bidders from time to time propose rates at the time of bidding for one or more Resource Categories that they later refuse to honour, on the basis that these rates do not allow them to recover their own costs and/or make a profit. This denies Canada of the benefit of the awarded contract. If the Contractor does not respond or refuses to provide an individual with the qualifications described in the Contract within the time described in the Contract (or proposes instead to provide someone from an alternate category at a different rate), whether or not Canada terminates the Contract as a whole or in part or chooses to exercise any of the rights provided to it under the general conditions, Canada may impose sanctions or take other measures in accordance with the PWGSC Vendor Performance Corrective Measure Policy (or equivalent) then in effect, which measures may include an assessment that results in conditions applied against the Contractor to be fulfilled before doing further business with Canada, or full debarment of the Contractor from bidding on future requirements.
- (b) **Limitation of Expenditure – Cumulative Total of all Task Authorizations**
- (i) Canada's total liability to the Contractor under the Contract for all validly issued Task Authorizations (TAs), inclusive of any revisions, must not exceed the amount set out on page 1 of the Contract, less any Applicable taxes. With respect to the amount set out on page 1 of the Contract, Customs duties are excluded and Applicable Taxes are included
  - (ii) No increase in the total liability of Canada will be authorized or paid to the Contractor unless an increase has been approved, in writing, by the Contracting Authority.
  - (iii) The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:
    - (A) when it is 75 percent committed, or
    - (B) 4 months before the contract expiry date, or
    - (C) As soon as the Contractor considers that the sum is inadequate for the completion of the Work required in all authorized TAs, inclusive of any revisions, whichever comes first.

- (i) If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority a written estimate for the additional funds required. Providing this information does not increase Canada's liability.
- (c) **Method of Payment for Task Authorizations with a Maximum Price:** For each Task Authorization validly issued under the Contract that contains a maximum price:
  - (i) Canada will pay the Contractor no more frequently than once a month in accordance with the Basis of Payment. The Contractor must submit time sheets for each resource showing the days and hours worked to support the charges claimed in the invoice.
  - (ii) Once Canada has paid the maximum TA price, Canada will not be required to make any further payment, but the Contractor must complete all the work described in the TA, all of which is required to be performed for the maximum TA price. If the work described in the TA is completed in less time than anticipated, and the actual time worked (as supported by the time sheets) at the rates set out in the Contract is less than the maximum TA price, Canada is only required to pay for the time spent performing the work related to that TA.
- (d) **Method of Payment for Task Authorizations with a Firm Price - Lump Sum Payment on Completion:** Canada will pay the Contractor upon completion and delivery of all the Work associated with the validly issued Task Authorization in accordance with the payment provisions of the Contract if:
  - (i) an accurate and complete invoice and any other documents required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
  - (ii) all such documents have been verified by Canada; and
  - (iii) the Work delivered has been accepted by Canada.
- (e) **Electronic Payment of Invoices – Contract** *(To be determined at Contract award based on Bidder choices under Attachment 4)*

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

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

Time charged and the accuracy of the Contractor's time recording system are subject to verification by Canada, before or after payment is made to the Contractor. If verification is done after payment, the Contractor must repay any overpayment, at Canada's request.
- (g) **No Responsibility to Pay for Work not performed due to Closure of Government Offices**
  - (i) Where the Contractor, its employees, subcontractors, or agents are providing services on government premises under the Contract and those premises are inaccessible because of the evacuation or closure of government offices, and as a result no work is performed, Canada is not responsible for paying the Contractor for work that otherwise would have been performed if there had been no evacuation or closure.
  - (ii) If, as a result of any strike or lock-out, the Contractor or its employees, subcontractors or agents cannot obtain access to government premises and, as a result, no work is

performed, Canada is not responsible for paying the Contractor for work that otherwise would have been performed if the Contractor had been able to gain access to the premises

**7.10 Invoicing Instructions**

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

**7.11 Certifications and Additional Information**

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

**7.12 Federal Contractors Program for Employment Equity - Default by Contractor**

The Contractor understands and agrees that, when an Agreement to Implement Employment Equity (AIEE) exists between the Contractor and Employment and Social Development Canada (ESDC)-Labour, the AIEE must remain valid during the entire period of the Contract. If the AIEE becomes invalid, the name of the Contractor will be added to the "[FCP Limited Eligibility to Bid](#)" list. The imposition of such a sanction by ESDC will constitute the Contractor in default as per the terms of the Contract.

**7.13 Applicable Laws**

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

**7.14 Priority of Documents**

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

- (a) these Articles of Agreement, including any individual SACC clauses incorporated by reference in these Articles of Agreement;
- (b) Supplemental General Conditions, in the following order:
  - (i) 4002 (2010-08-16), Supplemental General Conditions - Software Development or Modification Services;
  - (ii) 4006 (2010-08-16), Supplemental General Conditions - Contractor to Own Intellectual Property Rights in Foreground Information;
- (c) General Conditions 2035 (2016-04-04), Higher Complexity - Services;
- (d) Annex A - Statement of Work, including its Appendices as follows:
  - (i) Appendix A to Annex A - Tasking Assessment Procedure;
  - (ii) Appendix B to Annex A - Task Authorization (TA) Form;

- (iii) Appendix C to Annex A - Resource Assessment Criteria;
- (iv) Appendix D to Annex A - Certifications at the TA stage;
- (e) Annex B, Basis of Payment;
- (f) Annex C, Security Requirements Check List;
- (g) the validly issued Task Authorizations and any required certifications (including all of their annexes, if any) ; and
- (h) the Contractor's bid dated \_\_\_\_\_ as clarified on \_\_\_\_\_ "or" as amended \_\_\_\_\_ .

**7.15 Foreign Nationals (Canadian Contractor)**

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

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

**7.16 Foreign Nationals (Foreign Contractor)**

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

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

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

**(b) Commercial General Liability Insurance**

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

interest of Canada should read as follows: Canada, as represented by Public Works and Government Services Canada.

- (B) Bodily Injury and Property Damage to third parties arising out of the operations of the Contractor.
- (C) Products and Completed Operations: Coverage for bodily injury or property damage arising out of goods or products manufactured, sold, handled, or distributed by the Contractor and/or arising out of operations that have been completed by the Contractor.
- (D) Personal Injury: While not limited to, the coverage must include Violation of Privacy, Libel and Slander, False Arrest, Detention or Imprisonment and Defamation of Character.
- (E) Cross Liability/Separation of Insureds: Without increasing the limit of liability, the policy must protect all insured parties to the full extent of coverage provided. Further, the policy must apply to each Insured in the same manner and to the same extent as if a separate policy had been issued to each.
- (F) Blanket Contractual Liability: The policy must, on a blanket basis or by specific reference to the Contract, extend to assumed liabilities with respect to contractual provisions.
- (G) Employees and, if applicable, Volunteers must be included as Additional Insured.
- (H) Employers' Liability (or confirmation that all employees are covered by Worker's compensation (WSIB) or similar program)
- (I) Broad Form Property Damage including Completed Operations: Expands the Property Damage coverage to include certain losses that would otherwise be excluded by the standard care, custody or control exclusion found in a standard policy.
- (J) Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of policy cancellation.
- (K) If the policy is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.
- (L) Owners' or Contractors' Protective Liability: Covers the damages that the Contractor becomes legally obligated to pay arising out of the operations of a subcontractor.
- (M) Advertising Injury: While not limited to, the endorsement must include coverage for piracy or misappropriation of ideas, or infringement of copyright, trademark, title or slogan.

(c) **Errors and Omissions Liability Insurance**

- (i) The Contractor must obtain Errors and Omissions Liability (a.k.a. Professional Liability) insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature but for not less than \$1,000,000 per loss and in the annual aggregate, inclusive of defence costs.
- (ii) If the Professional Liability insurance is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.
- (iii) The following endorsement must be included:  
  
Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of cancellation.



**7.18 Limitation of Liability - Information Management/Information Technology**

- (a) This section applies despite any other provision of the Contract and replaces the section of the general conditions entitled "Liability". Any reference in this section to damages caused by the Contractor also includes damages caused by its employees, as well as its subcontractors, agents, and representatives, and any of their employees. This section applies regardless of whether the claim is based in contract, tort, or another cause of action. The Contractor is not liable to Canada with respect to the performance of or failure to perform the Contract, except as described in this section and in any section of the Contract pre-establishing any liquidated damages. The Contractor is only liable for indirect, special or consequential damages to the extent described in this Article, even if it has been made aware of the potential for those damages.
- (b) **First Party Liability:**
- (i) The Contractor is fully liable for all damages to Canada, including indirect, special or consequential damages, caused by the Contractor's performance or failure to perform the Contract that relate to:
    - (A) any infringement of intellectual property rights to the extent the Contractor breaches the section of the General Conditions entitled "Intellectual Property Infringement and Royalties";
    - (B) physical injury, including death.
  - (ii) The Contractor is liable for all direct damages caused by the Contractor's performance or failure to perform the Contract affecting real or tangible personal property owned, possessed, or occupied by Canada.
  - (iii) Each of the Parties is liable for all direct damages resulting from any breach of confidentiality under the Contract. Each of the Parties is also liable for all indirect, special or consequential damages in respect of any unauthorized disclosure of the other Party's trade secrets (or trade secrets of a third party provided by one Party to another under the Contract) relating to information technology.
  - (iv) The Contractor is liable for all direct damages relating to any encumbrance or claim relating to any portion of the Work for which Canada has made any payment. This does not apply to encumbrances or claims relating to intellectual property rights, which are addressed under (i)(A) above.
  - (v) The Contractor is also liable for any other direct damages to Canada caused by the Contractor's performance or failure to perform the Contract that relate to:
    - (A) any breach of the warranty obligations under the Contract, up to the total amount paid by Canada (including any applicable taxes) for the goods and services affected by the breach of warranty; and
    - (B) Any other direct damages, including all identifiable direct costs to Canada associated with re-procuring the Work from another party if the Contract is terminated either in whole or in part for default, up to an aggregate maximum for this subparagraph (B) of the greater of .75 times the total estimated cost (meaning the dollar amount shown on the first page of the Contract in the cell titled "Total Estimated Cost" or shown on each call-up, purchase order or other document used to order goods or services under this instrument), or \$1,000,000.00.

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

Canada's records and data using the most recent back-up kept by Canada. Canada is responsible for maintaining an adequate back-up of its records and data.

(c) **Third Party Claims:**

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

**7.19 Joint Venture Contractor**

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

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

#### 7.20 Professional Services - General

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

##### Replacement of Specific Individuals

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

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

Where an Excusable Delay applies, Canada may require (c) (ii) (B) above instead of terminating under the "Excusable Delay" Article. An Excusable Delay does not include resource unavailability due to allocation of the resource to another Contract or project (including those for the Crown) being performed by the Contractor or any of its affiliates.
- (iii) The Contractor must not, in any event, allow performance of the Work by unauthorized replacement persons. The Contracting Authority may order that an original or replacement resource stop performing the Work. In such a case, the Contractor must

immediately comply with the order. The fact that the Contracting Authority does not order a resource to stop performing the Work does not relieve the Contractor from its responsibility to meet the requirements of the Contract.

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

#### **7.21 Safeguarding Electronic Media**

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

#### **7.22 Representations and Warranties**

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

#### **7.23 Access to Canada's Property and Facilities**

Canada's property, facilities, equipment, documentation, and personnel are not automatically available to the Contractor. If the Contractor would like access to any of these, it is responsible for making a request to the Technical Authority. Unless expressly stated in the Contract, Canada has no obligation to provide any of these to the Contractor. If Canada chooses, in its discretion, to make its property, facilities, equipment, documentation or personnel available to the Contractor to perform the Work, Canada may require an adjustment to the Basis of Payment and additional security requirements may apply.

#### **7.24 Identification Protocol Responsibilities**

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

- (a) Contractor Representatives who attend a Government of Canada meeting (whether internal or external to Canada's offices) must identify themselves as Contractor Representatives prior to the commencement of the meeting, to ensure that each meeting participant is aware of the fact that the individual is not an employee of the Government of Canada;
- (b) During the performance of any Work at a Government of Canada site, each Contractor Representative must be clearly identified at all times as being a Contractor Representative; and
- (c) If a Contractor Representative requires the use of the Government of Canada's e-mail system in the performance of the Work, then the individual must clearly identify him or herself as an agent or subcontractor of the Contractor in all electronic mail in the signature block as well as under "Properties." This identification protocol must also be used in all other correspondence, communication, and documentation.

- (d) If Canada determines that the Contractor is in breach of any obligation stated in this Article, upon written notice from Canada the Contractor must submit a written action plan describing corrective measures it will implement to eliminate the recurrence of the problem. The Contractor will have five working days to deliver the action plan to the Client and the Contracting Authority, and twenty working days to rectify the underlying problem.
- (e) In addition to any other rights it has under the Contract, Canada may terminate the Contract for default if the corrective measures required of the Contractor described above are not met.

## ANNEX A

### STATEMENT OF WORK

#### 1. BACKGROUND

##### 1.1 Integrated Services Branch

The Integrated Services Branch (ISB) of Public Works and Government Services Canada (PWGSC) delivers specialized programs and services that inform Canadians and contribute to the efficiency of Government. ISB supports PWGSC's strategic direction of delivering high-quality, centralized programs and services which incorporate sound stewardship practices. ISB consists of seven sectors and is responsible for a number of key initiatives and programs, as follows:

- Shared Services Integration (SSI) provides integrated program support and management to clusters of departments and agencies that use corporate administrative shared systems. SSI has a new service offering, the Shared Case Management System, which will provide a common case management solution to government departments and agencies.
- Government Information Services (GIS) provides Canadians with multi-channel access to information on Government of Canada (GC) programs, policies, legislation and services. GIS also provides tailored advice and services to federal organizations for advertising, public opinion research, electronic media monitoring and publishing. It manages the agency of record for advertising, which is responsible for all media placement for the GC. GIS reports annually on advertising and public opinion research for the GC. It also provides Canadians with free access to GC publications and publishes Canada's official newspaper, the Canada Gazette.
- Service Integration Sector (SIS) leads the development and supports the implementation of PWGSC's Client Service Strategy (CSS). The CSS revolves around three main axes: employee engagement by creating the conditions for a culture of service excellence; client engagement by leading to the development of better government-wide solutions; and, harmonized PWGSC service transformations to enable overall government renewal.
- My GCHR is the common service provider for the GC in developing a single instance of the Peoplesoft 9.1 standard and in planning & supporting the transition of all federal departments & agencies to this standard. My GCHR is part of the Human Resources (HR) Modernization initiative whose goal is to enhance the efficiency of HR services delivery while taking advantage of economies of scale through the standardization and consolidation of HR processes and systems. The sector also provides shared human resources services to various government departments and agencies.
- GCDOCS provides a solution for record management in the GC and helps organizations meet their obligations in relation to information life cycle management. It is the official Enterprise Document and Records Management Solution (EDRMS) of the GC. It is an automated bilingual archiving and information management system whose functions can be adjusted to meet organizations' requirements. This tool therefore helps organizations meet their obligations in relation to information life cycle management.
- Business Planning and Management Services (BPMS) delivers internal branch services such as strategic and business planning, internal and Web communications, Information Management/Information Technology (IM/IT) services and facilities, support to branch governance committees, and provides administrative support and services to the Branch.
- Specialized Services (SS) delivers an array of services to the GC related to Seized Property Management; GCSurplus (formerly Crown Assets Disposal); Shared Travel Services; and The Canadian General Standards Board (CGSB). They offer a wide range of standards development

services, including development of National Standards of Canada (NSC), CGSB standards, and GC standards, and support to the development of International Organization Standardization (ISO) standards.

## 2. Requirement

### 2.1 Summary of Services

The SSI Sector, on behalf of the ISB, requires IM/IT professional services resources with specialized knowledge of Enterprise Resource Planning (ERP) technologies, on an "as and when requested" basis in the National Capital Region (NCR), including:

- **PeopleSoft ERP Systems (Technical ):** Technical support for Oracle PeopleSoft Human Capital Management (HCM) and Oracle PeopleSoft North America (NA) Payroll;
- **PeopleSoft ERP Systems (Functional):** Functional and business support for: Oracle PeopleSoft Human Capital Management (HCM) and Oracle PeopleSoft North America (NA) Payroll;
- **Case Management System:** Microsoft Dynamics; and
- **GCDocs Document Management System:** OpenText Content Server
- **Financial Systems:** SAP and FreeBalance;

The required resources will support ERP systems and ERP-related projects, managed and controlled by ISB, which are common and strategic for the GC, including projects for ISB clients at other GC departments and agencies. Requirements may include, but are not limited to, projects related to:

- business transformation of existing ERP solutions;
- implementation of new ERP solutions;
- departmental onboarding to new common ERP solutions;
- integration of common ERP systems with departmental systems;
- modernization and evolution of existing ERP solutions (e.g. mobile technology); and
- promotion and support for the adoption of common solutions.

SSI's requirements are aligned by five workstreams.

### 2.2 Workstream 1: PeopleSoft ERP Systems Technical Professional Services

PeopleSoft ERP Systems Technical professional services, to develop and implement the PeopleSoft application, may be required throughout the Contract Period in any of the categories and levels identified in the table below. Resources will be requested in accordance with the Task Authorization (TA) Process set-out in the Contract.

Resources will be required to support PeopleSoft ERP requirements as identified in the applicable TA and will include resources with experience implementing and supporting:

- a) PeopleSoft HCM (versions 8.9, 9.1, 9.2 and future versions\*); or
- b) PeopleSoft NA Payroll (version 9.1 and future versions\*).

Resources will be evaluated at the time of TA in accordance with Appendix 2 - Resources Assessment Criteria .

**Note: (\*)** Future versions of PeopleSoft HCM or Payroll (as applicable) with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified in the TA as applicable.

WORKSTREAM 1: PEOPLESOFT ERP SYSTEMS TECHNICAL PROFESSIONAL SERVICES			
TBIPS RESOURCE CATEGORY		LEVEL	SSI RESOURCE ROLE
1)	A.1 Application/Software Architect	Level 3	Senior Application/Software Architect (PeopleSoft)
2)	A.4 ERP System Analyst	Level 2	Intermediate ERP System Analyst (PeopleSoft)
3)	A.4 ERP System Analyst	Level 3	Senior ERP System Analyst (PeopleSoft)
4)	A.5 ERP Technical Analyst	Level 2	Intermediate ERP Technical Analyst (PeopleSoft)
5)	A.5 ERP Technical Analyst	Level 3	Senior ERP Technical Analyst (PeopleSoft)
6)	A.7 Programmer/Analyst	Level 2	Intermediate Programmer/Analyst (PeopleSoft)
7)	A.7 Programmer/Analyst	Level 3	Senior Programmer/Analyst (PeopleSoft)
8)	A.11 Tester	Level 2	Intermediate Tester (ERP)
9)	A.11 Tester	Level 3	Senior Tester (ERP)
10)	I.1 Data Conversion Specialist	Level 2	Intermediate Data Conversion Specialist (PeopleSoft)
11)	I.1 Data Conversion Specialist	Level 3	Senior Data Conversion Specialist (PeopleSoft)
12)	P.2 Enterprise Architect	Level 3	Senior Enterprise Architect (PeopleSoft)

### 2.3 Workstream 2: PeopleSoft ERP Systems Functional Professional Services

PeopleSoft ERP Systems Functional professional services, to onboard and support clients on the PeopleSoft application, may be required throughout the Contract Period in any of the categories and levels identified in the table below. Resources will be requested in accordance with the Task Authorization (TA) Process set-out in the Contract.

Resources will be required to provide functional support for PeopleSoft ERP requirements as identified in the applicable TA and will include resources with experience implementing and supporting:

- PeopleSoft HCM (versions 8.9, 9.1, 9.2 and future versions\*); or
- PeopleSoft NA Payroll (version 9.1 and future versions\*).

Resources will be evaluated at the time of TA in accordance with Appendix 2 - Resources Assessment Criteria.

**Note: (\*)** Future versions of PeopleSoft HCM or Payroll (as applicable) with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified in the TA as applicable.

WORKSTREAM 2: PEOPLESOFT ERP SYSTEMS FUNCTIONAL PROFESSIONAL SERVICES			
TBIPS RESOURCE CATEGORY		LEVEL	SSI RESOURCE ROLE
1)	A.2 ERP Functional Analyst	Level 2	Intermediate ERP Functional Analyst (PeopleSoft)
2)	A.2 ERP Functional Analyst	Level 3	Senior ERP Functional Analyst (PeopleSoft)
3)	B.1 Business Analyst	Level 2	Intermediate Business Analyst (ERP)
4)	B.1 Business Analyst	Level 3	Senior Business Analyst (ERP)
5)	B.2 Business Architect	Level 3	Senior Business Architect (ERP)
6)	B.5 Business Process Re-engineering (BPR) Consultant	Level 3	Senior Business Process Re-engineering (BPR) Consultant (ERP)



WORKSTREAM 2: PEOPLESOFT ERP SYSTEMS FUNCTIONAL PROFESSIONAL SERVICES			
	TBIPS RESOURCE CATEGORY	LEVEL	SSI RESOURCE ROLE
7)	B.6 Business System Analyst	Level 2	Intermediate Business System Analyst (ERP)
8)	B.6 Business System Analyst	Level 3	Senior Business System Analyst (ERP)
9)	B.7 Business Transformation Architect	Level 3	Senior Business Transformation Architect (PeopleSoft)
10)	B.9 Courseware Developer	Level 2	Intermediate Courseware Developer (PeopleSoft)
11)	B.9 Courseware Developer	Level 2	Senior Courseware Developer (PeopleSoft)
12)	B.10 Help Desk Specialist	Level 2	Intermediate Help Desk Specialist (PeopleSoft)
13)	B.10 Help Desk Specialist	Level 3	Senior Help Desk Specialist (PeopleSoft)
14)	B.14 Technical Writer	Level 2	Intermediate Technical Writer (ERP)
15)	P.1 Change Management Consultant	Level 3	Senior Change Management Consultant (PeopleSoft)
16)	P.7 Project Coordinator	Level 2	Intermediate Project Coordinator
17)	P.7 Project Coordinator	Level 3	Senior Project Coordinator (ERP)
18)	P.9 Project Manager	Level 2	Intermediate Project Manager (ERP)
19)	P.9 Project Manager	Level 3	Senior Project Manager (ERP)
20)	P.11 Quality Assurance Specialist/Analyst	Level 2	Intermediate Quality Assurance Specialist/Analyst (ERP)
21)	P.11 Quality Assurance Specialist/Analyst	Level 3	Senior Quality Assurance Specialist/Analyst (ERP)
22)	P.12 Risk Management Specialist	Level 3	Senior Risk Management Specialist (ERP)

#### 2.4 Workstream 3: Case Management System Professional Services

Case Management System professional services may be required throughout the Contract Period in any of the categories and levels identified in the table below. Resources will be requested in accordance with the Task Authorization (TA) Process set-out in the Contract.

Resources with experience implementing and supporting Microsoft Dynamics (version 2013 and future versions\*), including associated technologies such as SharePoint required to support CRM, will be required to support various requirements as identified in the applicable TA. Resources will be evaluated at the time of TA in accordance with Appendix 2 - Resources Assessment Criteria.

**Note:** (\*) Future versions of Dynamics with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified in the TA as applicable.

WORKSTREAM 3: CASE MANAGEMENT SYSTEM PROFESSIONAL SERVICES			
	TBIPS RESOURCE CATEGORY	LEVEL	SSI RESOURCE ROLE
1)	A.1 Application/Software Architect	Level 3	Senior Application/Software Architect (Dynamics)
2)	A.7 Programmer/Analyst	Level 2	Intermediate Programmer/Analyst (Dynamics)
3)	A.7 Programmer/Analyst	Level 3	Senior Programmer/Analyst (Dynamics)
4)	A.8 System Analyst	Level 2	Intermediate System Analyst (Dynamics)

WORKSTREAM 3: CASE MANAGEMENT SYSTEM PROFESSIONAL SERVICES			
	TBIPS RESOURCE CATEGORY	LEVEL	SSI RESOURCE ROLE
5)	A.8 System Analyst	Level 3	Senior System Analyst (Dynamics)
6)	A.11 Tester	Level 2	Intermediate Tester (Dynamics)
7)	A.11 Tester	Level 3	Senior Tester (Dynamics)
8)	A.15 Web Graphics Designer	Level 2	Intermediate Web Graphics Designer
9)	A.15 Web Graphics Designer	Level 3	Senior Web Graphics Designer
10)	I.1 Data Conversion Specialist	Level 2	Intermediate Data Conversion Specialist (Dynamics)
11)	I.1 Data Conversion Specialist	Level 3	Senior Data Conversion Specialist (Dynamics)
12)	B.1 Business Analyst	Level 2	Intermediate Business Analyst
13)	B.1 Business Analyst	Level 3	Senior Business Analyst (Dynamics)
14)	B.2 Business Architect	Level 3	Senior Business Architect (Business Process Management)
15)	B.7 Business Transformation Architect	Level 3	Senior Business Transformation Architect (Business Process Management)
16)	B.9 Courseware Developer	Level 2	Intermediate Courseware Developer (Dynamics)
17)	B.9 Courseware Developer	Level 3	Senior Courseware Developer (Dynamics)
18)	P.1 Change Management Consultant	Level 3	Senior Change Management Consultant (Business Process Management)
19)	P.2 Enterprise Architect	Level 3	Senior Enterprise Architect (Dynamics)
20)	P.9 Project Manager	Level 2	Intermediate Project Manager
21)	P.9 Project Manager	Level 3	Senior Project Manager (Business Process Management)

## 2.5 Workstream 4: GCDOCS System Professional Services

GCDOCS System professional services may be required throughout the Contract Period in any of the categories and levels identified in the table below. Resources will be requested in accordance with the Task Authorization (TA) Process set-out in the Contract.

Resources with experience implementing and supporting OpenText Content Server (10.5 and future versions\*) will be required to support various requirements as identified in the applicable Task Authorization (TA). Resources will be evaluated at the time of TA in accordance with Appendix 2 - Resources Assessment Criteria.

**Note:** (\*) Future versions of OpenText Content Server with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified in the TA as applicable.

WORKSTREAM 4: GCDOS SYSTEM PROFESSIONAL SERVICES			
TBIPS RESOURCE CATEGORY		LEVEL	SSI RESOURCE ROLE
1)	A.1 Application/Software Architect	Level 3	Senior Application/Software Architect (OpenText Content Server)
2)	A.7 Programmer/Analyst	Level 2	Intermediate Programmer/Analyst (OpenText Content Server)
3)	A.7 Programmer/Analyst	Level 3	Senior Programmer/Analyst (OpenText Content Server)
4)	A.8 System Analyst	Level 2	Intermediate System Analyst (OpenText Content Server)
5)	A.8 System Analyst	Level 3	Senior System Analyst (OpenText Content Server)
6)	A.11 Tester	Level 2	Intermediate Tester (OpenText Content Server)
7)	A.11 Tester	Level 3	Senior Tester (OpenText Content Server)
8)	I.5 IM Architect	Level 3	Senior IM Architect (OpenText Content Server)
9)	I.1 Data Conversion Specialist	Level 2	Intermediate Data Conversion Specialist (OpenText Content Server)
10)	I.1 Data Conversion Specialist	Level 3	Senior Data Conversion Specialist (OpenText Content Server)
11)	B.1 Business Analyst	Level 2	Intermediate Business Analyst
12)	B.1 Business Analyst	Level 3	Senior Business Analyst (Imaging and Document Management)
13)	B.5 Business Process Re-engineering (BPR) Consultant	Level 3	Senior Business Process Re-engineering (BPR) Consultant (OpenText Content Server)
14)	B.7 Business Transformation Architect	Level 3	Senior Business Transformation Architect (IM)
15)	B.9 Courseware Developer	Level 2	Intermediate Courseware Developer (OpenText Content Server)
16)	B.9 Courseware Developer	Level 3	Senior Courseware Developer (OpenText Content Server)
17)	B.14 Technical Writer	Level 2	Intermediate Technical Writer (OpenText Content Server)
18)	B.14 Technical Writer	Level 3	Senior Technical Writer (OpenText Content Server)
19)	P.1 Change Management Consultant	Level 3	Senior Change Management Consultant (EDRMS)
20)	P.2 Enterprise Architect	Level 3	Senior Enterprise Architect (OpenText Content Server)
21)	P.7 Project Coordinator	Level 2	Intermediate Project Coordinator
22)	P.7 Project Coordinator	Level 3	Senior Project Coordinator (OpenText Content Server)
23)	P.9 Project Manager	Level 2	Intermediate Project Manager
24)	P.9 Project Manager	Level 3	Senior Project Manager (OpenText Content Server)
25)	P.11 Quality Assurance Specialist/Analyst	Level 2	Intermediate Quality Assurance Specialist/Analyst
26)	P.11 Quality Assurance Specialist/Analyst	Level 3	Senior Quality Assurance Specialist/Analyst
27)	P.12 Risk Management Specialist	Level 3	Senior Risk Management Specialist

## 2.6 Workstream 5: Financial Systems Professional Services

Financial System professional services may be required throughout the Contract Period in any of the categories and levels identified in the table below. Resources will be requested in accordance with the Task Authorization (TA) Process set-out in the Contract.

Resources will be required to support various Financial System requirements as identified in the applicable TA and will include resources with experience upgrading and transforming:

- a) SAP ERP, including Central Component (ECC) (version 6.0 or future versions\*) and the next generation SAP business suite (i.e. SAP S/4 HANA); or
- b) FreeBalance (version 6.5E and future versions\*).

Resources will be evaluated at the time of TA in accordance with Appendix 2 - Resources Assessment Criteria.

**Note:** (\*) Future versions of SAP or FreeBalance with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified in the TA as applicable.

WORKSTREAM 5: FINANCIAL SYSTEMS PROFESSIONAL SERVICES			
TBIPS RESOURCE CATEGORY		LEVEL	SSI RESOURCE ROLE
1)	A.1 Application/Software Architect	Level 3	Senior Application/Software Architect (Financial Systems)
2)	A.2 ERP Functional Analyst	Level 2	Senior ERP Functional Analyst (Financial Systems)
3)	A.2 ERP Functional Analyst	Level 3	Senior ERP Functional Analyst (Financial Systems)
4)	A.4 ERP System Analyst	Level 2	Senior ERP System Analyst (Financial Systems)
5)	A.4 ERP System Analyst	Level 3	Senior ERP System Analyst (Financial Systems)
6)	A.5 ERP Technical Analyst	Level 3	Senior ERP Technical Analyst (SAP)
7)	A.7 Programmer/Analyst	Level 3	Senior Programmer/Analyst (SAP)
8)	I.1 Data Conversion Specialist	Level 3	Senior Data Conversion Specialist (Financial Systems)
9)	B.1 Business Analyst	Level 2	Intermediate Business Analyst (Financial Systems)
10)	B.1 Business Analyst	Level 3	Senior Business Analyst (Financial Systems)
11)	B.9 Courseware Developer	Level 3	Senior Courseware Developer (Financial Systems)
12)	B.9 Courseware Developer	Level 2	Senior Courseware Developer (uPerform)
13)	B.9 Courseware Developer	Level 3	Senior Courseware Developer (uPerform)
14)	P.1 Change Management Consultant	Level 3	Senior Change Management Consultant
15)	P.2 Enterprise Architect	Level 3	Senior Enterprise Architect (Financial Systems)
16)	P.7 Project Coordinator	Level 2	Intermediate Project Coordinator
17)	P.7 Project Coordinator	Level 3	Senior Project Coordinator (Financial Systems)
18)	P.9 Project Manager	Level 2	Intermediate Project Manager (Financial Systems)
19)	P.9 Project Manager	Level 3	Senior Project Manager (Financial Systems)
20)	P.11 Quality Assurance Specialist/Analyst	Level 3	Senior Quality Assurance Specialist/Analyst

WORKSTREAM 5: FINANCIAL SYSTEMS PROFESSIONAL SERVICES			
TBIPS RESOURCE CATEGORY		LEVEL	SSI RESOURCE ROLE
21)	P.12 Risk Management Specialist	Level 3	Senior Risk Management Specialist (Financial Systems)
22)	A.11 Tester	Level 2	Intermediate Tester (Financial Systems)
23)	A.11 Tester	Level 3	Senior Tester (Financial Systems)
24)	B.14 Technical Writer	Level 2	Intermediate Technical Writer (Financial Systems)
25)	B.14 Technical Writer	Level 3	Senior Technical Writer (Financial Systems)

## 2.7 Deliverables

- a) Using Task Authorizations (TAs), Contractor resources will be required to undertake tasks and activities in support of ERP systems and ERP-related projects for SSI and its client partners (i.e. other GC departments and agencies).
- b) The TA will identify the required resource category, the applicable resource assessment criteria, and the required tasks, activities and deliverables to be completed by the individual resource within the scope of the tasks and activities as outlined in section 3 below.
- c) Requirements for regular status reporting (e.g. weekly, monthly), as well as attendance at regular Project meetings will be identified in each TA as applicable.
- d) All deliverables must be submitted in the English language.

## 2.8 Location of Work

- a) The work must be conducted on-site at PWGSC or other government department (OGC) location in the National Capital Region (NCR) or if the work may be conducted off-site from the Contractor's location. The TA will stipulate the exact location.
- b) Resources may be required to travel between PWGSC and client department offices within the NCR.
- c) Canada will not reimburse the Contractor for any travel and living expenses associated with resources that must commute between the NCR and their place of residence (i.e. outside the NCR) or for any expenses associated with commuting within the NCR.
- d) If the TA stipulates that travel outside of the NCR is required to support delivery of the work under the TA, travel must be pre-authorized by the Technical Authority and will be reimbursed in accordance with National Joint Council Travel Directive.

**2.9 Working Hours**

- a) The Task Authorization will stipulate if the resource is required on a full-time or part-time basis.
- b) For resources required on a full-time basis, normal working hours will be from 07:00 to 17:00 EDT Monday through Friday where the Contractor resource will be expected to work 7.5 hours each day between those hours. A day is defined as 7.5 hours exclusive of meal breaks. If requested, Contractor resources will be required, on an occasional basis, to work outside normal working hours to support specific application activities (e.g. major releases).
- c) Payment will be for days actually worked with no provision for annual leave, statutory holidays and sick leave. Time worked which is more or less than a day will be prorated to reflect actual time worked in accordance with the following formula:

$$\frac{\text{Hours worked} \times \text{applicable firm per diem rate}}{7.5 \text{ hours}}$$

**2.10 Language Requirements**

Language requirements for Contractor resources will be identified in the TA as applicable. There will be some requirements, in specific categories (e.g. Help Desk Specialist), for bilingual resources (English/French).

**3. Resource Tasks and Activities**

**Note:** Although a common task lists is presented for all categories, PWGSC recognizes that work assignments defined at the Task Authorization may warrant a higher level resource as the work may be deemed more complex by the nature of the project or operational context. PWGSC identifies project or operational complexity as a combination of factors such as project value and or complexity, having a timeline in excess of 6 months, or involving supervising deliverables of the more junior category resources associated with it.

**3.1 Workstream 1: PeopleSoft ERP Technical Professional Services)****3.1.1 APPLICATION/SOFTWARE ARCHITECT (SENIOR)**

The Application/Software Architect must perform, without being limited to, the following tasks to support PeopleSoft ERP systems and related projects:

- a) Develop technical architectures, frameworks and strategies, for an application area, to meet the business and application requirements;
- b) Analyze functional requirements to identify information, procedures and decision flows;
- c) Analyze and evaluate alternative software solutions to meet business problems;
- d) Ensure the integration of all aspects of software solutions;
- e) Create an application component roadmap - roadmap to align business vision and functional coverage to IT vision; and
- f) Create an application architecture framework.

**3.1.2 ERP SYSTEM ANALYST (INTERMEDIATE / SENIOR)**

The ERP System Analyst must perform, without being limited to, the following tasks to support PeopleSoft ERP systems and related projects:

- a) Develop requirements, feasibility, cost, design, and specification documents for ERP systems;
- b) Implement ERP systems to support projects, departments, organizations or businesses;
- c) Translate ERP business requirements into systems design and specifications;
- d) Analyze and recommend alternatives and options for solutions;
- e) Develop technical specifications for ERP systems development, design and implementation;
- f) Research, analyze and document user requirements, map interdependencies, and produce the required functional specifications and/or process re-engineering recommendations;
- g) Provide functional and technical expertise on applications; and
- h) Review Functional and Technical Design Documents to ensure that there is alignment across the application(s).

**3.1.3 ERP TECHNICAL ANALYST (INTERMEDIATE / SENIOR)**

The ERP Technical Analyst must perform, without being limited to, the following tasks to support PeopleSoft ERP systems and related projects:

- a) Plan and provide recommendations to management regarding system landscape architectures including upgrade strategies;
- b) Translate functional and business requirements into technical requirements;
- c) Develop and/or manage technical aspects of application software, user interfaces, and third-party components;
- d) Conduct, assist with, and/or manage unit and system tests;
- e) Establish technical standards for the technical framework;
- f) Analyze and coordinate data file conversions;
- g) Complete mapping, interfaces, mock conversion work, enhancements, actual conversion, and verify completeness and accuracy of converted data; and
- h) Import files from heterogeneous platforms.

**3.1.4 PROGRAMMER/ANALYST (INTERMEDIATE / SENIOR)**

The Programmer/Analyst must perform, without being limited to, the following tasks to support PeopleSoft ERP systems and related projects:

- a) Analysis of functional requirements leading to the execution of the design, development and implementation of changes to the application;
- b) Develop and maintain configuration and programs based on approved requirements working both independently and within a team;
- c) Deliver technical specifications documents using the functional specifications provided by the functional and integration teams;
- d) Create and modify configuration and code for software as per technical specifications;
- e) Produce reports, manuals, programs, data files, and procedures for applications;
- f) Analyze code and objects to determine functional fit; and
- g) Execute tasks related to the implementation of application and database design and fixes, coding and technical documentation.

**3.1.5 TESTER (INTERMEDIATE / SENIOR)**

The Tester must perform, without being limited to, the following tasks to support PeopleSoft ERP systems and related projects:

- a) Develop the Test strategy; test planning and coordination;
- b) Manage and monitor test plans for all levels of testing;
- c) Develop test scenarios and test scripts;
- d) Establish and maintain test procedures and script libraries; and
- e) Establish a validation and verification capability which assumes functional and performance compliance.

**3.1.6 DATA CONVERSION SPECIALIST (INTERMEDIATE / SENIOR)**

The Data Conversion Specialist must perform, without being limited to, the following tasks to support PeopleSoft ERP systems and related projects:

- a) Oversee all facets of the conversion process;
- b) Complete mapping, interfaces, mock conversion work, enhancements, actual conversion, and verify completeness and accuracy of converted data;
- c) Analyze and coordinate data file conversions; and
- d) Import files from heterogeneous platforms.

**3.1.7 ENTERPRISE ARCHITECT (SENIOR)**

The Enterprise Architect must perform, without being limited to, the following tasks to support PeopleSoft ERP systems and related projects:

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



**3.2 Workstream 2: PeopleSoft ERP Functional Professional Services****3.2.1 ERP FUNCTIONAL ANALYST (INTERMEDIATE / SENIOR)**

The ERP Functional Analyst must perform, without being limited to, the following tasks to support PeopleSoft ERP systems and related projects:

- a) Research, analyze and document user requirements, map interdependencies, and produce the required functional specifications and/or process re-engineering recommendations;
- b) Perform and document fit/gaps;
- c) Model/map administrative process and data requirements;
- d) Review Functional/Transaction Design Documents;
- e) Help to resolve various implementation issues;
- f) Create test scenarios and scripts according to business requirements; and
- g) Participate in testing, monitoring and reconciliation work related to data quality, data integrity and reports.

**3.2.2 BUSINESS ANALYST (INTERMEDIATE / SENIOR)**

The Business Analyst must perform, without being limited to, the following tasks to support PeopleSoft ERP systems and related projects:

- a) Determine operational objectives by studying business functions; gathering information; evaluating output requirements and formats;
- b) Perform business analyses of requirements to identify information, procedures, and decision flows;
- c) Evaluate existing procedures and methods, identify and document items such as database content, structure, application subsystems;
- d) Develop data dictionary;
- e) Define and document interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems;
- f) Identify candidate business processes for re-design, prototype potential solutions, provide trade-off information and suggest a recommended course of action. Identify the modifications to the automated processes; and
- g) Establish acceptance test criteria with client.

**3.2.3 BUSINESS ARCHITECT (SENIOR)**

The Business Architect must perform, without being limited to, the following tasks to support PeopleSoft ERP systems and related projects:

- a) Develop policies and rules that allow an organization to carry out its mandate and functional responsibilities, and that govern the organization's actual and planned capabilities in terms of computers, data, information, human resources, communication facilities, software and management responsibilities; and
- b) Develop the specifications for where, how and why the various organizational components fit together as they do, and how they support the organization's mandate.

**3.2.4 BUSINESS PROCESS RE-ENGINEERING (BPR) CONSULTANT (SENIOR)**

The Business Process Re-engineering (BPR) Consultant must perform, without being limited to, the following tasks to support PeopleSoft ERP systems and related projects:

- a) Review existing work processes and organizational structure;
- b) Analyze business functional requirements to identify information, procedures and decision flows;
- c) Identify candidate processes for re-design; prototype potential solutions, provide trade-off information and suggest a recommended course of action. Identify the modifications to the automated processes;
- d) Provide recommendations in defining new requirements and opportunities for applying efficient and effective solutions; identify and provide preliminary costs of potential options;
- e) Provide recommendations in developing and integrating process and information models between processes to eliminate information and process redundancies;
- f) Identify and recommend new processes and organizational structures;
- g) Provide recommendations on and/or assist in implementing new processes and organizational changes;
- h) Document workflows; and
- i) Use business, workflow and organizational modeling software tools.

### **3.2.5 BUSINESS SYSTEM ANALYST (INTERMEDIATE / SENIOR)**

The Business System Analyst must perform, without being limited to, the following tasks to support PeopleSoft ERP systems and related projects:

- a) Perform functional facets of the software development life cycle (SDLC) including: process definition and reengineering, high and detailed-level requirements gathering, fit/gap analysis, functional design, testing, training, reporting, support, and continuous improvement of business applications;
- b) Determine operational objectives by studying business functions; gathering information; evaluating output requirements and formats;
- c) Identify candidate business processes for re-design, prototype potential solutions, provide trade-off information and suggest a recommended course of action. Identify the modifications to the automated processes; and
- d) Review Functional and Technical Design Documents to ensure that there is alignment across the application(s).

### **3.2.6 BUSINESS TRANSFORMATION ARCHITECT (SENIOR)**

The Business Transformation Architect must perform, without being limited to, the following tasks to support PeopleSoft ERP systems and related projects:

- a) Analyze and develop of architecture requirements design, process development, process mapping and training;
- b) Responsible for leading other functional staff to define business strategy and processes in support of transformation and change management activities;
- c) Participate in change impact analysis and change management activities; and
- d) Participate in organizational realignment (job re-design organizational re-structuring).

### **3.2.7 COURSEWARE DEVELOPER (INTERMEDIATE / SENIOR)**

The Courseware Developer must perform, without being limited to, the following tasks to support PeopleSoft ERP systems and related projects:

- a) Perform needs assessment/analysis for training purposes;
- b) Plan and monitor training projects;
- c) Perform job, task, and/or content analysis;
- d) Recommend instructional media and strategies;
- e) Develop performance measurement standards;
- f) Develop training materials;

- g) Prepare end-users for implementation of courseware materials; and
- h) Deliver training to end users (individually and in groups). .

### **3.2.8 HELP DESK SPECIALIST (INTERMEDIATE / SENIOR)**

The Help Desk Specialist must perform, without being limited to, the following tasks to support PeopleSoft ERP systems and related projects:

- a) Perform a variety of applications problem analysis and monitoring tasks and respond appropriately to user requests and problems;
- b) Perform initial problem analysis and triage problem to other appropriate staff when appropriate;
- c) Maintain liaison with application users, functional and technical staff to communicate the status of problem resolution to users; log and track requests for assistance;
- d) Develop, implement, and/or participate in the preparation of procedure manuals and documentation for help desk use; and
- e) Develop, implement, and/or participate in the distribution of application related information to users to include information such as help desk procedures and handbooks.

### **3.2.9 TECHNICAL WRITER (INTERMEDIATE)**

The Technical Writer must perform, without being limited to, the following tasks to support PeopleSoft ERP systems and related projects:

- a) Document help text, user manuals, technical documentation, web page content, etc.;
- b) Review documentation standards and the existing project documentation;
- c) Determine documentation requirements and makes plans for meeting them;
- d) Gather information concerning the features and functions provided by the developers;
- e) Assess the audience for the documents/manuals which are required and prepare a statement of purpose and scope for each;
- f) Develop a table of content for each document/manual and write or edit the required content;
- g) Investigate the accuracy of the information collected by making direct use of the material being documented;
- h) Prepare or coordinate the preparation of any required illustrations and diagrams;
- i) Design the layout of the documents/manuals; and
- j) Use word-processing, desk-top publishing and graphics software packages to produce final camera-ready copy.

### **3.2.10 CHANGE MANAGEMENT CONSULTANT (SENIOR)**

The Change Management Consultant must perform, without being limited to, the following tasks to support PeopleSoft ERP systems and related projects:

- a) Responsible for leading other functional resources to define business strategy and processes in support of transformation and change management activities;
- b) Engage and enable the organization to implement solutions by providing practical and actionable tools and templates;
- c) Participate in change impact analysis and change management activities;
- d) Work with the target community to ensure alignment, correct skills and experience to enable the change; and
- e) Provide onsite as well as remote advisory services for the management of change and individuals as required.

**3.2.11 PROJECT COORDINATOR (INTERMEDIATE)**

The Project Coordinator must perform, without being limited to, the following tasks to support PeopleSoft ERP systems and related projects:

- a) Assist project management, business, functional, technical users and end users in project coordination and synchronization tasks;
- b) Provide administrative and technical support of a clerical nature as required to a project team;
- c) Maintain project documentation and application/system libraries;
- d) Track and manage issues, defects and change requests in the service desk database;
- e) Maintain and update relevant project information in manual and/or electronic files; project information might include such things as project activity schedule, status reports, correspondence; etc.

**3.2.12 PROJECT MANAGER (INTERMEDIATE / SENIOR)**

The Project Manager must perform, without being limited to, the following tasks to support PeopleSoft ERP systems and related projects:

- a) Manage other Project Management resources that are responsible for an element of the project and its associated project team;
- b) Manage the project during the development, implementation and operations startup by ensuring that resources are made available and that the project is developed and is fully operational within previously agreed time, cost and performance parameters;
- c) Formulate statements of problems; establishes procedures for the development and implementation of significant, new or modified project elements to solve these problems, and obtains approval thereof;
- d) Define and document the objectives for the project; determine budgetary requirements, the composition, roles and responsibilities and terms of reference for the project team;
- e) Report progress of the project on an ongoing basis and at scheduled points in the life cycle;
- f) Prepare plans, charts, tables and diagrams to assist in analyzing or displaying problems; work with a variety of project management tools; and
- g) Project sign-off.

**3.2.13 QUALITY ASSURANCE SPECIALIST/ANALYST (INTERMEDIATE / SENIOR)**

The Quality Assurance Specialist/Analyst must perform, without being limited to, the following tasks to support PeopleSoft ERP systems and related projects:

- a) Lead development of test plans, test scripts and test data;
- b) Participate in functional and technical design reviews, perform integration/functional and system testing, and verify test results;
- c) Identify and document software defects;
- d) Collaborate with other project resources to resolve defects; and
- e) Perform regression testing of software applications.

**3.2.14 RISK MANAGEMENT SPECIALIST (SENIOR)**

The Risk Management Specialist must perform, without being limited to, the following tasks to support PeopleSoft ERP systems and related projects:

- a) Conduct risk assessments;
- b) Identify project risks and overall project risks;
- c) Recommend alternative solutions, methodologies and strategies for risk mitigation and management;
- d) Produce risk management plans;
- e) Conduct risk assessments for troubled projects to quickly assess associated risks and recommend courses of action to minimize inherent risks;
- f) Assist in prioritization and assignment of risks;
- g) Assist in the development and/or implementation of Risk Management Plans;
- h) Manage the implementation of Risk Management Plans to identify, analyze, plan, track and control project risks on a continuous basis throughout the project life cycle; and
- i) Train project teams in risk mitigation techniques.

**3.3 Workstream 3: Case Management ERP Systems****3.3.1 APPLICATION/SOFTWARE ARCHITECT (SENIOR)**

The Application/Software Architect must perform, without being limited to, the following tasks to support Case Management ERP systems and related projects:

- a) Develop technical architectures, frameworks and strategies, for an application area, to meet the business and application requirements;
- b) Analyze functional requirements to identify information, procedures and decision flows;
- c) Analyze and evaluate alternative software solutions to meet business problems;
- d) Ensure the integration of all aspects of software solutions;
- e) Create an application component roadmap - roadmap to align business vision and functional coverage to IT vision; and
- f) Create an application architecture framework.

**3.3.2 PROGRAMMER/ANALYST (INTERMEDIATE / SENIOR)**

The Programmer/Analyst must perform, without being limited to, the following tasks to support Case Management ERP systems and related projects:

- a) Analyze of functional requirements leading to the execution of the design, development and implementation of changes to the application;
- b) Develop and maintain configuration and programs based on approved requirements working both independently and within a team;
- c) Deliver technical specifications documents using the functional specifications provided by the functional and integration teams;
- d) Create and modify configuration and code for software as per technical specifications;
- e) Produce reports, manuals, programs, data files, and procedures for applications;
- f) Analyze code and objects to determine functional fit; and
- g) Execute tasks related to the implementation of application and database design and fixes, coding and technical documentation.

**3.3.3 SYSTEM ANALYST (INTERMEDIATE / SENIOR)**

The System Analyst must perform, without being limited to, the following tasks to support Case Management ERP systems and related projects:

- a) Develop requirements, feasibility, cost, design, and specification documents for systems;
- b) Implement systems to support projects, departments, organizations or businesses;
- c) Translate business requirements into systems design and specifications;
- d) Analyze and recommend alternatives and options for solutions; and
- e) Develop technical specifications for systems development, design and implementation.

**3.3.4 TESTER (INTERMEDIATE / SENIOR)**

The Tester must perform, without being limited to, the following tasks to support Case Management ERP systems and related projects:

- a) Develop the Test strategy; test planning and coordination;
- b) Manage and monitor test plans for all levels of testing;
- c) Develop test scenarios and test scripts;
- d) Establish and maintain test procedures and script libraries; and
- e) Establish a validation and verification capability which assumes functional and performance compliance.

**3.3.5 WEB GRAPHICS DESIGNER (INTERMEDIATE / SENIOR)**

The Web Graphics Designer must perform, without being limited to, the following tasks to support Case Management ERP systems and related projects:

- a) Create web pages including graphics and general web site design;
- b) Develop flowcharts (web site flow maps) depicting navigation and basic content;
- c) Develop content diagrams showing the interactive connection between web pages; and
- d) Develop interactive prototypes showing basic form and functionality for both usability testing and presentations.

**3.3.6 DATA CONVERSION SPECIALIST (INTERMEDIATE / SENIOR)**

The Data Conversion Specialist must perform, without being limited to, the following tasks to support Case Management ERP systems and related projects:

- a) Oversee all facets of the conversion process;
- b) Complete mapping, interfaces, mock conversion work, enhancements, actual conversion, and verify completeness and accuracy of converted data;
- c) Analyze and coordinate data file conversions; and
- d) Import files from heterogeneous platforms.

**3.3.7 BUSINESS ANALYST (INTERMEDIATE / SENIOR)**

The Business Analyst must perform, without being limited to, the following tasks to support Case Management ERP systems and related projects:

- a) Determine operational objectives by studying business functions; gathering information; evaluating output requirements and formats;

- b) Perform business analyses of requirements to identify information, procedures, and decision flows;
- c) Evaluate existing procedures and methods, identify and document items such as database content, structure, application subsystems;
- d) Develop data dictionary;
- e) Define and document interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems;
- f) Identify candidate business processes for re-design, prototype potential solutions, provide trade-off information and suggest a recommended course of action. Identify the modifications to the automated processes; and
- g) Establish acceptance test criteria with client.

### **3.3.8 BUSINESS ARCHITECT (SENIOR)**

The Business Architect must perform, without being limited to, the following tasks to support Case Management ERP systems and related projects:

- a) Develop policies and rules that allow an organization to carry out its mandate and functional responsibilities, and that govern the organization's actual and planned capabilities in terms of computers, data, information, human resources, communication facilities, software and management responsibilities; and
- b) Develop the specifications for where, how and why the various organizational components fit together as they do, and how they support the organization's mandate.

### **3.3.9 BUSINESS TRANSFORMATION ARCHITECT (SENIOR)**

The Business Transformation Architect must perform, without being limited to, the following tasks to support Case Management ERP systems and related projects:

- a) Analysis and development of architecture requirements design, process development, process mapping and training;
- b) Responsible for leading other functional staff to define business strategy and processes in support of transformation and change management activities;
- c) Participate in change impact analysis and change management activities; and
- d) Participate in organizational realignment (job re-design organizational re-structuring).

### **3.3.10 COURSEWARE DEVELOPER (INTERMEDIATE / SENIOR)**

The Courseware Developer must perform, without being limited to, the following tasks to support Case Management ERP systems and related projects:

- a) Perform needs assessment/analysis for training purposes;
- b) Plan and monitor training projects;
- c) Perform job, task, and/or content analysis;
- d) Recommend instructional media and strategies;
- e) Develop performance measurement standards;
- f) Develop training materials;
- g) Prepare end-users for implementation of courseware materials; and
- h) Deliver training to end users (individually and in groups).

**3.3.11 CHANGE MANAGEMENT CONSULTANT (SENIOR)**

The Change Management Consultant must perform, without being limited to, the following tasks to support Case Management ERP systems and related projects:

- a) Responsible for leading other functional resources to define business strategy and processes in support of transformation and change management activities;
- b) Engage and enable the organization to implement solutions by providing practical and actionable tools and templates;
- c) Participate in change impact analysis and change management activities;
- d) Work with the target community to ensure alignment, correct skills and experience to enable the change; and
- e) Provide onsite as well as remote advisory services for the management of change and individuals as required.

**3.3.12 ENTERPRISE ARCHITECT (SENIOR)**

The Enterprise Architect must perform, without being limited to, the following tasks to support Case Management ERP systems and related projects:

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

**3.3.13 PROJECT MANAGER (INTERMEDIATE / SENIOR)**

The Project Manager must perform, without being limited to, the following tasks to support Case Management ERP systems and related projects:

- a) Manage other Project Management resources that are responsible for an element of the project and its associated project team;
- b) Manage the project during the development, implementation and operations startup by ensuring that resources are made available and that the project is developed and is fully operational within previously agreed time, cost and performance parameters;



- c) Formulate statements of problems; establishes procedures for the development and implementation of significant, new or modified project elements to solve these problems, and obtains approval thereof;
- d) Define and document the objectives for the project; determine budgetary requirements, the composition, roles and responsibilities and terms of reference for the project team;
- e) Report progress of the project on an ongoing basis and at scheduled points in the life cycle;
- f) Prepare plans, charts, tables and diagrams to assist in analyzing or displaying problems; work with a variety of project management tools; and
- g) Project sign-off.

### **3.4 Workstream 4: GCDOCS Systems**

#### **3.4.1 APPLICATION/SOFTWARE ARCHITECT (SENIOR)**

The Application/Software Architect must perform, without being limited to, the following tasks to support GCDOCS systems and related projects:

- a) Develop technical architectures, frameworks and strategies, for an application area, to meet the business and application requirements;
- b) Analyze functional requirements to identify information, procedures and decision flows;
- c) Analyze and evaluate alternative software solutions to meet business problems;
- d) Ensure the integration of all aspects of software solutions;
- e) Create an application component roadmap - roadmap to align business vision and functional coverage to IT vision; and
- f) Create an application architecture framework.

#### **3.4.2 PROGRAMMER/ANALYST (INTERMEDIATE / SENIOR)**

The Programmer/Analyst must perform, without being limited to, the following tasks to support GCDOCS systems and related projects:

- a) Analyze functional requirements leading to the execution of the design, development and implementation of changes to the application;
- b) Develop and maintain configuration and programs based on approved requirements working both independently and within a team;
- c) Deliver technical specifications documents using the functional specifications provided by the functional and integration teams;
- d) Create and modify configuration and code for software as per technical specifications;
- e) Produce reports, manuals, programs, data files, and procedures for applications;
- f) Analyze code and objects to determine functional fit; and
- g) Execute tasks related to the implementation of application and database design and fixes, coding and technical documentation.

#### **3.4.3 SYSTEM ANALYST (INTERMEDIATE / SENIOR)**

The System Analyst must perform, without being limited to, the following tasks to support GCDOCS systems and related projects:

- a) Develop requirements, feasibility, cost, design, and specification documents for systems;
- b) Implement systems to support projects, departments, organizations or businesses;
- c) Translate business requirements into systems design and specifications;
- d) Analyze and recommend alternatives and options for solutions; and
- e) Develop technical specifications for systems development, design and implementation.

**3.4.4 TESTER (INTERMEDIATE / SENIOR)**

The Tester must perform, without being limited to, the following tasks to support GCDOCS systems and related projects:

- a) Develop the Test strategy; test planning and coordination;
- b) Manage and monitor test plans for all levels of testing;
- c) Develop test scenarios and test scripts;
- d) Establish and maintain test procedures and script libraries; and
- e) Establish a validation and verification capability which assumes functional and performance compliance.

**3.4.5 IM ARCHITECT (SENIOR)**

The IM Architect must perform, without being limited to, the following tasks to support GCDOCS systems and related projects:

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

**3.4.6 DATA CONVERSION SPECIALIST (INTERMEDIATE / SENIOR)**

The Data Conversion Specialist must perform, without being limited to, the following tasks to support GCDOCS systems and related projects:

- a) Oversee all facets of the conversion process;
- b) Complete mapping, interfaces, mock conversion work, enhancements, actual conversion, and verify completeness and accuracy of converted data;
- c) Analyze and coordinate data file conversions; and
- d) Import files from heterogeneous platforms.

**3.4.7 BUSINESS ANALYST (INTERMEDIATE / SENIOR)**

The Business Analyst must perform, without being limited to, the following tasks to support GCDOCS systems and related projects:

- a) Determine operational objectives by studying business functions; gathering information; evaluating output requirements and formats;

- b) Perform business analyses of requirements to identify information, procedures, and decision flows;
- c) Evaluate existing procedures and methods, identify and document items such as database content, structure, application subsystems;
- d) Develop data dictionary;
- e) Define and document interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems;
- f) Identify candidate business processes for re-design, prototype potential solutions, provide trade-off information and suggest a recommended course of action. Identify the modifications to the automated processes; and
- g) Establish acceptance test criteria with client.

#### **3.4.8 BUSINESS PROCESS RE-ENGINEERING (BPR) CONSULTANT (SENIOR)**

The Business Process Re-engineering (BPR) Consultant must perform, without being limited to, the following tasks to support GCDOCS systems and related projects:

- a) Review existing work processes and organizational structure;
- b) Analyze business functional requirements to identify information, procedures and decision flows;
- c) Identify candidate processes for re-design; prototype potential solutions, provide trade-off information and suggest a recommended course of action. Identify the modifications to the automated processes;
- d) Provide recommendations in defining new requirements and opportunities for applying efficient and effective solutions; identify and provide preliminary costs of potential options;
- e) Provide recommendations in developing and integrating process and information models between processes to eliminate information and process redundancies;
- f) Identify and recommend new processes and organizational structures;
- g) Provide recommendations on and/or assist in implementing new processes and organizational changes;
- h) Document workflows; and
- i) Use business, workflow and organizational modeling software tools.

#### **3.4.9 BUSINESS TRANSFORMATION ARCHITECT (SENIOR)**

The Business Transformation Architect must perform, without being limited to, the following tasks to support GCDOCS systems and related projects:

- a) Analyze and develop architecture requirements design, process development, process mapping and training;
- b) Responsible for leading other functional resources to define business strategy and processes in support of transformation and change management activities;
- c) Participate in change impact analysis and change management activities; and
- d) Participate in organizational realignment (job re-design organizational re-structuring).

#### **3.4.10 COURSEWARE DEVELOPER (INTERMEDIATE / SENIOR)**

The Courseware Developer must perform, without being limited to, the following tasks to support GCDOCS systems and related projects:

- a) Perform needs assessment/analysis for training purposes;
- b) Plan and monitor training projects;
- c) Perform job, task, and/or content analysis;
- d) Recommend instructional media and strategies;
- e) Develop performance measurement standards;
- f) Develop training materials;
- g) Prepare end-users for implementation of courseware materials; and

- h) Deliver training to end users (individually and in groups).

#### **3.4.11 TECHNICAL WRITER (INTERMEDIATE / SENIOR)**

The Technical Writer must perform, without being limited to, the following tasks to support GCDOCS systems and related projects:

- k) Document help text, user manuals, technical documentation, web page content, etc.;
- l) Review documentation standards and the existing project documentation;
- m) Determine documentation requirements and makes plans for meeting them;
- n) Gather information concerning the features and functions provided by the developers;
- o) Assess the audience for the documents/manuals which are required and prepare a statement of purpose and scope for each;
- p) Develop a table of content for each document/manual and write or edit the required content;
- q) Investigate the accuracy of the information collected by making direct use of the material being documented;
- r) Prepare or coordinate the preparation of any required illustrations and diagrams;
- s) Design the layout of the documents/manuals; and
- t) Use word-processing, desk-top publishing and graphics software packages to produce final camera-ready copy.

#### **3.4.12 CHANGE MANAGEMENT CONSULTANT (SENIOR)**

The Change Management Consultant must perform, without being limited to, the following tasks to support GCDOCS systems and related projects:

- a) Responsible for leading other functional resources to define business strategy and processes in support of transformation and change management activities;
- b) Engage and enable the organization to implement solutions by providing practical and actionable tools and templates;
- c) Participate in change impact analysis and change management activities;
- d) Work with the target community to ensure alignment, correct skills and experience to enable the change; and
- e) Provide onsite as well as remote and advisory services for the management of change and individuals as required.

#### **3.4.13 ENTERPRISE ARCHITECT (SENIOR)**

The Enterprise Architect must perform, without being limited to, the following tasks to support GCDOCS systems and related projects:

- a) Evaluate the enterprise's business/Information and Communication Technology (ICT) architecture, determine its consistency and integration with the organization's business/ICT strategies, assess the degree of its alignment with Treasury Board Secretariat - Chief Information Officer Branch (CIOB) Business Transformation Enablement Program (BTEP) and Federated Architecture Program (FAP) and recommend changes to the business/ICT architecture to improve its alignment with these external factors;
- b) Identify future business/ICT requirements against the current enterprise architecture, perform gaps analyses, develop Requirements for Technology Architectures (RTA), and prepare migration strategies;
- c) Assess the feasibility of migrating from the current state to the target business architecture and enabling technologies and identify the risks associated with migrating to the target business architecture and technologies and make recommendations for risk mitigation;

- d) Identify business and technology trends that create opportunities for business improvement, advise business and ICT Senior Executives on ICT trends and emerging technologies and the impact on the organization's and government ICT architectures and business strategies, model "What if" scenarios and recommend appropriate changes to the existing architecture and ICT infrastructure, and recommend alternative solutions, methodologies and strategies;
- e) Produce an architectural evolution plan, recommend prioritization of architecture evolution initiatives, and develop and/or implement an architecture evolution plan;
- f) Manage the development and implementation of an architectural improvement plan; and
- g) Train the organization to perform any of the above.

#### **3.4.14 PROJECT COORDINATOR (INTERMEDIATE / SENIOR)**

The Project Coordinator must perform, without being limited to, the following tasks to support GCDOCS systems and related projects:

- a) Assist project management, business, functional, technical users and end users in project coordination and synchronization tasks;
- b) Provide administrative and technical support of a clerical nature as required to a project team;
- c) Maintain project documentation and application/system libraries;
- d) Track and manage issues, defects and change requests in the service desk database;
- e) Maintain and update relevant project information in manual and/or electronic files; project information might include such things as project activity schedule, status reports, correspondence; etc.

#### **3.4.15 PROJECT MANAGER (INTERMEDIATE / SENIOR)**

The Project Manager must perform, without being limited to, the following tasks to support GCDOCS systems and related projects:

- a) a) Manage other Project Management resources that are responsible for an element of the project and its associated project team;
- b) Manage the project during the development, implementation and operations startup by ensuring that resources are made available and that the project is developed and is fully operational within previously agreed time, cost and performance parameters;
- c) Formulate statements of problems; establishes procedures for the development and implementation of significant, new or modified project elements to solve these problems, and obtains approval thereof;
- d) Define and document the objectives for the project; determine budgetary requirements, the composition, roles and responsibilities and terms of reference for the project team;
- e) Report progress of the project on an ongoing basis and at scheduled points in the life cycle;
- f) Prepare plans, charts, tables and diagrams to assist in analyzing or displaying problems; work with a variety of project management tools; and
- g) Project sign-off.

#### **3.4.16 QUALITY ASSURANCE SPECIALIST/ANALYST (INTERMEDIATE / SENIOR)**

The Quality Assurance Specialist/Analyst must perform, without being limited to, the following tasks to support GCDOCS systems and related projects:

- a) Lead development of test plans, test scripts and test data;
- b) Participate in functional and technical design reviews, perform integration/functional and system testing, and verify test results;
- c) Identify and document software defects;
- d) Collaborate with other project resources to resolve defects; and

- e) Perform regression testing of software applications.

#### **3.4.17 RISK MANAGEMENT SPECIALIST (SENIOR)**

The Risk Management Specialist must perform, without being limited to, the following tasks to support GCDOCS systems and related projects:

- a) Conduct risk assessments;
- b) Identify project risks and overall project risks;
- c) Recommend alternative solutions, methodologies and strategies for risk mitigation and management;
- d) Produce risk management plans;
- e) Conduct risk assessments for troubled projects to quickly assess associated risks and recommend courses of action to minimize inherent risks;
- f) Assist in prioritization and assignment of risks;
- g) Assist in the development and/or implementation of Risk Management Plans;
- h) Manage the implementation of Risk Management Plans to identify, analyze, plan, track and control project risks on a continuous basis throughout the project life cycle; and
- i) Train project teams in risk mitigation techniques.

### **3.5 Workstream 5: Financial Systems**

#### **3.5.1 APPLICATION/SOFTWARE ARCHITECT (SENIOR)**

The Application/Software Architect must perform, without being limited to, the following tasks to support Financial ERP systems and related projects:

- a) Develop technical architectures, frameworks and strategies, for an application area, to meet the business and application requirements;
- b) Analyze functional requirements to identify information, procedures and decision flows;
- c) Analyze and evaluate alternative software solutions to meet business problems;
- d) Ensure the integration of all aspects of software solutions;
- e) Create an application component roadmap - roadmap to align business vision and functional coverage to IT vision; and
- f) Create an application architecture framework.

#### **3.5.2 ERP FUNCTIONAL ANALYST (INTERMEDIATE / SENIOR)**

The ERP Functional Analyst must perform, without being limited to, the following tasks to support Financial ERP systems and related projects:

- a) Research, analyze and document user requirements, map interdependencies, and produce the required functional specifications and/or process re-engineering recommendations;
- b) Perform and document fit/gaps;
- c) Model/map administrative process and data requirements;
- d) Review Functional/Transaction Design Documents;
- e) Help to resolve various implementation issues;
- f) Create test scenarios and scripts according to business requirements; and
- g) Participate in testing, monitoring and reconciliation work related to data quality, data integrity and reports.

**3.5.3 ERP SYSTEM ANALYST (INTERMEDIATE / SENIOR)**

The ERP System Analyst must perform, without being limited to, the following tasks to support Financial ERP systems and related projects:

- a) Develop requirements, feasibility, cost, design, and specification documents for ERP systems;
- b) Implement ERP systems to support projects, departments, organizations or businesses;
- c) Translate ERP business requirements into systems design and specifications;
- d) Analyze and recommend alternatives and options for solutions;
- e) Develop technical specifications for ERP systems development, design and implementation;
- f) Research, analyze and document user requirements, map interdependencies, and produce the required functional specifications and/or process re-engineering recommendations;
- g) Provide functional and technical expertise on applications; and
- h) Review Functional and Technical Design Documents to ensure that there is alignment across the application(s).

**3.5.4 ERP TECHNICAL ANALYST (SENIOR)**

The ERP Technical Analyst must perform, without being limited to, the following tasks to support Financial ERP systems and related projects:

- a) Plan and provide recommendations to management regarding system landscape architectures including upgrade strategies;
- b) Translate functional and business requirements into technical requirements;
- c) Develop and/or manage technical aspects of application software, user interfaces, and third-party components;
- d) Conduct, assist with, and/or manage unit and system tests;
- e) Establish technical standards for the technical framework;
- f) Analyze and coordinate data file conversions;
- g) Complete mapping, interfaces, mock conversion work, enhancements, actual conversion, and verify completeness and accuracy of converted data; and
- h) Import files from heterogeneous platforms.

**3.5.5 PROGRAMMER/ANALYST (SENIOR)**

The Programmer/Analyst must perform, without being limited to, the following tasks to support Financial ERP systems and related projects:

- a) Analyze functional requirements leading to the execution of the design, development and implementation of changes to the application;
- b) Develop and maintain configuration and programs based on approved requirements working both independently and within a team;
- c) Deliver technical specifications documents using the functional specifications provided by the functional and integration teams;
- d) Create and modify configuration and code for software as per technical specifications;
- e) Produce reports, manuals, programs, data files, and procedures for applications;
- f) Analyze code and objects to determine functional fit; and
- g) Execute tasks related to the implementation of application and database design and fixes, coding and technical documentation.

**3.5.6 DATA CONVERSION SPECIALIST (SENIOR)**

The Data Conversion Specialist must perform, without being limited to, the following tasks to support Financial ERP systems and related projects:

- a) Oversee all facets of the conversion process;
- b) Complete mapping, interfaces, mock conversion work, enhancements, actual conversion, and verify completeness and accuracy of converted data;
- c) Analyze and coordinate data file conversions; and
- d) Import files from heterogeneous platforms.

**3.5.7 BUSINESS ANALYST (INTERMEDIATE / SENIOR)**

The Business Analyst must perform, without being limited to, the following tasks to support Financial ERP systems and related projects:

- a) Determine operational objectives by studying business functions; gathering information; evaluating output requirements and formats;
- b) Perform business analyses of requirements to identify information, procedures, and decision flows;
- c) Evaluate existing procedures and methods, identify and document items such as database content, structure, application subsystems;
- d) Develop data dictionary;
- e) Define and document interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems;
- f) Identify candidate business processes for re-design, prototype potential solutions, provide trade-off information and suggest a recommended course of action. Identify the modifications to the automated processes; and
- g) Establish acceptance test criteria with client.

**3.5.8 COURSEWARE DEVELOPER (SENIOR)**

The Courseware Developer must perform, without being limited to, the following tasks to support Financial ERP systems and related projects:

- a) Perform needs assessment/analysis for training purposes;
- b) Plan and monitor training projects;
- c) Perform job, task, and/or content analysis;
- d) Recommend instructional media and strategies;
- e) Develop performance measurement standards;
- f) Develop training materials;
- g) Prepare end-users for implementation of courseware materials; and
- h) Deliver training to end users (individually and in groups).

**3.5.9 CHANGE MANAGEMENT CONSULTANT (SENIOR)**

The Change Management Consultant must perform, without being limited to, the following tasks to support Financial ERP systems and related projects:

- a) Responsible for leading other functional resources to define business strategy and processes in support of transformation and change management activities;
- b) Engage and enable the organization to implement solutions by providing practical and actionable tools and templates;
- c) Participate in change impact analysis and change management activities;



- d) Work with the target community to ensure alignment, correct skills and experience to enable the change; and
- e) Provide onsite as well as remote and advisory services for the management of change and individuals as required.

#### **3.5.10 ENTERPRISE ARCHITECT (SENIOR)**

The Enterprise Architect must perform, without being limited to, the following tasks to support Financial ERP systems and related projects:

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

#### **3.5.11 PROJECT COORDINATOR (INTERMEDIATE / SENIOR)**

The Project Coordinator must perform, without being limited to, the following tasks to support Financial ERP systems and related projects:

- a) Assisting project management, business, functional, technical users and end users in project coordination and synchronization tasks;
- b) Providing administrative and technical support of a clerical nature as required to a project team;
- c) Maintaining project documentation and application/system libraries;
- d) Tracking and managing issues, defects and change requests in the service desk database;
- e) Maintaining and updating relevant project information in manual and/or electronic files; project information might include such things as project activity schedule, status reports, correspondence; etc.

#### **3.5.12 PROJECT MANAGER (INTERMEDIATE / SENIOR)**

The Project Manager must perform, without being limited to, the following tasks to support Financial ERP systems and related projects:

- a) Manage other Project Management resources that are responsible for an element of the project and its associated project team;

- b) Manage the project during the development, implementation and operations startup by ensuring that resources are made available and that the project is developed and is fully operational within previously agreed time, cost and performance parameters;
- c) Formulate statements of problems; establishes procedures for the development and implementation of significant, new or modified project elements to solve these problems, and obtains approval thereof;
- d) Define and document the objectives for the project; determine budgetary requirements, the composition, roles and responsibilities and terms of reference for the project team;
- e) Report progress of the project on an ongoing basis and at scheduled points in the life cycle;
- f) Prepare plans, charts, tables and diagrams to assist in analyzing or displaying problems; work with a variety of project management tools; and
- g) Project sign-off.

### **3.5.13 QUALITY ASSURANCE SPECIALIST/ANALYST (SENIOR)**

The Quality Assurance Specialist/Analyst must perform, without being limited to, the following tasks to support Financial ERP systems and related projects:

- a) Lead development of test plans, test scripts and test data;
- b) Participate in functional and technical design reviews, perform integration/functional and system testing, and verify test results;
- c) Identify and document software defects;
- d) Participate with other project resources to resolve defects; and
- e) Perform regression testing of software applications.

### **3.5.14 RISK MANAGEMENT SPECIALIST (SENIOR)**

The Risk Management Specialist must perform, without being limited to, the following tasks to support Financial ERP systems and related projects:

- a) Conduct risk assessments;
- b) Identify project risks and overall project risks;
- c) Recommend alternative solutions, methodologies and strategies for risk mitigation and management;
- d) Produce risk management plans;
- e) Conduct risk assessments for troubled projects to quickly assess associated risks and recommend courses of action to minimize inherent risks;
- f) Assist in prioritization and assignment of risks;
- g) Assist in the development and/or implementation of Risk Management Plans;
- h) Manage the implementation of Risk Management Plans to identify, analyze, plan, track and control project risks on a continuous basis throughout the project life cycle; and
- i) Train project teams in risk mitigation techniques.

### **3.5.15 TESTER (INTERMEDIATE / SENIOR)**

The Tester must perform, without being limited to, the following tasks to support Financial ERP systems and related projects:

- a) Develop the Test strategy; test planning and coordination;
- b) Manage and monitor test plans for all levels of testing;
- c) Develop test scenarios and test scripts;
- d) Establish and maintain test procedures and script libraries; and
- e) Establish a validation and verification capability which assumes functional and performance compliance.

**3.5.16 TECHNICAL WRITER (INTERMEDIATE / SENIOR)**

The Technical Writer must perform, without being limited to, the following tasks to support Financial ERP systems and related projects:

- a) Document help text, user manuals, technical documentation, web page content, etc.;
- b) Review documentation standards and the existing project documentation;
- c) Determine documentation requirements and makes plans for meeting them;
- d) Gather information concerning the features and functions provided by the developers;
- e) Assess the audience for the documents/manuals which are required and prepare a statement of purpose and scope for each;
- f) Develop a table of content for each document/manual and write or edit the required content;
- g) Investigate the accuracy of the information collected by making direct use of the material being documented;
- h) Prepare or coordinate the preparation of any required illustrations and diagrams;
- i) Design the layout of the documents/manuals; and
- j) Use word-processing, desk-top publishing and graphics software packages to produce final camera-ready copy.

## ANNEX B BASIS OF PAYMENT

### Workstream 1: PeopleSoft ERP Systems Technical Professional Services

Initial Contract Period		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.1 Application/Software Architect	Level 3	\$ TBD
A.4 ERP System Analyst	Level 2	\$ TBD
A.4 ERP System Analyst	Level 3	\$ TBD
A.5 ERP Technical Analyst	Level 2	\$ TBD
A.5 ERP Technical Analyst	Level 3	\$ TBD
A.7 Programmer/Analyst	Level 2	\$ TBD
A.7 Programmer/Analyst	Level 3	\$ TBD
A.11 Tester	Level 2	\$ TBD
A.11 Tester	Level 3	\$ TBD
I.1 Data Conversion Specialist	Level 2	\$ TBD
I.1 Data Conversion Specialist	Level 3	\$ TBD
P.2 Enterprise Architect	Level 3	\$ TBD

Option Period 1		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.1 Application/Software Architect	Level 3	\$ TBD
A.4 ERP System Analyst	Level 2	\$ TBD
A.4 ERP System Analyst	Level 3	\$ TBD
A.5 ERP Technical Analyst	Level 2	\$ TBD
A.5 ERP Technical Analyst	Level 3	\$ TBD
A.7 Programmer/Analyst	Level 2	\$ TBD
A.7 Programmer/Analyst	Level 3	\$ TBD
A.11 Tester	Level 2	\$ TBD
A.11 Tester	Level 3	\$ TBD
I.1 Data Conversion Specialist	Level 2	\$ TBD
I.1 Data Conversion Specialist	Level 3	\$ TBD
P.2 Enterprise Architect	Level 3	\$ TBD

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Option Period 2		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.1 Application/Software Architect	Level 3	\$ TBD
A.4 ERP System Analyst	Level 2	\$ TBD
A.4 ERP System Analyst	Level 3	\$ TBD
A.5 ERP Technical Analyst	Level 2	\$ TBD
A.5 ERP Technical Analyst	Level 3	\$ TBD
A.7 Programmer/Analyst	Level 2	\$ TBD
A.7 Programmer/Analyst	Level 3	\$ TBD
A.11 Tester	Level 2	\$ TBD
A.11 Tester	Level 3	\$ TBD
I.1 Data Conversion Specialist	Level 2	\$ TBD
I.1 Data Conversion Specialist	Level 3	\$ TBD
P.2 Enterprise Architect	Level 3	\$ TBD

**Workstream 2: PeopleSoft ERP Systems Functional Professional Services**

Initial Contract Period		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.2 ERP Functional Analyst	Level 2	\$ TBD
A.2 ERP Functional Analyst	Level 3	\$ TBD
B.1 Business Analyst	Level 2	\$ TBD
B.1 Business Analyst	Level 3	\$ TBD
B.2 Business Architect	Level 3	\$ TBD
B.5 Business Process Re-engineering (BPR) Consultant	Level 3	\$ TBD
B.6 Business System Analyst	Level 2	\$ TBD
B.6 Business System Analyst	Level 3	\$ TBD
B.7 Business Transformation Architect	Level 3	\$ TBD
B.9 Courseware Developer	Level 2	\$ TBD
B.9 Courseware Developer	Level 2	\$ TBD
B.10 Help Desk Specialist	Level 2	\$ TBD
B.10 Help Desk Specialist	Level 3	\$ TBD
B.14 Technical Writer	Level 2	\$ TBD
P.1 Change Management Consultant	Level 3	\$ TBD
P.7 Project Coordinator	Level 2	\$ TBD

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Initial Contract Period		
Resource Category	Level of Expertise	Firm Per Diem Rate
P.7 Project Coordinator	Level 3	\$ TBD
P.9 Project Manager	Level 2	\$ TBD
P.9 Project Manager	Level 3	\$ TBD
P.11 Quality Assurance Specialist/Analyst	Level 2	\$ TBD
P.11 Quality Assurance Specialist/Analyst	Level 3	\$ TBD
P.12 Risk Management Specialist	Level 3	\$ TBD

Option Period 1		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.2 ERP Functional Analyst	Level 2	\$ TBD
A.2 ERP Functional Analyst	Level 3	\$ TBD
B.1 Business Analyst	Level 2	\$ TBD
B.1 Business Analyst	Level 3	\$ TBD
B.2 Business Architect	Level 3	\$ TBD
B.5 Business Process Re-engineering (BPR) Consultant	Level 3	\$ TBD
B.6 Business System Analyst	Level 2	\$ TBD
B.6 Business System Analyst	Level 3	\$ TBD
B.7 Business Transformation Architect	Level 3	\$ TBD
B.9 Courseware Developer	Level 2	\$ TBD
B.9 Courseware Developer	Level 2	\$ TBD
B.10 Help Desk Specialist	Level 2	\$ TBD
B.10 Help Desk Specialist	Level 3	\$ TBD
B.14 Technical Writer	Level 2	\$ TBD
P.1 Change Management Consultant	Level 3	\$ TBD
P.7 Project Coordinator	Level 2	\$ TBD
P.7 Project Coordinator	Level 3	\$ TBD
P.9 Project Manager	Level 2	\$ TBD
P.9 Project Manager	Level 3	\$ TBD
P.11 Quality Assurance Specialist/Analyst	Level 2	\$ TBD
P.11 Quality Assurance Specialist/Analyst	Level 3	\$ TBD
P.12 Risk Management Specialist	Level 3	\$ TBD

Option Period 2		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.2 ERP Functional Analyst	Level 2	\$ TBD
A.2 ERP Functional Analyst	Level 3	\$ TBD
B.1 Business Analyst	Level 2	\$ TBD
B.1 Business Analyst	Level 3	\$ TBD
B.2 Business Architect	Level 3	\$ TBD
B.5 Business Process Re-engineering (BPR) Consultant	Level 3	\$ TBD
B.6 Business System Analyst	Level 2	\$ TBD
B.6 Business System Analyst	Level 3	\$ TBD
B.7 Business Transformation Architect	Level 3	\$ TBD
B.9 Courseware Developer	Level 2	\$ TBD
B.9 Courseware Developer	Level 2	\$ TBD
B.10 Help Desk Specialist	Level 2	\$ TBD
B.10 Help Desk Specialist	Level 3	\$ TBD
B.14 Technical Writer	Level 2	\$ TBD
P.1 Change Management Consultant	Level 3	\$ TBD
P.7 Project Coordinator	Level 2	\$ TBD
P.7 Project Coordinator	Level 3	\$ TBD
P.9 Project Manager	Level 2	\$ TBD
P.9 Project Manager	Level 3	\$ TBD
P.11 Quality Assurance Specialist/Analyst	Level 2	\$ TBD
P.11 Quality Assurance Specialist/Analyst	Level 3	\$ TBD
P.12 Risk Management Specialist	Level 3	\$ TBD

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**Workstream 3: Case Management System Professional Services**

Initial Contract Period		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.1 Application/Software Architect	Level 3	\$ TBD
A.7 Programmer/Analyst	Level 2	\$ TBD
A.7 Programmer/Analyst	Level 3	\$ TBD
A.8 System Analyst	Level 2	\$ TBD
A.8 System Analyst	Level 3	\$ TBD
A.11 Tester	Level 2	\$ TBD
A.11 Tester	Level 3	\$ TBD
A.15 Web Graphics Designer	Level 2	\$ TBD
A.15 Web Graphics Designer	Level 3	\$ TBD
I.1 Data Conversion Specialist	Level 2	\$ TBD
I.1 Data Conversion Specialist	Level 3	\$ TBD
B.1 Business Analyst	Level 2	\$ TBD
B.1 Business Analyst	Level 3	\$ TBD
B.2 Business Architect	Level 3	\$ TBD
B.7 Business Transformation Architect	Level 3	\$ TBD
B.9 Courseware Developer	Level 2	\$ TBD
B.9 Courseware Developer	Level 3	\$ TBD
P.1 Change Management Consultant	Level 3	\$ TBD
P.2 Enterprise Architect	Level 3	\$ TBD
P.9 Project Manager	Level 2	\$ TBD
P.9 Project Manager	Level 3	\$ TBD

Option Period 1		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.1 Application/Software Architect	Level 3	\$ TBD
A.7 Programmer/Analyst	Level 2	\$ TBD
A.7 Programmer/Analyst	Level 3	\$ TBD
A.8 System Analyst	Level 2	\$ TBD
A.8 System Analyst	Level 3	\$ TBD
A.11 Tester	Level 2	\$ TBD
A.11 Tester	Level 3	\$ TBD



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Option Period 1		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.15 Web Graphics Designer	Level 2	\$ TBD
A.15 Web Graphics Designer	Level 3	\$ TBD
I.1 Data Conversion Specialist	Level 2	\$ TBD
I.1 Data Conversion Specialist	Level 3	\$ TBD
B.1 Business Analyst	Level 2	\$ TBD
B.1 Business Analyst	Level 3	\$ TBD
B.2 Business Architect	Level 3	\$ TBD
B.7 Business Transformation Architect	Level 3	\$ TBD
B.9 Courseware Developer	Level 2	\$ TBD
B.9 Courseware Developer	Level 3	\$ TBD
P.1 Change Management Consultant	Level 3	\$ TBD
P.2 Enterprise Architect	Level 3	\$ TBD
P.9 Project Manager	Level 2	\$ TBD
P.9 Project Manager	Level 3	\$ TBD

Option Period 2		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.1 Application/Software Architect	Level 3	\$ TBD
A.7 Programmer/Analyst	Level 2	\$ TBD
A.7 Programmer/Analyst	Level 3	\$ TBD
A.8 System Analyst	Level 2	\$ TBD
A.8 System Analyst	Level 3	\$ TBD
A.11 Tester	Level 2	\$ TBD
A.11 Tester	Level 3	\$ TBD
A.15 Web Graphics Designer	Level 2	\$ TBD
A.15 Web Graphics Designer	Level 3	\$ TBD
I.1 Data Conversion Specialist	Level 2	\$ TBD
I.1 Data Conversion Specialist	Level 3	\$ TBD
B.1 Business Analyst	Level 2	\$ TBD
B.1 Business Analyst	Level 3	\$ TBD
B.2 Business Architect	Level 3	\$ TBD
B.7 Business Transformation Architect	Level 3	\$ TBD
B.9 Courseware Developer	Level 2	\$ TBD

Option Period 2		
Resource Category	Level of Expertise	Firm Per Diem Rate
B.9 Courseware Developer	Level 3	\$ TBD
P.1 Change Management Consultant	Level 3	\$ TBD
P.2 Enterprise Architect	Level 3	\$ TBD
P.9 Project Manager	Level 2	\$ TBD
P.9 Project Manager	Level 3	\$ TBD

**Workstream 4: GCDOCS System Professional Services**

Initial Contract Period		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.1 Application/Software Architect	Level 3	\$ TBD
A.7 Programmer/Analyst	Level 2	\$ TBD
A.7 Programmer/Analyst	Level 3	\$ TBD
A.8 System Analyst	Level 2	\$ TBD
A.8 System Analyst	Level 3	\$ TBD
A.11 Tester	Level 2	\$ TBD
A.11 Tester	Level 3	\$ TBD
I.5 IM Architect	Level 3	\$ TBD
I.1 Data Conversion Specialist	Level 2	\$ TBD
I.1 Data Conversion Specialist	Level 3	\$ TBD
B.1 Business Analyst	Level 2	\$ TBD
B.1 Business Analyst	Level 3	\$ TBD
B.5 Business Process Re-engineering (BPR) Consultant	Level 3	\$ TBD
B.7 Business Transformation Architect	Level 3	\$ TBD
B.9 Courseware Developer	Level 2	\$ TBD
B.9 Courseware Developer	Level 3	\$ TBD
B.14 Technical Writer	Level 2	\$ TBD
B.14 Technical Writer	Level 3	\$ TBD
P.1 Change Management Consultant	Level 3	\$ TBD
P.2 Enterprise Architect	Level 3	\$ TBD
P.7 Project Coordinator	Level 2	\$ TBD
P.7 Project Coordinator	Level 3	\$ TBD
P.9 Project Manager	Level 2	\$ TBD

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P.9 Project Manager	Level 3	\$ TBD
P.11 Quality Assurance Specialist/Analyst	Level 2	\$ TBD
P.11 Quality Assurance Specialist/Analyst	Level 3	\$ TBD
P.12 Risk Management Specialist	Level 3	\$ TBD

Option Period 1		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.1 Application/Software Architect	Level 3	\$ TBD
A.7 Programmer/Analyst	Level 2	\$ TBD
A.7 Programmer/Analyst	Level 3	\$ TBD
A.8 System Analyst	Level 2	\$ TBD
A.8 System Analyst	Level 3	\$ TBD
A.11 Tester	Level 2	\$ TBD
A.11 Tester	Level 3	\$ TBD
I.5 IM Architect	Level 3	\$ TBD
I.1 Data Conversion Specialist	Level 2	\$ TBD
I.1 Data Conversion Specialist	Level 3	\$ TBD
B.1 Business Analyst	Level 2	\$ TBD
B.1 Business Analyst	Level 3	\$ TBD
B.5 Business Process Re-engineering (BPR) Consultant	Level 3	\$ TBD
B.7 Business Transformation Architect	Level 3	\$ TBD
B.9 Courseware Developer	Level 2	\$ TBD
B.9 Courseware Developer	Level 3	\$ TBD
B.14 Technical Writer	Level 2	\$ TBD
B.14 Technical Writer	Level 3	\$ TBD
P.1 Change Management Consultant	Level 3	\$ TBD
P.2 Enterprise Architect	Level 3	\$ TBD
P.7 Project Coordinator	Level 2	\$ TBD
P.7 Project Coordinator	Level 3	\$ TBD
P.9 Project Manager	Level 2	\$ TBD
P.9 Project Manager	Level 3	\$ TBD
P.11 Quality Assurance Specialist/Analyst	Level 2	\$ TBD
P.11 Quality Assurance Specialist/Analyst	Level 3	\$ TBD
P.12 Risk Management Specialist	Level 3	\$ TBD

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Option Period 2		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.1 Application/Software Architect	Level 3	\$ TBD
A.7 Programmer/Analyst	Level 2	\$ TBD
A.7 Programmer/Analyst	Level 3	\$ TBD
A.8 System Analyst	Level 2	\$ TBD
A.8 System Analyst	Level 3	\$ TBD
A.11 Tester	Level 2	\$ TBD
A.11 Tester	Level 3	\$ TBD
I.5 IM Architect	Level 3	\$ TBD
I.1 Data Conversion Specialist	Level 2	\$ TBD
I.1 Data Conversion Specialist	Level 3	\$ TBD
B.1 Business Analyst	Level 2	\$ TBD
B.1 Business Analyst	Level 3	\$ TBD
B.5 Business Process Re-engineering (BPR) Consultant	Level 3	\$ TBD
B.7 Business Transformation Architect	Level 3	\$ TBD
B.9 Courseware Developer	Level 2	\$ TBD
B.9 Courseware Developer	Level 3	\$ TBD
B.14 Technical Writer	Level 2	\$ TBD
B.14 Technical Writer	Level 3	\$ TBD
P.1 Change Management Consultant	Level 3	\$ TBD
P.2 Enterprise Architect	Level 3	\$ TBD
P.7 Project Coordinator	Level 2	\$ TBD
P.7 Project Coordinator	Level 3	\$ TBD
P.9 Project Manager	Level 2	\$ TBD
P.9 Project Manager	Level 3	\$ TBD
P.11 Quality Assurance Specialist/Analyst	Level 2	\$ TBD
P.11 Quality Assurance Specialist/Analyst	Level 3	\$ TBD
P.12 Risk Management Specialist	Level 3	\$ TBD

**Workstream 5: Financial Systems Technical Professional Services**

Initial Contract Period		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.1 Application/Software Architect	Level 3	\$ TBD
A.2 ERP Functional Analyst	Level 2	\$ TBD
A.2 ERP Functional Analyst	Level 3	\$ TBD
A.4 ERP System Analyst	Level 2	\$ TBD
A.4 ERP System Analyst	Level 3	\$ TBD
A.5 ERP Technical Analyst	Level 3	\$ TBD
A.7 Programmer/Analyst	Level 3	\$ TBD
I.1 Data Conversion Specialist	Level 3	\$ TBD
B.1 Business Analyst	Level 2	\$ TBD
B.1 Business Analyst	Level 3	\$ TBD
B.9 Courseware Developer (Financial Systems)	Level 3	\$ TBD
B.9 Courseware Developer	Level 2	\$ TBD
B.9 Courseware Developer (uPerform)	Level 3	\$ TBD
P.1 Change Management Consultant	Level 3	\$ TBD
P.2 Enterprise Architect	Level 3	\$ TBD
P.7 Project Coordinator	Level 2	\$ TBD
P.7 Project Coordinator	Level 3	\$ TBD
P.9 Project Manager	Level 2	\$ TBD
P.9 Project Manager	Level 3	\$ TBD
P.11 Quality Assurance Specialist/Analyst	Level 3	\$ TBD
P.12 Risk Management Specialist	Level 3	\$ TBD
A.11 Tester	Level 2	\$ TBD
A.11 Tester	Level 3	\$ TBD
B.14 Technical Writer	Level 2	\$ TBD
B.14 Technical Writer	Level 3	\$ TBD

Option Period 1		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.1 Application/Software Architect	Level 3	\$ TBD
A.2 ERP Functional Analyst	Level 2	\$ TBD
A.2 ERP Functional Analyst	Level 3	\$ TBD
A.4 ERP System Analyst	Level 2	\$ TBD
A.4 ERP System Analyst	Level 3	\$ TBD
A.5 ERP Technical Analyst	Level 3	\$ TBD
A.7 Programmer/Analyst	Level 3	\$ TBD
I.1 Data Conversion Specialist	Level 3	\$ TBD
B.1 Business Analyst	Level 2	\$ TBD
B.1 Business Analyst	Level 3	\$ TBD
B.9 Courseware Developer (Financial Systems)	Level 3	\$ TBD
B.9 Courseware Developer	Level 2	\$ TBD
B.9 Courseware Developer (uPerform)	Level 3	\$ TBD
P.1 Change Management Consultant	Level 3	\$ TBD
P.2 Enterprise Architect	Level 3	\$ TBD
P.7 Project Coordinator	Level 2	\$ TBD
P.7 Project Coordinator	Level 3	\$ TBD
P.9 Project Manager	Level 2	\$ TBD
P.9 Project Manager	Level 3	\$ TBD
P.11 Quality Assurance Specialist/Analyst	Level 3	\$ TBD
P.12 Risk Management Specialist	Level 3	\$ TBD
A.11 Tester	Level 2	\$ TBD
A.11 Tester	Level 3	\$ TBD
B.14 Technical Writer	Level 2	\$ TBD
B.14 Technical Writer	Level 3	\$ TBD

Option Period 2		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.1 Application/Software Architect	Level 3	\$ TBD
A.2 ERP Functional Analyst	Level 2	\$ TBD
A.2 ERP Functional Analyst	Level 3	\$ TBD
A.4 ERP System Analyst	Level 2	\$ TBD
A.4 ERP System Analyst	Level 3	\$ TBD
A.5 ERP Technical Analyst	Level 3	\$ TBD
A.7 Programmer/Analyst	Level 3	\$ TBD
I.1 Data Conversion Specialist	Level 3	\$ TBD
B.1 Business Analyst	Level 2	\$ TBD
B.1 Business Analyst	Level 3	\$ TBD
B.9 Courseware Developer (Financial Systems)	Level 3	\$ TBD
B.9 Courseware Developer	Level 2	\$ TBD
B.9 Courseware Developer (uPerform)	Level 3	\$ TBD
P.1 Change Management Consultant	Level 3	\$ TBD
P.2 Enterprise Architect	Level 3	\$ TBD
P.7 Project Coordinator	Level 2	\$ TBD
P.7 Project Coordinator	Level 3	\$ TBD
P.9 Project Manager	Level 2	\$ TBD
P.9 Project Manager	Level 3	\$ TBD
P.11 Quality Assurance Specialist/Analyst	Level 3	\$ TBD
P.12 Risk Management Specialist	Level 3	\$ TBD
A.11 Tester	Level 2	\$ TBD
A.11 Tester	Level 3	\$ TBD
B.14 Technical Writer	Level 2	\$ TBD
B.14 Technical Writer	Level 3	\$ TBD

**ANNEX C**  
**SECURITY REQUIREMENTS CHECK LIST**  
(SEE ATTACHED HERETO)



**ATTACHMENT 1**  
**BID SUBMISSION FORM**

BID SUBMISSION FORM		
<b>Bidder's full legal name</b>		
<b>Authorized Representative of Bidder for evaluation purposes (e.g., clarifications)</b>	Name	
	Title	
	Address	
	Telephone #	
	Fax #	
	Email	
<b>Bidder's Procurement Business Number (PBN)</b> [see the Standard Instructions 2003]  <b>[Note to Bidders: Please ensure that the PBN you provide matches the legal name under which you have submitted your bid. If it does not, the Bidder will be determined based on the legal name provided, not based on the PBN, and the Bidder will be required to submit the PBN that matches the legal name of the Bidder.]</b>		
<b>Jurisdiction of Contract:</b> Province or territory in Canada the Bidder wishes to be the legal jurisdiction applicable to any resulting contract (if other than as specified in solicitation)		
<b>Former Public Servants</b>  See the Article in Part 2 of the bid solicitation entitled "Former Public Servant for a definition of "Former Public Servant".	Is the Bidder a FPS in receipt of a pension as defined in the bid solicitation? Yes ____ No ____  If yes, provide the information required by the Article in Part 2 entitled "Former Public Servant"	
	Is the Bidder a FPS who received a lump sum payment under the terms of the Work Force Adjustment Directive? Yes ____ No ____  If yes, provide the information required by the Article in Part 2 entitled "Former Public Servant"	
<b>Security Clearance Level of Bidder</b> [include both the level and the date it was granted]		
<b>[Note to Bidders: Please ensure that the security clearance matches the legal name of the Bidder.]</b>		

If it does not, the security clearance is not valid for the Bidder.]		
<div>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:</div> <div><div>1. The Bidder considers itself and its proposed resources able to meet all the mandatory requirements described in the bid solicitation;</div><div>2. This bid is valid for the period requested in the bid solicitation;</div><div>3. All the information provided in the bid is complete, true and accurate; and</div><div>4. If the Bidder is awarded a contract, it will accept all the terms and conditions set out in the resulting contract clauses included in the bid solicitation.</div></div>		
Signature of Authorized Representative of Bidder		

**ATTACHMENT 2**  
**BID EVALUATION CRITERIA**

**Workstream 1 PeopleSoft ERP Systems Technical Professional Services**

**1. Evaluation Summary (Workstream 1)**

Evaluation Summary (Workstream 1)				
No.	Mandatory Criteria	Compliant Yes/No		Bidder Response Tables to be completed (Cross-reference)
<b>M-1</b>	<b>Corporate Experience</b>			
	• Reference Contract #1			Appendix 1 to Attachment 2, Bidder Response Table (Corporate Reference Contracts, WS1), for each Contract
	• Reference Contract #2			
<b>M-2</b>	<b>Corporate Capability (Workstream 1)</b>			
	• Resource #1			Appendix 1 to Attachment 2, Bidder Response Table (Identified Resources, WS1) as applicable to each resource category
	• Resource #2			
	• Resource #3			
	• Resource #4			
	• Resource #5			
	• Resource #6			
	• Resource #7			
	• Resource #8			
No.	Point-Rated Criteria	Maximum Points	Sub-Total	
<b>R-1</b>	<b>Corporate Reference Contracts</b>		<b>200</b>	
	• Reference Contract #1	100		R-1 Corporate Reference Contracts, for each Contract
	• Reference Contract #2	100		
<b>R-2</b>	<b>PeopleSoft HCM Experience of Identified Resources</b>		<b>176</b>	
	• Resource #1	22		R-2 PeopleSoft HCM Experience of Identified Resources, for each Resource
	• Resource #2	22		
	• Resource #3	22		
	• Resource #4	22		
	• Resource #5	22		
	• Resource #6	22		
	• Resource #7	22		
	• Resource #8	22		
<b>R-3</b>	<b>Bench Strength (PeopleSoft HCM Technical)</b>		<b>296</b>	
	• Additional Resource #1	37		R-3 Bench Strength (PeopleSoft) & applicable Appendix 1 to Attachment 2, Bidder Response Table
	• Additional Resource #2	37		
	• Additional Resource #3	37		
	• Additional Resource #4	37		
	• Additional Resource #5	37		

Evaluation Summary (Workstream 1)				
	• Additional Resource #6	37		(Identified Resources, WS1) for each resource
	• Additional Resource #7	37		
	• Additional Resource #8	37		
<b>Overall Maximum Points</b>		<b>672</b>		
<b>Pass Mark</b> (50% of Overall Maximum Points)		<b>336</b>		

## 2. Mandatory Evaluation Criteria (Workstream 1)

### M-1 Corporate Experience

M-1 Corporate Experience		
Item	Mandatory Criteria	Demonstrated Experience
<b>M-1</b>	<p>The Bidder must provide two Customer Reference Contracts, with a cumulative billed value of \$5,000,000.00 (Canadian, including taxes) within the last five years of the issuance date of this RFP, where the Bidder was contracted to provide resources to support the implementation, upgrade or support of the PeopleSoft Human Capital Management (HCM) application (version 8.9 or more recent).</p> <p>Of the two Customer Reference Contracts provided, at least one contract must have had a minimum billed value of \$2,000,000.00 (Canadian, including taxes) as of the issuance date of this RFP (Canadian including taxes), within a consecutive twelve-month period, under the contract.</p> <p><b>Note:</b> If more than the requested number of reference contracts are provided, Canada will only evaluate the first 2 in the order in which they are set out in the Bid.</p>	Bidder to complete Appendix 1 to Attachment 2, Bidder Response Table (Corporate Reference Contracts, WS1) for each referenced Contract

**M-2 Corporate Capability (Workstream 1)**

<b>M-2 Corporate Capability (Workstream 1)</b>																										
<b>Item</b>	<b>Mandatory Criteria</b>	<b>Demonstrated Experience</b>																								
<b>M-2</b>	<p>The Bidder must demonstrate its capability to provide resources (that meet PWGSC's minimum requirements as set-out in Appendix C to Annex A, Resource Assessment Criteria), as and when requested, by identifying a resource in response to each of the requirements identified in the table below. <u>Each of the identified resources must have previously been contracted by the Bidder for a minimum period of six months within the last two years two years preceding the issuance date of this RFP.</u></p> <table border="1"> <thead> <tr> <th><b>Workstream 1 Resource Category</b></th><th><b>Level</b></th><th><b># of resources to be identified</b></th></tr> </thead> <tbody> <tr> <td>ERP Systems Analyst (PeopleSoft)</td><td>3</td><td>2</td></tr> <tr> <td>ERP Technical Analyst (PeopleSoft)</td><td>3</td><td>2</td></tr> <tr> <td>Programmer / Analyst (PeopleSoft)</td><td>3</td><td>2</td></tr> <tr> <td>Tester (ERP)</td><td>2</td><td rowspan="4">2 (total in at least 2 out of 4 categories)</td></tr> <tr> <td>Tester (ERP)</td><td>3</td></tr> <tr> <td>Data Conversion Specialist (PeopleSoft)</td><td>2</td></tr> <tr> <td>Data Conversion Specialist (PeopleSoft)</td><td>3</td></tr> <tr> <td colspan="2"><b>Total # Resources</b></td><td><b>8</b></td></tr> </tbody> </table> <p><b>Note:</b> The resources identified in response to this requirement will be used to assess <u>Corporate Capability only</u>.</p>	<b>Workstream 1 Resource Category</b>	<b>Level</b>	<b># of resources to be identified</b>	ERP Systems Analyst (PeopleSoft)	3	2	ERP Technical Analyst (PeopleSoft)	3	2	Programmer / Analyst (PeopleSoft)	3	2	Tester (ERP)	2	2 (total in at least 2 out of 4 categories)	Tester (ERP)	3	Data Conversion Specialist (PeopleSoft)	2	Data Conversion Specialist (PeopleSoft)	3	<b>Total # Resources</b>		<b>8</b>	Bidder to complete the Appendix 1 to Attachment 2, Bidder Response Table (Identified Resources, WS1) as applicable to each resource category.
<b>Workstream 1 Resource Category</b>	<b>Level</b>	<b># of resources to be identified</b>																								
ERP Systems Analyst (PeopleSoft)	3	2																								
ERP Technical Analyst (PeopleSoft)	3	2																								
Programmer / Analyst (PeopleSoft)	3	2																								
Tester (ERP)	2	2 (total in at least 2 out of 4 categories)																								
Tester (ERP)	3																									
Data Conversion Specialist (PeopleSoft)	2																									
Data Conversion Specialist (PeopleSoft)	3																									
<b>Total # Resources</b>		<b>8</b>																								

**2. Point-Rated Evaluation Criteria (Workstream 1)****R-1 Corporate Reference Contracts**

The Bidder should demonstrate the extent to which the two Reference Contracts, provided in response to #M-1, exemplify the experience in the areas identified in the table below.

The Bidder will be awarded up to **100 points** for each Reference Contract (to a maximum of 200 points) in accordance with the evaluation criteria contained in the table below. If the Bidder does not demonstrate experience for a rated criterion they will get 0 points, no partial points will be awarded for a single criterion.

R-1 Corporate Reference Contracts				
Item	Point-rated Criteria	Max. Points	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
<b>Reference Contract #1 - Client Organization Name / Project Title:</b>				
R-1.1	Version of PeopleSoft HCM	10	<ul style="list-style-type: none"> <li><b>10 points</b> – The work delivered by the Bidder under the contract was related to the implementation of PeopleSoft HCM version 9.1 (or more recent).</li> </ul>	
R-1.2	Application Integration	70	<p><b>Up to 70 points</b> – The work delivered by the Bidder under the contract included application integration of the <a href="#">SAP Financials/PeopleSoft HCM</a> system with any of the following external systems:</p> <ul style="list-style-type: none"> <li>PeopleSoft Payroll = <b>20 points</b></li> <li>Database systems = <b>15 points</b></li> <li>BI/Data Warehouse systems = <b>15 points</b></li> <li>Enterprise Service Bus = <b>20 points</b></li> </ul>	
R-1.3	Data Conversion	10	<ul style="list-style-type: none"> <li><b>10 points</b> – The work delivered by the Bidder under the contract included data migration or conversion from a legacy application to the new PeopleSoft ERP system</li> </ul>	
R-1.4	Organizational Change Management (OCM)	10	<ul style="list-style-type: none"> <li><b>10 points</b> – The work delivered by the Bidder under the contract included OCM activities to support the successful implementation or upgrade of the PeopleSoft solution.</li> </ul> <p><b>Note:</b> OCM activities include the development of business strategies and processes in support of transformation initiatives, and/or conducting change impact analysis and the development of an associated Change Management Plan</p>	
<b>Total Maximum Points Contract #1</b>		<b>100</b>		
<b>Reference Contract #2 - Client Organization Name / Project Title:</b>				
R-1.5	Version of PeopleSoft HCM	10	<ul style="list-style-type: none"> <li><b>10 points</b> – The work delivered by the Bidder under the contract was related to the implementation of PeopleSoft</li> </ul>	

R-1 Corporate Reference Contracts				
Item	Point-rated Criteria	Max. Points	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
			HCM version 9.1 (or more recent).	
R-1.6	Application Integration	70	<p><b>Up to 70 points</b> – The work delivered by the Bidder under the contract included application integration of the <a href="#">PeopleSoft HCM SAP Financials</a> system with any of the following external systems:</p> <ul style="list-style-type: none"> <li>• PeopleSoft Payroll = <b>20 points</b></li> <li>• Database systems = <b>15 points</b></li> <li>• BI/Data Warehouse systems = <b>15 points</b></li> <li>Enterprise Service Bus = <b>20 points</b></li> </ul>	
R-1.7	Data Conversion	10	<b>10 points</b> – The work delivered by the Bidder under the contract included data migration or conversion from a legacy application to the new PeopleSoft ERP system	
R-1.8	Organizational Change Management (OCM)	10	<ul style="list-style-type: none"> <li>• <b>10 points</b> – The work delivered by the Bidder under the contract included OCM activities to support the successful implementation or upgrade of the PeopleSoft solution.</li> </ul> <p><b>Note:</b> OCM activities include the development of business strategies and processes in support of transformation initiatives, and/or conducting change impact analysis and the development of an associated Change Management Plan</p>	
<b>Total Maximum Points Contract #2</b>		<b>100</b>		
<b>Points Achieved</b>				

**R-2 PeopleSoft Experience of Identified Resources**

The Bidder should further demonstrate the depth of experience in PeopleSoft HCM of the eight resources identified in response to #M-2.

The Bidder will be awarded up to **22 points** for each resource (to a maximum of 176 points) in accordance with the evaluation criteria contained in the table below. If the Bidder does not demonstrate experience for a rated criterion they will get 0 points, no partial points will be awarded for a single criterion.

<b>R-2 PeopleSoft Experience of Identified Resources</b>				
<b>Resource Category:</b>		<insert applicable category>		
<b>Name of Identified Resource:</b>		<insert name of resource identified in response to #M-2>		
<b>Item</b>	<b>Point-Rated Criteria</b>	<b>Max. Points</b>	<b>Evaluation Criteria</b>	<b>Demonstrated Experience (Bidder to Insert Data)</b>
<b>R-2.1</b>	<b>Integration Experience</b>  The identified resource has experience integrating or interfacing PeopleSoft HCM with PeopleSoft NA Payroll  To be considered, the resource should have worked on the project for a minimum of six months within the last five years.	<b>5</b>	Up to 5 points as follows: <ul style="list-style-type: none"> <li>• <b>5 points</b> –Experience integrating version 9.1 (or more recent) demonstrated; or</li> <li>• <b>2 points</b> –Experience integrating version 8.9 demonstrated.</li> </ul>	Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.
<b>R-2.2</b>	<b>Experience with PeopleSoft NA Payroll</b>  The identified resource has experience performing the tasks associated with the resource category as detailed in Appendix 1 to Attachment 2, Bidder Response Table, Minimum experience in the resource category criteria 2-x.1 (as applicable to the resource category) to support PeopleSoft NA Payroll suite (version 9.1 or more recent):  To be considered, the resource should have worked on the project for a minimum of six months within the last five years.	<b>5</b>	<ul style="list-style-type: none"> <li>• <b>5 points</b> –Experience demonstrated.</li> </ul>	



R-2 PeopleSoft Experience of Identified Resources				
<b>Resource Category:</b>		<insert applicable category>		
<b>Name of Identified Resource:</b>		<insert name of resource identified in response to #M-2>		
Item	Point-Rated Criteria	Max. Points	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
R-2.3	<p><b>Depth of Experience with PeopleSoft HCM</b></p> <p>The identified resource has experience performing the tasks associated with the resource category as detailed in Appendix 1 to Attachment 2, Bidder Response Table, Minimum experience in the resource category criteria 2-x.1 (as applicable to the resource category) to support specific modules of the PeopleSoft HCM suite (version 8.9 or more recent)</p> <p>a) PeopleSoft HCM Self Service</p> <p>b) PeopleSoft HCM Manager Self Service</p> <p>c) PeopleSoft HCM Manage Priorities</p> <p>d) PeopleSoft HCM Recruiting Workforce Administration</p> <p>e) PeopleSoft HCM Labour Administration</p> <p>f) PeopleSoft HCM Workforce Development - Profile Management, Performance Management</p> <p>g) PeopleSoft HCM Organization Development - Position Management, Enterprise Learning,</p> <p>h) PeopleSoft HCM Workforce Monitoring - Health &amp; Safety;</p> <p>i) PeopleSoft HCM Absence Management.</p> <p>To be considered, the resource should have worked on the project for a minimum of six months within the last five years.</p>	12	<p>Up to 12 points as follows:</p> <ul style="list-style-type: none"> <li>• <b>2 points</b> – For each module (version 9.1 or more recent); or</li> <li>• <b>1 point</b> – For each module (version 8.9).</li> </ul> <p><b>Note:</b> The Bidder should demonstrate that the identified resource conducted at least 50% of the tasks associated with the resource category (as set out in SOW section 3). Separate projects may be provided to demonstrate experience with different modules.</p>	

R-2 PeopleSoft Experience of Identified Resources				
<b>Resource Category:</b>		<insert applicable category>		
<b>Name of Identified Resource:</b>		<insert name of resource identified in response to #M-2>		
Item	Point-Rated Criteria	Max. Points	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
<b>Total Points</b>		<b>22</b>		
<b>Points Achieved</b>				

**R-3 Bench Strength (PeopleSoft HCM Technical)**

The Bidder should further demonstrate its capacity to provide resources with expertise in PeopleSoft HCM by identifying up to eight additional resources, over and beyond the eight resources identified in response to #M-2, as set out in the table below. Each of the additional resources must have previously been contracted by the Bidder for a minimum period of six months within the last two yearstwo years preceding the issuance date of this RFP.

Workstream 1 Resource Category	Level	Maximum # of additional resources to be identified
ERP Systems Analyst (PeopleSoft)	Level 3	2
ERP Technical Analyst (PeopleSoft)	Level 3	2
Programmer / Analyst (PeopleSoft)	Level 3	2
Tester (ERP)	2	2 (total in at least 2 out of 4 categories)
Tester (ERP)	3	
Data Conversion Specialist (PeopleSoft)	2	
Data Conversion Specialist (PeopleSoft)	3	
<b>Total # Resources</b>		<b>8</b>

The Bidder will be awarded up to **37 points** for each additional resource (to a maximum of 296 points) in accordance with the evaluation criteria contained in the table below. If the Bidder does not demonstrate experience for rated criteria they will get 0 points, no partial points will be awarded.

R-3 Bench Strength (PeopleSoft HCM Technical)				
<i>Bidder to replicate table for each of the eight additional resources</i>				
<b>Resource Category:</b>		<insert applicable category>		
<b>Name of Identified Resource:</b>		<insert name of additional resource>		
Item	Point-Rated Criteria	Max. Points	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
R-3.1	<p>The Bidder should demonstrate that the identified resource meet the minimum requirements associated with the applicable resource category (as set-out in Appendix 1 to Attachment 2, Bidder Response Table). <u>The identified resource must have previously been contracted by the Bidder for a minimum period of six months within the last two yearstwo years preceding the issuance date of this RFP.</u></p> <p><b>Note:</b> The resources identified in response to this requirement will be</p>	15	<ul style="list-style-type: none"> <li><b>15 points –</b> Identified resource meets the minimum criteria associated with the resource category.</li> </ul>	Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or

<b>R-3 Bench Strength (PeopleSoft HCM Technical)</b> <i>Bidder to replicate table for each of the eight additional resources</i>				
<b>Resource Category:</b>		<insert applicable category>		
<b>Name of Identified Resource:</b>		<insert name of additional resource>		
Item	Point-Rated Criteria	Max. Points	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
	used to assess <u>Corporate Capability only</u>			other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.
If full score is awarded in R-3.1 above; then up to 22 additional points may be awarded as follows (if 0 points are awarded then the resource will not be evaluated any further).				
<b>R-3.2</b>	<b>Integration Experience</b>  The identified resource has experience integrating or interfacing PeopleSoft HCM with PeopleSoft NA Payroll  To be considered, the resource should have worked on the project for a minimum of six months within the last five years.	<b>5</b>	Up to 5 points as follows: <ul style="list-style-type: none"> <li><b>5 points</b> – Experience integrating version 9.1 (or more recent) demonstrated; or</li> <li><b>2 points</b> – Experience integrating version 8.9 demonstrated.</li> </ul>	
<b>R-3.3</b>	<b>Experience with PeopleSoft NA Payroll</b>  The identified resource has experience performing the tasks associated with the resource category (as set-out in Appendix 1 to Attachment 2, Bidder Response Table) to support PeopleSoft NA Payroll suite (version 9.1 or more recent):  To be considered, the resource should have worked on the project for a minimum of six months within the last five years.	<b>5</b>	<ul style="list-style-type: none"> <li><b>5 points</b> – Experience demonstrated.</li> </ul>	
<b>R-3.4</b>	<b>Depth of Experience with PeopleSoft HCM</b>  The identified resource has experience performing the tasks associated with	<b>12</b>	Up to 12 points as follows: <ul style="list-style-type: none"> <li><b>2 points</b> – For each module (version 9.1 or more recent); or</li> </ul>	

<b>R-3 Bench Strength (PeopleSoft HCM Technical)</b> <i>Bidder to replicate table for each of the eight additional resources</i>				
<b>Resource Category:</b>		<insert applicable category>		
<b>Name of Identified Resource:</b>		<insert name of additional resource>		
<b>Item</b>	<b>Point-Rated Criteria</b>	<b>Max. Points</b>	<b>Evaluation Criteria</b>	<b>Demonstrated Experience</b> (Bidder to Insert Data)
	<p>the resource category (as set-out in Appendix 1 to Attachment 2, Bidder Response Table) to support specific modules of the PeopleSoft HCM suite (version 8.9 or more recent)</p> <p>a) PeopleSoft HCM Self Service b) PeopleSoft HCM Manager Self Service c) PeopleSoft HCM Manage Priorities d) PeopleSoft HCM Recruiting Workforce Administration e) PeopleSoft HCM Labour Administration f) PeopleSoft HCM Workforce Development - Profile Management, Performance Management g) PeopleSoft HCM Organization Development - Position Management, Enterprise Learning, h) PeopleSoft HCM Workforce Monitoring - Health &amp; Safety; i) PeopleSoft HCM Absence Management.</p> <p>To be considered, the resource should have worked on the project for a minimum of six months within the last five years.</p>		<ul style="list-style-type: none"> <li><b>1 point</b> – For each module (version 8.9).</li> </ul> <p><b>Note:</b> The Bidder should demonstrate that the identified resource conducted at least 50% of the tasks associated with the resource category (as set out in SOW section 3). Separate projects may be provided to demonstrate experience with different modules.</p>	
<b>Total Points</b>		<b>37</b>		
<b>Points Achieved</b>				

**Appendix 1 to Attachment 2, Bidder Response Table (Corporate Reference Contracts, WS1)**

<b>Bidder Response Table (Corporate Reference Contracts, WS1)</b> <i>Bidder to replicate table for each of the two Corporate Reference Contracts</i>	
<b>Corporate Reference Contract Description</b> (Bidder to Insert Data)	
<b>Client Particulars</b>	Client Organization Name
	Address
	Contract or Purchase Order Number
	Project Title
	Client Client Contact Name and Title
	Contact telephone number and/or e-mail address.
1.	Provide a brief description of the Bidder's contract to provide resources to support the implementation, upgrade or support of the PeopleSoft Human Capital Management (HCM) application (version 8.9 or more recent), including a list of Resource Categories provided under the contract.
2.	Specify contract start and end date (mm/yyyy to mm/yyyy)
3.	Specify total amount billed value (Canadian, including taxes) within the last five years of the issuance date of this RFP.

**Appendix 1 to Attachment 2, Bidder Response Table (Identified Resources, WS1)****1. ERP System Analyst (Level 3) (PeopleSoft)**

Resource Evaluation Criteria		
Resource Category	1. ERP System Analyst (Level 3) (PeopleSoft)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2-1.1	<p><b>Minimum experience in the resource category.</b></p> <p>The identified resource must have experience in the proposed resource category including:</p> <p>a) A minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this RFP, working as an ERP System Analyst (as defined below in 2-1.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the eight tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Develop requirements, feasibility, cost, design, and specification documents for ERP systems;</li><li>2) Implement ERP systems to support projects, departments, organizations or businesses;</li><li>3) Translate ERP business requirements into systems design and specifications;</li><li>4) Analyze and recommend alternatives and options for solutions;</li><li>5) Develop technical specifications for ERP systems development, design and implementation;</li><li>6) Research, analyze and document user requirements, map interdependencies, and produce the required functional specifications and/or process re-engineering recommendations;</li><li>7) Provide functional and technical expertise on applications; and</li><li>8) Review Functional and Technical Design Documents to ensure that there is alignment across the application(s).</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p><a href="#">The Bidder hereby certifies that the identified resource meets the "Minimum Experience in the resource category" as detailed under Evaluation Criteria #2-1.1. The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.</a></p> <p><a href="#">Name and signature of Authorized Representative</a></p> <p><a href="#">Substantiation of demonstrated experience must be included in the table; resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a></p>

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Resource Evaluation Criteria		
Resource Category		1. ERP System Analyst (Level 3) (PeopleSoft)
Name of Identified Resource:		<insert name>
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2-1.2	<p><b>Minimum experience with PeopleSoft</b></p> <p>The identified resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this RFP, implementing or upgrading a HCM solution (version 9.1 or more recent).</p>	<p><u>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</u></p>
Attachment 2-1.3	<p><b>Previously contracted by the Bidder.</b></p> <p>The identified resource must have previously been contracted by the Bidder for a minimum period of six months within the <u>last two years</u><u>two years preceding the issuance date of this RFP.</u></p> <p>The Bidder must provide the following substantiating information in its bid:</p> <ul style="list-style-type: none"><li>a) Customer organization name;</li><li>b) Customer contact (including name, title, and telephone number or e-mail address);</li><li>c) Project name;</li><li>d) Role of the resource on the project; and</li><li>e) Dates resource worked of contract (start and finish date, mm/yyyy).</li></ul> <p><b>Note:</b> Resources identified at the time of RFP must have previously been contracted by the Bidder as stipulated. This requirement does not apply to resources proposed after contract award in response to TAs.</p>	

**2. ERP Technical Analyst (Level 3) (PeopleSoft)**

Resource Evaluation Criteria		
Resource Category	2. ERP Technical Analyst (Level 3) (PeopleSoft)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2-2.1	<p><b>Minimum experience in the resource category.</b></p> <p>The identified resource must have experience in the proposed resource category including:</p> <p>a) A minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this RFP, working as an ERP Technical Analyst (as defined below in 2-2.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the eight tasks listed below for a minimum of six cumulative months of experience per task:</p> <p>1) Plan and provide recommendations to management regarding system landscape architectures including upgrade strategies;</p> <p>2) Translate functional and business requirements into technical requirements;</p> <p>3) Develop and/or manage technical aspects of application software, user interfaces, and third-party components;</p> <p>4) Conduct, assist with, and/or manage unit and system tests;</p> <p>5) Establish technical standards for the technical framework;</p> <p>6) Analyze and coordinate data file conversions;</p> <p>7) Complete mapping, interfaces, mock conversion work, enhancements, actual conversion, and verify completeness and accuracy of converted data; and</p> <p>8) Import files from heterogeneous platforms.</p> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p><a href="#">The Bidder hereby certifies that the identified resource meets the "Minimum Experience in the resource category" as detailed under Evaluation Criteria #2-2.1. The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.</a></p> <p><a href="#">Name and signature of Authorized Representative</a></p> <p><a href="#">Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a></p>
Attachment 2-2.2	<p><b>Minimum experience with PeopleSoft.</b></p>	<p><a href="#">Substantiation of demonstrated experience must be included in the</a></p>



Resource Evaluation Criteria		
Resource Category	2. ERP Technical Analyst (Level 3) (PeopleSoft)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
	<p>The identified resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this RFP, using PeopleTools to implement or upgrade a PeopleSoft HCM solution (version 9.1 or more recent).</p>	<a href="#">table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a>
Attachment 2-2.3	<p><b>Previously contracted by the Bidder.</b></p> <p>The identified resource must have previously been contracted by the Bidder for a minimum period of six months within the <a href="#">last two years two years preceding the issuance date of this RFP</a>.</p> <p>The Bidder must provide the following substantiating information in its bid:</p> <ul style="list-style-type: none"><li>a) Customer organization name;</li><li>b) Customer contact (including name, title, and telephone number or e-mail address);</li><li>c) Project name;</li><li>d) Role of the resource on the project; and</li><li>e) Dates resource worked of contract (start and finish date, mm/yyyy).</li></ul> <p><b>Note:</b> Resources identified at the time of RFP must have previously been contracted by the Bidder as stipulated. This requirement does not apply to resources proposed after contract award in response to TAs.</p>	

**3. Programmer / Analyst (Level 3) (PeopleSoft)**

Resource Evaluation Criteria		
Resource Category	3. Programmer / Analyst (Level 3) (PeopleSoft)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2-3.1	<p><b>Minimum experience in the resource category.</b></p> <p>The identified resource must have experience in the proposed resource category including:</p> <p>a) A minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this RFP, working as a Programmer / Analyst (as defined below in 2-3.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the seven tasks listed below for a minimum of six cumulative months of experience per task:</p> <p>1) Analysis of functional requirements leading to the execution of the design, development and implementation of changes to the application;</p> <p>2) Develop and maintain configuration and programs based on approved requirements working both independently and within a team;</p> <p>3) Deliver technical specifications documents using the functional specifications provided by the functional and integration teams;</p> <p>4) Create and modify configuration and code for software as per technical specifications;</p> <p>5) Produce reports, manuals, programs, data files, and procedures for applications;</p> <p>6) Analyze code and objects to determine functional fit; and</p> <p>7) Execute tasks related to the implementation of application and database design and fixes, coding and technical documentation.</p> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p><a href="#">The Bidder hereby certifies that the identified resource meets the "Minimum Experience in the resource category" as detailed under Evaluation Criteria #2-3.1. The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.</a></p> <p><a href="#">Name and signature of Authorized Representative</a></p> <p><a href="#">Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a></p>
Attachment 2-3.2	<p><b>Minimum experience with PeopleSoft</b></p>	<p><a href="#">Substantiation of demonstrated experience must be included in the</a></p>

Resource Evaluation Criteria		
Resource Category	3. Programmer / Analyst (Level 3) (PeopleSoft)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
	<p>The identified resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this RFP, implementing or upgrading a PeopleSoft HCM solution (version 9.1 or more recent).</p>	<a href="#">table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a>
Attachment 2-3.3	<p><b>Previously contracted by the Bidder</b></p> <p>The identified resource must have previously been contracted by the Bidder for a minimum period of six months within the <a href="#">last two years two years preceding the issuance date of this RFP</a>.</p> <p>The Bidder must provide the following substantiating information in its bid:</p> <ul style="list-style-type: none"><li>a) Customer organization name;</li><li>b) Customer contact (including name, title, and telephone number or e-mail address);</li><li>c) Project name;</li><li>d) Role of the resource on the project; and</li><li>e) Dates resource worked of contract (start and finish date, mm/yyyy).</li></ul> <p><b>Note:</b> Resources identified at the time of RFP must have previously been contracted by the Bidder as stipulated. This requirement does not apply to resources proposed after contract award in response to TAs.</p>	

**4. Tester (Level 2 or Level 3) (ERP)**

Resource Evaluation Criteria		
Resource Category	4. Tester (Level 2 or Level 3) (ERP)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2-4.1	<p><b>Minimum experience in the resource category.</b></p> <p>The identified resource must have experience in the proposed resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this RFP, working as a Tester (as defined below in 2-4.1 b); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this RFP, working as a Tester (as defined below in 2-4.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the five tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Develop the Test strategy; test planning and coordination;</li><li>2) Manage and monitor test plans for all levels of testing;</li><li>3) Develop test scenarios and test scripts;</li><li>4) Establish and maintain test procedures and script libraries; and</li><li>5) Establish a validation and verification capability which assumes functional and performance compliance.</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p><a href="#">The Bidder hereby certifies that the identified resource meets the "Minimum Experience in the resource category" as detailed under Evaluation Criteria #2-4.1. The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.</a></p> <p><a href="#">Name and signature of Authorized Representative</a></p>
	Attachment 2-4.2	<p><b>Minimum experience with ERP Systems.</b></p> <p><u>Level 2</u>: The identified resource must have a minimum of two years of experience, within the five years preceding the issuance date of this RFP, executing testing activities for an ERP application implementation or upgrade project.</p> <p><u>Level 3</u>: The identified resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this RFP, ERP application implementation or upgrade project.</p>

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Resource Evaluation Criteria		
Resource Category	4. Tester (Level 2 or Level 3) (ERP)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
		<a href="#">corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a>
Attachment 2-4.3	<p><b>Previously contracted by the Bidder.</b></p> <p>The identified resource must have previously been contracted by the Bidder for a minimum period of six months within the <a href="#">last two years/two years preceding the issuance date of this RFP</a>.</p> <p>The Bidder must provide the following substantiating information in its bid:</p> <ul style="list-style-type: none"><li>a) Customer organization name;</li><li>b) Customer contact (including name, title, and telephone number or e-mail address);</li><li>c) Project name;</li><li>d) Role of the resource on the project; and</li><li>e) Dates resource worked of contract (start and finish date, mm/yyyy).</li></ul> <p><b>Note:</b> Resources identified at the time of RFP must have previously been contracted by the Bidder as stipulated. This requirement does not apply to resources proposed after contract award in response to TAs.</p>	

**5. Data Conversion Specialist (Level 2 or Level 3) (PeopleSoft)**

Resource Evaluation Criteria		
Resource Category	5. Data Conversion Specialist (Level 2 or Level 3) (PeopleSoft)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2-5.1	<p><b>Minimum experience in the resource category.</b></p> <p>The identified resource must have experience in the proposed resource category including:</p> <p>a) <u>Level 2:</u> a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this RFP, working as a Data Conversion Specialist (as defined below in 2-5.1 b); and</p> <p><u>Level 3:</u> a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this RFP, working as a Data Conversion Specialist (as defined below in 2-5.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the four tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Oversee all facets of the conversion process;</li><li>2) Complete mapping, interfaces, mock conversion work, enhancements, actual conversion, and verify completeness and accuracy of converted data;</li><li>3) Analyze and coordinate data file conversions; and</li><li>4) Import files from heterogeneous platforms.</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p><a href="#">The Bidder hereby certifies that the identified resource meets the "Minimum Experience in the resource category" as detailed under Evaluation Criteria #2-5.1. The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.</a></p> <p><a href="#">Name and signature of Authorized Representative</a></p> <p>_____</p>
	Attachment 2-5.2	<p><b>Minimum experience with PeopleSoft</b></p> <p><u>Level 2:</u> The identified resource must have a minimum of two years of experience, within the five years preceding the issuance date of this RFP, performing data conversions for a PeopleSoft HCM solution (version 9.1 or more recent)..</p> <p><u>Level 3:</u> The identified resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this RFP, performing data</p>

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Resource Evaluation Criteria		
Resource Category	5. Data Conversion Specialist (Level 2 or Level 3) (PeopleSoft)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
	conversions for a PeopleSoft HCM solution (version 9.1 or more recent).	<a href="#">information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a>
Attachment 2-5.3	<p><b>Previously contracted by the Bidder.</b></p> <p>The identified resource must have previously been contracted by the Bidder for a minimum period of six months within the <a href="#">last two years/two years preceding the issuance date of this RFP</a>.</p> <p>The Bidder must provide the following substantiating information in its bid:</p> <ul style="list-style-type: none"><li>a) Customer organization name;</li><li>b) Customer contact (including name, title, and telephone number or e-mail address);</li><li>c) Project name;</li><li>d) Role of the resource on the project; and</li><li>e) Dates resource worked of contract (start and finish date, mm/yyyy).</li></ul> <p><b>Note:</b> Resources identified at the time of RFP must have previously been contracted by the Bidder as stipulated. This requirement does not apply to resources proposed after contract award in response to TAs.</p>	

**Workstream 2 PeopleSoft ERP Systems Functional Professional Services**
**1. Evaluation Summary (Workstream 2)**

Evaluation Summary (Workstream 2)				
No.	Mandatory Criteria	Compliant Yes/No		Bidder Response Tables to be completed (Cross-reference)
<b>M-1</b>	<b>Corporate Experience</b>			
	• Reference Contract #1			Appendix 1 to Attachment 2, Bidder Response Table (Corporate Reference Contracts, WS2), for each Contract
	• Reference Contract #2			
<b>M-2</b>	<b>Corporate Capability (Workstream 2)</b>			
	• Resource #1			Appendix 1 to Attachment 2, Bidder Response Table (Identified Resources, WS2) as applicable to each resource category
	• Resource #2			
	• Resource #3			
	• Resource #4			
	• Resource #5			
	• Resource #6			
	• Resource #7			
	• Resource #8			
No.	Point-Rated Criteria	Maximum Points	Sub-Total	
<b>R-1</b>	<b>Corporate Reference Contracts</b>		<b>200</b>	
	• Reference Contract #1	100		R-1 Corporate Reference Contracts, for each Contract
	• Reference Contract #2	100		
<b>R-2</b>	<b>PeopleSoft HCM Experience of Identified Resources</b>		<b>176</b>	
	• Resource #1	22		R-2 PeopleSoft Experience of Identified Resources, for each Resource
	• Resource #2	22		
	• Resource #3	22		
	• Resource #4	22		
	• Resource #5	22		
	• Resource #6	22		
	• Resource #7	22		
	• Resource #8	22		
<b>R-3</b>	<b>Bench Strength (PeopleSoft HCM Functional)</b>		<b>296</b>	
	• Additional Resource #1	37		R-3 Bench Strength (PeopleSoft HCM Functional) & applicable
	• Additional Resource #2	37		
	• Additional Resource #3	37		



Evaluation Summary (Workstream 2)				
	• Additional Resource #4	37		Appendix 1 to Attachment 2, Bidder Response Table (Identified Resources, WS2) for each resource
	• Additional Resource #5	37		
	• Additional Resource #6	37		
	• Additional Resource #7	37		
	• Additional Resource #8	37		
<b>Overall Maximum Points</b>		<b>672</b>		
<b>Pass Mark</b> (50% of Overall Maximum Points)		<b>336</b>		

## 2. Mandatory Evaluation Criteria (Workstream 2)

### M-1 Corporate Experience

M-1 Corporate Experience		
Item	Mandatory Criteria	Demonstrated Experience
<b>M-1</b>	<p>The Bidder must provide two Customer Reference Contracts, with a cumulative billed value of \$5,000,000.00 (Canadian, including taxes) within the last five years of the issuance date of this RFP, where the Bidder was contracted to provide resources to support the implementation, upgrade or support of the PeopleSoft Human Capital Management (HCM) application (version 8.9 or more recent).</p> <p>Of the two Customer Reference Contracts provided, at least one contract must have had a minimum billed value of \$2,000,000.00 (Canadian, including taxes) as of the issuance date of this RFP (Canadian including taxes), within a consecutive twelve-month period, under the contract.</p> <p><b>Note:</b> If more than the requested number of reference contracts are provided, Canada will only evaluate the first 2 in the order in which they are set out in the Bid.</p>	<p>Bidder to complete Appendix 1 to Attachment 2, Bidder Response Table (Corporate Reference Contracts, WS2) for each referenced Contract</p>

**M-2 Corporate Capability (Workstream 2)**

<b>M-2 Corporate Capability (Workstream 2)</b>																										
<b>Item</b>	<b>Mandatory Criteria</b>	<b>Demonstrated Experience</b>																								
<b>M-2</b>	<p>The Bidder must demonstrate its capability to provide resources (that meet PWGSC's minimum requirements as set-out in Appendix C to Annex A, Resource Assessment Criteria), as and when requested, by identifying a resource in response to each of the requirements identified in the table below. <u>Each of the identified resources must have previously been contracted by the Bidder for a minimum period of six months within the last two years two years preceding the issuance date of this RFP.</u></p> <table border="1"> <thead> <tr> <th><b>Workstream 2 Resource Category</b></th><th><b>Level</b></th><th><b># of resources to be identified</b></th></tr> </thead> <tbody> <tr> <td>ERP Functional Analyst (PeopleSoft)</td><td>3</td><td>2</td></tr> <tr> <td>Business Transformation Architect (PeopleSoft)</td><td>3</td><td>2</td></tr> <tr> <td>Courseware Developer (PeopleSoft)</td><td>3</td><td>2</td></tr> <tr> <td>Business Analyst (ERP)</td><td>2</td><td rowspan="4">2 (total in at least 2 out of 4 categories)</td></tr> <tr> <td>Business Analyst (ERP)</td><td>3</td></tr> <tr> <td>Help Desk Specialist (PeopleSoft)</td><td>3</td></tr> <tr> <td>Project Manager (ERP)</td><td>3</td></tr> <tr> <td colspan="2"><b>Total # Resources</b></td><td><b>8</b></td></tr> </tbody> </table> <p><b>Note:</b> The resources identified in response to this requirement will be used to assess <u>Corporate Capability only</u>.</p>	<b>Workstream 2 Resource Category</b>	<b>Level</b>	<b># of resources to be identified</b>	ERP Functional Analyst (PeopleSoft)	3	2	Business Transformation Architect (PeopleSoft)	3	2	Courseware Developer (PeopleSoft)	3	2	Business Analyst (ERP)	2	2 (total in at least 2 out of 4 categories)	Business Analyst (ERP)	3	Help Desk Specialist (PeopleSoft)	3	Project Manager (ERP)	3	<b>Total # Resources</b>		<b>8</b>	Bidder to complete the Appendix 1 to Attachment 2, Bidder Response Table (Identified Resources, WS2) as applicable to each resource category.
<b>Workstream 2 Resource Category</b>	<b>Level</b>	<b># of resources to be identified</b>																								
ERP Functional Analyst (PeopleSoft)	3	2																								
Business Transformation Architect (PeopleSoft)	3	2																								
Courseware Developer (PeopleSoft)	3	2																								
Business Analyst (ERP)	2	2 (total in at least 2 out of 4 categories)																								
Business Analyst (ERP)	3																									
Help Desk Specialist (PeopleSoft)	3																									
Project Manager (ERP)	3																									
<b>Total # Resources</b>		<b>8</b>																								

**2. Point-Rated Evaluation Criteria (Workstream 2)****R-1 Corporate Reference Contracts**

The Bidder should demonstrate the extent to which the two Reference Contracts, provided in response to #M-1, exemplify the experience in the areas identified in the table below.

The Bidder will be awarded up to **100 points** for each Reference Contract (to a maximum of 200 points) in accordance with the evaluation criteria contained in the table below. If the Bidder does not demonstrate experience for a rated criterion they will get 0 points, no partial points will be awarded for a single criterion.

R-1 Corporate Reference Contracts				
Item	Point-rated Criteria	Max. Points	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
<b>Reference Contract #1 - Client Organization Name / Project Title:</b>				
R-1.1	Version of PeopleSoft HCM	10	<ul style="list-style-type: none"> <li>• <b>10 points</b> – The work delivered by the Bidder under the contract was related to the implementation of PeopleSoft HCM version 9.1 (or more recent).</li> </ul>	
R-1.2	Application Integration	70	<p><b>Up to 70 points</b> – The work delivered by the Bidder under the contract included application integration of the <a href="#">PeopleSoft HCM</a> <a href="#">SAP Financials</a> system with any of the following external systems:</p> <ul style="list-style-type: none"> <li>• PeopleSoft Payroll = <b>20 points</b></li> <li>• Database systems = <b>15 points</b></li> <li>• BI/Data Warehouse systems = <b>15 points</b></li> <li>• Enterprise Service Bus = <b>20 points</b></li> </ul>	
R-1.3	Data Conversion	10	<ul style="list-style-type: none"> <li>• <b>10 points</b> – The work delivered by the Bidder under the contract included data migration or conversion from a legacy application to the new PeopleSoft ERP system</li> </ul>	
R-1.4	Organizational Change Management (OCM)	10	<ul style="list-style-type: none"> <li>• <b>10 points</b> – The work delivered by the Bidder under the contract included OCM activities to support the successful implementation or upgrade of the PeopleSoft solution.</li> </ul> <p><b>Note:</b> OCM activities include the development of business strategies and processes in support of transformation initiatives, and/or conducting change impact analysis and the development of an associated Change Management Plan</p>	
<b>Total Maximum Points Contract #1</b>		<b>100</b>		
<b>Reference Contract #2 - Client Organization Name / Project Title:</b>				
R-1.5	Version of PeopleSoft HCM	10	<ul style="list-style-type: none"> <li>• <b>10 points</b> – The work delivered by the Bidder under the contract was related to the implementation of PeopleSoft HCM version 9.1 (or more recent).</li> </ul>	

R-1 Corporate Reference Contracts				
Item	Point-rated Criteria	Max. Points	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
R-1.6	Application Integration	70	<p><b>Up to 70 points</b> – The work delivered by the Bidder under the contract included application integration of the <a href="#">PeopleSoft HCM</a> <a href="#">SAP Financials</a> system with any of the following external systems:</p> <ul style="list-style-type: none"> <li>• PeopleSoft Payroll = <b>20 points</b></li> <li>• Database systems = <b>15 points</b></li> <li>• BI/Data Warehouse systems = <b>15 points</b></li> <li>• Enterprise Service Bus = <b>20 points</b></li> </ul>	
R-1.7	Data Conversion	10	<ul style="list-style-type: none"> <li>• <b>10 points</b> – The work delivered by the Bidder under the contract included data migration or conversion from a legacy application to the new PeopleSoft ERP system</li> </ul>	
R-1.8	Organizational Change Management (OCM)	10	<ul style="list-style-type: none"> <li>• <b>10 points</b> – The work delivered by the Bidder under the contract included OCM activities to support the successful implementation or upgrade of the PeopleSoft solution.</li> </ul> <p><b>Note:</b> OCM activities include the development of business strategies and processes in support of transformation initiatives, and/or conducting change impact analysis and the development of an associated Change Management Plan</p>	
<b>Total Maximum Points Contract #2</b>		<b>100</b>		
<b>Points Achieved</b>				

**R-2 PeopleSoft Experience of Identified Resources**

The Bidder should further demonstrate the depth of experience in PeopleSoft HCM of the eight resources identified in response to #M-2.

The Bidder will be awarded up to **22 points** for each resource (to a maximum of 176 points) in accordance with the evaluation criteria contained in the table below. If the Bidder does not demonstrate experience for a rated criterion they will get 0 points, no partial points will be awarded for a single criterion.

<b>R-2 PeopleSoft Experience of Identified Resources</b>				
<b>Resource Category:</b>		<insert applicable category>		
<b>Name of Identified Resource:</b>		<insert name of resource identified in response to #M-2>		
<b>Item</b>	<b>Point-Rated Criteria</b>	<b>Max. Points</b>	<b>Evaluation Criteria</b>	<b>Demonstrated Experience (Bidder to Insert Data)</b>
<b>R-2.1</b>	<b>Integration Experience</b>  The identified resource has experience integrating or interfacing PeopleSoft HCM with PeopleSoft NA Payroll  To be considered, the resource should have worked on the project for a minimum of six months within the last five years.	<b>5</b>	Up to 5 points as follows: <ul style="list-style-type: none"> <li>• <b>5 points</b> –Experience integrating version 9.1 (or more recent) demonstrated; or</li> <li>• <b>2 points</b> –Experience integrating version 8.9 demonstrated.</li> </ul>	Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.
<b>R-2.2</b>	<b>Experience with PeopleSoft NA Payroll</b>  The identified resource has experience performing the tasks associated with the resource category as detailed in Appendix 1 to Attachment 2, Bidder Response Table, Minimum experience in the resource category criteria 2-x.1 (as applicable to the resource category) to support PeopleSoft NA Payroll suite (version 9.1 or more recent):  To be considered, the resource should have worked on the project for a minimum of six months within the last five years.	<b>5</b>	<ul style="list-style-type: none"> <li>• <b>5 points</b> –Experience demonstrated.</li> </ul>	

R-2 PeopleSoft Experience of Identified Resources				
<b>Resource Category:</b>		<insert applicable category>		
<b>Name of Identified Resource:</b>		<insert name of resource identified in response to #M-2>		
Item	Point-Rated Criteria	Max. Points	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
R-2.3	<p><b>Depth of Experience with PeopleSoft HCM</b></p> <p>The identified resource has experience performing the tasks associated with the resource category as detailed in Appendix 1 to Attachment 2, Bidder Response Table, Minimum experience in the resource category criteria 2-x.1 (as applicable to the resource category) to support specific modules of the PeopleSoft HCM suite (version 8.9 or more recent)</p> <p>a) PeopleSoft HCM Self Service</p> <p>b) PeopleSoft HCM Manager Self Service</p> <p>c) PeopleSoft HCM Manage Priorities</p> <p>d) PeopleSoft HCM Recruiting Workforce Administration</p> <p>e) PeopleSoft HCM Labour Administration</p> <p>f) PeopleSoft HCM Workforce Development - Profile Management, Performance Management</p> <p>g) PeopleSoft HCM Organization Development - Position Management, Enterprise Learning,</p> <p>h) PeopleSoft HCM Workforce Monitoring - Health &amp; Safety;</p> <p>i) PeopleSoft HCM Absence Management.</p> <p>To be considered, the resource should have worked on the project for a minimum of six months within the last five years.</p>	12	<p>Up to 12 points as follows:</p> <ul style="list-style-type: none"> <li>• <b>2 points</b> – For each module (version 9.1 or more recent); or</li> <li>• <b>1 point</b> – For each module (version 8.9).</li> </ul> <p><b>Note:</b> The Bidder should demonstrate that the identified resource conducted at least 50% of the tasks associated with the resource category (as set out in SOW section 3). Separate projects may be provided to demonstrate experience with different modules.</p>	

R-2 PeopleSoft Experience of Identified Resources				
<b>Resource Category:</b>		<insert applicable category>		
<b>Name of Identified Resource:</b>		<insert name of resource identified in response to #M-2>		
Item	Point-Rated Criteria	Max. Points	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
<b>Total Points</b>		<b>22</b>		
<b>Points Achieved</b>				

### R-3 Bench Strength (PeopleSoft HCM Functional)

The Bidder should further demonstrate its capacity to provide resources with expertise in PeopleSoft HCM by identifying up to eight additional resources, over and beyond the eight resources identified in response to #M-2, as set out in the table below. Each of the additional resources must have previously been contracted by the Bidder for a minimum period of six months within the last two yearstwo years preceding the issuance date of this RFP.

Workstream 2 Resource Category	Level	Maximum # of additional resources to be identified
ERP Functional Analyst (PeopleSoft)	Level 3	2
Business Transformation Architect (PeopleSoft)	Level 3	2
Courseware Developer (PeopleSoft)	Level 3	2
Business Analyst (ERP)	2	2 (total in at least 2 out of 4 categories)
Business Analyst (ERP)	3	
Help Desk Specialist (PeopleSoft)	2	
Project Manager (ERP)	3	
<b>Total # Resources</b>		<b>8</b>

The Bidder will be awarded up to **37 points** for each additional resource (to a maximum of 296 points) in accordance with the evaluation criteria contained in the table below. If the Bidder does not demonstrate experience for rated criteria they will get 0 points, no partial points will be awarded.

R-3 Bench Strength (PeopleSoft HCM Functional)				
<i>Bidder to replicate table for each of the eight additional resources</i>				
<b>Resource Category:</b>		<insert applicable category>		
<b>Name of Identified Resource:</b>		<insert name of additional resource>		
Item	Point-Rated Criteria	Max. Points	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
R-3.1	<p>The Bidder should demonstrate that the identified resource meet the minimum requirements associated with the applicable resource category (as set-out in Appendix 1 to Attachment 2, Bidder Response Table). <u>The identified resource must have previously been contracted by the Bidder for a minimum period of six months within the last two yearstwo years preceding the issuance date of this RFP.</u></p> <p><b>Note:</b> The resources identified in response to this requirement will be</p>	15	<ul style="list-style-type: none"> <li><b>15 points –</b> Identified resource meets the minimum criteria associated with the resource category.</li> </ul>	Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or

<b>R-3 Bench Strength (PeopleSoft HCM Functional)</b> <i>Bidder to replicate table for each of the eight additional resources</i>				
<b>Resource Category:</b>		<insert applicable category>		
<b>Name of Identified Resource:</b>		<insert name of additional resource>		
Item	Point-Rated Criteria	Max. Points	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
	used to assess <u>Corporate Capability only</u> .			other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.
If full score is awarded in R-3.1 above; then up to 22 additional points may be awarded as follows (if 0 points are awarded then the resource will not be evaluated any further).				
<b>R-3.2</b>	<b>Integration Experience</b>  The identified resource has experience integrating or interfacing PeopleSoft HCM with PeopleSoft NA Payroll  To be considered, the resource should have worked on the project for a minimum of six months within the last five years.	<b>5</b>	Up to 5 points as follows: <ul style="list-style-type: none"> <li><b>5 points</b> – Experience integrating version 9.1 (or more recent) demonstrated; or</li> <li><b>2 points</b> – Experience integrating version 8.9 demonstrated.</li> </ul>	
<b>R-3.3</b>	<b>Experience with PeopleSoft NA Payroll</b>  The identified resource has experience performing the tasks associated with the resource category (as set-out in Appendix 1 to Attachment 2, Bidder Response Table) to support PeopleSoft NA Payroll suite (version 9.1 or more recent):  To be considered, the resource should have worked on the project for a minimum of six months within the last five years.	<b>5</b>	<ul style="list-style-type: none"> <li><b>5 points</b> – Experience demonstrated.</li> </ul>	
<b>R-3.4</b>	<b>Depth of Experience with PeopleSoft HCM</b>  The identified resource has experience performing the tasks associated with	<b>12</b>	Up to 12 points as follows: <ul style="list-style-type: none"> <li><b>2 points</b> – For each module (version 9.1 or more recent); or</li> </ul>	



<b>R-3 Bench Strength (PeopleSoft HCM Functional)</b> <i>Bidder to replicate table for each of the eight additional resources</i>				
<b>Resource Category:</b>		<insert applicable category>		
<b>Name of Identified Resource:</b>		<insert name of additional resource>		
<b>Item</b>	<b>Point-Rated Criteria</b>	<b>Max. Points</b>	<b>Evaluation Criteria</b>	<b>Demonstrated Experience</b> (Bidder to Insert Data)
	<p>the resource category (as set-out in Appendix 1 to Attachment 2, Bidder Response Table) to support specific modules of the PeopleSoft HCM suite (version 8.9 or more recent)</p> <p>a) PeopleSoft HCM Self Service b) PeopleSoft HCM Manager Self Service c) PeopleSoft HCM Manage Priorities d) PeopleSoft HCM Recruiting Workforce Administration e) PeopleSoft HCM Labour Administration f) PeopleSoft HCM Workforce Development - Profile Management, Performance Management g) PeopleSoft HCM Organization Development - Position Management, Enterprise Learning, h) PeopleSoft HCM Workforce Monitoring - Health &amp; Safety; i) PeopleSoft HCM Absence Management.</p> <p>To be considered, the resource should have worked on the project for a minimum of six months within the last five years.</p>		<ul style="list-style-type: none"> <li><b>1 point</b> – For each module (version 8.9).</li> </ul> <p><b>Note:</b> The Bidder should demonstrate that the identified resource conducted at least 50% of the tasks associated with the resource category (as set out in SOW section 3). Separate projects may be provided to demonstrate experience with different modules.</p>	
<b>Total Points</b>		<b>37</b>		
<b>Points Achieved</b>				

**Appendix 1 to Attachment 2, Bidder Response Table (Corporate Reference Contracts, WS2)**

<b>Bidder Response Table (Corporate Reference Contracts, WS2)</b> <i>Bidder to replicate table for each of the two Corporate Reference Contracts</i>	
	<b>Corporate Reference Contract Description</b> <b>(Bidder to Insert Data)</b>
<b>Client Particulars</b>	Client Organization Name
	Address
	Contract or Purchase Order Number
	Project Title
	Client Client Contact Name and Title
	Contact telephone number and/or e-mail address.
1.	Provide a brief description of the Bidder's contract to provide resources to support the implementation, upgrade or support of the PeopleSoft Human Capital Management (HCM) application (version 8.9 or more recent), including a list of Resource Categories provided under the contract.
2.	Specify contract start and end date (mm/yyyy to mm/yyyy)
3.	Specify total amount billed value (Canadian, including taxes) within the last five years of the issuance date of this RFP.

**Appendix 1 to Attachment 2, Bidder Response Table (Identified Resources, WS2)****1. ERP Functional Analyst (Level 3) (PeopleSoft)**

Resource Evaluation Criteria		
Resource Category	1. ERP Functional Analyst (Level 3) (PeopleSoft)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2-1.1	<p><b>Minimum experience in the resource category.</b></p> <p>The identified resource must have experience in the proposed resource category including:</p> <p>a) A minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this RFP, working as an ERP Functional Analyst (as defined below in 2-1.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the seven tasks listed below for a minimum of six cumulative months of experience per task:</p> <p>1) Research, analyze and document user requirements, map interdependencies, and produce the required functional specifications and/or process re-engineering recommendations;</p> <p>2) Perform and document fit/gaps;</p> <p>3) Model/map administrative process and data requirements;</p> <p>4) Review Functional/Transaction Design Documents;</p> <p>5) Help to resolve various implementation issues;</p> <p>6) Create test scenarios and scripts according to business requirements; and</p> <p>7) Participate in testing, monitoring and reconciliation work related to data quality, data integrity and reports.</p> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p><a href="#">The Bidder hereby certifies that the identified resource meets the "Minimum Experience in the resource category" as detailed under Evaluation Criteria #2-1.1. The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.</a></p> <p><a href="#">Name and signature of Authorized Representative</a></p> <p><a href="#">Substantiation of demonstrated experience must be included in the table; resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a></p>

Resource Evaluation Criteria		
Resource Category		1. ERP Functional Analyst (Level 3) (PeopleSoft)
Name of Identified Resource:		<insert name>
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2-1.2	<p><b>Minimum experience with PeopleSoft HCM</b></p> <p>The identified resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this RFP, implementing or upgrading PeopleSoft HCM (version 9.1 or more recent).</p>	<p><u>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</u></p>
Attachment 2-1.3	<p><b>Previously contracted by the Bidder.</b></p> <p>The identified resource must have previously been contracted by the Bidder for a minimum period of six months within the <u>last two years</u><del>two years</del> <u>preceding the issuance date of this RFP.</u></p> <p>The Bidder must provide the following substantiating information in its bid:</p> <ul style="list-style-type: none"><li>a) Customer organization name;</li><li>b) Customer contact (including name, title, and telephone number or e-mail address);</li><li>c) Project name;</li><li>d) Role of the resource on the project; and</li><li>e) Dates resource worked of contract (start and finish date, mm/yyyy).</li></ul> <p><b>Note:</b> Resources identified at the time of RFP must have previously been contracted by the Bidder as stipulated. This requirement does not apply to resources proposed after contract award in response to TAs.</p>	

**2. Business Transformation Architect (Level 3) (PeopleSoft)**

Resource Evaluation Criteria		
Resource Category		2. Business Transformation Architect (Level 3) (PeopleSoft)
Name of Identified Resource:		<insert name>
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2-2.1	<p><b>Minimum experience in the resource category.</b></p> <p>The identified resource must have experience in the proposed resource category including:</p> <p>a) A minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this RFP, working as a Business Transformation Architect (as defined below in 2-2.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the four tasks listed below for a minimum of six cumulative months of experience per task:</p> <p>1) Analyze and develop architecture requirements design, process development, process mapping and training;</p> <p>2) Responsible for leading other functional staff to define business strategy and processes in support of transformation and change management activities;</p> <p>3) Participate in change impact analysis and change management activities; and</p> <p>4) Participate in organizational realignment (job re-design organizational re-structuring).</p> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p><u>The Bidder hereby certifies that the identified resource meets the "Minimum Experience in the resource category" as detailed under Evaluation Criteria #2-1.1. The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.</u></p> <p><u>Name and signature of Authorized Representative</u></p> <p><u>Substantiation of demonstrated experience must be included in the table; resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</u></p>
	Attachment 2-2.2	<p><b>Minimum experience with PeopleSoft HCM.</b></p>

Resource Evaluation Criteria		
Resource Category	2. Business Transformation Architect (Level 3) (PeopleSoft)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
	The identified resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this RFP, conducting BTA activities in support of an organization-wide PeopleSoft HCM implementation project.	<a href="#">must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a>
Attachment 2-2.3	<p><b>Previously contracted by the Bidder.</b></p> <p>The identified resource must have previously been contracted by the Bidder for a minimum period of six months within the <a href="#">last two years</a><a href="#">two years preceding the issuance date of this RFP.</a></p> <p>The Bidder must provide the following substantiating information in its bid:</p> <ul style="list-style-type: none"><li>a) Customer organization name;</li><li>b) Customer contact (including name, title, and telephone number or e-mail address);</li><li>c) Project name;</li><li>d) Role of the resource on the project; and</li><li>e) Dates resource worked of contract (start and finish date, mm/yyyy).</li></ul> <p><b>Note:</b> Resources identified at the time of RFP must have previously been contracted by the Bidder as stipulated. This requirement does not apply to resources proposed after contract award in response to TAs.</p>	

**3. Courseware Developer (Level 3) (PeopleSoft)**

Resource Evaluation Criteria		
Resource Category		3. Courseware Developer (Level 3) (PeopleSoft)
Name of Identified Resource:		<insert name>
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2-3.1	<p><b>Minimum experience in the resource category.</b></p> <p>The identified resource must have experience in the proposed resource category including:</p> <p>a) A minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this RFP, working as a Courseware Developer (as defined below in 2-3.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the eight tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Perform needs assessment/analysis for training purposes;</li><li>2) Plan and monitor training projects;</li><li>3) Perform job, task, and/or content analysis;</li><li>4) Recommend instructional media and strategies;</li><li>5) Develop performance measurement standards;</li><li>6) Develop training materials;</li><li>7) Prepare end-users for implementation of courseware materials; and</li><li>8) Deliver training to end users (Individually and in groups).</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p><a href="#">The Bidder hereby certifies that the identified resource meets the "Minimum Experience in the resource category" as detailed under Evaluation Criteria #2-3.1. The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.</a></p> <p><a href="#">Name and signature of Authorized Representative</a></p> <p><a href="#">Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a></p>
Attachment 2-3.2	<b>Minimum experience with PeopleSoft HCM</b>	<p><a href="#">Substantiation of demonstrated experience must be included in the</a></p>

Resource Evaluation Criteria		
Resource Category	3. Courseware Developer (Level 3) (PeopleSoft)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
	<p>The identified resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this RFP, developing training materials for a PeopleSoft HCM (version 9.1 or more recent) system implementation or upgrade project.</p>	<a href="#">table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a>
Attachment 2-3.3	<p><b>Previously contracted by the Bidder</b></p> <p>The identified resource must have previously been contracted by the Bidder for a minimum period of six months within the <a href="#">last two years two years preceding the issuance date of this RFP</a>.</p> <p>The Bidder must provide the following substantiating information in its bid:</p> <ul style="list-style-type: none"><li>a) Customer organization name;</li><li>b) Customer contact (including name, title, and telephone number or e-mail address);</li><li>c) Project name;</li><li>d) Role of the resource on the project; and</li><li>e) Dates resource worked of contract (start and finish date, mm/yyyy).</li></ul> <p><b>Note:</b> Resources identified at the time of RFP must have previously been contracted by the Bidder as stipulated. This requirement does not apply to resources proposed after contract award in response to TAs.</p>	



**4. Business Analyst (Level 2 or Level 3) (ERP)**

Resource Evaluation Criteria		
Resource Category	4. Business Analyst (Level 2 or Level 3) (ERP)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2-4.1	<p><b>Minimum experience in the resource category.</b></p> <p>The identified resource must have experience in the proposed resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this RFP, working as a Business Analyst (as defined below in 2-4.1 b); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this RFP, working as a Business Analyst (as defined below in 2-4.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the seven tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Determine operational objectives by studying business functions; gathering information; evaluating output requirements and formats;</li><li>2) Perform business analyses of requirements to identify information, procedures, and decision flows;</li><li>3) Evaluate existing procedures and methods, identify and document items such as database content, structure, application subsystems;</li><li>4) Develop data dictionary;</li><li>5) Define and document interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems;</li><li>6) Identify candidate business processes for re-design, prototype potential solutions, provide trade-off information and suggest a recommended course of action. Identify the modifications to the automated processes; and</li><li>7) Establish acceptance test criteria with client.</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p><a href="#">The Bidder hereby certifies that the identified resource meets the "Minimum Experience in the resource category" as detailed under Evaluation Criteria #2-4.1. The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.</a></p> <p><a href="#">Name and signature of Authorized Representative</a></p>

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Resource Evaluation Criteria		
Resource Category	4. Business Analyst (Level 2 or Level 3) (ERP)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2-4.2	<p><b>Minimum experience with ERP Systems.</b></p> <p><u>Level 2:</u> The resource must have a minimum of two years of experience, within the five years preceding the issuance date of this RFP, analyzing and documenting requirements for an organization-wide ERP application implementation or upgrade project.</p> <p><u>Level 3:</u> The resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this RFP, analyzing and documenting requirements for an organization-wide ERP application implementation or upgrade project.</p>	<p><u>Substantiation of demonstrated experience must be included in the table. resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</u></p>
Attachment 2-4.3	<p><b>Previously contracted by the Bidder.</b></p> <p>The identified resource must have previously been contracted by the Bidder for a minimum period of six months within the <u>last two years</u><u>two years preceding the issuance date of this RFP.</u></p> <p>The Bidder must provide the following substantiating information in its bid:</p> <ul style="list-style-type: none"><li>a) Customer organization name;</li><li>b) Customer contact (including name, title, and telephone number or e-mail address);</li><li>c) Project name;</li><li>d) Role of the resource on the project; and</li><li>e) Dates resource worked of contract (start and finish date, mm/yyyy).</li></ul> <p><b>Note:</b> Resources identified at the time of RFP must have previously been contracted by the Bidder as stipulated. This requirement does not apply to resources proposed after contract award in response to TAs.</p>	

**5. Help Desk Specialist (Level 2 or Level 3) (PeopleSoft)**

Resource Evaluation Criteria		
Resource Category	5. Help Desk Specialist (Level 2 or Level 3) (PeopleSoft)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2-5.1	<p><b>Minimum experience in the resource category.</b></p> <p>The identified resource must have experience in the proposed resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this RFP, working as a Help Desk Specialist (as defined below in 2-5.1 b); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this RFP, working as a Help Desk Specialist (as defined below in 2-5.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the five tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Perform a variety of applications problem analysis and monitoring tasks and respond appropriately to user requests and problems;</li><li>2) Perform initial problem analysis and triage problem to other appropriate staff when appropriate;</li><li>3) Maintain liaison with application users, functional and technical staff to communicate the status of problem resolution to users; log and track requests for assistance;</li><li>4) Develop, implement, and/or participate in the preparation of procedure manuals and documentation for help desk use; and</li><li>5) Develop, implement, and/or participate in the distribution of application related information to users to include information such as help desk procedures and handbooks.</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p><a href="#">The Bidder hereby certifies that the identified resource meets the "Minimum Experience in the resource category" as detailed under Evaluation Criteria #2-5.1. The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.</a></p> <p><a href="#">Name and signature of Authorized Representative</a></p> <p>_____</p>
	Attachment 2-5.2	<p><b>Minimum experience with PeopleSoft HCM</b></p> <p><u>Level 2</u>: The resource must have a minimum of two years of experience, within the five years preceding the issuance</p>

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Resource Evaluation Criteria		
Resource Category	5. Help Desk Specialist (Level 2 or Level 3) (PeopleSoft)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
	<p>date of this RFP, providing first-level end user support for a PeopleSoft HCM (version 8.9 or more recent) system.</p> <p><u>Level 3:</u> The resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this RFP, providing first-level end user support for a PeopleSoft HCM (version 8.9 or more recent) system.</p>	<a href="#">required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a>
Attachment 2-5.3	<p><b>Previously contracted by the Bidder.</b></p> <p>The identified resource must have previously been contracted by the Bidder for a minimum period of six months within the <a href="#">last two years/two years preceding the issuance date of this RFP.</a></p> <p>The Bidder must provide the following substantiating information in its bid:</p> <ul style="list-style-type: none"><li>a) Customer organization name;</li><li>b) Customer contact (including name, title, and telephone number or e-mail address);</li><li>c) Project name;</li><li>d) Role of the resource on the project; and</li><li>e) Dates resource worked of contract (start and finish date, mm/yyyy).</li></ul> <p><b>Note:</b> Resources identified at the time of RFP must have previously been contracted by the Bidder as stipulated. This requirement does not apply to resources proposed after contract award in response to TAs.</p>	

**6. Project Manager (Level 3) (ERP)**

Resource Evaluation Criteria		
Resource Category	6. Project Manager (Level 3) (ERP)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2-6.1	<p><b>Minimum experience in the resource category.</b></p> <p>The identified resource must have experience in the proposed resource category including:</p> <p>a) A minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this RFP, working as a Project Manager (as defined below in 2-6.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the seven tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Manage other Project Management resources that are responsible for an element of the project and its associated project team;</li><li>2) Manage the project during the development, implementation and operations start up by ensuring that resources are made available and that the project is developed and is fully operational within previously agreed time, cost and performance parameters;</li><li>3) Formulate statements of problems; establishes procedures for the development and implementation of significant, new or modified project elements to solve these problems, and obtains approval thereof;</li><li>4) Define and document the objectives for the project; determine budgetary requirements, the composition, roles and responsibilities and terms of reference for the project team;</li><li>5) Report progress of the project on an ongoing basis and at scheduled points in the life cycle;</li><li>6) Prepare plans, charts, tables and diagrams to assist in analyzing or displaying problems; work with a variety of project management tools; and</li><li>7) Project sign-off.</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p><a href="#">The Bidder hereby certifies that the identified resource meets the "Minimum Experience in the resource category" as detailed under Evaluation Criteria #2-6.1. The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.</a></p> <p><a href="#">Name and signature of Authorized Representative</a></p> <p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>

Resource Evaluation Criteria		
Resource Category	6. Project Manager (Level 3) (ERP)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2-6.2	<p><b>Minimum experience with ERP Systems</b></p> <p>The identified resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this RFP, as a Project Manager on an ERP implementation project.</p>	<p><u>Substantiation of demonstrated experience must be included in the table. resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</u></p>
Attachment 2-6.3	<p><b>Minimum experience as a Senior PM</b></p> <p>The identified resource must have experience as a Project Manager, on a minimum of one project, where the resource was responsible for a complex application development or application implementation project. A complex project is a project which includes multiple (i.e. three or more teams or sub-projects and includes multi-departmental stakeholders).</p> <p>For each project to be considered, the resource should have worked on the project for a minimum duration of twelve months within the five years preceding the issuance date of this RFP.</p>	<p><u>Substantiation of demonstrated experience must be included in the table. resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</u></p>
Attachment 2-6.4	<p><b>Previously contracted by the Bidder</b></p> <p>The identified resource must have previously been contracted by the Bidder for a minimum period of six months within the <u>last two years</u> <u>two years preceding the issuance date of this RFP</u>.</p> <p>The Bidder must provide the following substantiating information in its bid:</p> <ul style="list-style-type: none"><li>a) Customer organization name;</li><li>b) Customer contact (including name, title, and telephone number or e-mail address);</li></ul>	

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Resource Evaluation Criteria		
Resource Category		6. Project Manager (Level 3) (ERP)
Name of Identified Resource:		<insert name>
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
	<p>c) Project name; d) Role of the resource on the project; and e) Dates resource worked of contract (start and finish date, mm/yyyy).</p> <p><b>Note:</b> Resources identified at the time of RFP must have previously been contracted by the Bidder as stipulated. This requirement does not apply to resources proposed after contract award in response to TAs.</p>	

### Workstream 3, Case Management Professional Services

#### 1. Evaluation Summary (Workstream 3)

Evaluation Summary (Workstream 3)				
No.	Mandatory Criteria	Compliant Yes/No		Bidder Response Tables to be completed (Cross-reference)
M-1	<b>Corporate Experience</b>			
	<ul style="list-style-type: none"> <li>Reference Contract #1</li> <li>Reference Contract #2</li> </ul>			Appendix 1 to Attachment 2, Bidder Response Table (Corporate Reference Contracts, WS3), for each Contract
M-2	<b>Corporate Capability (Workstream 3)</b>			
	<ul style="list-style-type: none"> <li>Resource #1</li> <li>Resource #2</li> <li>Resource #3</li> <li>Resource #4</li> <li>Resource #5</li> <li>Resource #6</li> <li>Resource #7</li> <li>Resource #8</li> </ul>			Appendix 1 to Attachment 2, Bidder Response Table (Identified Resources, WS3) as applicable to each resource category
No.	Point-Rated Criteria	Maximum Points	Sub-Total	
R-1	<b>Corporate Reference Contracts</b>		<b>200</b>	
	<ul style="list-style-type: none"> <li>Reference Contract #1</li> <li>Reference Contract #2</li> </ul>	100		R-1 Corporate Reference Contracts, for each Contract
R-2	<b>Microsoft Certified Partner</b>	100	<b>100</b>	R-2 Microsoft Certified Partner
R-3	<b>Corporate Dynamics Practice</b>	<u>100</u> <del>200</del>	<u>200</u> <del>100</del>	R-3 Corporate Dynamics Practice
R-4	<b>Dynamics Experience of Identified Resources</b>		<b>160</b>	
	<ul style="list-style-type: none"> <li>Resource #1</li> <li>Resource #2</li> <li>Resource #3</li> <li>Resource #4</li> <li>Resource #5</li> <li>Resource #6</li> <li>Resource #7</li> <li>Resource #8</li> </ul>	20		R-4 Dynamics Experience of Identified Resources, for each Resource
R-5	<b>Bench Strength (Dynamics Experience)</b>		<b>280</b>	
	<ul style="list-style-type: none"> <li>Additional Resource #1</li> <li>Additional Resource #2</li> <li>Additional Resource #3</li> <li>Additional Resource #4</li> <li>Additional Resource #5</li> <li>Additional Resource #6</li> </ul>	35		R-5 Bench Strength (Dynamics) & applicable Appendix 1 to Attachment 2, Bidder Response Table (Identified Resources, WS3) for each Resource



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Evaluation Summary (Workstream 3)			
	• Additional Resource #7	35	
	• Additional Resource #8	35	
Overall Maximum Points		940840	
Pass Mark		470420	
(5070% of Overall Maximum Points)			

## 2. Mandatory Evaluation Criteria (Workstream 3)

### M-1 Corporate Experience

M-1 Corporate Experience		
Item	Mandatory Criteria	Demonstrated Experience
M-1	<p>The Bidder must provide two Customer Reference Contracts, with a cumulative billed value of \$750,000.00 (Canadian, including taxes) within the last five years of the issuance date of this RFP, where the Bidder was contracted to design and implement solutions based on MS Dynamics CRM (version 2013 or above).</p> <p><b>Note:</b> If more than the requested number of reference contracts are provided, Canada will only evaluate the first 2 in the order in which they are set out in the Bid.</p>	Bidder to complete Appendix 1 to Attachment 2, M-1 Bidder Response Table for each referenced Contract

**M-2 Demonstrated Capability (Workstream 3)**

M-2 Corporate Capability (Workstream 3)																																						
Item	Mandatory Criteria		Demonstrated Experience																																			
M-2	<p>The Bidder must demonstrate its capability to provide resources (that meet PWGSC's minimum requirements as set-out in Appendix C to Annex A, Resource Assessment Criteria), as and when requested, by identifying a resource in response to each of the requirements identified in the table below. <u>Each of the identified resources must have previously been contracted by the Bidder for a minimum period of six months within the last two years two years preceding the issuance date of this RFP.</u></p> <table><tr><th>Workstream 3 Resource Category</th><th>Level</th><th># of resources to be identified</th></tr><tr><td>Application/Software Architect (Dynamics CRM Specialist)</td><td>Level 3</td><td rowspan="3">2 resources (total, in at least 2 out of 4 categories)</td></tr><tr><td>Business Architect (ERP Specialist)</td><td>Level 3</td></tr><tr><td>Business Transformation Architect</td><td>Level 3</td></tr><tr><td>Enterprise Architect (Dynamics CRM Specialist)</td><td>Level 3</td><td rowspan="4">3 resources (total, in at least 2 out of 4 categories)</td></tr><tr><td>Intermediate Programmer/Analyst (Dynamics CRM Specialist)</td><td>Level 2</td></tr><tr><td>Senior Programmer/Analyst (Dynamics CRM Specialist)</td><td>Level 3</td></tr><tr><td>Intermediate System Analyst (Dynamics CRM Specialist)</td><td>Level 2</td></tr><tr><td>Senior System Analyst (Dynamics CRM Specialist)</td><td>Level 3</td><td rowspan="2">1 (Level 2 or 3)</td></tr><tr><td>Intermediate Tester (Dynamics CRM Specialist)</td><td>Level 2</td></tr><tr><td>Senior Tester (Dynamics CRM Specialist)</td><td>Level 3</td><td rowspan="2">1</td></tr><tr><td>Senior Data Conversion Specialist (Dynamics CRM Specialist)</td><td>Level 3</td></tr><tr><td>Senior Business Analyst (Dynamics CRM Specialist)</td><td>Level 3</td><td>1</td></tr><tr><td colspan="2">Total # Resources</td><td>8</td></tr></table>		Workstream 3 Resource Category	Level	# of resources to be identified	Application/Software Architect (Dynamics CRM Specialist)	Level 3	2 resources (total, in at least 2 out of 4 categories)	Business Architect (ERP Specialist)	Level 3	Business Transformation Architect	Level 3	Enterprise Architect (Dynamics CRM Specialist)	Level 3	3 resources (total, in at least 2 out of 4 categories)	Intermediate Programmer/Analyst (Dynamics CRM Specialist)	Level 2	Senior Programmer/Analyst (Dynamics CRM Specialist)	Level 3	Intermediate System Analyst (Dynamics CRM Specialist)	Level 2	Senior System Analyst (Dynamics CRM Specialist)	Level 3	1 (Level 2 or 3)	Intermediate Tester (Dynamics CRM Specialist)	Level 2	Senior Tester (Dynamics CRM Specialist)	Level 3	1	Senior Data Conversion Specialist (Dynamics CRM Specialist)	Level 3	Senior Business Analyst (Dynamics CRM Specialist)	Level 3	1	Total # Resources		8	Bidder to complete the Appendix 1 to Attachment 2, M-2 Bidder Response Table (Identified Resources, WS3), as applicable to each resource category.
Workstream 3 Resource Category	Level	# of resources to be identified																																				
Application/Software Architect (Dynamics CRM Specialist)	Level 3	2 resources (total, in at least 2 out of 4 categories)																																				
Business Architect (ERP Specialist)	Level 3																																					
Business Transformation Architect	Level 3																																					
Enterprise Architect (Dynamics CRM Specialist)	Level 3	3 resources (total, in at least 2 out of 4 categories)																																				
Intermediate Programmer/Analyst (Dynamics CRM Specialist)	Level 2																																					
Senior Programmer/Analyst (Dynamics CRM Specialist)	Level 3																																					
Intermediate System Analyst (Dynamics CRM Specialist)	Level 2																																					
Senior System Analyst (Dynamics CRM Specialist)	Level 3	1 (Level 2 or 3)																																				
Intermediate Tester (Dynamics CRM Specialist)	Level 2																																					
Senior Tester (Dynamics CRM Specialist)	Level 3	1																																				
Senior Data Conversion Specialist (Dynamics CRM Specialist)	Level 3																																					
Senior Business Analyst (Dynamics CRM Specialist)	Level 3	1																																				
Total # Resources		8																																				
<p><b>Note:</b> The resources identified in response to this requirement will be used to assess <u>Corporate Capability only</u>.</p>																																						

## 2. Point-Rated Evaluation Criteria (Workstream 3)

### R-1 Corporate Reference Contracts

The Bidder should demonstrate the extent to which the two Reference Contracts, provided in response to M-1, exemplify the experience in the areas identified in the table below.

The Bidder will be awarded up to **100 points** for each referenced contract (to a maximum of 200 points) in accordance with the criteria set-out in the table below. If the Bidder does not demonstrate experience for a rated criterion they will get 0 points, no partial points will be awarded for a single criterion.

R-1 Corporate Reference Contracts				
Item	Point-rated Criteria	Max. Points	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
<b>Reference Contract #1 - Client Organization Name / Project Title:</b>				
R-1.1	Application Integration	80	<b>Up to 80 points</b> – The work delivered by the Bidder under the contract included application integration of the Dynamics system with any of the following external systems (to a maximum of 4 systems): <ul style="list-style-type: none"> <li>• SharePoint = <b>20 points</b></li> <li>• SAP = <b>20 points</b></li> <li>• Database systems = <b>20 points</b></li> <li>• Portal systems = <b>20 points</b></li> <li>• OpenText Content Server = <b>20 points</b></li> </ul>	
R-1.2	Data Migration	10	<ul style="list-style-type: none"> <li>• <b>10 points</b> – The work delivered by the Bidder under the contract included migration from a legacy application to the new MS Dynamics CRM system</li> </ul>	
R-1.3	Change Management	10	<ul style="list-style-type: none"> <li>• <b>10 points</b> – The work delivered by the Bidder under the contract included organizational change management activities to support the successful implementation of the new Dynamics solution.</li> </ul>	
<b>Total Maximum Points Contract #1</b>		<b>100</b>		
<b>Reference Contract #2 - Client Organization Name / Project Title:</b>				
R-1.4	Application Integration	80	<b>Up to 80 points</b> – The work delivered by the Bidder under the contract included application integration of the Dynamics system with any of the following external systems (to a maximum of 4 systems): <ul style="list-style-type: none"> <li>• SharePoint = <b>20 points</b></li> <li>• SAP = <b>20 points</b></li> <li>• Database systems = <b>20 points</b></li> <li>• Portal systems = <b>20 points</b></li> </ul>	

R-1 Corporate Reference Contracts				
Item	Point-rated Criteria	Max. Points	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
			<ul style="list-style-type: none"> <li>• OpenText Content Server = <b>20 points</b></li> </ul>	
R-1.5	Data Migration	10	<ul style="list-style-type: none"> <li>• <b>10 points</b> – The work delivered by the Bidder under the contract included migration from a legacy application to the new MS Dynamics CRM system</li> </ul>	
R-1.6	Change Management	10	<ul style="list-style-type: none"> <li>• <b>10 points</b> – The work delivered by the Bidder under the contract included organizational change management activities to support the successful implementation of the new Dynamics solution.</li> </ul>	
<b>Total Maximum Points Contract #2</b>		<b>100</b>		
<b>Points Achieved</b>				

**R-2 Microsoft Certified Partner**

The Bidder will be awarded up to **100 points** in accordance with the evaluation criteria contained in the table below. If the Bidder does not demonstrate the rated criteria they will get 0 points, no partial points will be awarded.

R-2 Microsoft Certified Partner				
Item	Point-rated Criteria	Max. Points	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
R-2	The Bidder should demonstrate that is a Microsoft Partner with Competency in CRM (Silver or Gold Level).	100	<b>Up to 100 points</b> - The Bidder provided evidence of valid Partner status as follows: <ul style="list-style-type: none"> <li>• <b>100 points</b> – Gold Level status</li> <li>• <b>70 points</b> – Silver Level status</li> </ul>	
<b>Total Maximum Points</b>		<b>100</b>		
<b>Points Achieved</b>				

**R-3 Corporate Dynamics Practice**

The Bidder will be awarded up to **200 points** in accordance with the evaluation criteria contained in the table below. If the Bidder does not demonstrate experience for rated criteria they will get 0 points, no partial points will be awarded.

<b>R-3 Corporate Dynamics Practice</b>				
<b>Item</b>	<b>Point-rated Criteria</b>	<b>Max. Points</b>	<b>Evaluation Criteria</b>	<b>Demonstrated Experience (Bidder to Insert Data)</b>
<b>R-3.1</b>	The Bidder should demonstrate the extent to which it has formally established a corporate practice in the area of Dynamics solutions.	<del>60</del> <b>30</b>	<b>Up to <del>60-30</del> points</b> - The extent to which the Bidder has clearly described its Dynamics practice: <ul style="list-style-type: none"> <li><b><del>60-30</del> points</b> - Dynamics Practice is clearly described and includes complete details of robust methods and activities that have been implemented to develop corporate knowledge and expertise in Dynamics and ensure that CRM-related professional services delivered to clients reflect best practices;</li> <li><b><del>40-20</del> points</b> - Dynamics Practice is adequately described with some detail of established methods and activities;</li> <li><b><del>20-10</del> points</b> - Dynamics Practice is poorly described with few details; or</li> <li><b>0 points</b> - A Dynamics Practice is not described.</li> </ul>	
	Examples of establishing a corporate practice include, but are not limited to, the implementation of a formal Dynamics implementation methodology; the documentation of formal processes that are routinely applied to deliver Dynamics services; the establishment of a Dynamics community of practice to provide a forum for practitioners to share tips and best practices, ask questions of their colleagues, and provide support for each other; formal training or mentoring programs to ensure all resource are knowledgeable and adhere to corporate methods; or other initiatives the Bidder has implemented to develop corporate knowledge and expertise in Dynamics and ensure that Dynamics -related professional services	<del>60</del> <b>30</b>	<b>Up to <del>60-30</del> points</b> - The Maturity of Bidder's Dynamics: <ul style="list-style-type: none"> <li><b><del>60-30</del> points</b> - Response clearly demonstrates an established and robust Dynamics practice which includes a proven methodology and processes and formal training or mentoring programs to ensure all resource are knowledgeable and adhere to corporate methods;</li> <li><b><del>40-20</del> points</b> - Response demonstrates an established Dynamics practice but lacking some features/functions of a more robust practice;</li> <li><b><del>20-10</del> points</b> - Response demonstrates a Dynamics practice which is still in early development; or</li> <li><b>0 points</b> - Bidder does not have an established Dynamics practice.</li> </ul>	

R-3 Corporate Dynamics Practice				
Item	Point-rated Criteria	Max. Points	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
	delivered to clients reflect best practices.			
R-3.2	The Bidder should provide up to two Customer Reference Projects where it has utilized specific assets from its' Dynamics Practice (describe above) to deliver services to support a Dynamics solution implementation project	<del>80</del> 40	<p><b>Up to <del>80-40</del> points</b> – Each Customer Reference Project (maximum 2 projects):</p> <ul style="list-style-type: none"> <li><b><del>40-20</del> points</b> – The Bidder has clearly demonstrated how it utilized specific assets from its' Dynamics Practice to deliver the referenced Dynamics project.</li> </ul>	
<b>Total Maximum Points</b>		<del>200</del> 100		
<b>Points Achieved</b>				

#### R-4 Dynamics Experience of Identified Resources

The Bidder should further demonstrate the depth of experience in Dynamics CRM of its identified resources (i.e. the eight resources named in response to mandatory criteria #M-2).

The Bidder will be awarded up to **20 points** for each resource (to a maximum of 160 points) in accordance with the evaluation criteria contained in the table below. If the Bidder does not demonstrate experience for rated criteria they will get 0 points, no partial points will be awarded.

R-4 Dynamics Experience of Identified Resources				
<i>Bidder to replicate table for each of the eight identified resources</i>				
<b>Resource Category:</b>		<insert applicable category>		
<b>Name of Identified Resource:</b>		<insert name of resource identified in response to #M-2>		
Item	Point-Rated Criteria	Max. Points	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
R-4.1	<p><b>Certification</b></p> <p>The identified resource has a valid professional certification or accreditation as follows:</p> <ul style="list-style-type: none"> <li>Microsoft Certified for Dynamics</li> <li>Project Management Certification (PMP or PRINCE2 Practitioner)</li> <li>Business Analysis (CBAP or PMI-PBA)</li> <li>Change Management (ACMP Certified Change Management Professional or CMI Accredited Change Manager (Foundation or Master)</li> </ul>	5	<ul style="list-style-type: none"> <li><b>5 points</b> – Evidence of valid certification provided</li> </ul> <p><b>Note:</b> Evidence of valid certification should be contained in the Bid.</p>	Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.

R-4 Dynamics Experience of Identified Resources				
Bidder to replicate table for each of the eight identified resources				
<b>Resource Category:</b>		<insert applicable category>		
<b>Name of Identified Resource:</b>		<insert name of resource identified in response to #M-2>		
Item	Point-Rated Criteria	Max. Points	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
R-4.2	<b>Integration Experience</b>  The identified resource has experience integrating Dynamics with other systems as follows: a) SharePoint b) SAP c) Database systems d) Portal systems e) OpenText Content Server  To be considered, the resource should have worked on the project for a minimum of six months within the last five years.  <b>Note:</b> Separate projects may be provided to demonstrate experience with integrating each type of system.	15	Up to 15 points as follows: • <b>5 points</b> – For each system integration demonstrated (to a maximum of 3)	
<b>Total Points</b>		20		
<b>Points Achieved</b>				

**R-5 Bench Strength**

The Bidder should further demonstrate its capacity to provide resources with expertise in [Dynamics CRM SAP ECC Financial System](#) by identifying up to ~~eight~~<sup>six</sup> additional resources, over and beyond the ~~eight~~<sup>six</sup> resources identified in response to #M-2, as set out in the table below. Each of the additional resources must have previously been contracted by the Bidder for a minimum period of six months within the last two yearstwo years preceding the issuance date of this RFP.

Workstream 3 Resource Category	Level	Maximum # of additional resources to be identified
Application/Software Architect (Dynamics CRM Specialist)	Level 3	2
Business Architect (ERP Specialist)	Level 3	
Business Transformation Architect	Level 3	
Enterprise Architect (Dynamics CRM Specialist)	Level 3	3
Intermediate Programmer/Analyst (Dynamics CRM Specialist)	Level 2	
Senior Programmer/Analyst (Dynamics CRM Specialist)	Level 3	
Intermediate System Analyst (Dynamics CRM Specialist)	Level 2	1
Senior System Analyst (Dynamics CRM Specialist)	Level 3	
Intermediate Tester (Dynamics CRM Specialist)	Level 2	
Senior Tester (Dynamics CRM Specialist)	Level 3	1
Senior Data Conversion Specialist (Dynamics CRM Specialist)	Level 3	1
Senior Business Analyst (Dynamics CRM Specialist)	Level 3	1

Workstream 3 Resource Category	Level	Maximum # of additional resources to be identified
Total # Resources		68

The Bidder will be awarded up to **35 points** for each additional resource (to a maximum of 280 points) in accordance with the evaluation criteria contained in the table below. If the Bidder does not demonstrate experience for rated criteria they will get 0 points, no partial points will be awarded.

**Note:** Bidder to replicate table for each of the six identified resources.

R-5 Bench Strength (Dynamics)				
Bidder to replicate table for each of the six additional resources				
Resource Category:		<insert applicable category>		
Name of Identified Resource:		<insert name of additional resource >		
Item	Point-Rated Criteria	Max. Points	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
R-5.1	<p>The Bidder should demonstrate that the identified resource meet the minimum requirements associated with the applicable resource category (as set-out in Appendix 1 to Attachment 2, Bidder Response Table). <u>The identified resource must have previously been contracted by the Bidder for a minimum period of six months within the last two years/two years preceding the issuance date of this RFP.</u></p> <p><b>Note:</b> The resources identified in response to this requirement will be used to assess <u>Corporate Capability only.</u></p>	15	<ul style="list-style-type: none"> <li><b>15 points –</b> Identified resource meets the minimum criteria associated with the resource category.</li> </ul>	<p>Bidder to complete the Appendix 1 to Attachment 2, Bidder Response Table (Identified Resources, WS3) as applicable to each resource category.</p> <p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome</p>



<b>R-5 Bench Strength (Dynamics)</b>				
<i>Bidder to replicate table for each of the six additional resources</i>				
<b>Resource Category:</b>		<insert applicable category>		
<b>Name of Identified Resource:</b>		<insert name of additional resource >		
Item	Point-Rated Criteria	Max. Points	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
				achieved, etc.) otherwise the experience will not be considered.
If full score is awarded in R-5.1 above; then up to 20 additional points may be awarded as follows (if 0 points are awarded then the resource will not be evaluated any further).				
<b>R-5.2</b>	<b>Certification</b>  The identified resource has a valid professional certification or accreditation as follows: <ul style="list-style-type: none"> <li>• Microsoft Certified for Dynamics</li> <li>• Project Management Certification (PMP or PRINCE2 Practitioner)</li> <li>• Business Analysis (CBAP or PMI-PBA)</li> <li>• Change Management (ACMP Certified Change Management Professional or CMI Accredited Change Manager (Foundation or Master)</li> </ul>	<b>5</b>	<ul style="list-style-type: none"> <li>• <b>5 points</b> - Copy of applicable certification provided with bid</li> </ul>	
<b>R-5.3</b>	<b>Integration Experience</b>  The identified resource has experience integrating Dynamics with other systems as follows: <ol style="list-style-type: none"> <li>a) SharePoint</li> <li>b) SAP</li> <li>c) Database systems</li> <li>d) Portal systems</li> <li>e) OpenText Content Server</li> </ol> To be considered, the resource must have worked on the project for a minimum of six months.  <b>Note:</b> Separate projects may be provided to demonstrate experience with integrating each type of system.	<b>15</b>	Up to 15 points as follows: <ul style="list-style-type: none"> <li>• <b>5 points</b> – For each system integration demonstrated (to a maximum of 3)</li> </ul>	The Bidder should demonstrate that the identified resource conducted at least 50% of the tasks associated with the relevant resource category (as set out in SOW section 3).
<b>Total Points</b>		<b>35</b>		
<b>Points Achieved</b>				

**Appendix 1 to Attachment 2, M-1 Bidder Response Table (Workstream 3)**

<b>M-1 Bidder Response Table</b>		
<i>Bidder to replicate table for each of the two Corporate Reference Contracts</i>		
<b>Corporate Reference Contract Description</b>		<b>(Bidder to Insert Data)</b>
<b>Client Particulars</b>	Client Organization Name	
	Address	
	Contract or Purchase Order Number	
	Project Title	
	Client Client Contact Name and Title	
	Contact telephone number and/or e-mail address.	
1. Provide a brief description of the Dynamics CRM (version 2011 or above) implementation project.		
2. Specify contract start and end date (mm/yyyy to mm/yyyy)		
3. Specify total amount billed value (Canadian, including taxes) within the last five years of the issuance date of this RFP.		

**Appendix 1 to Attachment 2, Bidder Response Table (Identified Resources, WS3)****1. Application / Software Architect (Level 3) (Dynamics Specialist)**

Resource Evaluation Criteria		
Resource Category	1. Application / Software Architect (Level 3) (Dynamics Specialist)	
Name of identified resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2-1.1	<p><b>Minimum experience in the resource category.</b> The identified resource must have experience in the identified resource category including:</p> <p>a) a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this RFP, working as an Application / Software Architect (as defined below in 2-1.1 b); and</p> <p>b) that within that time frame of experience, the resource has experience performing each of the five tasks listed below for a minimum of six cumulative months of experience per task:</p> <p>1) Develop technical architectures, frameworks and strategies, for an application area, to meet the business and application requirements;</p> <p>2) Analyze functional requirements to identify information, procedures and decision flows. Analyze and evaluate alternative software solutions to meet business problems;</p> <p>3) Ensure the integration of all aspects of software solutions;</p> <p>4) Create an application component roadmap - roadmap to align business vision and functional coverage to IT vision; and</p> <p>5) Create an application architecture framework.</p> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p><a href="#">The Bidder hereby certifies that the identified resource meets the "Minimum Experience in the resource category" as detailed under Evaluation Criteria #2-1.1. The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.</a></p> <p><a href="#">Name and signature of Authorized Representative</a></p> <p><a href="#">Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.)</a></p>

Resource Evaluation Criteria		
Resource Category	1. Application / Software Architect (Level 3) (Dynamics Specialist)	
Name of identified resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
		<del>otherwise the experience will not be considered.</del>
Attachment 2-1.2	<p><b>Minimum experience with Business Process Management Solutions.</b></p> <p>The identified resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this RFP, developing technical architectures, frameworks or strategies for Business Process Management Solutions.</p>	<u>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</u>
Attachment 2-1.3	<p><b>Minimum experience with Dynamics.</b></p> <p>The identified resource must have experience on a minimum of three projects developing technical architectures, frameworks or strategies, to meet the business and application requirements for a Dynamics project version 2011 (and above), with at least one project at version 2013 (and above).</p> <p>For each project to be considered, the resource must have worked on the project for a minimum duration of six months within the five years preceding the issuance date of this RFP.</p>	<u>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</u>
Attachment 2-1.4	<p><b>Previously contracted by the Bidder.</b></p> <p>As stipulated in M-2 or R-3.1 (as applicable), the identified resource must have previously been contracted by the Bidder for a minimum period of six months within the <del>last two year</del><u>two years</u> preceding the issuance date of this RFP.</p>	

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Resource Evaluation Criteria		
Resource Category	1. Application / Software Architect (Level 3) (Dynamics Specialist)	
Name of identified resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
	The Bidder must provide the following substantiating information in its bid: a) Customer organization name; b) Customer contact (including name, title, and telephone number or e-mail address); c) Project name; d) Role of the resource on the project; and e) Dates resource worked of contract (start and finish date, mm/yyyy).	

**2. Programmer / Analyst (Level 2 or Level 3) (Dynamics Specialist)**

Resource Evaluation Criteria		
Resource Category		2. Programmer / Analyst (Level 2 or Level 3) (Dynamics Specialist)
Name of Identified Resource:		<insert name>
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2-2.1	<p><b>Minimum experience in the resource category.</b></p> <p>The identified resource must have experience in the identified resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this RFP, working as a Programmer / Analyst (as defined below in 2-2.1 b); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this RFP, working as a Programmer / Analyst (as defined below in 2-2.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the seven tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Analyze functional requirements leading to the execution of the design, development and implementation of changes to the application;</li><li>2) Develop and maintain configuration and programs based on approved requirements working both independently and within a team;</li><li>3) Deliver technical specifications documents using the functional specifications provided by the functional and integration teams;</li><li>4) Create and modify configuration and code for software as per technical specifications;</li><li>5) Produce reports, manuals, programs, data files, and procedures for applications;</li><li>6) Analyze code and objects to determine functional fit; and</li><li>7) Execute tasks related to the implementation of application and database design and fixes, coding and technical documentation.</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p><a href="#">The Bidder hereby certifies that the identified resource meets the "Minimum Experience in the resource category" as detailed under Evaluation Criteria #2-1.1. The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.</a></p> <p><a href="#">Name and signature of Authorized Representative</a></p> <p><a href="#">Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a></p>

Resource Evaluation Criteria		
Resource Category	2. Programmer / Analyst (Level 2 or Level 3) (Dynamics Specialist)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2-2.2	<p><b>Minimum experience with Business Process Management Solutions.</b></p> <p><u>Level 2:</u> The identified resource must have a minimum of two years of experience, within the five years preceding the issuance date of this RFP, developing applications for Business Process Management Solutions.</p> <p><u>Level 3:</u> The identified resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this RFP, developing applications for Business Process Management Solutions.</p>	<p><a href="#">Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a></p>
Attachment 2-2.3	<p><b>Minimum experience with Dynamics.</b></p> <p><u>Level 2:</u> The identified resource must have experience on a minimum of two projects performing the implementation or upgrade of a Dynamics solution version 2011 (and above), with at least one project at version 2013 (and above). For each project to be considered, the resource must have worked on the project for a minimum duration of four months within the three years preceding the issuance date of this RFP.</p> <p><u>Level 3:</u> The identified resource must have experience on a minimum of three projects performing the implementation or upgrade of a Dynamics solution version 2011 (and above), with at least one project at version 2013 (and above). For each project to be considered, the resource must have worked on the project for a minimum duration of six months within the five years preceding the issuance date of this RFP.</p>	<p><a href="#">Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a></p>
Attachment 2-2.4	<p><b>Previously contracted by the Bidder.</b></p> <p>As stipulated in M-2 or R-3.1 (as applicable), the identified resource must have previously been contracted by the Bidder for a minimum period of six months within the <a href="#">last two years</a><del>two years</del> preceding the issuance date of this RFP.</p>	

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Resource Evaluation Criteria		
Resource Category	2. Programmer / Analyst (Level 2 or Level 3) (Dynamics Specialist)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
	The Bidder must provide the following substantiating information in its bid: a) Customer organization name; b) Customer contact (including name, title, and telephone number or e-mail address); c) Project name; d) Role of the resource on the project; and e) Dates resource worked of contract (start and finish date, mm/yyyy).	



**3. System Analyst (Level 2 or Level 3) (Dynamics Specialist)**

Resource Evaluation Criteria		
<b>Resource Category</b>	3. System Analyst (Level 2 or Level 3) (Dynamics Specialist)	
<b>Name of Identified Resource:</b>	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2-3.1	<p><b>Minimum experience in the resource category.</b></p> <p>The identified resource must have experience in the identified resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this RFP, working as a System Analyst (as defined below in 2-3.1 b); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this RFP, working as a System Analyst (as defined below in 2-3.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the five tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"> <li>1) Develop requirements, feasibility, cost, design, and specification documents for systems;</li> <li>2) Implement systems to support projects, departments, organizations or businesses;</li> <li>3) Translate business requirements into systems design and specifications;</li> <li>4) Analyze and recommend alternatives and options for solutions; and</li> <li>5) Develop technical specifications for systems development, design and implementation.</li> </ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p><u>The Bidder hereby certifies that the identified resource meets the "Minimum Experience in the resource category" as detailed under Evaluation Criteria #2-3.1. The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.</u></p> <p><u>Name and signature of Authorized Representative</u></p> <p><u>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</u></p>

Resource Evaluation Criteria		
Resource Category	3. System Analyst (Level 2 or Level 3) (Dynamics Specialist)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2-3.2	<p><b>Minimum experience with Business Process Management Solutions.</b></p> <p><u>Level 2:</u> The identified resource must have a minimum of two years of experience, within the five years preceding the issuance date of this RFP, developing applications for Business Process Management Solutions.</p> <p><u>Level 3:</u> The identified resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this RFP, developing applications for Business Process Management Solutions.</p>	<p><a href="#">Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a></p>
Attachment 2-3.3	<p><b>Minimum experience with Dynamics.</b></p> <p><u>Level 2:</u> The identified resource must have experience on a minimum of two projects performing the implementation or upgrade of a Dynamics solution version 2011 (and above), with at least one project at version 2013 (and above). For each project to be considered, the resource must have worked on the project for a minimum duration of four months within the three years preceding the issuance date of this RFP.</p> <p><u>Level 3:</u> The identified resource must have experience on a minimum of three projects performing the implementation or upgrade of a Dynamics solution version 2011 (and above), with at least one project at version 2013 (and above). For each project to be considered, the resource must have worked on the project for a minimum duration of six months within the five years preceding the issuance date of this RFP.</p>	<p><a href="#">Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a></p>
Attachment 2-3.4	<p><b>Previously contracted by the Bidder.</b></p> <p>As stipulated in M-2 or R-3.1 (as applicable), the identified resource must have previously been contracted by the Bidder for a minimum period of six months within the <a href="#">last two years</a>two years preceding the issuance date of this RFP.</p>	

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Resource Evaluation Criteria		
Resource Category	3. System Analyst (Level 2 or Level 3) (Dynamics Specialist)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
	The Bidder must provide the following substantiating information in its bid: a) Customer organization name; b) Customer contact (including name, title, and telephone number or e-mail address); c) Project name; d) Role of the resource on the project; and e) Dates resource worked of contract (start and finish date, mm/yyyy).	

**4. Tester (Level 2 or Level 3) (Dynamics Specialist)**

Resource Evaluation Criteria		
Resource Category	4. Tester (Level 2 or Level 3) (Dynamics Specialist)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2-4.1	<p><b>Minimum experience in the resource category.</b></p> <p>The identified resource must have experience in the identified resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this RFP, working as a Tester (as defined below in 2-4.1 b); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this RFP, working as a Tester (as defined below in 2-4.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the five tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"> <li>1) Develop the Test strategy; test planning and coordination;</li> <li>2) Manage and monitor test plans for all levels of testing;</li> <li>3) Develop test scenarios and test scripts;</li> <li>4) Establish and maintain test procedures and script libraries; and</li> <li>5) Establish a validation and verification capability which assumes functional and performance compliance.</li> </ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p><a href="#">The Bidder hereby certifies that the identified resource meets the "Minimum Experience in the resource category" as detailed under Evaluation Criteria #2-4.1. The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.</a></p> <p><a href="#">Name and signature of Authorized Representative</a></p> <p><a href="#">Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a></p>
Attachment 2-4.2	<b>Minimum experience with Dynamics.</b>	<a href="#">Substantiation of demonstrated experience</a>

Resource Evaluation Criteria		
Resource Category	4. Tester (Level 2 or Level 3) (Dynamics Specialist)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
	<p><u>Level 2:</u> The identified resource must have experience on a minimum of two projects executing testing activities for a Dynamics application implementation or upgrade project version 2011 (and above), with at least one project at version 2013 (and above). For each project to be considered, the resource must have worked on the project for a minimum duration of four months within the three years preceding the issuance date of this RFP.</p> <p><u>Level 3:</u> The identified resource must have experience on a minimum of three projects executing testing activities for a Dynamics application implementation or upgrade project version 2011 (and above), with at least one project at version 2013 (and above). For each project to be considered, the resource must have worked on the project for a minimum duration of six months within the five years preceding the issuance date of this RFP.</p>	<p><a href="#">must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a></p>
Attachment 2-4.3	<p><b>Previously contracted by the Bidder.</b></p> <p>As stipulated in M-2 or R-3.1 (as applicable), the identified resource must have previously been contracted by the Bidder for a minimum period of six months within the <a href="#">last two years</a><a href="#">two years preceding the issuance date of this RFP.</a></p> <p>The Bidder must provide the following substantiating information in its bid:</p> <ul style="list-style-type: none"><li>a) Customer organization name;</li><li>b) Customer contact (including name, title, and telephone number or e-mail address);</li><li>c) Project name;</li><li>d) Role of the resource on the project; and</li><li>e) Dates resource worked of contract (start and finish date, mm/yyyy).</li></ul>	

**5. Web Graphics Designer (Level 2 or Level 3)**

Resource Evaluation Criteria		
Resource Category	5. Web Graphics Designer (Level 2 or Level 3)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2-5.1	<p><b>Minimum experience in the resource category.</b></p> <p>The identified resource must have experience in the identified resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this RFP, working as a Web Graphics Designer (as defined below in 2-5.1 b); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this RFP, working as a Web Graphics Designer (as defined below in 2-5.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the four tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Create web pages including graphics and general web site design;</li><li>2) Develop flowcharts (web site flow maps) depicting navigation and basic content;</li><li>3) Develop content diagrams showing the interactive connection between web pages; and</li><li>4) Develop interactive prototypes showing basic form and functionality for both usability testing and presentations.</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p><a href="#">The Bidder hereby certifies that the identified resource meets the "Minimum Experience in the resource category" as detailed under Evaluation Criteria #2-5.1. The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.</a></p> <p><a href="#">Name and signature of Authorized Representative</a></p> <p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>
	Attachment 2-5.2	<p><b>Minimum experience creating Web Pages.</b></p>

Resource Evaluation Criteria		
Resource Category	5. Web Graphics Designer (Level 2 or Level 3)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data.)
	<p><u>Level 2:</u> The identified resource must have experience on a minimum of two projects creating a web page that was put into production. For each project to be considered, the resource must have worked on the project for a minimum duration of four months within the three years preceding the issuance date of this RFP.</p> <p><u>Level 3:</u> The identified resource must have experience on a minimum of three projects creating a web page that was put into production. For each project to be considered, the resource must have worked on the project for a minimum duration of six months within the five years preceding the issuance date of this RFP.</p>	<p><u>must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</u></p>
Attachment 2-5.3	<p><b>Previously contracted by the Bidder.</b></p> <p>As stipulated in M-2 or R-3.1 (as applicable), the identified resource must have previously been contracted by the Bidder for a minimum period of six months within the <u>last two years</u><u>two years preceding the issuance date of this RFP.</u></p> <p>The Bidder must provide the following substantiating information in its bid:</p> <ul style="list-style-type: none"><li>a) Customer organization name;</li><li>b) Customer contact (including name, title, and telephone number or e-mail address);</li><li>c) Project name;</li><li>d) Role of the resource on the project; and</li><li>e) Dates resource worked of contract (start and finish date, mm/yyyy).</li></ul>	

**6. Data Conversion Specialist (Level 2 or Level 3) (Dynamics Specialist)**

Resource Evaluation Criteria		
<b>Resource Category</b>	6. Data Conversion Specialist (Level 2 or Level 3) (Dynamics Specialist)	
<b>Name of Identified Resource:</b>	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2-6.1	<p><b>Minimum experience in the resource category.</b></p> <p>The identified resource must have experience in the identified resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this RFP, working as a Data Conversion Specialist (as defined below in 2-6.1 b); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this RFP, working as a Data Conversion Specialist (as defined below in 2-6.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the four tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"> <li>1) Oversee all facets of the conversion process;</li> <li>2) Complete mapping, interfaces, mock conversion work, enhancements, actual conversion, and verify completeness and accuracy of converted data;</li> <li>3) Analyze and coordinate data file conversions; and</li> <li>4) Import files from heterogeneous platforms.</li> </ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p><u>The Bidder hereby certifies that the identified resource meets the "Minimum Experience in the resource category" as detailed under Evaluation Criteria #2-6.1. The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.</u></p> <p><u>Name and signature of Authorized Representative</u></p> <p><u>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</u></p>



Resource Evaluation Criteria		
Resource Category	6. Data Conversion Specialist (Level 2 or Level 3) (Dynamics Specialist)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2-6.2	<b>Minimum experience with Dynamics.</b>  <u>Level 2:</u> The identified resource must have experience on a minimum of two projects performing data conversions for Dynamics project version 2011 (and above), with at least one project at version 2013 (and above). For each project to be considered, the resource must have worked on the project for a minimum duration of four months within the three years preceding the issuance date of this RFP.  <u>Level 3:</u> The identified resource must have experience on a minimum of three projects performing data conversions for a MS Dynamics project version 2011 (and above), with at least one project at version 2013 (and above). For each project to be considered, the resource must have worked on the project for a minimum duration of six months within the five years preceding the issuance date of this RFP. For each project to be considered, the resource must have worked on the project for a minimum duration of six months within the five years preceding the issuance date of this RFP.	<a href="#"><u>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</u></a>
	Attachment 2-6.3	<b>Previously contracted by the Bidder.</b>  As stipulated in M-2 or R-3.1 (as applicable), the identified resource must have previously been contracted by the Bidder for a minimum period of six months within the <del>last two years</del> <a href="#"><u>two years preceding the issuance date of this RFP.</u></a>  The Bidder must provide the following substantiating information in its bid: <ul style="list-style-type: none"><li>a) Customer organization name;</li><li>b) Customer contact (including name, title, and telephone number or e-mail address);</li><li>c) Project name;</li><li>d) Role of the resource on the project; and</li><li>e) Dates resource worked of contract (start and finish date, mm/yyyy).</li></ul>

**7. Business Analyst (Level 2 or Level 3)**

Resource Evaluation Criteria		
Resource Category	7. Business Analyst (Level 2 or Level 3)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2-7.1	<p><b>Minimum experience in the resource category.</b></p> <p>The identified resource must have experience in the identified resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this RFP, working as a Business Analyst (as defined below in 2-7.1 b); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this RFP, working as a Business Analyst (as defined below in 2-7.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the seven tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Determine operational objectives by studying business functions; gathering information; evaluating output requirements and formats;</li><li>2) Perform business analyses of requirements to identify information, procedures, and decision flows;</li><li>3) Evaluate existing procedures and methods, identify and document items such as database content, structure, application subsystems;</li><li>4) Develop data dictionary;</li><li>5) Define and document interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems;</li><li>6) Identify candidate business processes for re-design, prototype potential solutions, provide trade-off information and suggest a recommended course of action. Identify the modifications to the automated processes; and</li><li>7) Establish acceptance test criteria with client.</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p><u>The Bidder hereby certifies that the identified resource meets the "Minimum Experience in the resource category" as detailed under Evaluation Criteria #2-7.1. The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.</u></p> <p><u>Name and signature of Authorized Representative</u></p> <p><u>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</u></p>

Resource Evaluation Criteria		
Resource Category	7. Business Analyst (Level 2 or Level 3)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2-7.2	<p><b>Minimum experience with Dynamics.</b></p> <p><u>Level 2:</u> Not applicable</p> <p><u>Level 3:</u> The identified resource must have experience on a minimum of three projects analyzing and documenting requirements for a Dynamics application implementation or upgrade project version 2011 (and above), with at least one project at version 2013 (and above). For each project to be considered, the resource must have worked on the project for a minimum duration of six months within the five years preceding the issuance date of this RFP.</p>	<p><u>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</u></p>
Attachment 2-7.3	<p><b>Previously contracted by the Bidder.</b></p> <p>As stipulated in M-2 or R-3.1 (as applicable), the identified resource must have previously been contracted by the Bidder for a minimum period of six months within the <u>last two years</u><u>two years preceding the issuance date of this RFP.</u></p> <p>The Bidder must provide the following substantiating information in its bid:</p> <ul style="list-style-type: none"><li>a) Customer organization name;</li><li>b) Customer contact (including name, title, and telephone number or e-mail address);</li><li>c) Project name;</li><li>d) Role of the resource on the project; and</li><li>e) Dates resource worked of contract (start and finish date, mm/yyyy).</li></ul>	

**8. Business Architect (Level 3)**

Resource Evaluation Criteria		
Resource Category	8. Business Architect (Level 3)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2-8.1	<p><b>Minimum experience in the resource category.</b></p> <p>The identified resource must have experience in the identified resource category including:</p> <p>a) a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this RFP, working as a Business Architect (as defined below in 2-8.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the two tasks listed below for a minimum of six cumulative months of experience per task:</p> <p>1) Develop policies and rules that allow an organization to carry out its mandate and functional responsibilities, and that govern the organization's actual and planned capabilities in terms of computers, data, information, human resources, communication facilities, software and management responsibilities; and</p> <p>2) Develop the specifications for where, how and why the various organizational components fit together as they do, and how they support the organization's mandate.</p> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p><u>The Bidder hereby certifies that the identified resource meets the "Minimum Experience in the resource category" as detailed under Evaluation Criteria #2-8.1. The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.</u></p> <p><u>Name and signature of Authorized Representative</u></p> <p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>
	Attachment 2-8.2	<p><b>Minimum experience with Business Process Management Solutions.</b></p>

Resource Evaluation Criteria		
Resource Category		8. Business Architect (Level 3)
Name of Identified Resource:		<insert name>
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
	The identified resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this RFP, developing organizational strategies and plans in support of Business Process Management Solution implementation projects.	<a href="#">table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a>
Attachment 2-8.3	<p><b>Previously contracted by the Bidder.</b></p> <p>As stipulated in M-2 or R-3.1 (as applicable), the identified resource must have previously been contracted by the Bidder for a minimum period of six months within the <a href="#">last two years</a><a href="#">two years preceding the issuance date of this RFP.</a></p> <p>The Bidder must provide the following substantiating information in its bid:</p> <ul style="list-style-type: none"><li>a) Customer organization name;</li><li>b) Customer contact (including name, title, and telephone number or e-mail address);</li><li>c) Project name;</li><li>d) Role of the resource on the project; and</li><li>e) Dates resource worked of contract (start and finish date, mm/yyyy).</li></ul>	

**9. Business Transformation Architect (Level 3)**

Resource Evaluation Criteria		
Resource Category	9. Business Transformation Architect (Level 3)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2-9.1	<p><b>Minimum experience in the resource category.</b></p> <p>The identified resource must have experience in the identified resource category including:</p> <p>a) a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this RFP, working as a Business Transformation Architect (as defined below in 2-9.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the four tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Analysis and development of architecture requirements design, process development, process mapping and training;</li><li>2) Lead other functional staff to define business strategy and processes in support of transformation and change management activities;</li><li>3) Lead change impact analysis and change management activities; and</li><li>4) Provide recommendations and support the client in organizational realignment (job re-design organizational re-structuring).</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p><a href="#">The Bidder hereby certifies that the identified resource meets the "Minimum Experience in the resource category" as detailed under Evaluation Criteria #2-9.1. The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.</a></p> <p><a href="#">Name and signature of Authorized Representative</a></p> <p><a href="#">Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a></p>
	Attachment 2-9.2	<p><b>Minimum experience with Business Process Management Solutions.</b></p>

Resource Evaluation Criteria		
Resource Category		9. Business Transformation Architect (Level 3)
Name of Identified Resource:		<insert name>
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
	The identified resource must have a minimum of two years of experience, within the seven years preceding the issuance date of this RFP, conducting Business Transformation Architect activities (as defined above in 2-9.1 b) in support of a Business Process Management Solution implementation projects.	<a href="#">table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a>
Attachment 2-9.3	<p><b>Previously contracted by the Bidder.</b></p> <p>As stipulated in M-2 or R-3.1 (as applicable), the identified resource must have previously been contracted by the Bidder for a minimum period of six months within the <del>last two years</del><a href="#">two years preceding the issuance date of this RFP.</a></p> <p>The Bidder must provide the following substantiating information in its bid:</p> <ul style="list-style-type: none"><li>a) Customer organization name;</li><li>b) Customer contact (including name, title, and telephone number or e-mail address);</li><li>c) Project name;</li><li>d) Role of the resource on the project; and</li><li>e) Dates resource worked of contract (start and finish date, mm/yyyy).</li></ul>	

**10. Courseware Developer (Level 2 or Level 3) (Dynamics Specialist)**

Resource Evaluation Criteria		
Resource Category	10. Courseware Developer (Level 2 or Level 3) (Dynamics Specialist)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2- 10.1	<p><b>Minimum experience in the resource category.</b></p> <p>The identified resource must have experience in the identified resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this RFP, working as a Courseware Developer (as defined below in 2-10.1 b); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this RFP, working as a Courseware Developer (as defined below in 2-10.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the eight tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Perform needs assessment/analysis for training purposes;</li><li>2) Plan and monitor training projects;</li><li>3) Perform job, task, and/or content analysis;</li><li>4) Recommend instructional media and strategies;</li><li>5) Develop performance measurement standards;</li><li>6) Develop training materials;</li><li>7) Prepare end-users for implementation of courseware materials; and</li><li>8) Deliver training to end users (individually and in groups).</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p><u>The Bidder hereby certifies that the identified resource meets the "Minimum Experience in the resource category" as detailed under Evaluation Criteria #2-10.1. The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.</u></p> <p><u>Name and signature of Authorized Representative</u></p> <p><u>Substantiation of demonstrated experience must be included in the table; resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</u></p>
	Attachment 2- 10.2	<p><b>Minimum experience with Dynamics.</b></p>



Resource Evaluation Criteria		
Resource Category	10. Courseware Developer (Level 2 or Level 3) (Dynamics Specialist)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
	<p><u>Level 2:</u> The identified resource must have experience on a minimum of two projects developing training materials for a MS Dynamics implementation or upgrade project version 2011 (and above), with at least one project at version 2013 (and above). For each project to be considered, the resource must have worked on the project for a minimum duration of four months within the three years preceding the issuance date of this RFP.</p> <p><u>Level 3:</u> The identified resource must have experience on a minimum of three projects developing training materials for a MS Dynamics implementation or upgrade project version 2011 (and above), with at least one project at version 2013 (and above). For each project to be considered, the resource must have worked on the project for a minimum duration of six months within the five years preceding the issuance date of this RFP.</p>	<p><u>must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</u></p>
Attachment 2- 10.3	<p><b>Previously contracted by the Bidder.</b></p> <p>As stipulated in M-2 or R-3.1 (as applicable), the identified resource must have previously been contracted by the Bidder for a minimum period of six months within the <u>last two yearstwo years preceding the issuance date of this RFP.</u></p> <p>The Bidder must provide the following substantiating information in its bid:</p> <ul style="list-style-type: none"><li>a) Customer organization name;</li><li>b) Customer contact (including name, title, and telephone number or e-mail address);</li><li>c) Project name;</li><li>d) Role of the resource on the project; and</li><li>e) Dates resource worked of contract (start and finish date, mm/yyyy).</li></ul>	

**11. Change Management Consultant (Level 3)**

Resource Evaluation Criteria		
Resource Category	11. Change Management Consultant (Level 3)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2- 11.1	<p><b>Minimum experience in the resource category.</b></p> <p>The identified resource must have experience in the identified resource category including:</p> <p>a) a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this RFP, working as a Change Management Consultant (as defined below in 2- 11.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the five tasks listed below for a minimum of six cumulative months of experience per task:</p> <p>1) Responsible for leading other functional resources to define business strategy and processes in support of transformation and change management activities;</p> <p>2) Engage and enable the organization to implement solutions by providing practical and actionable tools and templates;</p> <p>3) Participate in change impact analysis and change management activities;</p> <p>4) Work with the target community to ensure alignment, correct skills and experience to enable the change; and</p> <p>5) Provide onsite as well as remote advisory services for the management of change and individuals as required.</p> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p><a href="#">The Bidder hereby certifies that the identified resource meets the "Minimum Experience in the resource category" as detailed under Evaluation Criteria #2-11.1. The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.</a></p> <p><a href="#">Name and signature of Authorized Representative</a></p> <p><a href="#">Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a></p>
Attachment 2- 11.2	<p><b>Minimum experience with Business Process Management Solutions.</b></p>	<p><a href="#">Substantiation of demonstrated experience must be included in the</a></p>

Resource Evaluation Criteria		
Resource Category	11. Change Management Consultant (Level 3)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
	The identified resource must have a minimum of two years of experience conducting Change Management activities in support of a Business Process Management Solution implementation projects.	<a href="#">table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a>
Attachment 2- 11.3	<p><b>Previously contracted by the Bidder.</b></p> <p>As stipulated in M-2 or R-3.1 (as applicable), the identified resource must have previously been contracted by the Bidder for a minimum period of six months within the <a href="#">last two years</a><a href="#">two years preceding the issuance date of this RFP.</a></p> <p>The Bidder must provide the following substantiating information in its bid:</p> <ul style="list-style-type: none"><li>a) Customer organization name;</li><li>b) Customer contact (including name, title, and telephone number or e-mail address);</li><li>c) Project name;</li><li>d) Role of the resource on the project; and</li><li>e) Dates resource worked of contract (start and finish date, mm/yyyy).</li></ul>	

**12. Enterprise Architect (Level 3) (Dynamics Specialist)**

Resource Evaluation Criteria		
Resource Category	12. Enterprise Architect (Level 3) (Dynamics Specialist)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2- 12.1	<b>Minimum experience in the resource category.</b>  The identified resource must have experience in the identified resource category including:  a) a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this RFP, working as an Enterprise Architect (as defined below in 2- 12.1 b W); and  b) that within that timeframe of experience, the resource has experience performing each of the seven tasks listed below for a minimum of six cumulative months of experience per task:  1) Evaluate the enterprise's business/Information and Communication Technology (ICT) architecture, determine its consistency and integration with the organization's business/ICT strategies, assess the degree of its alignment with Treasury Board CIO Business Transformation Enablement Program (BTEP) and Federated Architecture Program (FAP) and recommend changes to the business/ICT architecture to improve its alignment with these external factors;  2) Identify future business/ICT requirements against the current enterprise architecture, perform gaps analyses, develop Requirements for Technology Architectures (RTA), and prepare migration strategies;  3) Assess the feasibility of migrating from the current state to the target business architecture and enabling technologies and identify the risks associated with migrating to the target business architecture and technologies and make recommendations for risk mitigation;  4) Identify business and technology trends that create opportunities for business improvement, advise business and ICT Senior Executives on ICT trends and emerging technologies and the impact on the organization's and government ICT architectures and business strategies, model "What if" scenarios and recommend appropriate changes to the existing architecture and ICT infrastructure, and	<u>The Bidder hereby certifies that the identified resource meets the "Minimum Experience in the resource category" as detailed under Evaluation Criteria #2-12.1. The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.</u>  <u>Name and signature of Authorized Representative</u>  <u>Substantiation of demonstrated experience must be included in the table; resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</u>

Resource Evaluation Criteria		
Resource Category	12. Enterprise Architect (Level 3) (Dynamics Specialist)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
	<p>recommend alternative solutions, methodologies and strategies;</p> <p>5) Produce an architectural evolution plan, recommend prioritization of architecture evolution initiatives, and develop and/or implement an architecture evolution plan;</p> <p>6) Manage the development and implementation of an architectural improvement plan; and</p> <p>7) Train the organization to perform any of the above.</p> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	
Attachment 2- 12.2	<p><b>Minimum experience with Dynamics.</b></p> <p>The identified resource must have experience, on a minimum of three projects, assessing the feasibility and providing recommendations to mitigate the risk, associated with migrating from the current state to the target business architecture and technology based on Dynamics version 2011 (and above), with at least one project at version 2013 (and above). For each project to be considered, the resource must have worked on the project for a minimum duration of six months within the five years preceding the issuance date of this RFP.</p>	<p><a href="#">Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a></p>
Attachment 2- 12.3	<p><b>Previously contracted by the Bidder.</b></p> <p>As stipulated in M-2 or R-3.1 (as applicable), the identified resource must have previously been contracted by the Bidder for a minimum period of six months within the <a href="#">last two years</a><del>two years</del> preceding the issuance date of this RFP.</p> <p>The Bidder must provide the following substantiating information in its bid:</p> <ul style="list-style-type: none"><li>a) Customer organization name;</li><li>b) Customer contact (including name, title, and telephone number or e-mail address);</li><li>c) Project name;</li><li>d) Role of the resource on the project; and</li></ul>	

Resource Evaluation Criteria		
Resource Category		12. Enterprise Architect (Level 3) (Dynamics Specialist)
Name of Identified Resource:		<insert name>
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
	e) Dates resource worked of contract (start and finish date, mm/yyyy).	

**13. Project Manager (Level 2 or Level 3)**

Resource Evaluation Criteria		
<b>Resource Category</b>	13. Project Manager (Level 2 or Level 3)	
<b>Name of Identified Resource:</b>	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2- 13.1	<p><b>Minimum experience in the resource category.</b></p> <p>The identified resource must have experience in the identified resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this RFP, working as a Project Manager (as defined below in 2- 13.1 b); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this RFP, working as a Project Manager (as defined below in 2- 13.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the seven tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"> <li>1) Manage other Project Management resources that are responsible for an element of the project and its associated project team;</li> <li>2) Manage the project during the development, implementation and operations start up by ensuring that resources are made available and that the project is developed and is fully operational within previously agreed time, cost and performance parameters;</li> <li>3) Formulate statements of problems; establishes procedures for the development and implementation of significant, new or modified project elements to solve these problems, and obtains approval thereof;</li> <li>4) Define and document the objectives for the project; determine budgetary requirements, the composition, roles and responsibilities and terms of reference for the project team;</li> <li>5) Report progress of the project on an ongoing basis and at scheduled points in the life cycle;</li> <li>6) Prepare plans, charts, tables and diagrams to assist in analyzing or displaying problems; work with a variety of project management tools; and</li> <li>7) Project sign-off.</li> </ol>	<p><u>The Bidder hereby certifies that the identified resource meets the "Minimum Experience in the resource category" as detailed under Evaluation Criteria #2-13.1. The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.</u></p> <p><u>Name and signature of Authorized Representative</u></p> <p><u>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</u></p>

Resource Evaluation Criteria		
Resource Category	13. Project Manager (Level 2 or Level 3)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
	The required experience can be demonstrated over one or more Customer Reference Projects.	
Attachment 2- 13.2	<p><b>Minimum experience with Business Process Management Solutions.</b></p> <p><u>Level 2:</u> N/A</p> <p><u>Level 3:</u> The identified resource must have experience on a minimum of three projects as a Project Manager on a Business Process Movement Solution implementation project. For each project to be considered, the resource must have worked on the project for a minimum duration of six months within the five years preceding the issuance date of this RFP.</p>	<p><a href="#">Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a></p>
Attachment 2- 13.3	<p><b>Minimum experience as a senior PM.</b></p> <p><u>Level 2:</u> N/A</p> <p><u>Level 3:</u> The identified resource must have experience as a Project Manager, on a minimum of one project, where the resource was responsible for a complex application development or application implementation project. A complex project is a project which includes multiple (i.e. three or more teams or sub-projects and includes multi-departmental stakeholders). For each project to be considered, the resource must have worked on the project for a minimum duration of twelve months within the five years preceding the issuance date of this RFP.</p>	<p><a href="#">Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a></p>
Attachment 2- 13.4	<p><b>Previously contracted by the Bidder.</b></p> <p>As stipulated in M-2 or R-3.1 (as applicable), the identified resource must have previously been contracted by the Bidder for a minimum period of six months within the <del>last two year</del><a href="#">two years preceding the issuance date of this RFP.</a></p>	



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Amendment Number:

Buyer ID: 618EL

Resource Evaluation Criteria		
<b>Resource Category</b>		13. Project Manager (Level 2 or Level 3)
<b>Name of Identified Resource:</b>		<insert name>
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
	The Bidder must provide the following substantiating information in its bid: a) Customer organization name; b) Customer contact (including name, title, and telephone number or e-mail address); c) Project name; d) Role of the resource on the project; and e) Dates resource worked of contract (start and finish date, mm/yyyy).	

**Workstream 4 - GCDOCS Document Management Professional Services**
**1. Evaluation Summary (Workstream 4)**

Evaluation Summary (Workstream 4)				
No.	Mandatory Criteria	Compliant Yes/No		Bidder Response Tables to be completed (Cross-reference)
M-1	Corporate Experience			
	<ul style="list-style-type: none"><li>Reference Contract #1</li></ul>			Appendix 1 to Attachment 2, Bidder Response Table (Corporate Reference Contracts, WS4), for each Contract
	<ul style="list-style-type: none"><li>Reference Contract #2</li></ul>			
M-2	Corporate Capability (Workstream 4)			
	<ul style="list-style-type: none"><li>Resource #1</li></ul>			Appendix 1 to Attachment 2, Bidder Response Table (Identified Resources, WS4) as applicable to each resource category
	<ul style="list-style-type: none"><li>Resource #2</li></ul>			
	<ul style="list-style-type: none"><li>Resource #3</li></ul>			
	<ul style="list-style-type: none"><li>Resource #4</li></ul>			
	<ul style="list-style-type: none"><li>Resource #5</li></ul>			
	<ul style="list-style-type: none"><li>Resource #6</li></ul>			
No.	Point-Rated Criteria	Maximum Points	Sub-Total	
R-1	Corporate Reference Contracts		200	
	<ul style="list-style-type: none"><li>Reference Contract #1</li></ul>	100		R-1 Corporate Reference Contracts, for each Contract
	<ul style="list-style-type: none"><li>Reference Contract #2</li></ul>	100		
R-2	OpenText Content Server Experience of Identified Resources		120	
	<ul style="list-style-type: none"><li>Resource #1</li></ul>	20		R-2 OpenText Content Server Experience of Identified Resources, for each Resource
	<ul style="list-style-type: none"><li>Resource #2</li></ul>	20		
	<ul style="list-style-type: none"><li>Resource #3</li></ul>	20		
	<ul style="list-style-type: none"><li>Resource #4</li></ul>	20		
	<ul style="list-style-type: none"><li>Resource #5</li></ul>	20		
	<ul style="list-style-type: none"><li>Resource #6</li></ul>	20		
R-3	Bench Strength (OpenText Content Server)		210	
	<ul style="list-style-type: none"><li>Additional Resource #1</li></ul>	35		R-3 Bench Strength (OpenText Content Serve) for each resource & Appendix 1 to Attachment 2, Bidder Response Table (Identified Resources, WS4) as applicable to each resource category
	<ul style="list-style-type: none"><li>Additional Resource #2</li></ul>	35		
	<ul style="list-style-type: none"><li>Additional Resource #3</li></ul>	35		
	<ul style="list-style-type: none"><li>Additional Resource #4</li></ul>	35		
	<ul style="list-style-type: none"><li>Additional Resource #5</li></ul>	35		
	<ul style="list-style-type: none"><li>Additional Resource #6</li></ul>	35		
Overall Maximum Points		530		
Pass Mark (50% of Overall Maximum Points)		265		

**2. Mandatory Evaluation Criteria (Workstream 4)****M-1 Corporate Experience**

M-1 Corporate Experience		
Item	Mandatory Criteria	Demonstrated Experience
<b>M-1</b>	<p>The Bidder must provide two Customer Reference Contracts, with a cumulative billed value of \$1,000,000.00 (Canadian, including taxes) within the last five years of the issuance date of this RFP, where the Bidder was contracted to design and implement solutions based on OpenText Content Server (version 10.0 or more recent).</p> <p>For each Customer Reference Contract to be considered Bidder must have billed a minimum of \$250,000.00 as of the issuance date of this RFP (Canadian including taxes), within a consecutive twelve-month period, under the contract.</p> <p><b>Note:</b> If more than the requested number of reference contracts are provided, Canada will only evaluate the first 2 in the order in which they are set out in the Bid.</p>	Bidder to complete Appendix 1 to Attachment 2, Bidder Response Table (Corporate Reference Contracts, WS4) for each referenced Contract

**M-2 Demonstrated Corporate Capability (Workstream 4)**

<b>M-2 Corporate Capability (Workstream 4)</b>																										
<b>Item</b>	<b>Mandatory Criteria</b>	<b>Demonstrated Experience</b>																								
<b>M-2</b>	<p>The Bidder must demonstrate its capability to provide resources (that meet PWGSC's minimum requirements as set-out in Appendix C to Annex A, Resource Assessment Criteria), as and when requested, by identifying a resource in response to each of the requirements identified in the table below. <u>Each of the identified resources must have previously been contracted by the Bidder for a minimum period of six months within the last two yearstwo years preceding the issuance date of this RFP.</u></p> <table border="1"> <thead> <tr> <th><b>Workstream 4 Resource Category</b></th><th><b>Level</b></th><th><b># of resources to be identified</b></th></tr> </thead> <tbody> <tr> <td>Senior Programmer/Analyst (OpenText Content Server)</td><td>Level 3</td><td>1</td></tr> <tr> <td>IM Architect (OpenText Content Server)</td><td>Level 3</td><td>1</td></tr> <tr> <td>Senior Data Conversion Specialist (OpenText Content Server)</td><td>Level 3</td><td>1</td></tr> <tr> <td>Senior Business Analyst (Imaging and Document Management)</td><td>Level 3</td><td>1</td></tr> <tr> <td>Change Management Consultant (EDRMS)</td><td>Level 3</td><td>1</td></tr> <tr> <td>Senior Project Manager (OpenText Content Server)</td><td>Level 3</td><td>1</td></tr> <tr> <td><b>Total # Resources</b></td><td></td><td><b>6</b></td></tr> </tbody> </table> <p><b>Note:</b> The resources identified in response to this requirement will be used to assess <u>Corporate Capability only</u>.</p>	<b>Workstream 4 Resource Category</b>	<b>Level</b>	<b># of resources to be identified</b>	Senior Programmer/Analyst (OpenText Content Server)	Level 3	1	IM Architect (OpenText Content Server)	Level 3	1	Senior Data Conversion Specialist (OpenText Content Server)	Level 3	1	Senior Business Analyst (Imaging and Document Management)	Level 3	1	Change Management Consultant (EDRMS)	Level 3	1	Senior Project Manager (OpenText Content Server)	Level 3	1	<b>Total # Resources</b>		<b>6</b>	Bidder to complete the Appendix 1 to Attachment 2, Bidder Response Table (Identified Resources, WS4) as applicable to each resource category.
<b>Workstream 4 Resource Category</b>	<b>Level</b>	<b># of resources to be identified</b>																								
Senior Programmer/Analyst (OpenText Content Server)	Level 3	1																								
IM Architect (OpenText Content Server)	Level 3	1																								
Senior Data Conversion Specialist (OpenText Content Server)	Level 3	1																								
Senior Business Analyst (Imaging and Document Management)	Level 3	1																								
Change Management Consultant (EDRMS)	Level 3	1																								
Senior Project Manager (OpenText Content Server)	Level 3	1																								
<b>Total # Resources</b>		<b>6</b>																								

**3. Point-Rated Evaluation Criteria (Workstream 4)****R-1 Corporate Reference Contracts**

The Bidder should demonstrate the extent to which the two Reference Contracts, provided in response to #M-1, exemplify the experience in the areas identified in the table below.

The Bidder will be awarded up to **100 points** for each referenced contract (to a maximum of 200 points) in accordance with the evaluation criteria contained in the table below. If the Bidder does not demonstrate experience for a rated criterion they will get 0 points, no partial points will be awarded for a single criterion.

R-1 Corporate Reference Contracts				
Item	Point-rated Criteria	Max. Points	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Reference Contract #1 - Client Organization Name / Project Title:				
R-1.1	Version of OpenText Content Server	10	<ul style="list-style-type: none"> <li>• <b>10 points</b> – The work delivered by the Bidder under the contract was related to the implementation of OpenText Content Server version 10.5 (or more recent).</li> </ul>	
R-1.2	Application Integration	20	<p><b>Up to 20 points</b> – The work delivered by the Bidder under the contract included application integration of the OpenText Content Server system with any of the following external systems (to a maximum of 4 systems):</p> <ul style="list-style-type: none"> <li>• SharePoint = <b>5 points</b></li> <li>• Dynamics = <b>5 points</b></li> <li>• Database systems = <b>5 points</b></li> <li>• Portal systems = <b>5 points</b></li> <li>• PeopleSoft (HCM or Payroll) = <b>5 points</b></li> <li>• CCM Enterprise = <b>5 points</b></li> </ul>	
R-1.3	Security and Permissions	20	<p><b>Up to 20 points</b> - The work delivered by the Bidder under the contract included:</p> <ul style="list-style-type: none"> <li>• Assisting in setting the permissions Framework = <b>10 points</b></li> <li>• Establishing the Framework for Document Security including the development of Security Checklists = <b>10 points</b></li> </ul>	
R-1.4	Data Migration	20	<ul style="list-style-type: none"> <li>• <b>20 points</b> – The work delivered by the Bidder under the contract included migration from a legacy application to the new OpenText Content Server EDRMS system.</li> </ul>	
R-1.5	Organizational Change Management (OCM)	30	<ul style="list-style-type: none"> <li>• <b>30 points</b> – The work delivered by the Bidder under the contract included OCM activities to support the successful implementation or upgrade of the OpenText Content Server EDRMS solution.</li> </ul> <p><b>Note:</b> OCM activities include the development of business strategies and processes in support of transformation initiatives, and/or conducting change impact analysis and the development of an associated Change Management Plan</p>	
Total Maximum Points Contract #1		100		
Reference Contract #2 - Client Organization Name / Project Title:				

R-1 Corporate Reference Contracts				
Item	Point-rated Criteria	Max. Points	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
R-1.6	Version of OpenText Content Server	10	<ul style="list-style-type: none"> <li>• <b>10 points</b> – The work delivered by the Bidder under the contract was related to the implementation of OpenText Content Server version 10.5 (or more recent).</li> </ul>	
R-1.7	Application Integration	20	<p><b>Up to 20 points</b> – The work delivered by the Bidder under the contract included application integration of the OpenText Content Server system with any of the following external systems (to a maximum of 4 systems):</p> <ul style="list-style-type: none"> <li>• SharePoint = <b>5 points</b></li> <li>• Dynamics = <b>5 points</b></li> <li>• Database systems = <b>5 points</b></li> <li>• Portal systems = <b>5 points</b></li> <li>• PeopleSoft (HCM or Payroll) = <b>5 points</b></li> <li>• CCM Enterprise = <b>5 points</b></li> </ul>	
R-1.8	Security and Permissions	20	<p><b>Up to 20 points</b> - The work delivered by the Bidder under the contract included:</p> <ul style="list-style-type: none"> <li>• Assisting in setting the permissions Framework = <b>10 points</b></li> <li>• Establishing the Framework for Document Security including the development of Security Checklists = <b>10 points</b></li> </ul>	
R-1.9	Data Migration	20	<ul style="list-style-type: none"> <li>• <b>20 points</b> – The work delivered by the Bidder under the contract included migration from a legacy application to the new OpenText Content Server EDRMS system.</li> </ul>	
R-1.10	Organizational Change Management (OCM)	30	<ul style="list-style-type: none"> <li>• <b>30 points</b> – The work delivered by the Bidder under the contract included OCM activities to support the successful implementation or upgrade of the OpenText Content Server EDRMS solution.</li> </ul> <p><b>Note:</b> OCM activities include the development of business strategies and processes in support of transformation initiatives, and/or conducting change impact analysis and the development of an associated Change Management Plan</p>	
<b>Total Maximum Points Contract #2</b>		<b>100</b>		
<b>Points Achieved</b>				

**R-2 OpenText Content Server Experience of Identified Resources**

The Bidder should further demonstrate the depth of experience in OpenText Content Server of the six resources identified in response to #M-2.

The Bidder will be awarded up to **20 points** for each resource (to a maximum of 120 points) in accordance with the evaluation criteria contained in the table below. If the Bidder does not demonstrate experience for a rated criterion they will get 0 points, no partial points will be awarded for a single criterion.

<b>R-2 OpenText Content Server Experience of Identified Resources</b> <i>Bidder to replicate table for each of the six identified resources</i>				
<b>Resource Category:</b>		<insert applicable category>		
<b>Name of Identified Resource:</b>		<insert name of resource identified in response to #M-2>		
<b>Item</b>	<b>Point-Rated Criteria</b>	<b>Max. Points</b>	<b>Evaluation Criteria</b>	<b>Demonstrated Experience (Bidder to Insert Data)</b>
<b>R-2.1</b>	<b>Certification</b> The identified resource holds one of the following OpenText Content Server certifications: <ul style="list-style-type: none"> <li>Developer Certification;</li> <li>Consultant Certification;</li> <li>or</li> <li>Server Administrator Certification.</li> </ul>	<b>5</b>	<ul style="list-style-type: none"> <li><b>5 points</b> – Evidence of valid certification provided</li> </ul> <p><b>Note:</b> Evidence of valid certification should be contained in the Bid.</p>	Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.
<b>R-2.2</b>	<b>Project Complexity</b> The identified resource has experience performing the tasks associated with the resource category as detailed in Appendix 1 to Attachment 2, Bidder Response Table, Minimum experience in the resource category criteria 2-x.1 (as applicable to the resource category) to support the implementation of version 10.5 (or more recent) of OpenText Content Server for a complex project requirement. To be considered, the resource should have worked on the project for a minimum of six months within the last five years.	<b>10</b>	<p><b>Up to 10 points</b> based on the complexity:</p> <p><b>Size</b> - Up to 7 points based on the number of users supported by the system implemented:</p> <ul style="list-style-type: none"> <li><b>7 points</b> – Over 10,000 users</li> <li><b>5 points</b> – 5,001-10,000 users</li> <li><b>3 points</b> – 1,001-5,000 users</li> <li><b>1 point</b> – 0–1,000 users</li> </ul> <p><b>Project Budget</b> - Up to 3 points based on the total approved budget</p>	

R-2 OpenText Content Server Experience of Identified Resources <i>Bidder to replicate table for each of the six identified resources</i>				
<b>Resource Category:</b>		<insert applicable category>		
<b>Name of Identified Resource:</b>		<insert name of resource identified in response to #M-2>		
Item	Point-Rated Criteria	Max. Points	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
			for the OpenText Content Server project: <ul style="list-style-type: none"> <li>• <b>3 points</b> – Over \$1,000,000</li> <li>• <b>2 points</b> – \$500,00 to \$1,000,000</li> <li>• <b>1 point</b> – Under \$500,000.</li> </ul>	
R-2.3	<b>Security Clearance</b> The resource holds a valid GC Security Clearance, or equivalent from public or private domain, at the level of Secret or higher.  <b>Note:</b> Equivalent also includes bilateral security instruments with various countries and international organizations including: <ul style="list-style-type: none"> <li>• Australia</li> <li>• Belgium</li> <li>• Brazil</li> <li>• Bulgaria</li> <li>• Denmark</li> <li>• European Union institutions</li> <li>• Finland</li> <li>• France</li> <li>• Germany</li> <li>• Israel</li> <li>• Italy</li> <li>• Netherlands</li> <li>• New Zealand</li> <li>• Norway</li> <li>• South Africa</li> <li>• Spain</li> <li>• Sweden</li> <li>• Switzerland</li> <li>• United Kingdom</li> <li>• United States</li> </ul>	5	5 points for evidence of valid Security Clearance at the level of secret or higher.	
<b>Total Points</b>		<b>20</b>		
<b>Points Achieved</b>				



**R-3 Bench Strength (OpenText Content Server)**

The Bidder should further demonstrate its capacity to provide resources with expertise in OpenText Open Content Server by identifying up to six additional resources, over and beyond the six resources identified in response to #M-2, in any of the categories listed in the table below. Each of the additional resources must have previously been contracted by the Bidder for a minimum period of six months within the last two yearstwo years preceding the issuance date of this RFP.

Workstream 4 Resource Category	Level	Maximum # of additional resources to be identified
Application/Software Architect (OpenText Content Server)	Level 3	Up to 2 resources, in any single category listed, to a combined total of 6 resources
Senior Programmer/Analyst (OpenText Content Server)	Level 3	
Senior System Analyst (OpenText Content Server)	Level 3	
Senior Tester (OpenText Content Server)	Level 3	
IM Architect ((OpenText Content Server)	Level 3	
Senior Data Conversion Specialist (OpenText Content Server)	Level 3	
Senior Business Analyst (Imaging and Document Management)	Level 3	
Business Process Re-engineering (BPR) Consultant (OpenText Content Server)	Level 3	
Change Management Consultant (ERDMS)	Level 3	
Enterprise Architect (OpenText Content Server)	Level 3	
Senior Project Coordinator (OpenText Content Server)	Level 3	
Senior Project Manager (OpenText Content Server)	Level 3	
<b>Total # Resources</b>		<b>6</b>

The Bidder will be awarded up to **35 points** for each additional resource (to a maximum of 210 points) in accordance with the evaluation criteria contained in the table below. If the Bidder does not demonstrate experience for rated criteria they will get 0 points, no partial points will be awarded.

<b>R-3 Bench Strength (OpenText Content Server))</b>				
<i>Bidder to replicate table for each of the six additional resources</i>				
<b>Resource Category:</b>		<insert applicable category>		
<b>Name of Identified Resource:</b>		<insert name of additional resource >		
Item	Point-Rated Criteria	Max. Points	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
R-3.1	The Bidder should demonstrate that the identified resource meet the minimum requirements associated with the applicable resource category (as set-out in Appendix 1 to Attachment 2, Bidder Response Table). <u>The identified resource must have previously been contracted by the Bidder for a minimum period of six months within the last two yearstwo years preceding the issuance date of this RFP.</u>	15	<ul style="list-style-type: none"> <li><b>15 points –</b> Identified resource meets the minimum criteria associated with the resource category.</li> </ul>	<p>Bidder to complete Appendix 1 to Attachment 2, Bidder Response Table (Identified Resources, WS4) as applicable to each resource category.</p> <p>Substantiation of demonstrated experience must be included in the table,</p>

<b>R-3 Bench Strength (OpenText Content Server))</b> <i>Bidder to replicate table for each of the six additional resources</i>				
<b>Resource Category:</b>		<insert applicable category>		
<b>Name of Identified Resource:</b>		<insert name of additional resource >		
Item	Point-Rated Criteria	Max. Points	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
	<p><b>Note:</b> The resources identified in response to this requirement will be used to assess <u>Corporate Capability only</u> and do not need to be the same proposed resources to deliver services to PWGSC. Required Resources will be requested throughout the period of the Contract using the Task Authorization (TA) process and evaluated at time of TA using the Resource Assessment Criteria under Appendix 2 to Annex D.</p>			resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.
If full score is awarded in R-3.1 above; then up to 20 additional points may be awarded as follows (if 0 points are awarded then the resource will not be evaluated any further).				
<b>R-3.2</b>	<p><b>Certification</b></p> <p>The identified resource holds one of the following OpenText Content Server certifications:</p> <ul style="list-style-type: none"> <li>• Developer Certification;</li> <li>• Consultant Certification; or</li> <li>• Server Administrator Certification.</li> </ul>	<b>5</b>	<ul style="list-style-type: none"> <li>• <b>5 points</b> –Evidence of valid certification provided</li> </ul> <p><b>Note:</b> Evidence of valid certification should be contained in the Bid.</p>	
<b>R-3.3</b>	<p><b>Project Complexity</b></p> <p>The identified resource has experience performing the tasks associated with the resource category (as set-out in Attachment 2, Bidder Response Table) to support the implementation of version 10.5 (or more recent) of OpenText Content Server for a complex project requirement.</p> <p>To be considered, the resource must have worked on the project for a minimum of six months within the last five years.</p>	<b>10</b>	<p>Up to 10 points based on the complexity of the project as follows:</p> <p><b>Size</b> - Up to 7 points based on the number of users supported by the system implemented:</p> <ul style="list-style-type: none"> <li>• <b>7 points</b> – Over 10,000 users</li> <li>• <b>5 points</b> – 5,001-10,000 users</li> <li>• <b>3 points</b> – 1,001-5,000 users</li> </ul>	The Bidder must demonstrate that the identified resource conducted at least 50% of the tasks associated with the resource category (as set out in the SOW - section 3).

<b>R-3 Bench Strength (OpenText Content Server))</b> <i>Bidder to replicate table for each of the six additional resources</i>				
<b>Resource Category:</b>		<insert applicable category>		
<b>Name of Identified Resource:</b>		<insert name of additional resource >		
Item	Point-Rated Criteria	Max. Points	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
			<ul style="list-style-type: none"> <li>• <b>1 point</b> – 0–1,000 users</li> </ul> <p><b>Project Budget</b> - Up to 3 points based on the total approved budget for the OpenText Content Server project:</p> <ul style="list-style-type: none"> <li>• <b>3 points</b> – Over \$1,000,000</li> <li>• <b>2 points</b> – \$500,00 to \$1,000,000</li> <li>• <b>1 point</b> – Under \$500,000</li> </ul>	
<b>R-3.4</b>	<p><b>Security Clearance</b></p> <p>The resource holds a valid GC Security Clearance, or equivalent from public or private domain, at the level of Secret or higher.</p> <p><b>Note:</b> Equivalent also includes bilateral security instruments with various countries and international organizations including:</p> <ul style="list-style-type: none"> <li>• Australia</li> <li>• Belgium</li> <li>• Brazil</li> <li>• Bulgaria</li> <li>• Denmark</li> <li>• European Union institutions</li> <li>• Finland</li> <li>• France</li> <li>• Germany</li> <li>• Israel</li> <li>• Italy</li> <li>• Netherlands</li> <li>• New Zealand</li> <li>• Norway</li> <li>• South Africa</li> <li>• Spain</li> <li>• Sweden</li> <li>• Switzerland</li> <li>• United Kingdom</li> <li>• United States</li> </ul>	<b>5</b>	5 points for evidence of valid Security Clearance at the level of Secret or higher.	

Solicitation Number: EP597-180057

Amendment Number:

Buyer ID: 618EL

R-3 Bench Strength (OpenText Content Server)) <i>Bidder to replicate table for each of the six additional resources</i>				
<b>Resource Category:</b>		<insert applicable category>		
<b>Name of Identified Resource:</b>		<insert name of additional resource >		
Item	Point-Rated Criteria	Max. Points	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
	<b>Total Points</b>	<b>35</b>		
	<b>Points Achieved</b>			

**Appendix 1 to Attachment 2, Bidder Response Table (Corporate Reference Contracts, WS4)**

<b>Bidder Response Table (Corporate Reference Contracts, WS4)</b> <i>Bidder to replicate table for each of the two Corporate Reference Contracts</i>		
Corporate Reference Contract Description		(Bidder to Insert Data)
<b>Client Particulars</b>	Client Organization Name	
	Address	
	Contract or Purchase Order Number	
	Project Title	
	Client Client Contact Name and Title	
	Contact telephone number and/or e-mail address.	
	1. Provide a brief description of the on OpenText Content Sever (version 10.0 or more recent implementation project.	
2. Specify contract start and end date (mm/yyyy to mm/yyyy)		
3. Specify total amount billed value (Canadian, including taxes) within the last five years of the issuance date of this RFP.		

**Appendix 1 to Attachment 2, Bidder Response Table (Identified Resources, WS4)****1. Application / Software Architect (Level 3) (OpenText Content Server)**

Resource Evaluation Criteria		
Resource Category	1. Application / Software Architect (Level 3) (OpenText Content Server)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2-1.1	<p><b>Minimum experience in the resource category.</b> The identified resource must have experience in the proposed resource category including:</p> <p>a) a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this RFP, working as an Application / Software Architect (as defined below in 2-1.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the five tasks listed below for a minimum of six cumulative months of experience per task:</p> <p>1) Develop technical architectures, frameworks and strategies, for an application area, to meet the business and application requirements;</p> <p>2) Analyze functional requirements to identify information, procedures and decision flows. Analyze and evaluate alternative software solutions to meet business problems;</p> <p>3) Ensure the integration of all aspects of software solutions;</p> <p>4) Create an application component roadmap - roadmap to align business vision and functional coverage to IT vision; and</p> <p>5) Create an application architecture framework.</p> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p><a href="#">The Bidder hereby certifies that the identified resource meets the "Minimum Experience in the resource category" as detailed under Evaluation Criteria #2-1.1. The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.</a></p> <p><a href="#">Name and signature of Authorized Representative</a></p> <p><a href="#">Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.)</a></p>

Resource Evaluation Criteria		
Resource Category	1. Application / Software Architect (Level 3) (OpenText Content Server)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
		<del>otherwise the experience will not be considered.</del>
Attachment 2-1.2	<b>Minimum experience with OpenText Content Server.</b>  The identified resource must have experience on a minimum of three projects developing technical architectures, frameworks or strategies, to meet the business and application requirements for an OpenText Content Server (version 10.5 or more recent) project.	<u>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</u>
	To be considered, the resource should have worked on the project for a minimum of six months within the last five years.	
Attachment 2-1.3	<b>Previously contracted by the Bidder.</b>  The identified resource must have previously been contracted by the Bidder for a minimum period of six months within the <u>last two years two years preceding the issuance date of this RFP.</u>  The Bidder must provide the following substantiating information in its bid: <ul style="list-style-type: none"><li>a) Customer organization name;</li><li>b) Customer contact (including name, title, and telephone number or e-mail address);</li><li>c) Project name;</li><li>d) Role of the resource on the project; and</li><li>e) Dates resource worked of contract (start and finish date, mm/yyyy).</li></ul> <b>Note:</b> Resources identified at the time of RFP must have previously been contracted by the Bidder as stipulated. This requirement does not apply to resources proposed after contract award in response to TAs.	

**2. Senior Programmer / Analyst (Level 3) (OpenText Content Server)**

Resource Evaluation Criteria		
Resource Category	2. Programmer / Analyst (Level 3) (OpenText Content Server)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2-2.1	<p><b>Minimum experience in the resource category.</b></p> <p>The identified resource must have experience in the applicable resource category including:</p> <p>a) a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this RFP, working as a Programmer / Analyst (as defined below in 2-2.1 b); and</p> <p>b) that within that time frame of experience, the resource has experience performing each of the seven tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Analyze functional requirements leading to the execution of the design, development and implementation of changes to the application;</li><li>2) Develop and maintain configuration and programs based on approved requirements working both independently and within a team;</li><li>3) Deliver technical specifications documents using the functional specifications provided by the functional and integration teams;</li><li>4) Create and modify configuration and code for software as per technical specifications;</li><li>5) Produce reports, manuals, programs, data files, and procedures for applications;</li><li>6) Analyze code and objects to determine functional fit; and</li><li>7) Execute tasks related to the implementation of application and database design and fixes, coding and technical documentation.</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p><a href="#">The Bidder hereby certifies that the identified resource meets the "Minimum Experience in the resource category" as detailed under Evaluation Criteria #2-1.1. The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.</a></p> <p><a href="#">Name and signature of Authorized Representative</a></p> <p><a href="#">Substantiation of demonstrated experience must be included in the table; resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a></p>
	Attachment 2 - 2.2	<p><b>Minimum experience with OpenText Content Server.</b></p>



Resource Evaluation Criteria		
Resource Category	2. Programmer / Analyst (Level 3) (OpenText Content Server)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
	<p>The identified resource must have experience on a minimum of three projects developing solutions using OpenText Content Server (version 10.5 or more recent).</p> <p>To be considered, the resource should have worked on the project for a minimum of six months within the last five years.</p>	<p><a href="#">must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a></p>
Attachment 2 - 2.3	<p><b>Previously contracted by the Bidder.</b></p> <p>The identified resource must have previously been contracted by the Bidder for a minimum period of six months within the <a href="#">last two years two years preceding the issuance date of this RFP</a>.</p> <p>The Bidder must provide the following substantiating information in its bid:</p> <ul style="list-style-type: none"><li>a) Customer organization name;</li><li>b) Customer contact (including name, title, and telephone number or e-mail address);</li><li>c) Project name;</li><li>d) Role of the resource on the project; and</li><li>e) Dates resource worked of contract (start and finish date, mm/yyyy).</li></ul> <p><b>Note:</b> Resources identified at the time of RFP must have previously been contracted by the Bidder as stipulated. This requirement does not apply to resources proposed after contract award in response to TAs.</p>	

**3. Senior System Analyst (Level 3) (OpenText Content Server)**

Resource Evaluation Criteria		
Resource Category	3. System Analyst (Level 3) (OpenText Content Server)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2 - 3.1	<p><b>Minimum experience in the resource category.</b></p> <p>The identified resource must have experience in the applicable resource category including:</p> <p>a) A minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this RFP, working as a System Analyst (as defined below in 2-3.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the five tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Develop requirements, feasibility, cost, design, and specification documents for systems;</li><li>2) Implement systems to support projects, departments, organizations or businesses;</li><li>3) Translate business requirements into systems design and specifications;</li><li>4) Analyze and recommend alternatives and options for solutions; and</li><li>5) Develop technical specifications for systems development, design and implementation.</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p><u>The Bidder hereby certifies that the identified resource meets the "Minimum Experience in the resource category" as detailed under Evaluation Criteria #2-3.1. The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.</u></p> <p><u>Name and signature of Authorized Representative</u></p> <p><u>Substantiation of demonstrated experience must be included in the table; resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</u></p>
	Attachment 2 - 3.2	<p><b>Minimum experience with OpenText Content Server.</b></p>

Resource Evaluation Criteria		
Resource Category	3. System Analyst (Level 3) (OpenText Content Server)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
	<p>The identified resource must have experience on a minimum of three projects designing solutions using OpenText Content Server (version 10.5 or more recent) solution.</p> <p>To be considered, the resource should have worked on the project for a minimum of six months within the last five years.</p>	<p><a href="#">must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a></p>
Attachment 2 - 3.3	<p><b>Previously contracted by the Bidder.</b></p> <p>The identified resource must have previously been contracted by the Bidder for a minimum period of six months within the <a href="#">last two years/two years preceding the issuance date of this RFP</a>.</p> <p>The Bidder must provide the following substantiating information in its bid:</p> <ul style="list-style-type: none"><li>a) Customer organization name;</li><li>b) Customer contact (including name, title, and telephone number or e-mail address);</li><li>c) Project name;</li><li>d) Role of the resource on the project; and</li><li>e) Dates resource worked of contract (start and finish date, mm/yyyy).</li></ul> <p><b>Note:</b> Resources identified at the time of RFP must have previously been contracted by the Bidder as stipulated. This requirement does not apply to resources proposed after contract award in response to TAs.</p>	

**4. Senior Tester (Level 3) (OpenText Content Server)**

Resource Evaluation Criteria		
Resource Category	4. Tester (Level 3) (OpenText Content Server)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2 - 4.1	<p><b>Minimum experience in the resource category.</b></p> <p>The identified resource must have experience in the applicable resource category including:</p> <p>a) A minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this RFP, working as a Tester (as defined below in 2-4.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the five tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Develop the Test strategy; test planning and coordination;</li><li>2) Manage and monitor test plans for all levels of testing;</li><li>3) Develop test scenarios and test scripts;</li><li>4) Establish and maintain test procedures and script libraries; and</li><li>5) Establish a validation and verification capability which assumes functional and performance compliance.</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p><u>The Bidder hereby certifies that the identified resource meets the "Minimum Experience in the resource category" as detailed under Evaluation Criteria #2-4.1. The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.</u></p> <p><u>Name and signature of Authorized Representative</u></p> <p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>
	Attachment 2 - 4.2	<p><b>Minimum experience with OpenText Content Server.</b></p>

Resource Evaluation Criteria		
Resource Category	4. Tester (Level 3) (OpenText Content Server)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
	<p>The identified resource must have experience on a minimum of three projects developing test scripts and executing testing activities for an OpenText Content Server (version 10.5 or more recent) solution.</p> <p>To be considered, the resource should have worked on the project for a minimum of six months within the last five years.</p>	<p><a href="#">must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a></p>
Attachment 2 - 4.3	<p><b>Previously contracted by the Bidder.</b></p> <p>The identified resource must have previously been contracted by the Bidder for a minimum period of six months within the <del>last two years</del><a href="#">two years preceding the issuance date of this RFP.</a></p> <p>The Bidder must provide the following substantiating information in its bid:</p> <ul style="list-style-type: none"><li>a) Customer organization name;</li><li>b) Customer contact (including name, title, and telephone number or e-mail address);</li><li>c) Project name;</li><li>d) Role of the resource on the project; and</li><li>e) Dates resource worked of contract (start and finish date, mm/yyyy).</li></ul> <p><b>Note:</b> Resources identified at the time of RFP must have previously been contracted by the Bidder as stipulated. This requirement does not apply to resources proposed after contract award in response to TAs.</p>	

**5. IM Architect (Level 3) (OpenText Content Server)**

Bidder Response Table (Identified Resources, WS4)		
Resource Category		5. IM Architect (Level 3) (OpenText Content Server)
Name of Identified Resource:		<insert name>
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2 - 5.1	<b>Minimum experience in the resource category.</b>  The identified resource must have experience in the applicable resource category including:  a) A minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this RFP, working as an IM Architect (as defined below in 2-5.1 b); and  b) that within that timeframe of experience, the resource has experience performing a minimum of six out of the eight tasks listed below for a minimum of six cumulative months of experience per task:  1) Analyze existing capabilities and requirements, develop redesigned frameworks and recommend areas for improved capability and integration. Develop and document detailed statements of requirements; 2) Evaluate existing procedures and methods, identify and document database content, structure, and application subsystems, and develop data dictionary; 3) Define and document interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems; 4) Prototype potential solutions, provide tradeoff information and suggest recommended courses of action; 5) Perform information modelling in support of BPR implementation; 6) Perform cost/benefit analysis of implementing new processes and solutions; 7) Provide advice in developing and integrating process and information models between business processes to eliminate information and process redundancies; and 8) Provide advice in defining new requirements and opportunities for applying efficient and effective solutions; identify and provide preliminary costs of potential options.	<a href="#">The Bidder hereby certifies that the identified resource meets the "Minimum Experience in the resource category" as detailed under Evaluation Criteria #2-5.1. The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.</a>  <a href="#">Name and signature of Authorized Representative</a>  Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.

Bidder Response Table (Identified Resources, WS4)		
Resource Category		5. IM Architect (Level 3) (OpenText Content Server)
Name of Identified Resource:		<insert name>
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
	The required experience can be demonstrated over one or more Customer Reference Projects.	
Attachment 2 - 5.2	<p><b>Minimum experience with OpenText Content Server.</b></p> <p>The identified resource must have experience on a minimum of one project authoring an information architecture for unstructured content using OpenText Content Server (version 10.5 or more recent).</p> <p>To be considered, the resource should have worked on the project for a minimum of six months within the last five years.</p>	<p><a href="#">Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a></p>
Attachment 2 - 5.3	<p><b>Previously contracted by the Bidder.</b></p> <p>The identified resource must have previously been contracted by the Bidder for a minimum period of six months within the <a href="#">last two yearstwo years preceding the issuance date of this RFP</a>.</p> <p>The Bidder must provide the following substantiating information in its bid:</p> <ul style="list-style-type: none"><li>a) Customer organization name;</li><li>b) Customer contact (including name, title, and telephone number or e-mail address);</li><li>c) Project name;</li><li>d) Role of the resource on the project; and</li><li>e) Dates resource worked of contract (start and finish date, mm/yyyy).</li></ul> <p><b>Note:</b> Resources identified at the time of RFP must have previously been contracted by the Bidder as stipulated. This requirement does not apply to resources proposed after contract award in response to TAs.</p>	

**6. Senior Data Conversion Specialist (Level 3) (OpenText Content Server)**

Resource Evaluation Criteria		
Resource Category	6. Data Conversion Specialist (Level 3) (OpenText Content Server)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2 - 6.1	<p><b>Minimum experience in the resource category.</b></p> <p>The identified resource must have experience in the applicable resource category including:</p> <p>a) A minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this RFP, working as a Data Conversion Specialist (as defined below in 2-6.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the four tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Oversee all facets of the conversion process;</li><li>2) Complete mapping, interfaces, mock conversion work, enhancements, actual conversion, and verify completeness and accuracy of converted data;</li><li>3) Analyze and coordinate data file conversions; and</li><li>4) Import files from heterogeneous platforms.</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p><u>The Bidder hereby certifies that the identified resource meets the "Minimum Experience in the resource category" as detailed under Evaluation Criteria #2-6.1. The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.</u></p> <p><u>Name and signature of Authorized Representative</u></p> <p><u>Substantiation of demonstrated experience must be included in the table; resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</u></p>
	Attachment 2 - 6.2	<p><b>Minimum experience with OpenText Content Server.</b></p>



Resource Evaluation Criteria		
Resource Category	6. Data Conversion Specialist (Level 3) (OpenText Content Server)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
	<p>The identified resource must have experience on a minimum of three projects performing data conversions from legacy systems to OpenText Content Server version 10.5 or more recent) project. For each project to be considered, the resource must have worked on the project for a minimum duration of six months within the five years preceding the issuance date of this RFP.</p> <p>To be considered, the resource should have worked on the project for a minimum of six months within the last five years.</p>	<a href="#">must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a>
Attachment 2 - 6.3	<p><b>Previously contracted by the Bidder.</b></p> <p>The identified resource must have previously been contracted by the Bidder for a minimum period of six months within the <a href="#">last two years</a><a href="#">two years preceding the issuance date of this RFP.</a></p> <p>The Bidder must provide the following substantiating information in its bid:</p> <ul style="list-style-type: none"><li>a) Customer organization name;</li><li>b) Customer contact (including name, title, and telephone number or e-mail address);</li><li>c) Project name;</li><li>d) Role of the resource on the project; and</li><li>e) Dates resource worked of contract (start and finish date, mm/yyyy).</li></ul> <p><b>Note:</b> Resources identified at the time of RFP must have previously been contracted by the Bidder as stipulated. This requirement does not apply to resources proposed after contract award in response to TAs.</p>	

**7. Senior Business Analyst (Level 3) (Imaging and Document Management)**

Resource Evaluation Criteria		
Resource Category	7. Business Analyst (Level 3) (Imaging and Document Management)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2 - 7.1	<p><b>Minimum experience in the resource category.</b></p> <p>The identified resource must have experience in the applicable resource category including:</p> <p>a) A minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this RFP, working as a Business Analyst (as defined below in 2-7.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the seven tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Determine operational objectives by studying business functions; gathering information; evaluating output requirements and formats;</li><li>2) Perform business analyses of requirements to identify information, procedures, and decision flows;</li><li>3) Evaluate existing procedures and methods, identify and document items such as database content, structure, application subsystems;</li><li>4) Develop data dictionary;</li><li>5) Define and document interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems;</li><li>6) Identify candidate business processes for re-design, prototype potential solutions, provide trade-off information and suggest a recommended course of action. Identify the modifications to the automated processes; and</li><li>7) Establish acceptance test criteria with client.</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p><a href="#">The Bidder hereby certifies that the identified resource meets the "Minimum Experience in the resource category" as detailed under Evaluation Criteria #2-7.1. The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.</a></p> <p><a href="#">Name and signature of Authorized Representative</a></p> <p><a href="#">Substantiation of demonstrated experience must be included in the table; resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a></p>

Resource Evaluation Criteria		
Resource Category	7. Business Analyst (Level 3) (Imaging and Document Management)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2 - 7.2	<p><b>Minimum experience with Imaging and Document Management Solutions.</b></p> <p>The identified resource must have experience on a minimum of three projects analyzing and documenting requirements for an EDRMS solution implementation or upgrade project.</p> <p>To be considered, the resource should have worked on the project for a minimum of six months within the last five years.</p>	<p><a href="#">Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a></p>
Attachment 2 - 7.3	<p><b>Previously contracted by the Bidder.</b></p> <p>The identified resource must have previously been contracted by the Bidder for a minimum period of six months within the <a href="#">last two years two years preceding the issuance date of this RFP.</a></p> <p>The Bidder must provide the following substantiating information in its bid:</p> <ul style="list-style-type: none"><li>a) Customer organization name;</li><li>b) Customer contact (including name, title, and telephone number or e-mail address);</li><li>c) Project name;</li><li>d) Role of the resource on the project; and</li><li>e) Dates resource worked of contract (start and finish date, mm/yyyy).</li></ul> <p><b>Note:</b> Resources identified at the time of RFP must have previously been contracted by the Bidder as stipulated. This requirement does not apply to resources proposed after contract award in response to TAs.</p>	

**8. Business Process Re-engineering Consultant (Level 3) (Workflow)**

Resource Evaluation Criteria		
Resource Category	8. Business Process Re-engineering Consultant (Level 3) (Workflow)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2 - 8.1	<p><b>Minimum experience in the resource category.</b></p> <p>The identified resource must have experience in the applicable resource category including:</p> <p>a) a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this RFP, working as a Business Process Re-engineering Consultant (as defined below in 2-8.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the nine tasks listed for a minimum of six cumulative months of experience per task:</p> <p>1) Review existing work processes and organizational structure.</p> <p>2) Analyze business functional requirements to identify information, procedures and decision flows.</p> <p>3) Identify candidate processes for re-design; prototype potential solutions, provide trade-off information and suggest a recommended course of action. Identify the modifications to the automated processes.</p> <p>4) Provide recommendations defining new requirements and opportunities for applying efficient and effective solutions; identify and provide preliminary costs of potential options.</p> <p>5) Provide recommendations in developing and integrating process and information models between processes to eliminate information and process redundancies.</p> <p>6) Identify and recommend new processes and organizational structures.</p> <p>7) Provide recommendations on and/or assist in implementing new processes and organizational changes.</p> <p>8) Document workflows.</p> <p>9) Use business, workflow and organizational modeling software tools.</p>	<p><a href="#">The Bidder hereby certifies that the identified resource meets the "Minimum Experience in the resource category" as detailed under Evaluation Criteria #2-8.1. The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.</a></p> <p><a href="#">Name and signature of Authorized Representative</a></p> <p>Substantiation of demonstrated experience must be included in the table; resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>

Resource Evaluation Criteria		
Resource Category	8. Business Process Re-engineering Consultant (Level 3) (Workflow)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
	The required experience can be demonstrated over one or more Customer Reference Projects.	
Attachment 2 - 8.2	<p><b>Minimum experience with Workflow Solutions.</b></p> <p>The identified resource must have experience on a minimum of three projects designing and implementing workflows, and where at least one project utilized OpenText Content Server 2010 tools and functions (version 10.5 or more recent).</p> <p>To be considered, the resource should have worked on the project for a minimum of six months within the last five years.</p>	<p><u>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</u></p>
Attachment 2 - 8.3	<p><b>Previously contracted by the Bidder.</b></p> <p>The identified resource must have previously been contracted by the Bidder for a minimum period of six months within the <u>last two years two years preceding the issuance date of this RFP.</u></p> <p>The Bidder must provide the following substantiating information in its bid:</p> <ul style="list-style-type: none"><li>a) Customer organization name;</li><li>b) Customer contact (including name, title, and telephone number or e-mail address);</li><li>c) Project name;</li><li>d) Role of the resource on the project; and</li><li>e) Dates resource worked of contract (start and finish date, mm/yyyy).</li></ul> <p><b>Note:</b> Resources identified at the time of RFP must have previously been contracted by the Bidder as stipulated. This requirement does not apply to resources proposed after contract award in response to TAs.</p>	

**9. Change Management Consultant (Level 3) (EDRMS)**

Resource Evaluation Criteria		
Resource Category	9. Change Management Consultant (Level 2 and Level 3) (EDRMS)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2 - 9.1	<p><b>Minimum experience in the resource category.</b></p> <p>The identified resource must have experience in the applicable resource category including:</p> <p>a) A minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this RFP, working as a Change Management Consultant (as defined below in 2-9.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the five tasks listed for a minimum of six cumulative months of experience per task:</p> <p>1) Responsible for leading other functional resources to define business strategy and processes in support of transformation and change management activities;</p> <p>2) Engage and enable the organization to implement solutions by providing practical and actionable tools and templates;</p> <p>3) Participate in change impact analysis and change management activities;</p> <p>4) Work with the target community to ensure alignment, correct skills and experience to enable the change; and</p> <p>5) Provide onsite as well as remote coaching, mentoring and advisory services for the management of change and individuals as required.</p> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p><a href="#">The Bidder hereby certifies that the identified resource meets the "Minimum Experience in the resource category" as detailed under Evaluation Criteria #2-9.1. The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.</a></p> <p><a href="#">Name and signature of Authorized Representative</a></p> <p><a href="#">Substantiation of demonstrated experience must be included in the table; resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a></p>
	Attachment 2 - 9.2	<b>Minimum experience with EDRMS</b>

Resource Evaluation Criteria		
Resource Category	9. Change Management Consultant (Level 2 and Level 3) (EDRMS)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
	The identified resource must have a minimum of two years of experience conducting Change Management activities in support of EDRMS projects.	<a href="#">must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a>
Attachment 2 - 9.3	<b>Minimum experience supporting Communications.</b>  The identified resource must have a minimum of two years of experience developing communications materials in support of a software enabled business transformation initiative.	<a href="#">Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a>
Attachment 2 - 9.3	<b>Previously contracted by the Bidder.</b>  The identified resource must have previously been contracted by the Bidder for a minimum period of six months within the <del>last two years</del> <a href="#">two years preceding the issuance date of this RFP.</a>  The Bidder must provide the following substantiating information in its bid: a) Customer organization name; b) Customer contact (including name, title, and telephone number or e-mail address); c) Project name;	

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Amendment Number:

Buyer ID: 618EL

Resource Evaluation Criteria		
Resource Category	9. Change Management Consultant (Level 2 and Level 3) (EDRMS)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
	<p>d) Role of the resource on the project; and</p> <p>e) Dates resource worked of contract (start and finish date, mm/yyyy).</p> <p><b>Note:</b> Resources identified at the time of RFP must have previously been contracted by the Bidder as stipulated. This requirement does not apply to resources proposed after contract award in response to TAs.</p>	



**10. Enterprise Architect (Level 3) (OpenText Content Server)**

Resource Evaluation Criteria		
Resource Category	10. Enterprise Architect (Level 3) (OpenText Content Server)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2 - 10.1	<p><b>Minimum experience in the resource category.</b></p> <p>The identified resource must have experience in the applicable resource category including:</p> <p>a) a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this RFP, working as an Enterprise Architect (as defined below in 2-10.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the seven tasks listed below for a minimum of six cumulative months of experience per task:</p> <p>1) Evaluate the enterprise's business/Information and Communication Technology (ICT) architecture, determine its consistency and integration with the organization's business/ICT strategies, assess the degree of its alignment with Treasury Board CIO Business Transformation Enablement Program (BTEP) and Federated Architecture Program (FAP) and recommend changes to the business/ICT architecture to improve its alignment with these external factors;</p> <p>2) Identify future business/ICT requirements against the current enterprise architecture, perform gaps analyses, develop Requirements for Technology Architectures (RTA), and prepare migration strategies;</p> <p>3) Assess the feasibility of migrating from the current state to the target business architecture and enabling technologies and identify the risks associated with migrating to the target business architecture and technologies and make recommendations for risk mitigation;</p> <p>4) Identify business and technology trends that create opportunities for business improvement, advise business and ICT Senior Executives on ICT trends and emerging technologies and the impact on the organization's and government ICT architectures and business strategies, model "What if" scenarios and recommend appropriate changes to the existing architecture and ICT infrastructure, and</p>	<p><u>The Bidder hereby certifies that the identified resource meets the "Minimum Experience in the resource category" as detailed under Evaluation Criteria #2-10.1. The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.</u></p> <p><u>Name and signature of Authorized Representative</u></p> <p><u>Substantiation of demonstrated experience must be included in the table; resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</u></p>

Resource Evaluation Criteria		
Resource Category	10. Enterprise Architect (Level 3) (OpenText Content Server)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
	<p>recommend alternative solutions, methodologies and strategies;</p> <p>5) Produce an architectural evolution plan, recommend prioritization of architecture evolution initiatives, and develop and/or implement an architecture evolution plan;</p> <p>6) Manage the development and implementation of an architectural improvement plan; and</p> <p>7) Train the organization to perform any of the above.</p> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	
Attachment 2 - 10.2	<p><b>Minimum experience with OpenText Content Server.</b></p> <p>The identified resource must have experience, on a minimum of two projects, assessing the feasibility and providing recommendations to mitigate the risk, associated with migrating from the current state to the target business architecture and technology based on OpenText Content Server (version 10.5 or more recent).</p> <p>To be considered, the resource should have worked on the project for a minimum of six months within the last five years.</p>	<p><u>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</u></p>
Attachment 2 - 10.3	<p><b>Previously contracted by the Bidder.</b></p> <p>The identified resource must have previously been contracted by the Bidder for a minimum period of six months within the <u>last two years/two years preceding the issuance date of this RFP.</u></p> <p>The Bidder must provide the following substantiating information in its bid:</p> <ul style="list-style-type: none"><li>a) Customer organization name;</li><li>b) Customer contact (including name, title, and telephone number or e-mail address);</li><li>c) Project name;</li><li>d) Role of the resource on the project; and</li><li>e) Dates resource worked of contract (start and finish date, mm/yyyy).</li></ul>	

Resource Evaluation Criteria		
Resource Category		10. Enterprise Architect (Level 3) (OpenText Content Server)
Name of Identified Resource:		<insert name>
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
	<b>Note:</b> Resources identified at the time of RFP must have previously been contracted by the Bidder as stipulated. This requirement does not apply to resources proposed after contract award in response to TAs.	

**11. Project Coordinator (Level 3) (OpenText Content Server)**

Resource Evaluation Criteria		
Resource Category	11. Project Coordinator (Level 3) (OpenText Content Server)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2 - 11.1	<p><b>Minimum experience in the resource category.</b></p> <p>a) The identified resource must have experience in the applicable resource category including a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this RFP, working as a Project Coordinator (as defined below in 2-11.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing at least four out of the five tasks listed for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Assist project management, business, functional, technical users and end users in project coordination and synchronization tasks;</li><li>2) Provide administrative and technical support of a clerical nature as required to a project team;</li><li>3) Maintain project documentation and application/system libraries;</li><li>4) Track and manage issues, defects and change requests in the service desk database;</li><li>5) Maintain and update relevant project information in manual and/or electronic files; project information might include such things as project activity schedule, status reports, correspondence; etc.</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p><a href="#">The Bidder hereby certifies that the identified resource meets the "Minimum Experience in the resource category" as detailed under Evaluation Criteria #2-11.1. The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.</a></p> <p><a href="#">Name and signature of Authorized Representative</a></p> <p><a href="#">Substantiation of demonstrated experience must be included in the table; resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a></p>
Attachment 2 - 11.2	<b>Minimum experience with OpenText Content Server.</b>	<a href="#">Substantiation of demonstrated experience</a>

Resource Evaluation Criteria		
Resource Category	11. Project Coordinator (Level 3) (OpenText Content Server)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
	<p>The identified resource must have experience on a minimum of two projects as a Project Coordinator for an OpenText Content Server project (version 10.5 or more recent).</p> <p>To be considered, the resource should have worked on the project for a minimum of six months within the last five years.</p>	<p><a href="#">must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a></p>
Attachment 2 - 11.3	<p><b>Previously contracted by the Bidder.</b></p> <p>The identified resource must have previously been contracted by the Bidder for a minimum period of six months within the <a href="#">last two years/two years preceding the issuance date of this RFP</a>.</p> <p>The Bidder must provide the following substantiating information in its bid:</p> <ul style="list-style-type: none"><li>a) Customer organization name;</li><li>b) Customer contact (including name, title, and telephone number or e-mail address);</li><li>c) Project name;</li><li>d) Role of the resource on the project; and</li><li>e) Dates resource worked of contract (start and finish date, mm/yyyy).</li></ul> <p><b>Note:</b> Resources identified at the time of RFP must have previously been contracted by the Bidder as stipulated. This requirement does not apply to resources proposed after contract award in response to TAs.</p>	

**12. Project Manager (Level 3) (OpenText Content Server)**

Resource Evaluation Criteria		
Resource Category		12. Project Manager (Level 3) (OpenText Content Server)
Name of Identified Resource:		<insert name>
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2 - 12.1	<p><b>Minimum experience in the resource category.</b></p> <p>a) The identified resource must have experience in the applicable resource category including a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this RFP, working as a Project Manager (as defined below in 2-12.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the seven tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Manage other Project Management resources that are responsible for an element of the project and its associated project team;</li><li>2) Manage the project during the development, implementation and operations start up by ensuring that resources are made available and that the project is developed and is fully operational within previously agreed time, cost and performance parameters;</li><li>3) Formulate statements of problems; establishes procedures for the development and implementation of significant, new or modified project elements to solve these problems, and obtains approval thereof;</li><li>4) Define and document the objectives for the project; determine budgetary requirements, the composition, roles and responsibilities and terms of reference for the project team;</li><li>5) Report progress of the project on an ongoing basis and at scheduled points in the life cycle;</li><li>6) Prepare plans, charts, tables and diagrams to assist in analyzing or displaying problems; work with a variety of project management tools; and</li><li>7) Project sign-off.</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p><u>The Bidder hereby certifies that the identified resource meets the "Minimum Experience in the resource category" as detailed under Evaluation Criteria #2-12.1. The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.</u></p> <p><u>Name and signature of Authorized Representative</u></p> <p><u>Substantiation of demonstrated experience must be included in the table; resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</u></p>
	Attachment 2 - 12.2	<p><b>Minimum experience with OpenText Content Server.</b></p>

Resource Evaluation Criteria		
Resource Category	12. Project Manager (Level 3) (OpenText Content Server)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
	<p>The identified resource must have experience on a minimum of three projects as a Project Manager on an OpenText Content Server implementation project (version 10.5 or more recent).</p> <p>To be considered, the resource should have worked on the project for a minimum of six months within the last five years.</p>	<a href="#">must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a>
Attachment 2 - 12.3	<p><b>Minimum experience as a senior PM.</b></p> <p>The identified resource must have experience as a Project Manager, on a minimum of one project, where the resource was responsible for a complex application development or application implementation project. A complex project is a project which includes multiple (i.e. three or more teams or sub-projects and includes multi-departmental stakeholders).</p> <p>To be considered, the resource should have worked on the project for a minimum of six months within the last five years.</p>	<a href="#">Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a>
Attachment 2 - 12.4	<p><b>Previously contracted by the Bidder.</b></p> <p>The identified resource must have previously been contracted by the Bidder for a minimum period of six months within the <a href="#">last two years two years preceding the issuance date of this RFP</a>.</p> <p>The Bidder must provide the following substantiating information in its bid:</p> <ul style="list-style-type: none"><li>a) Customer organization name;</li><li>b) Customer contact (including name, title, and telephone number or e-mail address);</li><li>c) Project name;</li></ul>	

Resource Evaluation Criteria		
Resource Category	12. Project Manager (Level 3) (OpenText Content Server)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
	<div>d) Role of the resource on the project; and</div> <div>e) Dates resource worked of contract (start and finish date, mm/yyyy).</div> <div><b>Note:</b> Resources identified at the time of RFP must have previously been contracted by the Bidder as stipulated. This requirement does not apply to resources proposed after contract award in response to TAs.</div>	



### Workstream 5, Financial Systems Professional Services

#### 1. Evaluation Summary (Workstream 5)

Evaluation Summary (Workstream 5)				
No.	Mandatory Criteria	Compliant Yes/No		Bidder Response Tables to be completed (Cross-reference)
M-1	Corporate Experience			Appendix 1 to Attachment 2, Bidder Response Table (Corporate Reference Contracts, WS5), for each Contract
	• Reference Contract #1			
	• Reference Contract #2			
	• Reference Contract #3			
M-2	Corporate Capability (Workstream 5)			Appendix 1 to Attachment 2, Bidder Response Table (Identified Resources, WS5) as applicable to each resource category
	• Resource #1			
	• Resource #2			
	• Resource #3			
	• Resource #4			
	• Resource #5			
	• Resource #6			
	• Resource #7			
	• Resource #8			
No.	Point-Rated Criteria	Maximum Points	Sub-Total	
R-1	Corporate Reference Contracts		300270	R-1 Corporate Reference Contracts, for each Contract
	• Reference Contract #1	10090		
	• Reference Contract #2	10090		
	• Reference Contract #3	10090		
R-2	SAP ECC Experience of Identified Resources		168	R-2 SAP ECC Experience of Identified Resources, for each Resource
	• Resource #1	21		
	• Resource #2	21		
	• Resource #3	21		
	• Resource #4	21		
	• Resource #5	21		
	• Resource #6	21		
	• Resource #7	21		
	• Resource #8	21		
R-3	Bench Strength (SAP ECC Experience)		288	R-3 Bench Strength (SAP ECC) & applicable Appendix 1 to Attachment 2, Bidder Response Table (Identified Resources, WS5) for each resource
	• Additional Resource #1	36		
	• Additional Resource #2	36		
	• Additional Resource #3	36		
	• Additional Resource #4	36		
	• Additional Resource #5	36		
	• Additional Resource #6	36		
	• Additional Resource #7	36		
	• Additional Resource #8	36		
Overall Maximum Points		756		
Pass Mark		378		

Evaluation Summary (Workstream 5)		
(50% of Overall Maximum Points)		

## 2. Mandatory Evaluation Criteria (Workstream 5)

### M-1 Corporate Experience

M-1 Corporate Experience		
Item	Mandatory Criteria	Demonstrated Experience
M-1	<p>The Bidder must provide three Customer Reference Contracts, with a cumulative billed value of \$5,000,000.00 (Canadian, including taxes) within the last five years of the issuance date of this RFP, where the Bidder was contracted to deliver IM/IT professional services resources to support an SAP ERP Central Component (ECC) (version 6.0 or more recent) Financial System implementation or upgrade project</p> <p>Of the three Customer Reference Contracts provided, at least one contract must have been for a Government of Canada Department or Agency and had a minimum billed value of \$1,000,000.00 (Canadian, including taxes).</p> <p><b>Note:</b> If more than the requested number of reference contracts are provided, Canada will only evaluate the first 3 in the order in which they are set out in the Bid.</p>	<p>Bidder to complete Appendix 1 to Attachment 2, Bidder Response Table (Corporate Reference Contracts, WS5) for each referenced Contract</p>

**M-2 Corporate Capability (Workstream 5)**

<b>M-2 Corporate Capability (Workstream 5)</b>																				
<b>Item</b>	<b>Mandatory Criteria</b>	<b>Demonstrated Experience</b>																		
<b>M-2</b>	<p>The Bidder must demonstrate its capability to provide resources (that meet PWGSC's minimum requirements), as and when requested, by identifying a resource in response to each of the requirements identified in the table below. <u>Each of the identified resources must have previously been contracted by the Bidder for a minimum period of six months within the last two years two years preceding the issuance date of this RFP.</u></p> <table border="1"> <thead> <tr> <th><b>Workstream 5 Resource Category</b></th><th><b>Level</b></th><th><b># of resources to be identified</b></th></tr> </thead> <tbody> <tr> <td>Application/Software Architect (Financial Systems)</td><td>Level 3</td><td>1</td></tr> <tr> <td>Senior ERP Functional Analyst (SAP Financial Systems)</td><td>Level 3</td><td>4</td></tr> <tr> <td>Senior ERP Technical Analyst (SAP)</td><td>Level 3</td><td>2</td></tr> <tr> <td>Senior Project Manager (SAP Financial Systems)</td><td>Level 3</td><td>1</td></tr> <tr> <td><b>Total # Resources</b></td><td></td><td><b>8</b></td></tr> </tbody> </table> <p><b>Note:</b> The resources identified in response to this requirement will be used to assess <u>Corporate Capability only</u>.</p>	<b>Workstream 5 Resource Category</b>	<b>Level</b>	<b># of resources to be identified</b>	Application/Software Architect (Financial Systems)	Level 3	1	Senior ERP Functional Analyst (SAP Financial Systems)	Level 3	4	Senior ERP Technical Analyst (SAP)	Level 3	2	Senior Project Manager (SAP Financial Systems)	Level 3	1	<b>Total # Resources</b>		<b>8</b>	Bidder to complete the Appendix 1 to Attachment 2, Bidder Response Table (Identified Resources, WS5) as applicable to each resource category.
<b>Workstream 5 Resource Category</b>	<b>Level</b>	<b># of resources to be identified</b>																		
Application/Software Architect (Financial Systems)	Level 3	1																		
Senior ERP Functional Analyst (SAP Financial Systems)	Level 3	4																		
Senior ERP Technical Analyst (SAP)	Level 3	2																		
Senior Project Manager (SAP Financial Systems)	Level 3	1																		
<b>Total # Resources</b>		<b>8</b>																		

**2. Point-Rated Evaluation Criteria (Workstream 5)****R-1 Corporate Reference Contracts**

The Bidder should demonstrate the extent to which the three Reference Contracts, provided in response to #M-1, exemplify the experience in the areas identified in the table below.

The Bidder will be awarded up to **100 points** for each Reference Contract (to a maximum of 300 points) in accordance with the evaluation criteria contained in the table below. If the Bidder does not demonstrate experience for rated criteria they will get 0 points, no partial points will be awarded.

R-1 Corporate Reference Contracts				
Item	Point-rated Criteria	Max. Points	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
<b>Reference Contract #1 - Client Organization Name / Project Title:</b>				
R-1.1	Version of SAP ECC	10	<ul style="list-style-type: none"> <li>• <b>10 points</b> – The work delivered by the Bidder under the contract was related to the implementation of SAP ECC version 6.0 (or more recent).</li> </ul>	
R-1.2	Application Integration	60	<ul style="list-style-type: none"> <li>• <b>Up to 60 points</b> – The work delivered by the Bidder under the contract included application integration of the SAP Financials system with any of the following external systems: <ul style="list-style-type: none"> <li>• SharePoint = <b>10 points</b></li> <li>• Dynamics = <b>10 points</b></li> <li>• Database systems = <b>10 points</b></li> <li>• Portal systems = <b>10 points</b></li> <li>• PeopleSoft (HCM or Payroll) = <b>20 points</b></li> </ul> </li> </ul>	
R-1.3	Data Conversion	10	<ul style="list-style-type: none"> <li>• <b>10 points</b> – The work delivered by the Bidder under the contract included data conversion migration from a legacy SAP ECC or FreeBalance application to SAP S/4 HANA.</li> </ul>	
R-1.4	Organizational Change Management (OCM)	10	<ul style="list-style-type: none"> <li>• <b>10 points</b> – The work delivered by the Bidder under the contract included OCM activities to support the successful implementation or upgrade of the SAP ECC solution.</li> </ul> <p><b>Note:</b> OCM activities include the development of business strategies and processes in support of transformation initiatives, and/or conducting change impact analysis and the development of an associated Change Management Plan</p>	
<b>Total Maximum Points Contract #1</b>		<b><del>100</del>90</b>		
<b>Reference Contract #2 - Client Organization Name / Project Title:</b>				
R-1.5	Version of SAP ECC	10	<ul style="list-style-type: none"> <li>• <b>10 points</b> – The work delivered by the Bidder under the contract was related to the implementation of SAP ECC version 6.0 (or more recent).</li> </ul>	
R-1.6	Application Integration	60	<ul style="list-style-type: none"> <li>• <b>Up to 60 points</b> – The work delivered by the Bidder under the contract included application integration of the SAP Financials system with any of the following external systems: <ul style="list-style-type: none"> <li>• SharePoint = <b>10 points</b></li> </ul> </li> </ul>	

R-1 Corporate Reference Contracts				
Item	Point-rated Criteria	Max. Points	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
			<ul style="list-style-type: none"> <li>Dynamics = <b>10 points</b></li> <li>Database systems = <b>10 points</b></li> <li>Portal systems = <b>10 points</b></li> <li>PeopleSoft (HCM or Payroll) = <b>20 points</b></li> </ul>	
R-1.3	Data Conversion	10	<ul style="list-style-type: none"> <li><b>10 points</b> – The work delivered by the Bidder under the contract included data conversion migration from a legacy SAP ECC or FreeBalance application to SAP S/4 HANA.</li> </ul>	
R-1.8	Organizational Change Management (OCM)	10	<ul style="list-style-type: none"> <li><b>10 points</b> – The work delivered by the Bidder under the contract included OCM activities to support the successful implementation or upgrade of the SAP ECC solution.</li> </ul> <p><b>Note:</b> OCM activities include the development of business strategies and processes in support of transformation initiatives, and/or conducting change impact analysis and the development of an associated Change Management Plan</p>	
<b>Total Maximum Points Contract #2</b>		<del>100</del> 90	•	
<b>Reference Contract #3 - Client Organization Name / Project Title:</b>				
R-1.9	Version of SAP ECC	10	<ul style="list-style-type: none"> <li><b>10 points</b> – The work delivered by the Bidder under the contract was related to the implementation of SAP ECC version 6.0 (or more recent).</li> </ul>	
R-1.10	Application Integration	60	<p><b>Up to 60 points</b> – The work delivered by the Bidder under the contract included application integration of the SAP Financials system with any of the following external systems:</p> <ul style="list-style-type: none"> <li>SharePoint = <b>10 points</b></li> <li>Dynamics = <b>10 points</b></li> <li>Database systems = <b>10 points</b></li> <li>Portal systems = <b>10 points</b></li> <li>PeopleSoft (HCM or Payroll) = <b>20 points</b></li> </ul>	
R-1.11	Data Conversion	10	<ul style="list-style-type: none"> <li><b>10 points</b> – The work delivered by the Bidder under the contract included data conversion migration from a legacy SAP ECC or FreeBalance application to SAP S/4 HANA.</li> </ul>	

R-1 Corporate Reference Contracts				
Item	Point-rated Criteria	Max. Points	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
R-1.12	Organizational Change Management (OCM)	10	<ul style="list-style-type: none"> <li><b>10 points</b> – The work delivered by the Bidder under the contract included OCM activities to support the successful implementation or upgrade of the SAP ECC solution.</li> </ul> <p><b>Note:</b> OCM activities include the development of business strategies and processes in support of transformation initiatives, and/or conducting change impact analysis and the development of an associated Change Management Plan</p>	
<b>Total Maximum Points Contract #3</b>		<del>100</del> 90		
<b>Points Achieved</b>				

**R-2 SAP ECC Experience of Identified Resources**

The Bidder should further demonstrate the depth of experience in SAP ECC of the eight resources identified in response to #M-2.

The Bidder will be awarded up to **21 points** for each resource (to a maximum of 168 points) in accordance with the evaluation criteria contained in the table below. If the Bidder does not demonstrate experience for rated criteria they will get 0 points, no partial points will be awarded.

R-2 SAP ECC Experience of Identified Resources				
Bidder to replicate table for each of the eight identified resources				
<b>Resource Category:</b>		<insert applicable category>		
<b>Name of Identified Resource:</b>		<insert name of resource identified in response to #M-2>		
Item	Point-Rated Criteria	Max. Points	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
R-2.1	<b>Certification</b>  The identified resource holds one of the following SAP technical certifications: <ul style="list-style-type: none"> <li>SAP NetWeaver – SAP Security Certified Technology Consultant;</li> <li>SAP FI Academy Certification;</li> <li>SAP Material Management (MM) Certification;</li> <li>SAP Financial Accounting (FI) Certification;</li> <li>SAP Project Systems (PS) Certification;</li> </ul>	5	<ul style="list-style-type: none"> <li><b>5 points</b> – Evidence of valid certification provided</li> </ul> <p><b>Note:</b> Evidence of valid certification should be contained in the Bid.</p>	Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.

<b>R-2 SAP ECC Experience of Identified Resources</b> <i>Bidder to replicate table for each of the eight identified resources</i>				
<b>Resource Category:</b>		<insert applicable category>		
<b>Name of Identified Resource:</b>		<insert name of resource identified in response to #M-2>		
Item	Point-Rated Criteria	Max. Points	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
	<ul style="list-style-type: none"> <li>• SAP Controlling (CO) Certification;</li> <li>• SAP Funds Management (FM) Certification;</li> <li>• SAP Human Resources (HR) Certification</li> </ul>			
<b>R-2.2</b>	<p><b>Depth of Experience with SAP ECC</b></p> <p>The identified resource has experience performing the tasks associated with the resource category as detailed in Appendix 1 to Attachment 2, Bidder Response Table, Minimum experience in the resource category criteria 2-x.1 (as applicable to the resource category) to support specific modules of the SAP ECC suite (version 6.0 or more recent):</p> <ul style="list-style-type: none"> <li>a) Public Service Collection and Disbursements (PSCD),</li> <li>b) Asset Accounting (AA),</li> <li>c) Accounts Payable (AP),</li> <li>d) Accounts Receivable (AR),</li> <li>e) Business Intelligence (BI),</li> <li>f) Cost Accounting (CA),</li> <li>Central Interfaces (CI),</li> <li>g) Cross Application Timesheets (CT),</li> <li>h) Financial Accounting (FI),</li> <li>i) Funds Management (FM),</li> <li>j) General Ledger (GL),</li> <li>k) Special Purpose Ledger (SPL),</li> <li>l) Material Management (MM),</li> <li>m) NetWeaver (NW),</li> <li>n) Plant Maintenance (PM),</li> <li>o) Controlling (CO);</li> <li>p) Project Systems (PS),</li> <li>q) Sales &amp; Distribution (SD) and</li> <li>r) Warehouse Management (WM).</li> </ul>	<b>16</b>	<p>Up to 16 points as follows:</p> <ul style="list-style-type: none"> <li>• <b>2 points</b> – For each module (to a maximum of 8)</li> </ul> <p><b>Note:</b> The Bidder should demonstrate that the identified resource conducted at least 50% of the tasks associated with the resource category (as set out in SOW section 3). Separate projects may be provided to demonstrate experience with different modules.</p>	

<b>R-2 SAP ECC Experience of Identified Resources</b> <i>Bidder to replicate table for each of the eight identified resources</i>				
<b>Resource Category:</b>		<insert applicable category>		
<b>Name of Identified Resource:</b>		<insert name of resource identified in response to #M-2>		
<b>Item</b>	<b>Point-Rated Criteria</b>	<b>Max. Points</b>	<b>Evaluation Criteria</b>	<b>Demonstrated Experience</b> (Bidder to Insert Data)
	To be considered, the resource should have worked on the project for a minimum of six months within the last five years.			
<b>Total Points</b>		<b>21</b>		
<b>Points Achieved</b>				



**R-3 Bench Strength (SAP Financial Systems)**

The Bidder should further demonstrate its capacity to provide resources with expertise in SAP ECC Financial System by identifying up to eight additional resources, over and beyond the eight resources identified in response to #M-2, as set out in the table below. Each of the additional resources must have previously been contracted by the Bidder for a minimum period of six months within the last two years two years preceding the issuance date of this RFP.

Workstream 5 Resource Category	Level	Maximum # of additional resources to be identified
Application/Software Architect (Financial Systems)	Level 3	1
Senior ERP Functional Analyst (SAP Financial Systems)	Level 3	4
Senior ERP Technical Analyst (SAP)	Level 3	2
Senior Project Manager (SAP Financial Systems)	Level 3	1
<b>Total # Resources</b>		<b>8</b>

The Bidder will be awarded up to **36 points** for each additional resource (to a maximum of 288 points) in accordance with the evaluation criteria contained in the table below. If the Bidder does not demonstrate experience for rated criteria they will get 0 points, no partial points will be awarded.

<b>R-3 Bench Strength (SAP Financial Systems)</b>				
<i>Bidder to replicate table for each of the eight additional resources</i>				
<b>Resource Category:</b>		<insert applicable category>		
<b>Name of Identified Resource:</b>		<insert name of additional resource >		
Item	Point-Rated Criteria	Max. Points	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
R-3.1	<p>The Bidder should demonstrate that the identified resource meet the minimum requirements associated with the applicable resource category (as set-out in Appendix 1 to Attachment 2, Bidder Response Table). <u>The identified resource must have previously been contracted by the Bidder for a minimum period of six months within the last two years two years preceding the issuance date of this RFP.</u></p> <p><b>Note:</b> The resources identified in response to this requirement will be used to assess <u>Corporate Capability only</u>.</p>	15	<ul style="list-style-type: none"> <li><b>15 points</b> – Identified resource meets the minimum criteria associated with the resource category.</li> </ul>	<p>Bidder to complete the Appendix 1 to Attachment 2, Bidder Response Table (Identified Resources, WS5) as applicable to each resource category.</p> <p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent</p>

<b>R-3 Bench Strength (SAP Financial Systems)</b> <i>Bidder to replicate table for each of the eight additional resources</i>				
<b>Resource Category:</b>		<insert applicable category>		
<b>Name of Identified Resource:</b>		<insert name of additional resource >		
Item	Point-Rated Criteria	Max. Points	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
				information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.
If full score is awarded in R-3.1 above; then up to 21 additional points may be awarded as follows (if 0 points are awarded then the resource will not be evaluated any further).				
<b>R-3.2</b>	<b>Certification</b>  The identified resource holds one of the following SAP technical certifications: <ul style="list-style-type: none"> <li>• SAP NetWeaver – SAP Security Certified Technology Consultant;</li> <li>• SAP FI Academy Certification;</li> <li>• SAP Material Management (MM) Certification;</li> <li>• SAP Financial Accounting (FI) Certification;</li> <li>• SAP Project Systems (PS) Certification;</li> <li>• SAP Controlling (CO) Certification;</li> <li>• SAP Funds Management (FM) Certification;</li> <li>• SAP Human Resources (HR) Certification</li> </ul>	<b>5</b>	<ul style="list-style-type: none"> <li>• <b>5 points</b> – Evidence of valid certification provided</li> </ul> <b>Note:</b> Evidence of valid certification should be contained in the Bid.	
<b>R-3.3</b>	<b>Depth of Experience with SAP ECC</b>  The identified resource has experience performing the tasks associated with the resource category (as set-out in Appendix 1 to Attachment 2, Bidder Response Table) to support specific modules of the SAP ECC suite (version 6.0 or more recent): <ol style="list-style-type: none"> <li>Public Service Collection and Disbursements (PSCD),</li> <li>Asset Accounting (AA),</li> <li>Accounts Payable (AP),</li> <li>Accounts Receivable (AR),</li> </ol>	<b>16</b>	Up to 16 points as follows: <ul style="list-style-type: none"> <li>• <b>2 points</b> – For each module (to a maximum of 8)</li> </ul> <b>Note:</b> Separate projects may be provided to demonstrate experience with	The Bidder should demonstrate that the identified resource conducted at least 50% of the tasks associated with the relevant resource category (as set out in SOW section 3).

<b>R-3 Bench Strength (SAP Financial Systems)</b> <i>Bidder to replicate table for each of the eight additional resources</i>				
<b>Resource Category:</b>		<insert applicable category>		
<b>Name of Identified Resource:</b>		<insert name of additional resource >		
Item	Point-Rated Criteria	Max. Points	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
	e) Business Intelligence (BI), f) Cost Accounting (CA), Central Interfaces (CI), g) Cross Application Timesheets (CT), h) Financial Accounting (FI), i) Funds Management (FM), j) General Ledger (GL), k) Special Purpose Ledger (SPL), l) Material Management (MM), m) NetWeaver (NW), n) Plant Maintenance (PM), o) Controlling (CO); p) Project Systems (PS), q) Sales & Distribution (SD) and r) Warehouse Management (WM). To be considered, the resource should have worked on the project for a minimum of six months within the last five years.		different modules.	
<b>Total Points</b>		<b>36</b>		
<b>Points Achieved</b>				

**Appendix 1 to Attachment 2, Bidder Response Table (Corporate Reference Contracts, WS5)**

<b>Bidder Response Table (Corporate Reference Contracts, WS5)</b> <i>Bidder to replicate table for each of the three Corporate Reference Contracts</i>		
Corporate Reference Contract Description		(Bidder to Insert Data)
<b>Client Particulars</b>	Client Organization Name	
	Address	
	Contract or Purchase Order Number	
	Project Title	
	Client Client Contact Name and Title	
	Contact telephone number and/or e-mail address.	
1. Provide a brief description of the SAP ECC (version 6.0 or more recent) Financial System implementation or upgrade project.		
2. Specify contract start and end date (mm/yyyy to mm/yyyy)		
3. Specify total amount billed value (Canadian, including taxes) within the last five years of the issuance date of this RFP.		
4. Demonstrate that the referenced contract included the provision of resources, for a minimum period of six months, in each of the following resource categories:		
<b>Resource Category</b>	<b>Name of Resource(s)</b>	<b>Resource Start &amp; End dates (mm/yyyy)</b>
a. ERP Functional Analyst		
b. ERP Technical Analyst		
c. Application/Software Architect <u>or</u> Project Manager		

**Appendix 1 to Attachment 2, Bidder Response Table (Identified Resources, WS5)****1. Application / Software Architect (Level 3) (Financial Systems)**

Resource Evaluation Criteria		
Resource Category	1. Application / Software Architect (Level 3) (Financial Systems)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2 - 1.1	<p><b>Minimum experience in the resource category.</b> The identified resource must have experience in the applicable resource category including:</p> <p>a) a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this RFP, working as an Application / Software Architect (as defined below in 2-1.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the five tasks listed below for a minimum of six cumulative months of experience per task:</p> <p>1) Develop technical architectures, frameworks and strategies, for an application area, to meet the business and application requirements;</p> <p>2) Analyze functional requirements to identify information, procedures and decision flows. Analyze and evaluate alternative software solutions to meet business problems;</p> <p>3) Ensure the integration of all aspects of software solutions;</p> <p>4) Create an application component roadmap - roadmap to align business vision and functional coverage to IT vision; and</p> <p>5) Create an application architecture framework.</p> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p><a href="#">The Bidder hereby certifies that the identified resource meets the "Minimum Experience in the resource category" as detailed under Evaluation Criteria #2-1.1. The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.</a></p> <p><a href="#">Name and signature of Authorized Representative</a></p> <p><a href="#">Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.)</a></p>

Resource Evaluation Criteria		
Resource Category	1. Application / Software Architect (Level 3) (Financial Systems)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
		<del>otherwise the experience will not be considered.</del>
Attachment 2 - 1.2	<p><b>Minimum experience with Financial Systems.</b></p> <p>The identified resource must have experience on a minimum of three projects developing technical architectures, frameworks and strategies for one of the following Financial System technologies to meet the business and application requirements:</p> <ul style="list-style-type: none"><li>a) SAP ECC;</li><li>b) SAP Solution Manager</li><li>c) SAP S/4 HANA; or</li><li>d) FreeBalance.</li></ul> <p>To be considered, the resource should have worked on the project for a minimum of six months within the last five years.</p>	<del>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</del>
Attachment 2 - 1.3	<p><b>Previously contracted by the Bidder.</b></p> <p>The identified resource must have previously been contracted by the Bidder for a minimum period of six months within the <u>last two years two years preceding the issuance date of this RFP.</u></p> <p>The Bidder must provide the following substantiating information in its bid:</p> <ul style="list-style-type: none"><li>a) Customer organization name;</li><li>b) Customer contact (including name, title, and telephone number or e-mail address);</li><li>c) Project name;</li><li>d) Role of the resource on the project; and</li><li>e) Dates resource worked of contract (start and finish date, mm/yyyy).</li></ul> <p><b>Note:</b> Resources identified at the time of RFP must have previously been contracted by the Bidder as stipulated. This requirement does not apply to resources proposed after contract award in response to TAs.</p>	

**2. ERP Functional Analyst (Level 3) (SAP ECC)**

Resource Evaluation Criteria		
Resource Category	2. ERP Functional Analyst (Level 3) (SAP ECC)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2 - 2.1	<p><b>Minimum experience in the resource category.</b> The identified resource must have experience in the applicable resource category including:</p> <p>a) A minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this RFP, working as an ERP Functional Analyst (as outlined below in 2-2.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the seven tasks listed below for a minimum of twelve cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Research, analyze and document user requirements, map interdependencies, and produce the required functional specifications and/or process re-engineering recommendations;</li><li>2) Perform and document fit gaps;</li><li>3) Model/map administrative process and data requirements;</li><li>4) Create and/or review Functional Design Documents;</li><li>5) Perform configuration based on the functional design documentation and create documentation on the change;</li><li>6) Create test scenarios and scripts according to business requirements; and</li><li>7) Perform testing, monitoring and reconciliation work and provide required documentation.</li><li>8) Implement the solution/change into the system landscape and perform troubleshooting activities.</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p><u>The Bidder hereby certifies that the identified resource meets the "Minimum Experience in the resource category" as detailed under Evaluation Criteria #2-2.1. The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.</u></p> <p><u>Name and signature of Authorized Representative</u></p> <p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>
Attachment 2 - 2.2	<p><b>Minimum experience with SAP ECC.</b></p>	<p><u>Substantiation of demonstrated experience must be included in the</u></p>

Resource Evaluation Criteria		
Resource Category	2. ERP Functional Analyst (Level 3) (SAP ECC)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
	<p>The identified resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this RFP, as a Functional Analyst performing the tasks identified in 2-2.1 to support SAP ECC (version 6 or more recent), including a minimum of three years of experience designing, configuring, testing, implementing, and supporting one of the SAP ECC modules/functionalities listed below:</p> <ul style="list-style-type: none"><li>a. SAP Security and Authorizations;</li><li>b. Public Service Collection and Disbursements (PSCD);</li><li>c. Asset Accounting (AA);</li><li>d. Plant Maintenance (PM);</li><li>e. Funds Management (FM);</li><li>f. Project Systems (PS);</li><li>g. Cross-Application Timesheets (CATS);</li><li>h. Financial-Accounts Payable (FI-AP);</li><li>i. Financial-Accounts Receivable (FI-AR);</li><li>j. Financial-General Ledger/Special Purpose Ledger (FI-GL/SPL);</li><li>k. Controlling (CO);</li><li>l. Material Management (MM);</li><li>m. Solution Manager (SolMan);</li><li>n. Sales and Distribution (SD), or</li><li>o. Front-end and Back-end of the SAP BI (version 7.1 or more recent) environment.</li></ul> <p><sup>1</sup> Front-end is defined as the layers that are close to the user community such as reporting layer which includes the queries and reports.</p> <p><sup>2</sup> Back-end is defined as the extractors, inbound data layers and transformation layers.</p>	<p><a href="#">table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a></p>
Attachment 2 - 2.3	<p><b>Previously contracted by the Bidder.</b></p> <p>The identified resource must have previously been contracted by the Bidder for a minimum period of six months within the <del>last two years</del><a href="#">two years preceding the issuance date of this RFP.</a></p> <p>The Bidder must provide the following substantiating information in its bid:</p> <ul style="list-style-type: none"><li>a) Customer organization name;</li><li>b) Customer contact (including name, title, and telephone number or e-mail address);</li><li>c) Project name;</li><li>d) Role of the resource on the project; and</li><li>e) Dates resource worked of contract (start and finish date, mm/yyyy).</li></ul>	



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Resource Evaluation Criteria		
Resource Category		2. ERP Functional Analyst (Level 3) (SAP ECC)
Name of Identified Resource:		<insert name>
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
	<b>Note:</b> Resources identified at the time of RFP must have previously been contracted by the Bidder as stipulated. This requirement does not apply to resources proposed after contract award in response to TAs.	

**3. ERP Technical Analyst (Level 3) (SAP)**

Resource Evaluation Criteria		
Resource Category	3. ERP Technical Analyst (Level 3) (SAP)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2 - 3.1	<p><b>Minimum experience in the resource category.</b> The identified resource must have experience in the applicable resource category including:</p> <p>a) a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this RFP, working as an ERP Technical Analyst (as outlined below in 2-3.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the eight tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Plan and provide recommendations to management regarding system landscape architectures including upgrade strategies;</li><li>2) Translate functional and business requirements into technical requirements;</li><li>3) Develop and/or manage technical aspects of application software, user interfaces, and third-party components;</li><li>4) Conduct, assist with, and/or manage unit and system tests;</li><li>5) Establish technical standards for the technical framework;</li><li>6) Analyze and coordinate data file conversions;</li><li>7) Complete mapping, interfaces, mock conversion work, enhancements, actual conversion, and verify completeness and accuracy of converted data; and</li><li>8) Import files from heterogeneous platforms.</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p><a href="#">The Bidder hereby certifies that the identified resource meets the "Minimum Experience in the resource category" as detailed under Evaluation Criteria #2-3.1. The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.</a></p> <p><a href="#">Name and signature of Authorized Representative</a></p> <p><a href="#">Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a></p>
Attachment 2 - 3.2	<p><b>Minimum experience with SAP.</b></p>	<p><a href="#">Substantiation of demonstrated experience must be included in the</a></p>

Resource Evaluation Criteria		
Resource Category	3. ERP Technical Analyst (Level 3) (SAP)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
	<p>The identified resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this RFP, monitoring and performing administrative tasks required to maintain an SAP landscape including, at a minimum, the following environments:</p> <ul style="list-style-type: none"><li>• SAP ECC (version 6 or more recent);</li><li>• SAP Solution Manger (version 7.1 or more recent);</li><li>• SAP NetWeaver Business Warehouse (version 7.4 or more recent); and</li><li>• SAP NetWeaver Portal (version 7.4 or more recent).</li></ul>	<a href="#">table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a>
Attachment 2 - 3.3	<p><b>Previously contracted by the Bidder.</b></p> <p>The identified resource must have previously been contracted by the Bidder for a minimum period of six months within the <a href="#">last two years two years preceding the issuance date of this RFP</a>.</p> <p>The Bidder must provide the following substantiating information in its bid:</p> <ul style="list-style-type: none"><li>a) Customer organization name;</li><li>b) Customer contact (including name, title, and telephone number or e-mail address);</li><li>c) Project name;</li><li>d) Role of the resource on the project; and</li><li>e) Dates resource worked of contract (start and finish date, mm/yyyy).</li></ul> <p><b>Note:</b> Resources identified at the time of RFP must have previously been contracted by the Bidder as stipulated. This requirement does not apply to resources proposed after contract award in response to TAs.</p>	

**4. Project Manager (Level 3) (Financial ERP)**

Resource Evaluation Criteria		
Resource Category	4. Project Manager (PM) (Level 3)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
Attachment 2 - 4.1	<p><b>Minimum experience in the resource category.</b> The identified resource must have experience in the applicable resource category including:</p> <p>a) A minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this RFP, working as a Project Manager (as outlined below in 2-4.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the seven tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Manage other Project Management resources that are responsible for an element of the project and its associated project team;</li><li>2) Manage the project during the development, implementation and operations start up by ensuring that resources are made available and that the project is developed and is fully operational within previously agreed time, cost and performance parameters;</li><li>3) Formulate statements of problems; establishes procedures for the development and implementation of significant, new or modified project elements to solve these problems, and obtains approval thereof;</li><li>4) Define and document the objectives for the project; determine budgetary requirements, the composition, roles and responsibilities and terms of reference for the project team;</li><li>5) Report progress of the project on an ongoing basis and at scheduled points in the life cycle;</li><li>6) Prepare plans, charts, tables and diagrams to assist in analyzing or displaying problems; work with a variety of project management tools; and</li><li>7) Project sign-off.</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p><a href="#">The Bidder hereby certifies that the identified resource meets the "Minimum Experience in the resource category" as detailed under Evaluation Criteria #2-4.1. The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.</a></p> <p><a href="#">Name and signature of Authorized Representative</a></p> <p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>
Attachment 2 - 4.2	<p><b>Minimum experience with Financial Systems.</b></p>	<p><a href="#">Substantiation of demonstrated experience must be included in the</a></p>

Resource Evaluation Criteria		
Resource Category	4. Project Manager (PM) (Level 3)	
Name of Identified Resource:	<insert name>	
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
	<p>The identified resource must have experience on a minimum of three projects as a Project Manager on a Financial System implementation project.</p> <p>To be considered, the resource should have worked on the project for a minimum of six months within the last five years.</p>	<a href="#">table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a>
Attachment 2 - 4.3	<p><b>Minimum experience as a senior PM.</b></p> <p>The identified resource must have experience as a Project Manager, on a minimum of one project, where the resource was responsible for a complex application development or application implementation project. A complex project is a project which includes multiple (i.e. three or more teams or sub-projects and includes multi-departmental stakeholders).</p> <p>To be considered, the resource should have worked on the project for a minimum of six months within the last five years.</p>	<a href="#">Substantiation of demonstrated experience must be included in the table, resumes are not required. The Bidder must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</a>
Attachment 2 - 4.4	<p><b>Previously contracted by the Bidder.</b></p> <p>The identified resource must have previously been contracted by the Bidder for a minimum period of six months within the <del>last two years</del><a href="#">two years preceding the issuance date of this RFP</a>.</p> <p>The Bidder must provide the following substantiating information in its bid:</p> <ul style="list-style-type: none"><li>a) Customer organization name;</li><li>b) Customer contact (including name, title, and telephone number or e-mail address);</li><li>c) Project name;</li><li>d) Role of the resource on the project; and</li></ul>	

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Resource Evaluation Criteria		
Resource Category		4. Project Manager (PM) (Level 3)
Name of Identified Resource:		<insert name>
The Bidder must demonstrate that the identified resource meets the Evaluation Criteria:		
ID	Evaluation Criteria	Demonstrated Experience (Bidder to Insert Data)
	<p>e) Dates resource worked of contract (start and finish date, mm/yyyy).</p> <p><b>Note:</b> Resources identified at the time of RFP must have previously been contracted by the Bidder as stipulated. This requirement does not apply to resources proposed after contract award in response to TAs.</p>	

**ATTACHMENT 3**  
**PRICING SCHEDULE**

**Workstream 1: PeopleSoft ERP Systems Technical Professional Services**

Initial Contract Period		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.1 Application/Software Architect	Level 3	
A.4 ERP System Analyst	Level 2	
A.4 ERP System Analyst	Level 3	
A.5 ERP Technical Analyst	Level 2	
A.5 ERP Technical Analyst	Level 3	
A.7 Programmer/Analyst	Level 2	
A.7 Programmer/Analyst	Level 3	
A.11 Tester	Level 2	
A.11 Tester	Level 3	
I.1 Data Conversion Specialist	Level 2	
I.1 Data Conversion Specialist	Level 3	
P.2 Enterprise Architect	Level 3	

Option Period 1		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.1 Application/Software Architect	Level 3	
A.4 ERP System Analyst	Level 2	
A.4 ERP System Analyst	Level 3	
A.5 ERP Technical Analyst	Level 2	
A.5 ERP Technical Analyst	Level 3	
A.7 Programmer/Analyst	Level 2	
A.7 Programmer/Analyst	Level 3	
A.11 Tester	Level 2	
A.11 Tester	Level 3	
I.1 Data Conversion Specialist	Level 2	
I.1 Data Conversion Specialist	Level 3	
P.2 Enterprise Architect	Level 3	

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Option Period 2		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.1 Application/Software Architect	Level 3	
A.4 ERP System Analyst	Level 2	
A.4 ERP System Analyst	Level 3	
A.5 ERP Technical Analyst	Level 2	
A.5 ERP Technical Analyst	Level 3	
A.7 Programmer/Analyst	Level 2	
A.7 Programmer/Analyst	Level 3	
A.11 Tester	Level 2	
A.11 Tester	Level 3	
I.1 Data Conversion Specialist	Level 2	
I.1 Data Conversion Specialist	Level 3	
P.2 Enterprise Architect	Level 3	

**Workstream 2: PeopleSoft ERP Systems Functional Professional Services**

Initial Contract Period		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.2 ERP Functional Analyst	Level 2	
A.2 ERP Functional Analyst	Level 3	
B.1 Business Analyst	Level 2	
B.1 Business Analyst	Level 3	
B.2 Business Architect	Level 3	
B.5 Business Process Re-engineering (BPR) Consultant	Level 3	
B.6 Business System Analyst	Level 2	
B.6 Business System Analyst	Level 3	
B.7 Business Transformation Architect	Level 3	
B.9 Courseware Developer	Level 2	
B.9 Courseware Developer	Level 2	
B.10 Help Desk Specialist	Level 2	
B.10 Help Desk Specialist	Level 3	
B.14 Technical Writer	Level 2	
P.1 Change Management Consultant	Level 3	
P.7 Project Coordinator	Level 2	



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Initial Contract Period		
Resource Category	Level of Expertise	Firm Per Diem Rate
P.7 Project Coordinator	Level 3	
P.9 Project Manager	Level 2	
P.9 Project Manager	Level 3	
P.11 Quality Assurance Specialist/Analyst	Level 2	
P.11 Quality Assurance Specialist/Analyst	Level 3	
P.12 Risk Management Specialist	Level 3	

Option Period 1		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.2 ERP Functional Analyst	Level 2	
A.2 ERP Functional Analyst	Level 3	
B.1 Business Analyst	Level 2	
B.1 Business Analyst	Level 3	
B.2 Business Architect	Level 3	
B.5 Business Process Re-engineering (BPR) Consultant	Level 3	
B.6 Business System Analyst	Level 2	
B.6 Business System Analyst	Level 3	
B.7 Business Transformation Architect	Level 3	
B.9 Courseware Developer	Level 2	
B.9 Courseware Developer	Level 2	
B.10 Help Desk Specialist	Level 2	
B.10 Help Desk Specialist	Level 3	
B.14 Technical Writer	Level 2	
P.1 Change Management Consultant	Level 3	
P.7 Project Coordinator	Level 2	
P.7 Project Coordinator	Level 3	
P.9 Project Manager	Level 2	
P.9 Project Manager	Level 3	
P.11 Quality Assurance Specialist/Analyst	Level 2	
P.11 Quality Assurance Specialist/Analyst	Level 3	
P.12 Risk Management Specialist	Level 3	

Option Period 2		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.2 ERP Functional Analyst	Level 2	
A.2 ERP Functional Analyst	Level 3	
B.1 Business Analyst	Level 2	
B.1 Business Analyst	Level 3	
B.2 Business Architect	Level 3	
B.5 Business Process Re-engineering (BPR) Consultant	Level 3	
B.6 Business System Analyst	Level 2	
B.6 Business System Analyst	Level 3	
B.7 Business Transformation Architect	Level 3	
B.9 Courseware Developer	Level 2	
B.9 Courseware Developer	Level 2	
B.10 Help Desk Specialist	Level 2	
B.10 Help Desk Specialist	Level 3	
B.14 Technical Writer	Level 2	
P.1 Change Management Consultant	Level 3	
P.7 Project Coordinator	Level 2	
P.7 Project Coordinator	Level 3	
P.9 Project Manager	Level 2	
P.9 Project Manager	Level 3	
P.11 Quality Assurance Specialist/Analyst	Level 2	
P.11 Quality Assurance Specialist/Analyst	Level 3	
P.12 Risk Management Specialist	Level 3	

**Workstream 3: Case Management System Professional Services**

Initial Contract Period		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.1 Application/Software Architect	Level 3	
A.7 Programmer/Analyst	Level 2	
A.7 Programmer/Analyst	Level 3	
A.8 System Analyst	Level 2	
A.8 System Analyst	Level 3	
A.11 Tester	Level 2	
A.11 Tester	Level 3	
A.15 Web Graphics Designer	Level 2	
A.15 Web Graphics Designer	Level 3	
I.1 Data Conversion Specialist	Level 2	
I.1 Data Conversion Specialist	Level 3	
B.1 Business Analyst	Level 2	
B.1 Business Analyst	Level 3	
B.2 Business Architect	Level 3	
B.7 Business Transformation Architect	Level 3	
B.9 Courseware Developer	Level 2	
B.9 Courseware Developer	Level 3	
P.1 Change Management Consultant	Level 3	
P.2 Enterprise Architect	Level 3	
P.9 Project Manager	Level 2	
P.9 Project Manager	Level 3	

Option Period 1		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.1 Application/Software Architect	Level 3	
A.7 Programmer/Analyst	Level 2	
A.7 Programmer/Analyst	Level 3	
A.8 System Analyst	Level 2	
A.8 System Analyst	Level 3	
A.11 Tester	Level 2	
A.11 Tester	Level 3	

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Option Period 1		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.15 Web Graphics Designer	Level 2	
A.15 Web Graphics Designer	Level 3	
I.1 Data Conversion Specialist	Level 2	
I.1 Data Conversion Specialist	Level 3	
B.1 Business Analyst	Level 2	
B.1 Business Analyst	Level 3	
B.2 Business Architect	Level 3	
B.7 Business Transformation Architect	Level 3	
B.9 Courseware Developer	Level 2	
B.9 Courseware Developer	Level 3	
P.1 Change Management Consultant	Level 3	
P.2 Enterprise Architect	Level 3	
P.9 Project Manager	Level 2	
P.9 Project Manager	Level 3	

Option Period 2		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.1 Application/Software Architect	Level 3	
A.7 Programmer/Analyst	Level 2	
A.7 Programmer/Analyst	Level 3	
A.8 System Analyst	Level 2	
A.8 System Analyst	Level 3	
A.11 Tester	Level 2	
A.11 Tester	Level 3	
A.15 Web Graphics Designer	Level 2	
A.15 Web Graphics Designer	Level 3	
I.1 Data Conversion Specialist	Level 2	
I.1 Data Conversion Specialist	Level 3	
B.1 Business Analyst	Level 2	
B.1 Business Analyst	Level 3	
B.2 Business Architect	Level 3	
B.7 Business Transformation Architect	Level 3	
B.9 Courseware Developer	Level 2	

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Option Period 2		
Resource Category	Level of Expertise	Firm Per Diem Rate
B.9 Courseware Developer	Level 3	
P.1 Change Management Consultant	Level 3	
P.2 Enterprise Architect	Level 3	
P.9 Project Manager	Level 2	
P.9 Project Manager	Level 3	

**Workstream 4: GCDOCS System Professional Services**

Initial Contract Period		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.1 Application/Software Architect	Level 3	
A.7 Programmer/Analyst	Level 2	
A.7 Programmer/Analyst	Level 3	
A.8 System Analyst	Level 2	
A.8 System Analyst	Level 3	
A.11 Tester	Level 2	
A.11 Tester	Level 3	
I.5 IM Architect	Level 3	
I.1 Data Conversion Specialist	Level 2	
I.1 Data Conversion Specialist	Level 3	
B.1 Business Analyst	Level 2	
B.1 Business Analyst	Level 3	
B.5 Business Process Re-engineering (BPR) Consultant	Level 3	
B.7 Business Transformation Architect	Level 3	
B.9 Courseware Developer	Level 2	
B.9 Courseware Developer	Level 3	
B.14 Technical Writer	Level 2	
B.14 Technical Writer	Level 3	
P.1 Change Management Consultant	Level 3	
P.2 Enterprise Architect	Level 3	
P.7 Project Coordinator	Level 2	
P.7 Project Coordinator	Level 3	
P.9 Project Manager	Level 2	

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P.9 Project Manager	Level 3	
P.11 Quality Assurance Specialist/Analyst	Level 2	
P.11 Quality Assurance Specialist/Analyst	Level 3	
P.12 Risk Management Specialist	Level 3	

Option Period 1		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.1 Application/Software Architect	Level 3	
A.7 Programmer/Analyst	Level 2	
A.7 Programmer/Analyst	Level 3	
A.8 System Analyst	Level 2	
A.8 System Analyst	Level 3	
A.11 Tester	Level 2	
A.11 Tester	Level 3	
I.5 IM Architect	Level 3	
I.1 Data Conversion Specialist	Level 2	
I.1 Data Conversion Specialist	Level 3	
B.1 Business Analyst	Level 2	
B.1 Business Analyst	Level 3	
B.5 Business Process Re-engineering (BPR) Consultant	Level 3	
B.7 Business Transformation Architect	Level 3	
B.9 Courseware Developer	Level 2	
B.9 Courseware Developer	Level 3	
B.14 Technical Writer	Level 2	
B.14 Technical Writer	Level 3	
P.1 Change Management Consultant	Level 3	
P.2 Enterprise Architect	Level 3	
P.7 Project Coordinator	Level 2	
P.7 Project Coordinator	Level 3	
P.9 Project Manager	Level 2	
P.9 Project Manager	Level 3	
P.11 Quality Assurance Specialist/Analyst	Level 2	
P.11 Quality Assurance Specialist/Analyst	Level 3	
P.12 Risk Management Specialist	Level 3	

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Option Period 2		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.1 Application/Software Architect	Level 3	
A.7 Programmer/Analyst	Level 2	
A.7 Programmer/Analyst	Level 3	
A.8 System Analyst	Level 2	
A.8 System Analyst	Level 3	
A.11 Tester	Level 2	
A.11 Tester	Level 3	
I.5 IM Architect	Level 3	
I.1 Data Conversion Specialist	Level 2	
I.1 Data Conversion Specialist	Level 3	
B.1 Business Analyst	Level 2	
B.1 Business Analyst	Level 3	
B.5 Business Process Re-engineering (BPR) Consultant	Level 3	
B.7 Business Transformation Architect	Level 3	
B.9 Courseware Developer	Level 2	
B.9 Courseware Developer	Level 3	
B.14 Technical Writer	Level 2	
B.14 Technical Writer	Level 3	
P.1 Change Management Consultant	Level 3	
P.2 Enterprise Architect	Level 3	
P.7 Project Coordinator	Level 2	
P.7 Project Coordinator	Level 3	
P.9 Project Manager	Level 2	
P.9 Project Manager	Level 3	
P.11 Quality Assurance Specialist/Analyst	Level 2	
P.11 Quality Assurance Specialist/Analyst	Level 3	
P.12 Risk Management Specialist	Level 3	

**Workstream 5: Financial Systems Technical Professional Services**

Initial Contract Period		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.1 Application/Software Architect	Level 3	
A.2 ERP Functional Analyst	Level 2	
A.2 ERP Functional Analyst	Level 3	
A.4 ERP System Analyst	Level 2	
A.4 ERP System Analyst	Level 3	
A.5 ERP Technical Analyst	Level 3	
A.7 Programmer/Analyst	Level 3	
I.1 Data Conversion Specialist	Level 3	
B.1 Business Analyst	Level 2	
B.1 Business Analyst	Level 3	
B.9 Courseware Developer (Financial Systems)	Level 3	
B.9 Courseware Developer	Level 2	
B.9 Courseware Developer (uPerform)	Level 3	
P.1 Change Management Consultant	Level 3	
P.2 Enterprise Architect	Level 3	
P.7 Project Coordinator	Level 2	
P.7 Project Coordinator	Level 3	
P.9 Project Manager	Level 2	
P.9 Project Manager	Level 3	
P.11 Quality Assurance Specialist/Analyst	Level 3	
P.12 Risk Management Specialist	Level 3	
A.11 Tester	Level 2	
A.11 Tester	Level 3	
B.14 Technical Writer	Level 2	
B.14 Technical Writer	Level 3	



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Option Period 1		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.1 Application/Software Architect	Level 3	
A.2 ERP Functional Analyst	Level 2	
A.2 ERP Functional Analyst	Level 3	
A.4 ERP System Analyst	Level 2	
A.4 ERP System Analyst	Level 3	
A.5 ERP Technical Analyst	Level 3	
A.7 Programmer/Analyst	Level 3	
I.1 Data Conversion Specialist	Level 3	
B.1 Business Analyst	Level 2	
B.1 Business Analyst	Level 3	
B.9 Courseware Developer (Financial Systems)	Level 3	
B.9 Courseware Developer	Level 2	
B.9 Courseware Developer (uPerform)	Level 3	
P.1 Change Management Consultant	Level 3	
P.2 Enterprise Architect	Level 3	
P.7 Project Coordinator	Level 2	
P.7 Project Coordinator	Level 3	
P.9 Project Manager	Level 2	
P.9 Project Manager	Level 3	
P.11 Quality Assurance Specialist/Analyst	Level 3	
P.12 Risk Management Specialist	Level 3	
A.11 Tester	Level 2	
A.11 Tester	Level 3	
B.14 Technical Writer	Level 2	
B.14 Technical Writer	Level 3	

Option Period 2		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.1 Application/Software Architect	Level 3	
A.2 ERP Functional Analyst	Level 2	
A.2 ERP Functional Analyst	Level 3	
A.4 ERP System Analyst	Level 2	
A.4 ERP System Analyst	Level 3	
A.5 ERP Technical Analyst	Level 3	
A.7 Programmer/Analyst	Level 3	
I.1 Data Conversion Specialist	Level 3	
B.1 Business Analyst	Level 2	
B.1 Business Analyst	Level 3	
B.9 Courseware Developer (Financial Systems)	Level 3	
B.9 Courseware Developer	Level 2	
B.9 Courseware Developer (uPerform)	Level 3	
P.1 Change Management Consultant	Level 3	
P.2 Enterprise Architect	Level 3	
P.7 Project Coordinator	Level 2	
P.7 Project Coordinator	Level 3	
P.9 Project Manager	Level 2	
P.9 Project Manager	Level 3	
P.11 Quality Assurance Specialist/Analyst	Level 3	
P.12 Risk Management Specialist	Level 3	
A.11 Tester	Level 2	
A.11 Tester	Level 3	
B.14 Technical Writer	Level 2	
B.14 Technical Writer	Level 3	

**ATTACHMENT 4**  
**ELECTRONIC PAYMENT INSTRUMENTS**

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

- ☐ VISA Acquisition Card;
- ☐ MasterCard Acquisition Card;
- ☐ Direct Deposit (Domestic and International);
- ☐ Electronic Data Interchange (EDI);
- ☐ Wire Transfer (International Only);
- ☐ Large Value Transfer System (LVTS) (Over \$25M)

## **APPENDIX A TO ANNEX A**

### **TASKING ASSESSMENT PROCEDURE**

1. Where a requirement for a specific task is identified, a draft Task Authorization Form (TA Form) as attached at Appendix B to Annex A will be provided to the Contractor in accordance with the allocation methodology stated in the Contract Article titled "Allocation of Task Authorizations". Once a draft TA Form is received, the Contractor must submit to the Technical Authority a quotation of rates to supply the requested Resource Categories based on the information identified in the TA Form. The quotation must be signed and submitted to Canada within the time for response identified in the TA Form. The Contractor will be given a minimum of 5 working days turnaround time to submit a quotation.
2. For each proposed resource the Contractor must supply a résumé, the requested security clearance information and must complete the Response Tables at Appendix C of Annex A applicable to the Resource Categories identified in the draft TA. The same individual must not be proposed for more than one Resource Category. The résumés must demonstrate that each proposed individual meets the qualification requirements described (including any educational requirements, work experience requirements, and professional designation or membership requirements). With respect to the proposed resources:
  - (i) Proposed resources may be employees of the Contractor or employees of a subcontractor, or these individuals may be independent contractors to whom the Contractor would subcontract a portion of the Work. (Refer to Appendix D to Annex A, Certifications).
  - (ii) For educational requirements for a particular degree, designation or certificate, Canada will only consider educational programmes that were successfully completed by the resource before the date the draft TA was first issued to the Contractor.
  - (iii) For requirements relating to professional designation or membership, the resource must have the required designation or membership by the time of draft TA issuance and must continue, where applicable, to be a member in good standing of the profession or membership throughout the assessment period and Contract Period. Where the designation or membership must be demonstrated through a certification, diploma or degree, such document must be current, valid and issued by the entity specified in this Contract or if the entity is not specified, the issuer must have been an accredited or otherwise recognized body, institution or entity at the time the document was issued.
  - (iv) For work experience, Canada will not consider experience gained as part of an educational programme, except for experience gained through a formal co-operative programme at a post-secondary institution.
  - (v) For any requirements that specify a particular time period (e.g., 2 years) of work experience, Canada will disregard any information about experience if the résumé does not include the relevant dates (month and year) for the experience claimed (i.e., the start date and end date). Canada will evaluate only the duration that the resource actually worked on a project or projects (from his or her start date to end date), instead of the overall start and end date of a project or a combination of projects in which a resource has participated.
  - (vi) A résumé must not simply indicate the title of the individual's position, but must demonstrate that the resource has the required work experience by explaining the responsibilities and work performed by the individual while in that position. Only listing experience without providing any supporting data to describe responsibilities, duties and relevance to the requirement, or reusing the same wording as the TA Form, will not be considered "demonstrated" for the purposes of the assessment. The Contractor should provide complete details as to where, when, month and year, and how, through which activities/responsibilities, the stated qualifications / experience were obtained. In situations in which a proposed resource worked at the same time on more than one

project, the duration of any overlapping time period will be counted only once toward any requirements that relate to the individual's length of experience.

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

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

(SEE ATTACHED HERETO)

**APPENDIX C TO ANNEX A****Resource Assessment Criteria and Response Table (WS1)****Definitions**

The following definitions apply to the assessment criteria that follows.

<b>Term</b>	<b>Definition</b>
Building	The process of executing the design to deliver the required functionality or solution.
Business Process Management Solution	Refers to commercial-off the shelf (COTS) software application that are implemented to manage Public and Private sector business processes in areas such as but not limited to: <ul style="list-style-type: none"> <li>• Contracts and Grants Management (outreach, application, eligibility, administration, management, audit and evaluation, monitoring and reporting);</li> <li>• Courts/Judicial Management (registration, intake/identification, knowledge base, scheduling, appeals management, issues management, monitoring, and case tracking);</li> <li>• Compliance Management (registration, intake/identification, monitoring, occurrence management, inspections, licensing, certification and reporting);</li> <li>• Entitlement Case Management (intake, eligibility, case workflow, entitlement calculation, contract management, monitoring and payment);</li> <li>• Client Service (communication, service initiation, contact centre, knowledge base, sales, channel management, inquiries, case tracking);</li> <li>• Investigations and Enforcement (communications, correspondence, scheduling, monitoring and reporting).</li> </ul>
Customer Relationship Management (CRM) Solutions	A CRM Solution is defined as a widely implemented model for managing an organizations' interaction with customers, clients, and sales prospects. It involves using technology to organize, automate, and synchronize business processes - principally sales activities, but also those for marketing, customer service, and technical support.
Delivering	Carrying out something that was expected.
Designing	The process of defining software methods, functions, objects, and the overall structure and interaction of software code so that the resulting functionality will satisfy the requirements.
Dynamics	Refers to the Microsoft Dynamics software suite of products (version 10.5 or more recent including ) and including but not limited to the following software modules: <ol style="list-style-type: none"> <li>1) Social listening</li> <li>2) Social media analytics</li> <li>3) Workflows and approvals</li> <li>4) Sales automation</li> <li>5) Customer service automation</li> <li>6) Unified Service Desk</li> <li>7) Sales campaigns</li> <li>8) Reports and personal dashboards</li> <li>9) Integration via web services</li> </ol>

Term	Definition
	10) Mobile access 11) Access to customizations and extensions 12) Full mobile offline access
EDRMS	Electronic Document and Records Management System
ERP	An Enterprise Resource Planning (ERP) solution is business process management commercial-off the shelf (COTS) software that allows an organization to use a system of integrated applications to manage the business and automate many back office functions related to technology, services and human resources. Examples of ERP software implemented with the GC includes Oracle's PeopleSoft HCM, SAP Financials, Microsoft Dynamics, Oracle's Siebel CRM.
FreeBalance	Refers to the FreeBalance Accountability Suite of products (version 6.5E or more recent), including but not limited to the following software modules licensed by the Government of Canada: <ol style="list-style-type: none"> <li>1) Financial Accountability,</li> <li>2) Purchasing Accountability,</li> <li>3) Revenue Accountability,</li> <li>4) Asset Accountability,</li> <li>5) FreeBalance Forms Designer, and</li> <li>6) Performance Budgeting.</li> </ol>
Functional role	A functional role is one where an individual performs functional activities related to the management of an application. This could include: <ul style="list-style-type: none"> <li>• troubleshooting,</li> <li>• eliciting, elaborating, analyzing and documenting business requirements,</li> <li>• identifying test scenarios/scripts,</li> <li>• creating testing scripts,</li> <li>• performing functional testing,</li> <li>• documenting communication material (for e.g. release notes),</li> <li>• Business process analysis, mapping,</li> <li>• User interface design</li> <li>• Impact assessments (WBS elaboration of functional tasks)</li> </ul> WBS=Work Breakdown Structure
GC HR environment	Government of Canada Human Resource environment (GC HR environment), is an instance of the Government of Canada (GC) version of the PeopleSoft Human Resource (HR) application that is in operation at a GC department or agency.
Implementation / Implementing	Completed and put into operation as part of the final solution.
integrated end-to-end business process	Integrated end-to-end business process is the human resource (HR) lifecycle management process which commences with recruitment, concludes upon retirement, and includes all steps in between.
OpenText Content Server	Refers to OpenText's Content Server content management software product, version 10.5 or more recent.
PeopleSoft HCM	Refers to Oracle's PeopleSoft Human Capital Management (PeopleSoft HCM) software suite of products (version 9.1 or more recent) including but not limited to the following software modules / sub-modules licensed by the Government of Canada: <ol style="list-style-type: none"> <li>1) Core HR               <ol style="list-style-type: none"> <li>a. Workforce Administration</li> <li>b. Workforce Development</li> <li>c. Organizational Development</li> </ol> </li> </ol>



Term	Definition
	<ul style="list-style-type: none"> <li>d. Training Development</li> <li>e. Workforce Monitoring</li> <li>2) Recruiting Solution</li> <li>3) Profile Management</li> <li>4) eProfile <ul style="list-style-type: none"> <li>a. Employee Self Service</li> <li>b. Manager Self Service</li> </ul> </li> <li>5) eProfile Management</li> <li>6) Absence Management</li> <li>7) Payroll for North America</li> <li>8) Payroll Interface</li> <li>9) eDevelopment</li> <li>10) Time and Labour</li> <li>11) ePerformance</li> <li>12) Career Planning</li> <li>13) eCompensation</li> <li>14) Succession Planning</li> </ul>
PeopleSoft Pay	Refers to Oracle's PeopleSoft North America (NA) Payroll Module
SAP	<p>Refers to software products from SAP SE including:</p> <ul style="list-style-type: none"> <li>1) <b>SAP® ERP Central Component (ECC)</b> software module (version 6.0 or more recent), including but not limited to the following software components licensed by the Government of Canada: <ul style="list-style-type: none"> <li>a. Material Management (MM),</li> <li>b. Accounts Payable (AP),</li> <li>c. Accounts Receivable (AR),</li> <li>d. Asset Accounting (AA),</li> <li>e. Funds Management (FM),</li> <li>f. Controlling (CO),</li> <li>g. Sales and Distribution (SD),</li> <li>h. Real Estate (RE), Project Systems (PS),</li> <li>i. Plant Maintenance (PM),</li> <li>j. General Ledger and Special Purpose Ledgers (GL/SPL) (classic and new GL),</li> <li>k. Business Warehousing (BW), and</li> <li>l. Functionality developed by the Government of Canada such as the Salary Forecasting Tool, Travel Management Solution and the Receiver General Interfaces.</li> </ul> </li> </ul>
Performing	To carry out, accomplish, or fulfill an action, task, or function.
Providing	To supply or make available.
SharePoint	Refers to the Microsoft SharePoint software suite of products (version 2013 or more recent)
Software Integration (integrating)	Software integration means that the products work as one solution. Instead of passing information between the two systems over a bridge, the systems share the same code and database
Software Interface	A software interface is a bridge that allows two programs to share information with each other, even though they may have been developed by different sources or use different programming languages. An interface will often use a standard file format such as XML to move information from one system to another.
Support / Supporting	Maintaining the hardware or software environment by troubleshooting and fixing a wide variety of issues.

Term	Definition
Technical role	<p>A technical role is one where an individual performs technical activities related to the development and the implementation of an application. This could include:</p> <ul style="list-style-type: none"><li>• troubleshooting,</li><li>• developing and communicating application architectures,</li><li>• developing and maintaining codes(including application code changes, fixes and configuration) based on the specification that was given by the Functional team,</li><li>• packaging and implementing the codes to different application environments,</li><li>• providing application administration services,</li><li>• administrating the application databases and the Data Base Management System,</li><li>• providing application security services, and</li><li>• unit testing and solution design.</li></ul>
Upgrade / Upgrading	<p>A replacement of <i>software</i> with a newer version, in order to bring the system up to date or to improve its characteristics.</p>
Using	<p>The act of employing something for a specific purpose.</p>

**Mandatory Assessment Criteria (As and when requested Resources)**

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

**Workstream 1- PeopleSoft ERP Systems Technical Professional Services****1. Application / Software Architect (Level 3) (PeopleSoft)**

Resource Assessment Criteria		
Resource Category	1. Application / Software Architect (Level 3) (PeopleSoft)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-1.1	<p><b>Minimum experience in the resource category.</b> The proposed resource must have experience in the proposed resource category including:</p> <p>a) a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as an Application / Software Architect (as defined below in M-1.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the five tasks listed below for a minimum of six cumulative months of experience per task:</p> <p>1) Develop technical architectures, frameworks and strategies, for an application area, to meet the business and application requirements;</p> <p>2) Analyze functional requirements to identify information, procedures and decision flows. Analyze and evaluate alternative software solutions to meet business problems;</p> <p>3) Ensure the integration of all aspects of software solutions;</p> <p>4) Create an application component roadmap - roadmap to align business vision and functional coverage to IT vision; and</p> <p>5) Create an application architecture framework.</p> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>

Resource Assessment Criteria		
<b>Resource Category</b>	1. Application / Software Architect (Level 3) (PeopleSoft)	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-1.2	<p><b>Minimum experience with PeopleSoft.</b></p> <p>The resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this TA, developing technical architectures, frameworks and strategies, for a PeopleSoft ERP solution (HCM or Payroll as applicable) to meet the business and application requirements:</p> <p><input type="checkbox"/> HCM <input type="checkbox"/> Payroll</p> <p><b>Note:</b> Future versions of PeopleSoft HCM or Payroll (as applicable) with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable</p>	
M-1.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must have experience performing the tasks identified in M-1.1 to support specific components or modules of the PeopleSoft HCM suite, including but not limited to the following:</p> <p><input type="checkbox"/> Self Service  <input type="checkbox"/> Manager Self Service  <input type="checkbox"/> Administer Pay Interface  <input type="checkbox"/> Manage Pay Interface  <input type="checkbox"/> Manage Priorities  <input type="checkbox"/> Recruiting Workforce Administration  <input type="checkbox"/> Labour Administration  <input type="checkbox"/> Workforce Development - Profile  <input type="checkbox"/> Management, Performance Management  <input type="checkbox"/> Organization Development - Position  <input type="checkbox"/> Management, Enterprise Learning  <input type="checkbox"/> Workforce Monitoring - Health &amp; Safety  <input type="checkbox"/> Components or modules introduced in future versions of the PeopleSoft HCM suite up to version n-1 of the major version (to be specified herein).</p>	

Resource Assessment Criteria		
Resource Category	1. Application / Software Architect (Level 3) (PeopleSoft)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p>b) The resource must have experience performing the tasks identified in M-1.1 to support the PeopleSoft NA Payroll Module.</p> <p>c) The resource must have experience integrating PeopleSoft HCM and PeopleSoft NA Payroll.</p> <p>d) The resource must have experience performing the tasks identified in M-1.1 to support the evolution of the legacy PeopleSoft environment to a future version up to n-1 of the major version.</p> <p><b>Note:</b> Future versions of PeopleSoft HCM or Payroll (as applicable) with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable:</p> <p><input type="checkbox"/> HCM</p> <p><input type="checkbox"/> Payroll</p>	

**2. ERP System Analyst (Level 2 or Level 3) (PeopleSoft)**

Resource Assessment Criteria		
Resource Category	2. ERP System Analyst (Level 2 or Level 3) (PeopleSoft)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-2.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this TA, working as an ERP System Analyst (as defined below in M-2.1 b); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as an ERP System Analyst (as defined below in M-2.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the eight tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Develop requirements, feasibility, cost, design, and specification documents for ERP systems;</li><li>2) Implement ERP systems to support projects, departments, organizations or businesses;</li><li>3) Translate ERP business requirements into systems design and specifications;</li><li>4) Analyze and recommend alternatives and options for solutions;</li><li>5) Develop technical specifications for ERP systems development, design and implementation;</li><li>6) Research, analyze and document user requirements, map interdependencies, and produce the required functional specifications and/or process re-engineering recommendations;</li><li>7) Provide functional and technical expertise on applications; and</li><li>8) Review Functional and Technical Design Documents to ensure that there is alignment across the application(s).</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>

Resource Assessment Criteria		
<b>Resource Category</b>	2. ERP System Analyst (Level 2 or Level 3) (PeopleSoft)	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-2.2	<p><b>Minimum experience with PeopleSoft.</b></p> <p><u>Level 2:</u> The resource must have a minimum of two years of experience, within the five years preceding the issuance date of this TA, implementing or upgrading a PeopleSoft ERP solution (HCM or Payroll as applicable) :</p> <p><input type="checkbox"/> HCM <input type="checkbox"/> Payroll</p> <p><u>Level 3:</u> The resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this TA, implementing or upgrading a PeopleSoft ERP solution (HCM or Payroll as applicable) :</p> <p><input type="checkbox"/> HCM <input type="checkbox"/> Payroll</p> <p><b>Note:</b> Future versions of PeopleSoft HCM or Payroll (as applicable) with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable :</p> <p><input type="checkbox"/> HCM <input type="checkbox"/> Payroll</p>	
M-2.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must have experience performing the tasks identified in M-2.1 to provide solutions for a multiple-company environment with a single instance of PeopleSoft.</p> <p>b) The resource must have experience performing the tasks identified in M-2.1 to support specific components or modules of the PeopleSoft HCM suite, including but not limited to the following:</p> <p><input type="checkbox"/> Self Service <input type="checkbox"/> Manager Self Service <input type="checkbox"/> Administer Pay Interface <input type="checkbox"/> Manage Pay Interface <input type="checkbox"/> Manage Priorities</p>	

Resource Assessment Criteria		
<b>Resource Category</b>	2. ERP System Analyst (Level 2 or Level 3) (PeopleSoft)	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<input type="checkbox"/> Recruiting Workforce Administration <input type="checkbox"/> Labour Administration <input type="checkbox"/> Workforce Development - Profile <input type="checkbox"/> Management, Performance Management <input type="checkbox"/> Organization Development - Position <input type="checkbox"/> Management, Enterprise Learning <input type="checkbox"/> Workforce Monitoring - Health & Safety <input type="checkbox"/> Components or modules introduced in future versions of the PeopleSoft HCM suite up to version n-1 of the major version (to be specified herein).  c) The resource must have experience performing the tasks identified in M-2.1 to support the PeopleSoft NA Payroll Module.  d) The resource must have experience integrating PeopleSoft HCM and PeopleSoft NA Payroll.  e) The resource must have experience performing the tasks identified in M-2.1 to support the evolution of the legacy PeopleSoft environment to a future version up to n-1 of the major version.  <b>Note:</b> Future versions of PeopleSoft HCM or Payroll (as applicable) with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable: <input type="checkbox"/> HCM <input type="checkbox"/> Payroll	



**3. ERP Technical Analyst (Level 2 or Level 3) (PeopleSoft)**

Resource Assessment Criteria		
Resource Category	3. ERP Technical Analyst (Level 2 or Level 3) (PeopleSoft)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-3.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this TA, working as an ERP Technical Analyst (as defined below in M-3.1 b); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as an ERP Technical Analyst (as defined below in M-3.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the eight tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Plan and provide recommendations to management regarding system landscape architectures including upgrade strategies;</li><li>2) Translate functional and business requirements into technical requirements;</li><li>3) Develop and/or manage technical aspects of application software, user interfaces, and third-party components;</li><li>4) Conduct, assist with, and/or manage unit and system tests;</li><li>5) Establish technical standards for the technical framework;</li><li>6) Analyze and coordinate data file conversions;</li><li>7) Complete mapping, interfaces, mock conversion work, enhancements, actual conversion, and verify completeness and accuracy of converted data; and</li><li>8) Import files from heterogeneous platforms.</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>

Resource Assessment Criteria		
<b>Resource Category</b>	3. ERP Technical Analyst (Level 2 or Level 3) (PeopleSoft)	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-3.2	<p><b>Minimum experience with PeopleSoft</b></p> <p><u>Level 2:</u> The resource must have a minimum of two years of experience, within the five years preceding the issuance date of this TA, using PeopleTools to implement or upgrade a PeopleSoft ERP solution (HCM or Payroll as applicable) :</p> <p><input type="checkbox"/> HCM <input type="checkbox"/> Payroll</p> <p><u>Level 3:</u> The resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this TA, using PeopleTools to implement or upgrade a PeopleSoft ERP solution (HCM or Payroll as applicable) :</p> <p><input type="checkbox"/> HCM <input type="checkbox"/> Payroll</p> <p><b>Note:</b> Future versions of PeopleSoft HCM or Payroll (as applicable) with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	
M-3.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must have experience installing PeopleSoft related software products (e.g. Weblogic, Tuxedo, PeopleTools, Cobol, Oracle, Crystal) on both Windows and Linux platforms and on Oracle DBMS platform.</p> <p>b) The resource must have experience installing and configuring reverse proxy web server.</p> <p>c) The resource must have experience installing and configuring PeopleSoft Performance Monitor for monitoring PeopleSoft systems.</p> <p>d) The resource must have experience in a technical role supporting interfaces to PeopleSoft using Integration Broker technology.</p>	

Resource Assessment Criteria		
Resource Category	3. ERP Technical Analyst (Level 2 or Level 3) (PeopleSoft)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p>e) The resource must have experience in a technical role performing PeopleTools upgrades and PeopleCode/Application Engine/SQR/SQL/Change Assistant.</p> <p>f) The resource must have experience in a technical role providing upgrade kits for more than one database platform for PeopleSoft HCM.</p> <p>g) The resource must have experience in a technical role designing and building a custom ETL solution within PeopleTools to convert legacy PeopleSoft ERP systems from various organizations into a hosted multiple*-company environment within a single instance of PeopleSoft.</p> <p>h) The resource must have experience performing the tasks identified in M-3.1 to support components or modules of the PeopleSoft HCM suite, including but not limited to the following:</p> <ul style="list-style-type: none"><li><input type="checkbox"/> Self Service</li><li><input type="checkbox"/> Manager Self Service</li><li><input type="checkbox"/> Administer Pay Interface</li><li><input type="checkbox"/> Manage Pay Interface</li><li><input type="checkbox"/> Manage Priorities</li><li><input type="checkbox"/> Recruiting Workforce Administration</li><li><input type="checkbox"/> Labour Administration</li><li><input type="checkbox"/> Workforce Development - Profile</li><li><input type="checkbox"/> Management, Performance Management</li><li><input type="checkbox"/> Organization Development - Position</li><li><input type="checkbox"/> Management, Enterprise Learning</li><li><input type="checkbox"/> Workforce Monitoring - Health &amp; Safety</li><li><input type="checkbox"/> Components or modules introduced in future versions of the PeopleSoft HCM suite up to version n-1 of the major version (to be specified herein).</li></ul> <p>i) The resource must have experience performing the tasks identified in M-3.1 to support the PeopleSoft NA Payroll Module.</p> <p>j) The resource must have experience integrating PeopleSoft HCM and PeopleSoft NA Payroll.</p>	

Solicitation Number: EP597-180057

Amendment Number:

Buyer ID: 618EL

Resource Assessment Criteria		
Resource Category	3. ERP Technical Analyst (Level 2 or Level 3) (PeopleSoft)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p>k) The resource must have experience performing the tasks identified in M-3.1 to support the evolution of the legacy PeopleSoft environment to a future version up to n-1 of the major version.</p> <p><b>Note:</b> Future versions of PeopleSoft HCM or Payroll (as applicable) with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable:</p> <p><input type="checkbox"/> HCM</p> <p><input type="checkbox"/> Payroll</p>	

**4. Programmer / Analyst (Level 2 or Level 3) (PeopleSoft)**

Resource Assessment Criteria		
Resource Category	4. Programmer / Analyst (Level 2 or Level 3) (PeopleSoft)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-4.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this TA, working as a Programmer / Analyst (as defined below in M-4.1 b); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Programmer / Analyst (as defined below in M-4.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the seven tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Analysis of functional requirements leading to the execution of the design, development and implementation of changes to the application;</li><li>2) Develop and maintain configuration and programs based on approved requirements working both independently and within a team;</li><li>3) Deliver technical specifications documents using the functional specifications provided by the functional and integration teams;</li><li>4) Create and modify configuration and code for software as per technical specifications;</li><li>5) Produce reports, manuals, programs, data files, and procedures for applications;</li><li>6) Analyze code and objects to determine functional fit; and</li><li>7) Execute tasks related to the implementation of application and database design and fixes, coding and technical documentation.</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>

Resource Assessment Criteria		
<b>Resource Category</b>	4. Programmer / Analyst (Level 2 or Level 3) (PeopleSoft)	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-4.2	<p><b>Minimum experience with PeopleSoft.</b></p> <p><u>Level 2:</u> The resource must have a minimum of two years of experience, within the five years preceding the issuance date of this TA, implementing or upgrading a PeopleSoft ERP solution (HCM or Payroll as applicable):</p> <p><input type="checkbox"/> HCM <input type="checkbox"/> Payroll</p> <p><u>Level 3:</u> The resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this TA, implementing or upgrading a PeopleSoft ERP solution (HCM or Payroll as applicable):</p> <p><input type="checkbox"/> HCM <input type="checkbox"/> Payroll</p> <p><b>Note:</b> Future versions of PeopleSoft HCM or Payroll (as applicable) with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable</p>	
M-4.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must have experience performing the tasks identified in M-4.1 to support specific a module(s) of the PeopleSoft HCM suite, including but not limited to the following:</p> <p><input type="checkbox"/> Self Service <input type="checkbox"/> Manager Self Service <input type="checkbox"/> Administer Pay Interface <input type="checkbox"/> Manage Pay Interface <input type="checkbox"/> Manage Priorities <input type="checkbox"/> Recruiting Workforce Administration <input type="checkbox"/> Labour Administration <input type="checkbox"/> Workforce Development - Profile <input type="checkbox"/> Management, Performance Management</p>	

Resource Assessment Criteria		
Resource Category	4. Programmer / Analyst (Level 2 or Level 3) (PeopleSoft)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<div><input type="checkbox"/> Organization Development - Position</div> <div><input type="checkbox"/> Management, Enterprise Learning</div> <div><input type="checkbox"/> Workforce Monitoring - Health &amp; Safety</div> <div><input type="checkbox"/> Components or modules introduced in future versions of the PeopleSoft HCM suite up to version n-1 of the major version (to be specified herein).</div> <div>b) The resource must have experience performing the tasks identified in 4.1 to support the PeopleSoft NA Payroll Module.</div> <div>c) The resource must have experience integrating PeopleSoft HCM and PeopleSoft NA Payroll.</div> <div>d) The resource must have experience performing the tasks identified in M-4.1 to support the evolution of the legacy PeopleSoft environment to a future version up to n-1 of the major version.</div> <div><b>Note:</b> Future versions of PeopleSoft HCM or Payroll (as applicable) with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable:</div> <div><input type="checkbox"/> HCM</div> <div><input type="checkbox"/> Payroll</div>	

**5. Tester (Level 2 or Level 3) (ERP)**

Resource Assessment Criteria		
Resource Category	5. Tester (Level 2 or Level 3) (ERP)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-5.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this TA, working as a Tester (as defined below in M-5.1 b); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Tester (as defined below in M-5.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the five tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Develop the Test strategy; test planning and coordination;</li><li>2) Manage and monitor test plans for all levels of testing;</li><li>3) Develop test scenarios and test scripts;</li><li>4) Establish and maintain test procedures and script libraries; and</li><li>5) Establish a validation and verification capability which assumes functional and performance compliance.</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>
M-5.2	<p><b>Minimum experience with ERP Systems.</b></p> <p><u>Level 2</u>: The resource must have a minimum of two years of experience, within the five years preceding the issuance date of this TA, executing testing activities for an ERP application implementation or upgrade project.</p> <p><u>Level 3</u>: The resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this TA, ERP application implementation or upgrade project.</p>	



Resource Assessment Criteria		
<b>Resource Category</b>		5. Tester (Level 2 or Level 3) (ERP)
<b>Name of Proposed Resource:</b>		<insert name>
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-5.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must have experience performing the tasks identified in M-5.1 to support specific components or modules of the PeopleSoft HCM suite, including but not limited to the following:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Self Service</li> <li><input type="checkbox"/> Manager Self Service</li> <li><input type="checkbox"/> Administer Pay Interface</li> <li><input type="checkbox"/> Manage Pay Interface</li> <li><input type="checkbox"/> Manage Priorities</li> <li><input type="checkbox"/> Recruiting Workforce Administration</li> <li><input type="checkbox"/> Labour Administration</li> <li><input type="checkbox"/> Workforce Development - Profile</li> <li><input type="checkbox"/> Management, Performance Management</li> <li><input type="checkbox"/> Organization Development - Position</li> <li><input type="checkbox"/> Management, Enterprise Learning</li> <li><input type="checkbox"/> Workforce Monitoring - Health &amp; Safety</li> <li><input type="checkbox"/> Components or modules introduced in future versions of the PeopleSoft HCM suite up to version n-1 of the major version (to be specified herein).</li> </ul> <p>b) The resource must have experience performing the tasks identified in M-5.1 to support the PeopleSoft NA Payroll Module.</p> <p>c) The resource must have experience integrating PeopleSoft HCM and PeopleSoft NA Payroll.</p> <p>d) The resource must have experience performing the tasks identified in M-5.1 to support the evolution of the legacy PeopleSoft environment to a future version up to n-1 of the major version.</p> <p><b>Note:</b> Future versions of PeopleSoft HCM or Payroll (as applicable) with which the resource must have experience</p>	

Resource Assessment Criteria		
Resource Category		5. Tester (Level 2 or Level 3) (ERP)
Name of Proposed Resource:		<insert name>
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable: <input type="checkbox"/> HCM <input type="checkbox"/> Payroll	

**6. Data Conversion Specialist (Level 2 or Level 3) (PeopleSoft)**

Resource Assessment Criteria		
<b>Resource Category</b>	6. Data Conversion Specialist (Level 2 or Level 3) (PeopleSoft)	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-6.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) <u>Level 2:</u> a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this TA, working as a Data Conversion Specialist (as defined below in M-6.1 b); and</p> <p><u>Level 3:</u> a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Data Conversion Specialist (as defined below in M-6.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the four tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"> <li>1) Oversee all facets of the conversion process;</li> <li>2) Complete mapping, interfaces, mock conversion work, enhancements, actual conversion, and verify completeness and accuracy of converted data;</li> <li>3) Analyze and coordinate data file conversions; and</li> <li>4) Import files from heterogeneous platforms.</li> </ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>
M-6.2	<p><b>Minimum experience with PeopleSoft.</b></p> <p><u>Level 2:</u> The resource must have a minimum of two years of experience, within the five years preceding the issuance date of this TA, performing data conversions for a PeopleSoft ERP system (HCM or Payroll as applicable); :</p> <p><input type="checkbox"/> HCM <input type="checkbox"/> Payroll</p> <p><u>Level 3:</u> The resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this TA, performing data conversions for a PeopleSoft ERP system (HCM or Payroll as applicable); :</p> <p><input type="checkbox"/> HCM</p>	

Resource Assessment Criteria		
<b>Resource Category</b> 6	6. Data Conversion Specialist (Level 2 or Level 3) (PeopleSoft)	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<input type="checkbox"/> Payroll  <b>Note:</b> Future versions of PeopleSoft HCM or Payroll (as applicable) with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable	
M-6.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must have experience performing data conversion for multiple organizations into a single instance of PeopleSoft.</p> <p>b) The resource must have experience performing the tasks identified in M-6.1 to support specific components or modules of the PeopleSoft HCM suite, including but not limited to the following:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Self Service</li> <li><input type="checkbox"/> Manager Self Service</li> <li><input type="checkbox"/> Administer Pay Interface</li> <li><input type="checkbox"/> Manage Pay Interface</li> <li><input type="checkbox"/> Manage Priorities</li> <li><input type="checkbox"/> Recruiting Workforce Administration</li> <li><input type="checkbox"/> Labour Administration</li> <li><input type="checkbox"/> Workforce Development - Profile</li> <li><input type="checkbox"/> Management, Performance Management</li> <li><input type="checkbox"/> Organization Development - Position</li> <li><input type="checkbox"/> Management, Enterprise Learning</li> <li><input type="checkbox"/> Workforce Monitoring - Health &amp; Safety</li> <li><input type="checkbox"/> Components or modules introduced in future versions of the PeopleSoft HCM suite up to version n-1 of the major version (to be specified herein).</li> </ul> <p>c) The resource must have experience performing the tasks identified in M-6.1 to support the PeopleSoft NA Payroll Module.</p>	

Resource Assessment Criteria		
Resource Category6	6. Data Conversion Specialist (Level 2 or Level 3) (PeopleSoft)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p>d) The resource must have experience integrating PeopleSoft HCM and PeopleSoft NA Payroll.</p> <p>e) The resource must have experience performing the tasks identified in M-6.1 to support the evolution of the legacy PeopleSoft environment to a future version up to n-1 of the major version.</p> <p><b>Note:</b> Future versions of PeopleSoft HCM or Payroll (as applicable) with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable :</p> <p><input type="checkbox"/> HCM</p> <p><input type="checkbox"/> Payroll</p>	

**7. Enterprise Architect (Level 3) (PeopleSoft)**

Resource Assessment Criteria		
Resource Category	7. Enterprise Architect (Level 3) (PeopleSoft)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-7.1	<b>Minimum experience in the resource category.</b>  The proposed resource must have experience in the proposed resource category including:  a) a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as an Enterprise Architect (as defined below in M-7.1 b); and  b) that within that timeframe of experience, the resource has experience performing each of the seven tasks listed below for a minimum of six cumulative months of experience per task:  1) Evaluate the enterprise's business/Information and Communication Technology (ICT) architecture, determine its consistency and integration with the organization's business/ICT strategies, assess the degree of its alignment with Treasury Board CIO Business Transformation Enablement Program (BTEP) and Federated Architecture Program (FAP) and recommend changes to the business/ICT architecture to improve its alignment with these external factors;  2) Identify future business/ICT requirements against the current enterprise architecture, perform gaps analyses, develop Requirements for Technology Architectures (RTA), and prepare migration strategies;  3) Assess the feasibility of migrating from the current state to the target business architecture and enabling technologies and identify the risks associated with migrating to the target business architecture and technologies and make recommendations for risk mitigation;  4) Identify business and technology trends that create opportunities for business improvement, advise business and ICT Senior Executives on ICT trends and emerging technologies and the impact on the organization's ICT architectures and business strategies, model "What if" scenarios and recommend appropriate changes to the existing architecture and ICT infrastructure, and recommend alternative solutions, methodologies and strategies;	Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.

Resource Assessment Criteria		
Resource Category	7. Enterprise Architect (Level 3) (PeopleSoft)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<div>5) Produce an architectural evolution plan, recommend prioritization of architecture evolution initiatives, and develop and/or implement an architecture evolution plan;</div> <div>6) Manage the development and implementation of an architectural improvement plan; and</div> <div>7) Train key individuals in the organization to perform any of the above.</div> <div>The required experience can be demonstrated over one or more Customer Reference Projects.</div>	
M-7.2	<div><b>Minimum experience with PeopleSoft.</b></div> <div>The resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this TA, assessing the feasibility of migrating from the current state to the target business architecture and enabling technologies and providing recommendations to mitigate risk associated with migrating to the target business architecture and technologies to support an organization-wide PeopleSoft HCM application implementation project.</div> <div><b>Note:</b> Future versions of PeopleSoft HCM with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable</div>	
M-7.3	<div><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</div> <div>a) The resource must have experience performing the tasks identified in M-7.1 to support specific components or modules of the PeopleSoft HCM suite, including but not limited to the following:</div> <div><div><input type="checkbox"/> Self Service</div><div><input type="checkbox"/> Manager Self Service</div><div><input type="checkbox"/> Administer Pay Interface</div><div><input type="checkbox"/> Manage Pay Interface</div><div><input type="checkbox"/> Manage Priorities</div><div><input type="checkbox"/> Recruiting Workforce Administration</div></div>	

Resource Assessment Criteria		
<b>Resource Category</b>	7. Enterprise Architect (Level 3) (PeopleSoft)	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<input type="checkbox"/> Labour Administration <input type="checkbox"/> Workforce Development - Profile <input type="checkbox"/> Management, Performance Management <input type="checkbox"/> Organization Development - Position <input type="checkbox"/> Management, Enterprise Learning <input type="checkbox"/> Workforce Monitoring - Health & Safety <input type="checkbox"/> Components or modules introduced in future versions of the PeopleSoft HCM suite up to version n-1 of the major version (to be specified herein).  b) The resource must have experience performing the tasks identified in M-7.1 to support the PeopleSoft NA Payroll Module.  c) The resource must have experience integrating PeopleSoft HCM and PeopleSoft NA Payroll.  d) The resource must have experience performing the tasks identified in M-7.1 to support the evolution of the legacy PeopleSoft environment to a future version up to n-1 of the major version.  <b>Note:</b> Future versions of PeopleSoft HCM or Payroll (as applicable) with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable : <input type="checkbox"/> HCM <input type="checkbox"/> Payroll	



## Resource Assessment Criteria and Response Table (WS2)

### Definitions

The following definitions apply to the assessment criteria that follows.

Term	Definition
Building	The process of executing the design to deliver the required functionality or solution.
Business Process Management Solution	Refers to commercial-off the shelf (COTS) software application that are implemented to manage Public and Private sector business processes in areas such as but not limited to: <ul style="list-style-type: none"> <li>• Contracts and Grants Management (outreach, application, eligibility, administration, management, audit and evaluation, monitoring and reporting);</li> <li>• Courts/Judicial Management (registration, intake/identification, knowledge base, scheduling, appeals management, issues management, monitoring, and case tracking);</li> <li>• Compliance Management (registration, intake/identification, monitoring, occurrence management, inspections, licensing, certification and reporting);</li> <li>• Entitlement Case Management (intake, eligibility, case workflow, entitlement calculation, contract management, monitoring and payment);</li> <li>• Client Service (communication, service initiation, contact centre, knowledge base, sales, channel management, inquiries, case tracking);</li> <li>• Investigations and Enforcement (communications, correspondence, scheduling, monitoring and reporting).</li> </ul>
Customer Relationship Management (CRM) Solutions	A CRM Solution is defined as a widely implemented model for managing an organizations' interaction with customers, clients, and sales prospects. It involves using technology to organize, automate, and synchronize business processes - principally sales activities, but also those for marketing, customer service, and technical support.
Delivering	Carrying out something that was expected.
Designing	The process of defining software methods, functions, objects, and the overall structure and interaction of software code so that the resulting functionality will satisfy the requirements.
Dynamics	Refers to the Microsoft Dynamics software suite of products (version 10.5 or more recent including ) and including but not limited to the following software modules: <ol style="list-style-type: none"> <li>1) Social listening</li> <li>2) Social media analytics</li> <li>3) Workflows and approvals</li> <li>4) Sales automation</li> <li>5) Customer service automation</li> <li>6) Unified Service Desk</li> <li>7) Sales campaigns</li> <li>8) Reports and personal dashboards</li> <li>9) Integration via web services</li> <li>10) Mobile access</li> </ol>

Term	Definition
	11) Access to customizations and extensions 12) Full mobile offline access
EDRMS	Electronic Document and Records Management System
ERP	An Enterprise Resource Planning (ERP) solution is business process management commercial-off the shelf (COTS) software that allows an organization to use a system of integrated applications to manage the business and automate many back office functions related to technology, services and human resources. Examples of ERP software implemented with the GC includes Oracle's PeopleSoft HCM, SAP Financials, Microsoft Dynamics, Oracle's Siebel CRM.
FreeBalance	Refers to the FreeBalance Accountability Suite of products (version 6.5E or more recent), including but not limited to the following software modules licensed by the Government of Canada: 1) Financial Accountability, 2) Purchasing Accountability, 3) Revenue Accountability, 4) Asset Accountability, 5) FreeBalance Forms Designer, and 6) Performance Budgeting.
Functional role	A functional role is one where an individual performs functional activities related to the management of an application. This could include: <ul style="list-style-type: none"> <li>• troubleshooting,</li> <li>• eliciting, elaborating, analyzing and documenting business requirements,</li> <li>• identifying test scenarios/scripts,</li> <li>• creating testing scripts,</li> <li>• performing functional testing,</li> <li>• documenting communication material (for e.g. release notes),</li> <li>• Business process analysis, mapping,</li> <li>• User interface design</li> <li>• Impact assessments (WBS elaboration of functional tasks)</li> </ul> WBS=Work Breakdown Structure
GC HR environment	Government of Canada Human Resource environment (GC HR environment), is an instance of the Government of Canada (GC) version of the PeopleSoft Human Resource (HR) application that is in operation at a GC department or agency.
Implementation / Implementing	Completed and put into operation as part of the final solution.
integrated end-to-end business process	Integrated end-to-end business process is the human resource (HR) lifecycle management process which commences with recruitment, concludes upon retirement, and includes all steps in between.
OpenText Content Server	Refers to OpenText's Content Server content management software product, version 10.5 or more recent.
PeopleSoft HCM	Refers to Oracle's PeopleSoft Human Capital Management (PeopleSoft HCM) software suite of products (version 9.1 or more recent) including but not limited to the following software modules / sub-modules licensed by the Government of Canada: 1) Core HR

Term	Definition
	<ul style="list-style-type: none"> <li>a. Workforce Administration</li> <li>b. Workforce Development</li> <li>c. Organizational Development</li> <li>d. Training Development</li> <li>e. Workforce Monitoring</li> </ul> <ul style="list-style-type: none"> <li>2) Recruiting Solution</li> <li>3) Profile Management</li> <li>4) eProfile <ul style="list-style-type: none"> <li>a. Employee Self Service</li> <li>b. Manager Self Service</li> </ul> </li> <li>5) eProfile Management</li> <li>6) Absence Management</li> <li>7) Payroll for North America</li> <li>8) Payroll Interface</li> <li>9) eDevelopment</li> <li>10) Time and Labour</li> <li>11) ePerformance</li> <li>12) Career Planning</li> <li>13) eCompensation</li> <li>14) Succession Planning</li> </ul>
PeopleSoft Pay	Refers to Oracle's PeopleSoft North America (NA) Payroll Module
SAP	<p>Refers to software products from SAP SE including:</p> <ul style="list-style-type: none"> <li>1) <b>SAP® ERP Central Component (ECC)</b> software module (version 6.0 or more recent), including but not limited to the following software components licensed by the Government of Canada: <ul style="list-style-type: none"> <li>a. Material Management (MM),</li> <li>b. Accounts Payable (AP),</li> <li>c. Accounts Receivable (AR),</li> <li>d. Asset Accounting (AA),</li> <li>e. Funds Management (FM),</li> <li>f. Controlling (CO),</li> <li>g. Sales and Distribution (SD),</li> <li>h. Real Estate (RE), Project Systems (PS),</li> <li>i. Plant Maintenance (PM),</li> <li>j. General Ledger and Special Purpose Ledgers (GL/SPL) (classic and new GL),</li> <li>k. Business Warehousing (BW), and</li> <li>l. Functionality developed by the Government of Canada such as the Salary Forecasting Tool, Travel Management Solution and the Receiver General Interfaces.</li> </ul> </li> </ul>
Performing	To carry out, accomplish, or fulfill an action, task, or function.
Providing	To supply or make available.
SharePoint	Refers to the Microsoft SharePoint software suite of products (version 2013 or more recent)
Software Integration (integrating)	Software integration means that the products work as one solution. Instead of passing information between the two systems over a bridge, the systems share the same code and database
Software Interface	A software interface is a bridge that allows two programs to share information with each other, even though they may have been developed by different sources or use different programming

Term	Definition
	languages. An interface will often use a standard file format such as XML to move information from one system to another.
Support / Supporting	Maintaining the hardware or software environment by troubleshooting and fixing a wide variety of issues.
Technical role	<p>A technical role is one where an individual performs technical activities related to the development and the implementation of an application. This could include:</p> <ul style="list-style-type: none"><li>• troubleshooting,</li><li>• developing and communicating application architectures,</li><li>• developing and maintaining codes(including application code changes, fixes and configuration) based on the specification that was given by the Functional team,</li><li>• packaging and implementing the codes to different application environments,</li><li>• providing application administration services,</li><li>• administrating the application databases and the Data Base Management System,</li><li>• providing application security services, and</li><li>• unit testing and solution design.</li></ul>
Upgrade / Upgrading	A replacement of <i>software</i> with a newer version, in order to bring the system up to date or to improve its characteristics.
Using	The act of employing something for a specific purpose.

### Mandatory Assessment Criteria (As and when requested Resources)

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

#### Workstream 2 PeopleSoft ERP System Functional Professional Services

##### 1. ERP Functional Analyst (Level 2 or Level 3) (PeopleSoft)

Resource Assessment Criteria		
Resource Category	1. ERP Functional Analyst (Level 2 or Level 3) (PeopleSoft)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-1.1	<b>Minimum experience in the resource category.</b>  The proposed resource must have experience in the proposed resource category including:  a) <u>Level 2</u> : a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this TA, working as an ERP Functional Analyst (as defined below in M-1.1 b); and  <u>Level 3</u> : a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as an ERP Functional Analyst (as defined below in M-1.1 b); and	Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.
	b) that within that timeframe of experience, the resource has experience performing each of the seven tasks listed below for a minimum of six cumulative months of experience per task:  1) Research, analyze and document user requirements, map interdependencies, and produce the required functional specifications and/or process re-engineering recommendations; 2) Perform and document fit/gaps; 3) Model/map administrative process and data requirements; 4) Review Functional/Transaction Design Documents; 5) Help to resolve various implementation issues; 6) Create test scenarios and scripts according to business requirements; and	

Resource Assessment Criteria		
<b>Resource Category</b>	1. ERP Functional Analyst (Level 2 or Level 3) (PeopleSoft)	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p>7) Participate in testing, monitoring and reconciliation work related to data quality, data integrity and reports.</p> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	
M-1.2	<p><b>Minimum experience with PeopleSoft.</b></p> <p><u>Level 2:</u> The resource must have a minimum of two years of experience, within the five years preceding the issuance date of this TA, implementing or upgrading a PeopleSoft ERP solution (HCM or Payroll as applicable) :</p> <p><input type="checkbox"/> HCM <input type="checkbox"/> Payroll</p> <p><u>Level 3:</u> The resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this TA, implementing or upgrading PeopleSoft ERP solution (HCM or Payroll as applicable) :</p> <p><input type="checkbox"/> HCM <input type="checkbox"/> Payroll</p> <p><b>Note:</b> Future versions of PeopleSoft HCM or Payroll (as applicable) with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	
M-1.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must have experience performing the tasks identified in M-1.1 to support specific components or modules of the PeopleSoft HCM suite, including but not limited to the following:</p> <p><input type="checkbox"/> Self Service <input type="checkbox"/> Manager Self Service <input type="checkbox"/> Administer Pay Interface <input type="checkbox"/> Manage Pay Interface <input type="checkbox"/> Manage Priorities</p>	

Resource Assessment Criteria		
<b>Resource Category</b>	1. ERP Functional Analyst (Level 2 or Level 3) (PeopleSoft)	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<input type="checkbox"/> Recruiting Workforce Administration <input type="checkbox"/> Labour Administration <input type="checkbox"/> Workforce Development - Profile <input type="checkbox"/> Management, Performance Management <input type="checkbox"/> Organization Development - Position <input type="checkbox"/> Management, Enterprise Learning <input type="checkbox"/> Workforce Monitoring - Health & Safety <input type="checkbox"/> Components or modules introduced in future versions of the PeopleSoft HCM suite up to version n-1 of the major version (to be specified herein).  b) The resource must have experience performing the tasks identified in M-1.1 to support the PeopleSoft NA Payroll Module.  c) The resource must have experience integrating PeopleSoft HCM and PeopleSoft NA Payroll.  d) The resource must have performing the tasks identified in M-1.1 to support the evolution of the legacy PeopleSoft environment to a future version up to n-1 of the major version.  <b>Note:</b> Future versions of PeopleSoft HCM or Payroll (as applicable) with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable: <input type="checkbox"/> HCM <input type="checkbox"/> Payroll	

**2. Business Analyst (Level 2 or Level 3) (ERP)**

Resource Assessment Criteria		
Resource Category	2. Business Analyst (Level 2 or Level 3) (ERP)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-2.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this TA, working as a Business Analyst (as defined below in 2.1 b); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Business Analyst (as defined below in 2.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the seven tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Determine operational objectives by studying business functions; gathering information; evaluating output requirements and formats;</li><li>2) Perform business analyses of requirements to identify information, procedures, and decision flows;</li><li>3) Evaluate existing procedures and methods, identify and document items such as database content, structure, application subsystems;</li><li>4) Develop data dictionary;</li><li>5) Define and document interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems;</li><li>6) Identify candidate business processes for re-design, prototype potential solutions, provide trade-off information and suggest a recommended course of action. Identify the modifications to the automated processes; and</li><li>7) Establish acceptance test criteria with client.</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>
	M-2.2	



Resource Assessment Criteria		
Resource Category	2. Business Analyst (Level 2 or Level 3) (ERP)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p><u>Level 2:</u> The resource must have a minimum of two years of experience, within the five years preceding the issuance date of this TA, analyzing and documenting requirements for an organization-wide ERP application implementation or upgrade project.</p> <p><u>Level 3:</u> The resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this TA, analyzing and documenting requirements for an organization-wide ERP application implementation or upgrade project.</p>	
M-2.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must have experience performing the tasks identified in M-2.1 to support specific components or modules of the PeopleSoft HCM suite, including but not limited to the following:</p> <ul style="list-style-type: none"><li><input type="checkbox"/> Self Service</li><li><input type="checkbox"/> Manager Self Service</li><li><input type="checkbox"/> Administer Pay Interface</li><li><input type="checkbox"/> Manage Pay Interface</li><li><input type="checkbox"/> Manage Priorities</li><li><input type="checkbox"/> Recruiting Workforce Administration</li><li><input type="checkbox"/> Labour Administration</li><li><input type="checkbox"/> Workforce Development - Profile</li><li><input type="checkbox"/> Management, Performance Management</li><li><input type="checkbox"/> Organization Development - Position</li><li><input type="checkbox"/> Management, Enterprise Learning</li><li><input type="checkbox"/> Workforce Monitoring - Health &amp; Safety</li><li><input type="checkbox"/> Components or modules introduced in future versions of the PeopleSoft HCM suite up to version n-1 of the major version (to be specified herein).</li></ul> <p>b) The resource must have experience performing the tasks identified in M-2.1 to support the PeopleSoft NA Payroll Module.</p>	

Resource Assessment Criteria		
Resource Category	2. Business Analyst (Level 2 or Level 3) (ERP)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p>c) The resource must have experience integrating PeopleSoft HCM and PeopleSoft NA Payroll.</p> <p>d) The resource must have experience performing the tasks identified in M-2.1 to support the evolution of the legacy PeopleSoft environment to a future version up to n-1 of the major version.</p> <p><b>Note:</b> Future versions of PeopleSoft HCM or Payroll (as applicable) with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable:</p> <p><input type="checkbox"/> HCM</p> <p><input type="checkbox"/> Payroll</p>	

**3. Business Architect (Level 3) (ERP)**

Resource Assessment Criteria		
Resource Category	3. Business Architect (Level 3) (ERP)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-3.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Business Architect (as defined below in M-3.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the two tasks listed below for a minimum of six cumulative months of experience per task:</p> <p>1) Develop policies and rules that allow an organization to carry out its mandate and functional responsibilities, and that govern the organization's actual and planned capabilities in terms of computers, data, information, human resources, communication facilities, software and management responsibilities; and</p> <p>2) Develop the specifications for where, how and why the various organizational components fit together as they do, and how they support the organization's mandate.</p> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>
M-3.2	<p><b>Minimum experience with ERP Systems.</b></p> <p>The resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this TA, developing organizational strategies and plans related to an organization-wide ERP application implementation project.</p>	
M-3.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p>	

Resource Assessment Criteria		
<b>Resource Category</b>	3. Business Architect (Level 3) (ERP)	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p>a) The resource must have experience performing the tasks identified in 3.1 to support specific components or modules of the PeopleSoft HCM suite, including but not limited to the following:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Self Service</li> <li><input type="checkbox"/> Manager Self Service</li> <li><input type="checkbox"/> Administer Pay Interface</li> <li><input type="checkbox"/> Manage Pay Interface</li> <li><input type="checkbox"/> Manage Priorities</li> <li><input type="checkbox"/> Recruiting Workforce Administration</li> <li><input type="checkbox"/> Labour Administration</li> <li><input type="checkbox"/> Workforce Development - Profile</li> <li><input type="checkbox"/> Management, Performance Management</li> <li><input type="checkbox"/> Organization Development - Position</li> <li><input type="checkbox"/> Management, Enterprise Learning</li> <li><input type="checkbox"/> Workforce Monitoring - Health &amp; Safety</li> <li><input type="checkbox"/> Components or modules introduced in future versions of the PeopleSoft HCM suite up to version n-1 of the major version (to be specified herein).</li> </ul> <p>b) The resource must have experience performing the tasks identified in M-3.1 to support the PeopleSoft NA Payroll Module.</p> <p>c) The resource must have experience integrating PeopleSoft HCM and PeopleSoft NA Payroll.</p> <p>d) The resource must have experience performing the tasks identified in M-3.1 to support the evolution of the legacy PeopleSoft environment to a future version up to n-1 of the major version.</p> <p><b>Note:</b> Future versions of PeopleSoft HCM or Payroll (as applicable) with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> HCM</li> <li><input type="checkbox"/> Payroll</li> </ul>	

**4. Business Process Re-Engineering Consultant (Level 3) (ERP)**

Resource Assessment Criteria		
Resource Category	4. Business Process Re-Engineering Consultant (Level 3) (ERP)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-4.1	<b>Minimum experience in the resource category.</b>  The proposed resource must have experience in the proposed resource category including:  a) a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Business Process Re-Engineering Consultant (as defined below in M-4.1 b); and  b) that within that timeframe of experience, the resource has experience performing each of the nine tasks listed below for a minimum of six cumulative months of experience per task:  1) Review existing work processes and organizational structure; 2) Analyze business functional requirements to identify information, procedures and decision flows; 3) Identify candidate processes for re-design; prototype potential solutions, provide trade-off information and suggest a recommended course of action. Identify the modifications to the automated processes; 4) Provide recommendations in defining new requirements and opportunities for applying efficient and effective solutions; identify and provide preliminary costs of potential options; 5) Provide recommendations in developing and integrating process and information models between processes to eliminate information and process redundancies; 6) Identify and recommend new processes and organizational structures; 7) Provide recommendations on and/or assist in implementing new processes and organizational changes; 8) Document workflows; and 9) Use business, workflow and organizational modeling software tools.  The required experience can be demonstrated over one or more Customer Reference Projects.	Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.

Resource Assessment Criteria		
<b>Resource Category</b>	4. Business Process Re-Engineering Consultant (Level 3) (ERP)	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-4.2	<b>Minimum experience with ERP Systems.</b>  The resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this TA, conducting BPR activities in support of an organization-wide ERP application implementation project.	
M-4.3	<b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.  a) The resource must have experience performing the tasks identified in M-4.1 to support specific components or modules of the PeopleSoft HCM suite, including but not limited to the following: <input type="checkbox"/> Self Service <input type="checkbox"/> Manager Self Service <input type="checkbox"/> Administer Pay Interface <input type="checkbox"/> Manage Pay Interface <input type="checkbox"/> Manage Priorities <input type="checkbox"/> Recruiting Workforce Administration <input type="checkbox"/> Labour Administration <input type="checkbox"/> Workforce Development - Profile <input type="checkbox"/> Management, Performance Management <input type="checkbox"/> Organization Development - Position <input type="checkbox"/> Management, Enterprise Learning <input type="checkbox"/> Workforce Monitoring - Health & Safety <input type="checkbox"/> Components or modules introduced in future versions of the PeopleSoft HCM suite up to version n-1 of the major version (to be specified herein).  b) The resource must have experience performing the tasks identified in M-4.1 to support the PeopleSoft NA Payroll Module.  c) The resource must have experience integrating PeopleSoft HCM and PeopleSoft NA Payroll.	

Resource Assessment Criteria		
Resource Category	4. Business Process Re-Engineering Consultant (Level 3) (ERP)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p>d) The resource must have experience performing the tasks identified in M-4.1 to support the evolution of the legacy PeopleSoft environment to a future version up to n-1 of the major version.</p> <p><b>Note:</b> Future versions of PeopleSoft HCM or Payroll (as applicable) with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable:</p> <p><input type="checkbox"/> HCM</p> <p><input type="checkbox"/> Payroll</p>	

**5. Business System Analyst (Level 2 or Level 3) (ERP)**

Resource Assessment Criteria		
Resource Category	5. Business System Analyst (Level 2 or Level 3) (ERP)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-5.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this TA, working as a Business System Analyst (as defined below in M-5.1 b); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Business System Analyst (as defined below in M-5.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the four tasks listed below for a minimum of six cumulative months of experience per task:</p> <p>1) Perform functional facets of the software development life cycle (SDLC) including: process definition and reengineering, high and detailed-level requirements gathering, fit/gap analysis, functional design, testing, training, reporting, support, and continuous improvement of business applications;</p> <p>2) Determine operational objectives by studying business functions; gathering information; evaluating output requirements and formats;</p> <p>3) Identify candidate business processes for re-design, prototype potential solutions, provide trade-off information and suggest a recommended course of action. Identify the modifications to the automated processes; and</p> <p>4) Review Functional and Technical Design Documents to ensure that there is alignment across the application(s).</p> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>
M-5.2	<p><b>Minimum experience with ERP Systems.</b></p> <p><u>Level 2</u>: The resource must have a minimum of two years of experience, within the five years preceding the issuance</p>	



Resource Assessment Criteria		
<b>Resource Category</b>	5. Business System Analyst (Level 2 or Level 3) (ERP)	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p>date of this TA, prototyping potential solutions for an organization-wide ERP application implementation or upgrade project.</p> <p><u>Level 3:</u> The resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this TA, prototyping potential solutions for an organization-wide ERP application implementation or upgrade project.</p>	
M-5.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must have experience performing the tasks identified in M-5.1 to support specific a module(s) of the PeopleSoft HCM suite, including but not limited to the following:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Self Service</li> <li><input type="checkbox"/> Manager Self Service</li> <li><input type="checkbox"/> Administer Pay Interface</li> <li><input type="checkbox"/> Manage Pay Interface</li> <li><input type="checkbox"/> Manage Priorities</li> <li><input type="checkbox"/> Recruiting Workforce Administration</li> <li><input type="checkbox"/> Labour Administration</li> <li><input type="checkbox"/> Workforce Development - Profile</li> <li><input type="checkbox"/> Management, Performance Management</li> <li><input type="checkbox"/> Organization Development - Position</li> <li><input type="checkbox"/> Management, Enterprise Learning</li> <li><input type="checkbox"/> Workforce Monitoring - Health &amp; Safety</li> <li><input type="checkbox"/> Components or modules introduced in future versions of the PeopleSoft HCM suite up to version n-1 of the major version (to be specified herein).</li> </ul> <p>b) The resource must have experience performing the tasks identified in M-5.1 to support specific the PeopleSoft NA Payroll Module.</p> <p>c) The resource must have experience integrating PeopleSoft HCM and PeopleSoft NA Payroll.</p>	

Solicitation Number: EP597-180057

Amendment Number:

Buyer ID: 618EL

Resource Assessment Criteria		
<b>Resource Category</b>		5. Business System Analyst (Level 2 or Level 3) (ERP)
<b>Name of Proposed Resource:</b>		<insert name>
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p>d) The resource must have experience performing the tasks identified in M-5.1 to support the evolution of the legacy PeopleSoft environment to a future version up to n-1 of the major version.</p> <p><b>Note:</b> Future versions of PeopleSoft HCM or Payroll (as applicable) with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable:</p> <p><input type="checkbox"/> HCM</p> <p><input type="checkbox"/> Payroll</p>	

**6. Business Transformation Architect (Level 3) (PeopleSoft)**

Resource Assessment Criteria		
Resource Category	6. Business Transformation Architect (Level 3) (PeopleSoft)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-6.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Business Transformation Architect (as defined below in M-6.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the four tasks listed below for a minimum of six cumulative months of experience per task:</p> <p>1) Analyze and develop architecture requirements design, process development, process mapping and training;</p> <p>2) Responsible for leading other functional staff to define business strategy and processes in support of transformation and change management activities;</p> <p>3) Participate in change impact analysis and change management activities; and</p> <p>4) Participate in organizational realignment (job re-design organizational re-structuring).</p> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>
M-6.2	<p><b>Minimum experience with PeopleSoft</b> (as stipulated in the TA).</p> <p>The resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this TA, conducting BTA activities in support of an organization-wide PeopleSoft ERP system implementation project.</p> <p><b>Note:</b> Future versions of PeopleSoft HCM or Payroll (as applicable) with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	

Resource Assessment Criteria		
Resource Category	6. Business Transformation Architect (Level 3) (PeopleSoft)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-6.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must have experience performing the tasks identified in M-6.1 to support specific a module(s) of the PeopleSoft HCM suite, including but not limited to the following:</p> <ul style="list-style-type: none"><li><input type="checkbox"/> Self Service</li><li><input type="checkbox"/> Manager Self Service</li><li><input type="checkbox"/> Administer Pay Interface</li><li><input type="checkbox"/> Manage Pay Interface</li><li><input type="checkbox"/> Manage Priorities</li><li><input type="checkbox"/> Recruiting Workforce Administration</li><li><input type="checkbox"/> Labour Administration</li><li><input type="checkbox"/> Workforce Development - Profile</li><li><input type="checkbox"/> Management, Performance Management</li><li><input type="checkbox"/> Organization Development - Position</li><li><input type="checkbox"/> Management, Enterprise Learning</li><li><input type="checkbox"/> Workforce Monitoring - Health &amp; Safety</li><li><input type="checkbox"/> Components or modules introduced in future versions of the PeopleSoft HCM suite up to version n-1 of the major version (to be specified herein).</li></ul> <p>b) The resource must have experience performing the tasks identified in M-6.1 to support the PeopleSoft NA Payroll Module.</p> <p>c) The resource must have experience integrating PeopleSoft HCM and PeopleSoft NA Payroll.</p> <p>d) The resource must have experience performing the tasks identified in M-6.1 to support the evolution of the legacy PeopleSoft environment to a future version up to n-1 of the major version.</p> <p><b>Note:</b> Future versions of PeopleSoft HCM or Payroll (as applicable) with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable:</p>	

Resource Assessment Criteria		
Resource Category	6. Business Transformation Architect (Level 3) (PeopleSoft)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<input type="checkbox"/> HCM <input type="checkbox"/> Payroll	

**7. Courseware Developer (Level 2 or Level 3) (PeopleSoft)**

Resource Assessment Criteria		
<b>Resource Category</b>	7. Courseware Developer (Level 2 or Level 3) (PeopleSoft)	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-7.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this TA, working as a Courseware Developer (as defined below in M-7.1 b); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Courseware Developer (as defined below in M-7.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the eight tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"> <li>1) Perform needs assessment/analysis for training purposes;</li> <li>2) Plan and monitor training projects;</li> <li>3) Perform job, task, and/or content analysis;</li> <li>4) Recommend instructional media and strategies;</li> <li>5) Develop performance measurement standards;</li> <li>6) Develop training materials;</li> <li>7) Prepare end-users for implementation of courseware materials; and</li> <li>8) Deliver training to end users (individually and in groups).</li> </ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>
M-7.2	<p><b>Minimum experience with PeopleSoft.</b></p> <p><u>Level 2</u>: The resource must have a minimum of two years of experience, within the five years preceding the issuance date of this TA, developing training materials for a PeopleSoft ERP (HCM or Payroll as applicable) system implementation or upgrade project:</p> <p><input type="checkbox"/> HCM</p> <p><input type="checkbox"/> Payroll</p>	

Resource Assessment Criteria		
<b>Resource Category</b>	7. Courseware Developer (Level 2 or Level 3) (PeopleSoft)	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p><u>Level 3:</u> The resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this TA, developing training materials for a PeopleSoft ERP (HCM or Payroll as applicable) system implementation or upgrade project:</p> <p><input type="checkbox"/> HCM <input type="checkbox"/> Payroll</p> <p><b>Note:</b> Future versions of PeopleSoft HCM or Payroll (as applicable) with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	
M-7.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) Experience developing and coordinating training plans and logistics for training delivery.</p> <p>b) Experience in the delivery of training.</p> <p>c) The resource must have experience performing the tasks identified in M-7.1 to support specific a module(s) of the PeopleSoft HCM suite, including but not limited to the following:</p> <p><input type="checkbox"/> Self Service <input type="checkbox"/> Manager Self Service <input type="checkbox"/> Administer Pay Interface <input type="checkbox"/> Manage Pay Interface <input type="checkbox"/> Manage Priorities <input type="checkbox"/> Recruiting Workforce Administration <input type="checkbox"/> Labour Administration <input type="checkbox"/> Workforce Development - Profile <input type="checkbox"/> Management, Performance Management <input type="checkbox"/> Organization Development - Position <input type="checkbox"/> Management, Enterprise Learning <input type="checkbox"/> Workforce Monitoring - Health &amp; Safety</p>	

Resource Assessment Criteria		
Resource Category	7. Courseware Developer (Level 2 or Level 3) (PeopleSoft)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p><input type="checkbox"/> Components or modules introduced in future versions of the PeopleSoft HCM suite up to version n-1 of the major version (to be specified herein).</p> <p>d) The resource must have experience performing the tasks identified in M-7.1 to support specific the PeopleSoft NA Payroll Module.</p> <p>e) The resource must have experience performing the tasks identified in M-7.1 to support the evolution of the legacy PeopleSoft environment to a future version up to n-1 of the major version.</p> <p><b>Note:</b> Future versions of PeopleSoft HCM or Payroll (as applicable) with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable:</p> <p><input type="checkbox"/> HCM <input type="checkbox"/> Payroll</p>	



**8. Help Desk Specialist (Level 2 or Level 3) (PeopleSoft)**

Resource Assessment Criteria		
Resource Category	8. Help Desk Specialist (Level 2 or Level 3) (PeopleSoft)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-8.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this TA, working as a Help Desk Specialist (as defined below in M-8.1 b); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Help Desk Specialist (as defined below in M-8.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the five tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Perform a variety of applications problem analysis and monitoring tasks and respond appropriately to user requests and problems;</li><li>2) Perform initial problem analysis and triage problem to other appropriate staff when appropriate;</li><li>3) Maintain liaison with application users, functional and technical staff to communicate the status of problem resolution to users; log and track requests for assistance;</li><li>4) Develop, implement, and/or participate in the preparation of procedure manuals and documentation for help desk use; and</li><li>5) Develop, implement, and/or participate in the distribution of application related information to users to include information such as help desk procedures and handbooks.</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>
M-8.2	<p><b>Minimum experience with PeopleSoft.</b></p> <p><u>Level 2</u>: The resource must have a minimum of two years of experience, within the five years preceding the issuance</p>	

Resource Assessment Criteria		
<b>Resource Category</b>	8. Help Desk Specialist (Level 2 or Level 3) (PeopleSoft)	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p>date of this TA, providing first-level end user support for a PeopleSoft ERP system (HCM or Payroll as applicable): :</p> <p><input type="checkbox"/> HCM <input type="checkbox"/> Payroll</p> <p><u>Level 3:</u> The resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this TA, providing first-level end user support for a PeopleSoft ERP system HCM or Payroll as applicable); :</p> <p><input type="checkbox"/> HCM <input type="checkbox"/> Payroll</p> <p><b>Note:</b> Future versions of PeopleSoft HCM or Payroll (as applicable) with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	
M-8.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) Successful completion of formal training in specific components or modules of the PeopleSoft HCM suite, including but not limited to the following:</p> <p><input type="checkbox"/> Self Service  <input type="checkbox"/> Manager Self Service  <input type="checkbox"/> Administer Pay Interface  <input type="checkbox"/> Manage Pay Interface  <input type="checkbox"/> Manage Priorities  <input type="checkbox"/> Recruiting Workforce Administration  <input type="checkbox"/> Labour Administration  <input type="checkbox"/> Workforce Development - Profile  <input type="checkbox"/> Management, Performance Management  <input type="checkbox"/> Organization Development - Position  <input type="checkbox"/> Management, Enterprise Learning  <input type="checkbox"/> Workforce Monitoring - Health &amp; Safety</p>	

Resource Assessment Criteria		
Resource Category	8. Help Desk Specialist (Level 2 or Level 3) (PeopleSoft)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p><input type="checkbox"/> Components or modules introduced in future versions of the PeopleSoft HCM suite up to version n-1 of the major version (to be specified herein).</p> <p>b) Successful completion of formal training in specific modules(s) of the PeopleSoft Payroll suite, including but not limited to the following:</p> <p>c) The resource must have experience performing the tasks identified in M-8.1 to support the PeopleSoft NA Payroll Module.</p> <p>d) The resource must have experience performing the tasks identified in M-8.1 to support the evolution of the legacy PeopleSoft environment to a future version up to n-1 of the major version.</p> <p><b>Note:</b> Future versions of PeopleSoft HCM or Payroll (as applicable) with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable:</p> <p><input type="checkbox"/> HCM</p> <p><input type="checkbox"/> Payroll</p>	

**9. Technical Writer (Level 2 and Level 3) (Financial Systems)**

Resource Assessment Criteria		
Resource Category	9. Technical Writer (Level 2 and Level 3) (Financial Systems)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-9.1	<b>Minimum experience in the resource category.</b>  The proposed resource must have experience in the proposed resource category including:  a) <u>Level 2</u> : a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this TA, working as a Technical Writer (as defined below in M-9.1 b); and  <u>Level 3</u> : a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Technical Writer (as defined below in M-9.1 b); and  b) that within that timeframe of experience, the resource has experience performing each of the ten tasks listed below for a minimum of six cumulative months of experience per task:  1) Document help text, user manuals, technical documentation, web page content, etc.; 2) Review documentation standards and the existing project documentation; 3) Determine documentation requirements and makes plans for meeting them; 4) Gather information concerning the features and functions provided by the developers; 5) Assess the audience for the documents/manuals which are required and prepare a statement of purpose and scope for each; 6) Develop a table of content for each document/manual and write or edit the required content; 7) Investigate the accuracy of the information collected by making direct use of the material being documented; 8) Prepare or coordinate the preparation of any required illustrations and diagrams; 9) Design the layout of the documents/manuals; and 10) Use word-processing, desk-top publishing and graphics software packages to produce final camera-ready copy.	Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.

Resource Assessment Criteria		
Resource Category	9. Technical Writer (Level 2 and Level 3) (Financial Systems)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	The required experience can be demonstrated over one or more Customer Reference Projects.	
M-9.2	<b>Minimum experience with ERP Systems.</b>  The resource must have a minimum of two years of experience, within the last five years, writing technical user guides and communication materials related to the implementation and roll-out of corporate ERP applications.	
M-9.3	<b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.  a) The resource must have experience writing materials to support the implementation of PeopleSoft HCM.  b) The resource must have experience writing communication plans and strategies.  c) The resource must have experience writing release notes for various audiences.  d) The resource must have experience writing material for specific components or modules of the PeopleSoft HCM suite, including but not limited to the following: <input type="checkbox"/> Self Service <input type="checkbox"/> Manager Self Service <input type="checkbox"/> Administer Pay Interface <input type="checkbox"/> Manage Pay Interface <input type="checkbox"/> Manage Priorities <input type="checkbox"/> Recruiting Workforce Administration <input type="checkbox"/> Labour Administration <input type="checkbox"/> Workforce Development - Profile <input type="checkbox"/> Management, Performance Management <input type="checkbox"/> Organization Development - Position <input type="checkbox"/> Management, Enterprise Learning <input type="checkbox"/> Workforce Monitoring - Health & Safety	

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Resource Assessment Criteria		
Resource Category	9. Technical Writer (Level 2 and Level 3) (Financial Systems)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<div><input type="checkbox"/> Components or modules introduced in future versions of the PeopleSoft HCM suite up to version n-1 of the major version (to be specified herein).</div> <div><b>Note:</b> Future versions of PeopleSoft HCM or Payroll (as applicable) with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable: <input type="checkbox"/> HCM <input type="checkbox"/> Payroll</div>	

**10. Change Management Consultant (Level 3) (PeopleSoft)**

Resource Assessment Criteria		
Resource Category	10. Change Management Consultant (Level 3) (PeopleSoft)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-10.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Change Management Consultant (as defined below in M-10.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the five tasks listed below for a minimum of six cumulative months of experience per task:</p> <p>1) Responsible for leading other functional resources to define business strategy and processes in support of transformation and change management activities;</p> <p>2) Engage and enable the organization to implement solutions by providing practical and actionable tools and templates;</p> <p>3) Participate in change impact analysis and change management activities;</p> <p>4) Work with the target community to ensure alignment, correct skills and experience to enable the change; and</p> <p>5) Provide onsite as well as remote advisory services for the management of change and individuals as required.</p> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>
M-10.2	<p><b>Minimum experience with PeopleSoft.</b></p> <p>The resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this TA, conducting Change Management activities in support of an organization-wide PeopleSoft HCM application implementation project.</p> <p><b>Note:</b> Future versions of PeopleSoft HCM or Payroll (as applicable) with which the resource must have experience</p>	

Resource Assessment Criteria		
<b>Resource Category</b>	10. Change Management Consultant (Level 3) (PeopleSoft)	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.	
M-10.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must have experience performing the tasks identified in M-10.1 to support specific components or modules of the PeopleSoft HCM suite, including but not limited to the following:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Self Service</li> <li><input type="checkbox"/> Manager Self Service</li> <li><input type="checkbox"/> Administer Pay Interface</li> <li><input type="checkbox"/> Manage Pay Interface</li> <li><input type="checkbox"/> Manage Priorities</li> <li><input type="checkbox"/> Recruiting Workforce Administration</li> <li><input type="checkbox"/> Labour Administration</li> <li><input type="checkbox"/> Workforce Development - Profile</li> <li><input type="checkbox"/> Management, Performance Management</li> <li><input type="checkbox"/> Organization Development - Position</li> <li><input type="checkbox"/> Management, Enterprise Learning</li> <li><input type="checkbox"/> Workforce Monitoring - Health &amp; Safety</li> <li><input type="checkbox"/> Components or modules introduced in future versions of the PeopleSoft HCM suite up to version n-1 of the major version (to be specified herein).</li> </ul> <p>b) The resource must have experience performing the tasks identified in M-10.1 to support the PeopleSoft NA Payroll Module.</p> <p>c) The resource must have experience integrating PeopleSoft HCM and PeopleSoft NA Payroll.</p> <p>d) The resource must have experience performing the tasks identified in M-10.1 to support the evolution of the legacy PeopleSoft environment to a future version up to n-1 of the major version.</p>	



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Resource Assessment Criteria		
Resource Category		10. Change Management Consultant (Level 3) (PeopleSoft)
Name of Proposed Resource:		<insert name>
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<b>Note:</b> Future versions of PeopleSoft HCM or Payroll (as applicable) with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable: <input type="checkbox"/> HCM <input type="checkbox"/> Payroll	

**11. Project Coordinator (Level 2 or Level 3) (ERP)**

Resource Assessment Criteria		
Resource Category	11. Project Coordinator (Level 2 or Level 3) (ERP)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-11.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this TA, working as a Project Coordinator (as defined below in M-11.1 b); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Project Coordinator (as defined below in M-11.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing at least four out of the five tasks listed for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Assist project management, business, functional, technical users and end users in project coordination and synchronization tasks;</li><li>2) Provide administrative and technical support of a clerical nature as required to a project team;</li><li>3) Maintain project documentation and application/system libraries;</li><li>4) Track and manage issues, defects and change requests in the service desk database;</li><li>5) Maintain and update relevant project information in manual and/or electronic files; project information might include such things as project activity schedule, status reports, correspondence; etc.</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>
M-11.2	<p><b>Minimum experience with ERP Systems.</b></p> <p><u>Level 2</u>: N/A</p> <p><u>Level 3</u>: The resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this TA, providing Project Coordination support for an ERP Implementation project.</p>	

Resource Assessment Criteria		
<b>Resource Category</b>	11. Project Coordinator (Level 2 or Level 3) (ERP)	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-11.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must have experience providing Project Coordination support for a PeopleSoft ERP system project.</p> <p>b) The resource must have experience performing the tasks identified in M-11.1 to support the evolution of the legacy PeopleSoft environment to a future version up to n-1 of the major version.</p> <p><b>Note:</b> Future versions of PeopleSoft HCM or Payroll (as applicable) with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable:  <input type="checkbox"/> HCM  <input type="checkbox"/> Payroll</p>	

**12. Project Manager (Level 2 or Level 3) (ERP)**

Resource Assessment Criteria		
Resource Category	12. Project Manager (Level 2 or Level 3) (ERP)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-12.1	<b>Minimum experience in the resource category.</b>  The proposed resource must have experience in the proposed resource category including:  a) <u>Level 2</u> : a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this TA, working as a Project Manager (as defined below in M-12.1 b); and  <u>Level 3</u> : a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Project Manager (as defined below in M-12.1 b); and  b) that within that timeframe of experience, the resource has experience performing each of the seven tasks listed below for a minimum of six cumulative months of experience per task:  1) Manage other Project Management resources that are responsible for an element of the project and its associated project team; 2) Manage the project during the development, implementation and operations start up by ensuring that resources are made available and that the project is developed and is fully operational within previously agreed time, cost and performance parameters; 3) Formulate statements of problems; establishes procedures for the development and implementation of significant, new or modified project elements to solve these problems, and obtains approval thereof; 4) Define and document the objectives for the project; determine budgetary requirements, the composition, roles and responsibilities and terms of reference for the project team; 5) Report progress of the project on an ongoing basis and at scheduled points in the life cycle; 6) Prepare plans, charts, tables and diagrams to assist in analyzing or displaying problems; work with a variety of project management tools; and 7) Project sign-off.	Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.

Resource Assessment Criteria		
Resource Category	12. Project Manager (Level 2 or Level 3) (ERP)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	The required experience can be demonstrated over one or more Customer Reference Projects.	
M-12.2	<p><b>Minimum experience with ERP Systems.</b></p> <p><u>Level 2:</u> The resource must have a minimum of two years of experience, within the five years preceding the issuance date of this TA, as a Project Manager on an ERP implementation project.</p> <p><u>Level 3:</u> The resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this TA, as a Project Manager on an ERP implementation project.</p>	
M-12.3	<p><b>Minimum experience as a senior PM.</b></p> <p><u>Level 2:</u> N/A</p> <p><u>Level 3:</u> The resource must have experience as a Project Manager, on a minimum of one project, where the resource was responsible for a complex application development or application implementation project. A complex project is a project which includes multiple (i.e. three or more teams or sub-projects and includes multi-departmental stakeholders). For each project to be considered, the resource must have worked on the project for a minimum duration of twelve months within the five years preceding the issuance date of this TA.</p>	
M-12.5	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must have experience as a Project Manager responsible for a PeopleSoft ERP system implementation or upgrade project.</p> <p>b) The resource must have experience performing the tasks identified in M-12.1 to support the evolution of the legacy PeopleSoft environment to a future version up to n-1 of the major version.</p>	

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Resource Assessment Criteria		
<b>Resource Category</b>		12. Project Manager (Level 2 or Level 3) (ERP)
<b>Name of Proposed Resource:</b>		<insert name>
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<b>Note:</b> Future versions of PeopleSoft HCM or Payroll (as applicable) with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable: <input type="checkbox"/> HCM <input type="checkbox"/> Payroll	

**13. Quality Assurance Specialist (Level 3) (ERP)**

Resource Assessment Criteria		
Resource Category	13. Quality Assurance Specialist (Level 3) (ERP)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-13.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Quality Assurance Specialist (as defined below in M-13.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the five tasks listed below for a minimum of six cumulative months of experience per task:</p> <p>1) Lead development of test plans, test scripts and test data;</p> <p>2) Participate in functional and technical design reviews, perform integration/functional and system testing, and verify test results;</p> <p>3) Identify and document software defects;</p> <p>4) Collaborate with other project resources to resolve defects; and</p> <p>5) Perform regression testing of software applications.</p> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>
M-13.2	<p><b>Minimum experience with ERP Systems.</b></p> <p>The resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this TA, conducting quality assurance for implementation of an ERP application.</p>	
M-13.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must have experience performing the tasks identified in M-13.1 for a PeopleSoft ERP (HCM or</p>	

Resource Assessment Criteria		
<b>Resource Category</b>	13. Quality Assurance Specialist (Level 3) (ERP)	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p>Payroll as applicable) implementation or upgrade project:</p> <p><input type="checkbox"/> HCM</p> <p><input type="checkbox"/> Payroll</p> <p>b) The resource must have experience performing the tasks identified in M-13.1 to support specific components or modules of the PeopleSoft HCM suite, including but not limited to the following:</p> <p><input type="checkbox"/> Self Service</p> <p><input type="checkbox"/> Manager Self Service</p> <p><input type="checkbox"/> Administer Pay Interface</p> <p><input type="checkbox"/> Manage Pay Interface</p> <p><input type="checkbox"/> Manage Priorities</p> <p><input type="checkbox"/> Recruiting Workforce Administration</p> <p><input type="checkbox"/> Labour Administration</p> <p><input type="checkbox"/> Workforce Development - Profile</p> <p><input type="checkbox"/> Management, Performance Management</p> <p><input type="checkbox"/> Organization Development - Position</p> <p><input type="checkbox"/> Management, Enterprise Learning</p> <p><input type="checkbox"/> Workforce Monitoring - Health &amp; Safety</p> <p><input type="checkbox"/> Components or modules introduced in future versions of the PeopleSoft HCM suite up to version n-1 of the major version (to be specified herein).</p> <p>c) The resource must have experience performing the tasks identified in M-13.1 to support the PeopleSoft NA Payroll Module.</p> <p>d) The resource must have experience integrating PeopleSoft HCM and PeopleSoft NA Payroll.</p> <p>e) The resource must have experience performing the tasks identified in M-13.1 to support the evolution of the legacy PeopleSoft environment to a future version up to n-1 of the major version.</p> <p><b>Note:</b> Future versions of PeopleSoft HCM or Payroll (as applicable) with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable:</p> <p><input type="checkbox"/> HCM</p> <p><input type="checkbox"/> Payroll</p>	



**14. Risk Management Specialist (Level 3) (ERP)**

Resource Assessment Criteria		
Resource Category	14. Risk Management Specialist (Level 3) (ERP)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M14.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Risk Management Specialist (as defined below in M-14.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the eight tasks listed for a minimum of six cumulative months of experience per task:</p> <p>1) Conduct risk assessments;</p> <p>2) Identify project risks and overall project risks;</p> <p>3) Recommend alternative solutions, methodologies and strategies for risk mitigation and management;</p> <p>4) Produce risk management plans;</p> <p>5) Conduct risk assessments for troubled projects to quickly assess associated risks and recommend courses of action to minimize inherent risks;</p> <p>6) Assist in prioritization and assignment of risks;</p> <p>7) Assist in the development and/or implementation of Risk Management Plans;</p> <p>8) Manage the implementation of Risk Management Plans to identify, analyze, plan, track and control project risks on a continuous basis throughout the project life cycle; and</p> <p>9) Train project teams in risk mitigation techniques.</p> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>
M-14.2	<p><b>Minimum experience with ERP Systems.</b></p> <p>The resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this TA, conducting risk management activities for an ERP application implementation project.</p>	
M-14.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience</p>	

Resource Assessment Criteria		
<b>Resource Category</b>	14. Risk Management Specialist (Level 3) (ERP)	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p>requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must have experience performing the tasks identified in M-14.1 for a PeopleSoft HCM implementation project.</p> <p>b) The resource must have experience performing the tasks identified in M-14.1 to support specific components or modules of the PeopleSoft HCM suite, including but not limited to the following:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Self Service</li> <li><input type="checkbox"/> Manager Self Service</li> <li><input type="checkbox"/> Administer Pay Interface</li> <li><input type="checkbox"/> Manage Pay Interface</li> <li><input type="checkbox"/> Manage Priorities</li> <li><input type="checkbox"/> Recruiting Workforce Administration</li> <li><input type="checkbox"/> Labour Administration</li> <li><input type="checkbox"/> Workforce Development - Profile</li> <li><input type="checkbox"/> Management, Performance Management</li> <li><input type="checkbox"/> Organization Development - Position</li> <li><input type="checkbox"/> Management, Enterprise Learning</li> <li><input type="checkbox"/> Workforce Monitoring - Health &amp; Safety</li> <li><input type="checkbox"/> Components or modules introduced in future versions of the PeopleSoft HCM suite up to version n-1 of the major version (to be specified herein).</li> </ul> <p>c) The resource must have experience performing the tasks identified in M-14.1 to support specific the PeopleSoft NA Payroll Module.</p> <p>d) The resource must have experience integrating PeopleSoft HCM and PeopleSoft NA Payroll.</p> <p>e) The resource must have experience performing the tasks identified in M-14.1 to support the evolution of the legacy PeopleSoft environment to a future version up to n-1 of the major version.</p> <p><b>Note:</b> Future versions of PeopleSoft HCM or Payroll (as applicable) with which the resource must have experience</p>	

Resource Assessment Criteria		
Resource Category		14. Risk Management Specialist (Level 3) (ERP)
Name of Proposed Resource:		<insert name>
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable: <input type="checkbox"/> HCM <input type="checkbox"/> Payroll	

### Resource Assessment Criteria and Response Table (WS3)

#### Definitions

The following definitions apply to the assessment criteria that follows.

Term	Definition
Building	The process of executing the design to deliver the required functionality or solution.
Business Process Management Solution	Refers to commercial-off the shelf (COTS) software application that are implemented to manage Public and Private sector business processes in areas such as but not limited to: <ul style="list-style-type: none"> <li>• Contracts and Grants Management (outreach, application, eligibility, administration, management, audit and evaluation, monitoring and reporting);</li> <li>• Courts/Judicial Management (registration, intake/identification, knowledge base, scheduling, appeals management, issues management, monitoring, and case tracking);</li> <li>• Compliance Management (registration, intake/identification, monitoring, occurrence management, inspections, licensing, certification and reporting);</li> <li>• Entitlement Case Management (intake, eligibility, case workflow, entitlement calculation, contract management, monitoring and payment);</li> <li>• Client Service (communication, service initiation, contact centre, knowledge base, sales, channel management, inquiries, case tracking);</li> <li>• Investigations and Enforcement (communications, correspondence, scheduling, monitoring and reporting).</li> </ul>
Customer Relationship Management (CRM) Solutions	A CRM Solution is defined as a widely implemented model for managing an organizations' interaction with customers, clients, and sales prospects. It involves using technology to organize, automate, and synchronize business processes - principally sales activities, but also those for marketing, customer service, and technical support.
Delivering	Carrying out something that was expected.
Designing	The process of defining software methods, functions, objects, and the overall structure and interaction of software code so that the resulting functionality will satisfy the requirements.
Dynamics	Refers to the Microsoft Dynamics software suite of products (version 10.5 or more recent including ) and including but not limited to the following software modules: <ol style="list-style-type: none"> <li>1) Social listening</li> <li>2) Social media analytics</li> <li>3) Workflows and approvals</li> <li>4) Sales automation</li> <li>5) Customer service automation</li> <li>6) Unified Service Desk</li> <li>7) Sales campaigns</li> <li>8) Reports and personal dashboards</li> <li>9) Integration via web services</li> <li>10) Mobile access</li> <li>11) Access to customizations and extensions</li> <li>12) Full mobile offline access</li> </ol>
EDRMS	Electronic Document and Records Management System

Term	Definition
ERP	An Enterprise Resource Planning (ERP) solution is business process management commercial-off the shelf (COTS) software that allows an organization to use a system of integrated applications to manage the business and automate many back office functions related to technology, services and human resources. Examples of ERP software implemented with the GC includes Oracle's PeopleSoft HCM, SAP Financials, Microsoft Dynamics, Oracle's Siebel CRM.
FreeBalance	Refers to the FreeBalance Accountability Suite of products (version 6.5E or more recent), including but not limited to the following software modules licensed by the Government of Canada: <ol style="list-style-type: none"> <li>1) Financial Accountability,</li> <li>2) Purchasing Accountability,</li> <li>3) Revenue Accountability,</li> <li>4) Asset Accountability,</li> <li>5) FreeBalance Forms Designer, and</li> <li>6) Performance Budgeting.</li> </ol>
Functional role	A functional role is one where an individual performs functional activities related to the management of an application. This could include: <ul style="list-style-type: none"> <li>• troubleshooting,</li> <li>• eliciting, elaborating, analyzing and documenting business requirements,</li> <li>• identifying test scenarios/scripts,</li> <li>• creating testing scripts,</li> <li>• performing functional testing,</li> <li>• documenting communication material (for e.g. release notes),</li> <li>• Business process analysis, mapping,</li> <li>• User interface design</li> <li>• Impact assessments (WBS elaboration of functional tasks)</li> </ul> WBS=Work Breakdown Structure
GC HR environment	Government of Canada Human Resource environment (GC HR environment), is an instance of the Government of Canada (GC) version of the PeopleSoft Human Resource (HR) application that is in operation at a GC department or agency.
Implementation / Implementing	Completed and put into operation as part of the final solution.
integrated end-to-end business process	Integrated end-to-end business process is the human resource (HR) lifecycle management process which commences with recruitment, concludes upon retirement, and includes all steps in between.
OpenText Content Server	Refers to OpenText's Content Server content management software product, version 10.5 or more recent.
PeopleSoft HCM	Refers to Oracle's PeopleSoft Human Capital Management (PeopleSoft HCM) software suite of products (version 9.1 or more recent) including but not limited to the following software modules / sub-modules licensed by the Government of Canada: <ol style="list-style-type: none"> <li>1) Core HR <ol style="list-style-type: none"> <li>a. Workforce Administration</li> <li>b. Workforce Development</li> <li>c. Organizational Development</li> <li>d. Training Development</li> <li>e. Workforce Monitoring</li> </ol> </li> <li>2) Recruiting Solution</li> <li>3) Profile Management</li> </ol>

Term	Definition
	<ul style="list-style-type: none"> <li>4) eProfile <ul style="list-style-type: none"> <li>a. Employee Self Service</li> <li>b. Manager Self Service</li> </ul> </li> <li>5) eProfile Management</li> <li>6) Absence Management</li> <li>7) Payroll for North America</li> <li>8) Payroll Interface</li> <li>9) eDevelopment</li> <li>10) Time and Labour</li> <li>11) ePerformance</li> <li>12) Career Planning</li> <li>13) eCompensation</li> <li>14) Succession Planning</li> </ul>
PeopleSoft Pay	Refers to Oracle's PeopleSoft North America (NA) Payroll Module
SAP	<p>Refers to software products from SAP SE including:</p> <ul style="list-style-type: none"> <li>1) <b>SAP® ERP Central Component (ECC)</b> software module (version 6.0 or more recent), including but not limited to the following software components licensed by the Government of Canada: <ul style="list-style-type: none"> <li>a. Material Management (MM),</li> <li>b. Accounts Payable (AP),</li> <li>c. Accounts Receivable (AR),</li> <li>d. Asset Accounting (AA),</li> <li>e. Funds Management (FM),</li> <li>f. Controlling (CO),</li> <li>g. Sales and Distribution (SD),</li> <li>h. Real Estate (RE), Project Systems (PS),</li> <li>i. Plant Maintenance (PM),</li> <li>j. General Ledger and Special Purpose Ledgers (GL/SPL) (classic and new GL),</li> <li>k. Business Warehousing (BW), and</li> <li>l. Functionality developed by the Government of Canada such as the Salary Forecasting Tool, Travel Management Solution and the Receiver General Interfaces.</li> </ul> </li> </ul>
Performing	To carry out, accomplish, or fulfill an action, task, or function.
Providing	To supply or make available.
SharePoint	Refers to the Microsoft SharePoint software suite of products (version 2013 or more recent)
Software Integration (integrating)	Software integration means that the products work as one solution. Instead of passing information between the two systems over a bridge, the systems share the same code and database
Software Interface	A software interface is a bridge that allows two programs to share information with each other, even though they may have been developed by different sources or use different programming languages. An interface will often use a standard file format such as XML to move information from one system to another.
Support / Supporting	Maintaining the hardware or software environment by troubleshooting and fixing a wide variety of issues.
Technical role	A technical role is one where an individual performs technical activities related to the development and the implementation of an application. This could include:

Term	Definition
	<ul style="list-style-type: none"><li>• troubleshooting,</li><li>• developing and communicating application architectures,</li><li>• developing and maintaining codes(including application code changes, fixes and configuration) based on the specification that was given by the Functional team,</li><li>• packaging and implementing the codes to different application environments,</li><li>• providing application administration services,</li><li>• administrating the application databases and the Data Base Management System,</li><li>• providing application security services, and</li><li>• unit testing and solution design.</li></ul>
Upgrade / Upgrading	A replacement of <i>software</i> with a newer version, in order to bring the system up to date or to improve its characteristics.
Using	The act of employing something for a specific purpose.

### Mandatory Assessment Criteria (As and when requested Resources)

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

#### Workstream 3 Case Management System Professional Services

##### 1. Application / Software Architect (Level 3) (Dynamics Specialist)

Resource Assessment Criteria		
Resource Category	1. Application / Software Architect (Level 3) (Dynamics Specialist)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-1.1	<p><b>Minimum experience in the resource category.</b> The proposed resource must have experience in the proposed resource category including:</p> <p>a) a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as an Application / Software Architect (as defined below in M-1.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the five tasks listed below for a minimum of six cumulative months of experience per task:</p> <p>1) Develop technical architectures, frameworks and strategies, for an application area, to meet the business and application requirements;</p> <p>2) Analyze functional requirements to identify information, procedures and decision flows. Analyze and evaluate alternative software solutions to meet business problems;</p> <p>3) Ensure the integration of all aspects of software solutions;</p> <p>4) Create an application component roadmap - roadmap to align business vision and functional coverage to IT vision; and</p> <p>5) Create an application architecture framework.</p> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>



Resource Assessment Criteria		
<b>Resource Category</b>	1. Application / Software Architect (Level 3) (Dynamics Specialist)	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-1.2	<b>Minimum experience with Business Process Management Solutions.</b> The resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this TA, developing technical architectures, frameworks or strategies for Business Process Management Solutions.	
M-1.3	<p><b>Minimum experience with Dynamics.</b> The resource must have experience on a minimum of three projects developing technical architectures, frameworks or strategies, to meet the business and application requirements for a Dynamics project version 2011 (and above), with at least one project at version 2013 (and above).</p> <p>For each project to be considered, the resource must have worked on the project for a minimum duration of six months within the five years preceding the issuance date of this TA.</p> <p><b>Note:</b> Future versions of Dynamics with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	
M-1.4	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must be Microsoft Certified for Dynamics.</p> <p>b) The resource must have a valid Microsoft Developer Network (MSDN) subscription.</p> <p>c) The resource must have experience integrating Dynamics with other applications and databases, such as:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> SharePoint</li> <li><input type="checkbox"/> SAP</li> <li><input type="checkbox"/> Database systems</li> <li><input type="checkbox"/> Portal systems</li> <li><input type="checkbox"/> OpenText Content Server (e.g. GCDocs)</li> </ul>	

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Amendment Number:

Buyer ID: 618EL

Resource Assessment Criteria		
Resource Category	1. Application / Software Architect (Level 3) (Dynamics Specialist)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p>d) The resource must have experience performing the tasks identified in M-1.1 to support the evolution of the legacy environment to a future version of Dynamics up to n-1 of the major version.</p> <p><b>Notes:</b> Future versions of Dynamics with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	

**2. Programmer / Analyst (Level 2 or Level 3) (Dynamics Specialist)**

Resource Assessment Criteria		
Resource Category	2. Programmer / Analyst (Level 2 or Level 3) (Dynamics Specialist)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-2.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this TA, working as a Programmer / Analyst (as defined below in M-2.1 b); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Programmer / Analyst (as defined below in M-2.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the seven tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Analyze functional requirements leading to the execution of the design, development and implementation of changes to the application;</li><li>2) Develop and maintain configuration and programs based on approved requirements working both independently and within a team;</li><li>3) Deliver technical specifications documents using the functional specifications provided by the functional and integration teams;</li><li>4) Create and modify configuration and code for software as per technical specifications;</li><li>5) Produce reports, manuals, programs, data files, and procedures for applications;</li><li>6) Analyze code and objects to determine functional fit; and</li><li>7) Execute tasks related to the implementation of application and database design and fixes, coding and technical documentation.</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>
M-2.2	<p><b>Minimum experience with Business Process Management Solutions.</b></p>	

Resource Assessment Criteria		
Resource Category	2. Programmer / Analyst (Level 2 or Level 3) (Dynamics Specialist)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p><u>Level 2:</u> The resource must have a minimum of two years of experience, within the five years preceding the issuance date of this TA, developing applications for Business Process Management Solutions.</p> <p><u>Level 3:</u> The resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this TA, developing applications for Business Process Management Solutions.</p>	
M-2.3	<p><b>Minimum experience with Dynamics.</b></p> <p><u>Level 2:</u> The resource must have experience on a minimum of two projects performing the implementation or upgrade of a Dynamics project version 2011 (and above), with at least one project at version 2013 (and above). For each project to be considered, the resource must have worked on the project for a minimum duration of four months within the three years preceding the issuance date of this TA.</p> <p><u>Level 3:</u> The resource must have experience on a minimum of three projects performing the implementation or upgrade of a Dynamics project version 2011 (and above), with at least one project at version 2013 (and above). For each project to be considered, the resource must have worked on the project for a minimum duration of six months within the five years preceding the issuance date of this TA.</p> <p><b>Note:</b> Future versions of Dynamics with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	
M-2.4	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must be Microsoft Certified for Dynamics.</p> <p>b) The resource must have a valid Microsoft Developer Network (MSDN) subscription.</p>	

Resource Assessment Criteria		
Resource Category	2. Programmer / Analyst (Level 2 or Level 3) (Dynamics Specialist)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p>c) The resource must have experience integrating Dynamics with other applications and databases, such as:</p> <ul style="list-style-type: none"><li><input type="checkbox"/> SharePoint</li><li><input type="checkbox"/> SAP</li><li><input type="checkbox"/> Database systems</li><li><input type="checkbox"/> Portal systems</li><li><input type="checkbox"/> OpenText Content Server (e.g. GCDOCS)</li></ul> <p>d) The resource must have experience performing the upgrade of a Dynamics solution from an earlier version to a more recent version.</p> <p>e) The resource must have experience performing the tasks identified in M-2.1 to support the evolution of the legacy environment to a future version of Dynamics up to n-1 of the major version.</p> <p><b>Notes:</b> Future versions of Dynamics with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	

**3. System Analyst (Level 2 or Level 3) (Dynamics Specialist)**

Resource Assessment Criteria		
Resource Category	3. System Analyst (Level 2 or Level 3) (Dynamics Specialist)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-3.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this TA, working as a System Analyst (as defined below in M-3.1 b); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a System Analyst (as defined below in M-3.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the five tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Develop requirements, feasibility, cost, design, and specification documents for systems;</li><li>2) Implement systems to support projects, departments, organizations or businesses;</li><li>3) Translate business requirements into systems design and specifications;</li><li>4) Analyze and recommend alternatives and options for solutions; and</li><li>5) Develop technical specifications for systems development, design and implementation.</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>
M-3.2	<p><b>Minimum experience with Business Process Management Solutions.</b></p> <p><u>Level 2</u>: The resource must have a minimum of two years of experience, within the five years preceding the issuance date of this TA, developing applications for Business Process Management Solutions.</p> <p><u>Level 3</u>: The resource must have a minimum of five years of experience, within the seven years preceding the issuance</p>	

Resource Assessment Criteria		
Resource Category	3. System Analyst (Level 2 or Level 3) (Dynamics Specialist)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	date of this TA, developing applications for Business Process Management Solutions.	
M-3.3	<p><b>Minimum experience with Dynamics.</b></p> <p><u>Level 2:</u> The resource must have experience on a minimum of two projects performing the implementation or upgrade of a Dynamics solution version 2011 (and above), with at least one project at version 2013 (and above). For each project to be considered, the resource must have worked on the project for a minimum duration of four months within the three years preceding the issuance date of this TA.</p> <p><u>Level 3:</u> The resource must have experience on a minimum of three projects performing the implementation or upgrade of a Dynamics solution version 2011 (and above), with at least one project at version 2013 (and above). For each project to be considered, the resource must have worked on the project for a minimum duration of six months within the five years preceding the issuance date of this TA.</p> <p><b>Note:</b> Future versions of Dynamics with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	
M-3.4	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must be Microsoft Certified for Dynamics.</p> <p>b) The resource must have a valid Microsoft Developer Network (MSDN) subscription.</p> <p>c) The resource must have experience integrating Dynamics with other applications and databases, such as:</p> <ul style="list-style-type: none"><li><input type="checkbox"/> SharePoint</li><li><input type="checkbox"/> SAP</li><li><input type="checkbox"/> Database systems</li><li><input type="checkbox"/> Portal systems</li></ul>	

Resource Assessment Criteria		
Resource Category	3. System Analyst (Level 2 or Level 3) (Dynamics Specialist)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p><input type="checkbox"/> OpenText Content Server (e.g. GCDPCS)</p> <p>d) The resource must have experience performing the upgrade of a Dynamics solution from an earlier version to a more recent version.</p> <p>e) The resource must have experience performing the tasks identified in M-3.1 to support the evolution of the legacy environment to a future version of Dynamics up to n-1 of the major version.</p> <p><b>Note:</b> Future versions of Dynamics with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	



**4. Tester (Level 2 or Level 3) (Dynamics Specialist)**

Resource Assessment Criteria		
Resource Category	4. Tester (Level 2 or Level 3) (Dynamics Specialist)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-4.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this TA, working as a Tester (as defined below in M-4.1 b); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Tester (as defined below in M-4.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the five tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Develop the Test strategy; test planning and coordination;</li><li>2) Manage and monitor test plans for all levels of testing;</li><li>3) Develop test scenarios and test scripts;</li><li>4) Establish and maintain test procedures and script libraries; and</li><li>5) Establish a validation and verification capability which assumes functional and performance compliance.</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>
M-4.2	<p><b>Minimum experience with Dynamics.</b></p> <p><u>Level 2</u>: The resource must have experience on a minimum of two projects executing testing activities for a Dynamics application implementation or upgrade project version 2011 (and above), with at least one project at version 2013 (and above). For each project to be considered, the resource must have worked on the project for a minimum duration of four months within the three years preceding the issuance date of this TA.</p>	

Resource Assessment Criteria		
Resource Category	4. Tester (Level 2 or Level 3) (Dynamics Specialist)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p><u>Level 3:</u> The resource must have experience on a minimum of three projects executing testing activities for a Dynamics application implementation or upgrade project version 2011 (and above), with at least one project at version 2013 (and above). For each project to be considered, the resource must have worked on the project for a minimum duration of six months within the five years preceding the issuance date of this TA.</p> <p><b>Note:</b> Future versions of Dynamics with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	
M-4.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must be Microsoft Certified for Dynamics.</p> <p>b) The resource must have a valid Microsoft Developer Network (MSDN) subscription.</p> <p>c) The resource must have experience testing the integration of Dynamics with other applications and databases, such as:</p> <ul style="list-style-type: none"><li><input type="checkbox"/> SharePoint</li><li><input type="checkbox"/> SAP</li><li><input type="checkbox"/> Database systems</li><li><input type="checkbox"/> Portal systems</li><li><input type="checkbox"/> OpenText Content Server (e.g. GCDOCS)</li></ul> <p>d) The resource must have experience developing tests scripts for a Dynamics solution.</p> <p>e) The resource must have experience performing the tasks identified in M-4.1 to support the evolution of the legacy environment to a future version of Dynamics up to n-1 of the major version.</p> <p><b>Note:</b> Future versions of Dynamics with which the resource must have experience might include Software Publisher new</p>	

Resource Assessment Criteria		
Resource Category		4. Tester (Level 2 or Level 3) (Dynamics Specialist)
Name of Proposed Resource:		<insert name>
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	versions up to n-1 of the major version and will be specified herein as applicable.	

**5. Web Graphics Designer (Level 2 or Level 3)**

Resource Assessment Criteria		
Resource Category	5. Web Graphics Designer (Level 2 or Level 3)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-5.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this TA, working as a Web Graphics Designer (as defined below in M-5.1 b); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Web Graphics Designer (as defined below in M-5.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the four tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Create web pages including graphics and general web site design;</li><li>2) Develop flowcharts (web site flow maps) depicting navigation and basic content;</li><li>3) Develop content diagrams showing the interactive connection between web pages; and</li><li>4) Develop interactive prototypes showing basic form and functionality for both usability testing and presentations.</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>
M-5.2	<p><b>Minimum experience creating Web Pages.</b></p> <p><u>Level 2</u>: The resource must have experience on a minimum of two projects creating a web page that was put into production. For each project to be considered, the resource must have worked on the project for a minimum duration of four months within the three years preceding the issuance date of this TA.</p> <p><u>Level 3</u>: The resource must have experience on a minimum of three projects creating a web page that was put into production. For each project to be considered, the resource</p>	

Resource Assessment Criteria		
Resource Category	5. Web Graphics Designer (Level 2 or Level 3)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	must have worked on the project for a minimum duration of six months within the five years preceding the issuance date of this TA.	
M-5.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must have a valid Microsoft Developer Network (MSDN) subscription.</p> <p>b) The resource must be Microsoft Certified for Dynamics.</p> <p>c) The resource must have experience designing screen formats and creating screen mockups for a Dynamics solution.</p> <p>d) The resource must have experience performing the following tasks for a Dynamics solution:</p> <ul style="list-style-type: none"><li>a. Uploading completed designs, for example WET 3.0;</li><li>b. Adminstrating previously developed sites until sites with new template with working login, database and can be published;</li><li>c. Working with Web hosting provider from a technical perspective; and</li><li>d. Establishing login features for secure areas of Websites.</li></ul> <p>e) The resource must have experience utilizing specific technologies and/or languages to support the implementation of a Dynamics solution, such as:</p> <ul style="list-style-type: none"><li><input type="checkbox"/> Implementing solutions which comply with GC policies and standards (e.g. accessibility standards, security standard).</li><li><input type="checkbox"/> Applying Google Analytics to sites.</li><li><input type="checkbox"/> HTML5, JavaScript, jQuery, ASP, PHP, .NET, and Web publishing processes.</li><li><input type="checkbox"/> Languages and technologies to build and support the Websites, for example; JQuery, JavaScript, HTML, Adobe Dreamweaver, Adobe Contribute, SQL Server, IIS, HTDig (Search feature).</li><li><input type="checkbox"/> Using Adobe Dreamweaver and Content Management Systems (e.g. Adobe Contribute,</li></ul>	

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Resource Assessment Criteria		
<b>Resource Category</b>		5. Web Graphics Designer (Level 2 or Level 3)
<b>Name of Proposed Resource:</b>		<insert name>
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p>Drupal, Wordpress, etc.) to develop, test and manage Web sites and Web related products. <input type="checkbox"/> Using Web quality assurance and code validation tools.</p> <p>f) The resource must have experience performing the tasks identified in M-5.1 to support the evolution of the legacy environment to a future version of Dynamics up to n-1 of the major version.</p> <p><b>Note:</b> Future versions of Dynamics with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	

**6. Data Conversion Specialist (Level 2 or Level 3) (Dynamics Specialist)**

Resource Assessment Criteria		
Resource Category	6. Data Conversion Specialist (Level 2 or Level 3) (Dynamics Specialist)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-6.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this TA, working as a Data Conversion Specialist (as defined below in M-6.1 b); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Data Conversion Specialist (as defined below in M-6.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the four tasks listed below for a minimum of six cumulative months of experience per task:</p> <p>1) Oversee all facets of the conversion process;</p> <p>2) Complete mapping, interfaces, mock conversion work, enhancements, actual conversion, and verify completeness and accuracy of converted data;</p> <p>3) Analyze and coordinate data file conversions; and</p> <p>4) Import files from heterogeneous platforms.</p> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>
M-6.2	<p><b>Minimum experience with Dynamics.</b></p> <p><u>Level 2</u>: The resource must have experience on a minimum of two projects performing data conversions for a Dynamics project, version 2011 (and above), with at least one project at version 2013 (and above). For each project to be considered, the resource must have worked on the project for a minimum duration of four months within the three years preceding the issuance date of this TA.</p> <p><u>Level 3</u>: The resource must have experience on a minimum of three projects performing data conversions for a MS Dynamics project version 2011 (and above), with at least one project at version 2013 (and above). For each project to</p>	

Resource Assessment Criteria		
Resource Category	6. Data Conversion Specialist (Level 2 or Level 3) (Dynamics Specialist)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p>be considered, the resource must have worked on the project for a minimum duration of six months within the five years preceding the issuance date of this TA. For each project to be considered, the resource must have worked on the project for a minimum duration of six months within the five years preceding the issuance date of this TA.</p> <p><b>Note:</b> Future versions of Dynamics with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	
M-6.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must have experience performing the tasks identified in M-6.1 to support the evolution of the legacy environment to a future version of Dynamics up to n-1 of the major version.</p> <p><b>Note:</b> Future versions of Dynamics with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	



**7. Business Analyst (Level 2 or Level 3)**

Resource Assessment Criteria		
Resource Category	7. Business Analyst (Level 2 or Level 3)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-7.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this TA, working as a Business Analyst (as defined below in M-7.1 b); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Business Analyst (as defined below in M-7.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the seven tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Determine operational objectives by studying business functions; gathering information; evaluating output requirements and formats;</li><li>2) Perform business analyses of requirements to identify information, procedures, and decision flows;</li><li>3) Evaluate existing procedures and methods, identify and document items such as database content, structure, application subsystems;</li><li>4) Develop data dictionary;</li><li>5) Define and document interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems;</li><li>6) Identify candidate business processes for re-design, prototype potential solutions, provide trade-off information and suggest a recommended course of action. Identify the modifications to the automated processes; and</li><li>7) Establish acceptance test criteria with client.</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>

Resource Assessment Criteria		
Resource Category	7. Business Analyst (Level 2 or Level 3)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-7.2	<p><b>Minimum experience with Dynamics.</b></p> <p><u>Level 2:</u> Not applicable</p> <p><u>Level 3:</u> The resource must have experience on a minimum of three projects analyzing and documenting requirements for a Dynamics application implementation or upgrade project version 2011 (and above), with at least one project at version 2013 (and above). For each project to be considered, the resource must have worked on the project for a minimum duration of six months within the five years preceding the issuance date of this TA.</p>	
M-7.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must hold a professional accreditation in Business Analysis (e.g. IIBA Certified Business Analyst Professional (CBAP) or PMI Professional in Business Analysis (PMI-PBA)) or have completed a post-secondary program and obtained a Certificate in Business Analysis.</p> <p>b) The resource must have a valid Microsoft Developer Network (MSDN) subscription.</p> <p>c) The resource must have experience performing the tasks identified in M-7.1 to support the evolution of the legacy environment to a future version of Dynamics up to n-1 of the major version.</p> <p><b>Note:</b> Future versions of Dynamics with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	

**8. Business Architect (Level 3)**

Resource Assessment Criteria		
Resource Category	8. Business Architect (Level 3)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-8.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Business Architect (as defined below in M-8.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the two tasks listed below for a minimum of six cumulative months of experience per task:</p> <p>1) Develop policies and rules that allow an organization to carry out its mandate and functional responsibilities, and that govern the organization's actual and planned capabilities in terms of computers, data, information, human resources, communication facilities, software and management responsibilities; and</p> <p>2) Develop the specifications for where, how and why the various organizational components fit together as they do, and how they support the organization's mandate.</p> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>
M-8.2	<p><b>Minimum experience with Business Process Management Solutions.</b> The resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this TA, developing organizational strategies and plans in support of Business Process Management Solution implementation projects.</p>	
M-8.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p>	

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Resource Assessment Criteria		
Resource Category		8. Business Architect (Level 3)
Name of Proposed Resource:		<insert name>
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p>a) The resource must have a valid Microsoft Developer Network (MSDN) subscription.</p> <p>b) The resource must have experience developing organizational strategies and plans in support of a Dynamics solution implementation initiative.</p> <p>c) The resource must have experience performing the tasks identified in M-8.1 to support the evolution of the legacy environment to a future version of Dynamics up to n-1 of the major version.</p> <p><b>Note:</b> Future versions of Dynamics with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	

**9. Business Transformation Architect (Level 3)**

Resource Assessment Criteria		
Resource Category	9. Business Transformation Architect (Level 3)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-9.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Business Transformation Architect (as defined below in M-9.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the four tasks listed below for a minimum of six cumulative months of experience per task:</p> <p>1) Analysis and development of architecture requirements design, process development, process mapping and training;</p> <p>2) Lead other functional staff to define business strategy and processes in support of transformation and change management activities;</p> <p>3) Lead change impact analysis and change management activities; and</p> <p>4) Provide recommendations and support the client in organizational realignment (job re-design organizational re-structuring).</p> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>
M-9.2	<p><b>Minimum experience with Business Process Management Solutions.</b> The resource must have a minimum of two years of experience, within the seven years preceding the issuance date of this TA, conducting BTA activities in support of a Business Process Management Solution implementation projects.</p>	
M-9.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p>	

Resource Assessment Criteria		
Resource Category		9. Business Transformation Architect (Level 3)
Name of Proposed Resource:		<insert name>
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p>a) The resource must have a valid Microsoft Developer Network (MSDN) subscription.</p> <p>b) The resource must have experience conducting BTA activities in support of a Dynamics solution implementation initiative.</p> <p>c) The resource must have experience performing the tasks identified in M-9.1 to support the evolution of the legacy environment to a future version of Dynamics up to n-1 of the major version.</p> <p><b>Note:</b> Future versions of Dynamics with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	

**10. Courseware Developer (Level 2 or Level 3) (Dynamics Specialist)**

Resource Assessment Criteria		
Resource Category	10. Courseware Developer (Level 2 or Level 3) (Dynamics Specialist)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-10.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this TA, working as a Courseware Developer (as defined below in M-10.1 b); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Courseware Developer (as defined below in M-10.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the eight tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Perform needs assessment/analysis for training purposes;</li><li>2) Plan and monitor training projects;</li><li>3) Perform job, task, and/or content analysis;</li><li>4) Recommend instructional media and strategies;</li><li>5) Develop performance measurement standards;</li><li>6) Develop training materials;</li><li>7) Prepare end-users for implementation of courseware materials; and</li><li>8) Deliver training to end users (individually and in groups).</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>
M-10.2	<p><b>Minimum experience with Dynamics.</b></p> <p><u>Level 2</u>: The resource must have experience on a minimum of two projects developing training materials for a MS Dynamics implementation or upgrade project version 2011 (and above), with at least one project at version 2013 (and above). For each project to be considered, the resource must have worked on the project for a minimum duration of</p>	

Resource Assessment Criteria		
Resource Category	10. Courseware Developer (Level 2 or Level 3) (Dynamics Specialist)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p>four months within the three years preceding the issuance date of this TA.</p> <p><u>Level 3:</u> The resource must have experience on a minimum of three projects developing training materials for a MS Dynamics implementation or upgrade project version 2011 (and above), with at least one project at version 2013 (and above). For each project to be considered, the resource must have worked on the project for a minimum duration of six months within the five years preceding the issuance date of this TA.</p> <p><b>Note:</b> Future versions of Dynamics with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	
M-10.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must have experience developing and coordinating training plans and logistics for training delivery.</p> <p>b) The resource must have experience delivering classroom training to a minimum of 20 participants.</p>	



**11. Change Management Consultant (Level 3)**

Resource Assessment Criteria		
Resource Category	11. Change Management Consultant (Level 3)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-11.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <ul style="list-style-type: none"><li>a) a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Change Management Consultant (as defined below in M-11.1 b); and</li><li>b) that within that timeframe of experience, the resource has experience performing each of the five tasks listed below for a minimum of six cumulative months of experience per task:<ul style="list-style-type: none"><li>1) Responsible for leading other functional resources to define business strategy and processes in support of transformation and change management activities;</li><li>2) Engage and enable the organization to implement solutions by providing practical and actionable tools and templates;</li><li>3) Participate in change impact analysis and change management activities;</li><li>4) Work with the target community to ensure alignment, correct skills and experience to enable the change; and</li><li>5) Provide onsite as well as remote advisory services for the management of change and individuals as required.</li></ul></li></ul> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>
M-11.2	<p><b>Minimum experience with Business Process Management Solutions.</b></p> <p>The resource must have a minimum of two years of experience conducting Change Management activities in support of a Business Process Management Solution implementation projects.</p>	
M-11.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience</p>	

Resource Assessment Criteria		
Resource Category	11. Change Management Consultant (Level 3)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p>requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must:</p> <p>a. Hold a professional accreditation in Change Management (e.g. (Association of Change Management Professionals (ACMP) Certified Change Management Professional, Change Management Institute (CMI) Accredited Change Manager (Foundation or Master level)); or</p> <p>b. Has attended a Qualified Education Provider program in Change Management (as defined by ACMP) or a CMI endorsed course with a minimum of twenty hours of instruction (e.g. Prosci Change Management).</p> <p>b) The resource must have experience conducting Organizational Change management activities in support of a Dynamics solution implementation initiative.</p> <p>c) The resource must have experience performing the tasks identified in M-11.1 to support the evolution of the legacy environment to a future version of Dynamics up to n-1 of the major version.</p> <p><b>Note:</b> Future versions of Dynamics with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	

**12. Enterprise Architect (Level 3) (Dynamics Specialist)**

Resource Assessment Criteria		
Resource Category	12. Enterprise Architect (Level 3) (Dynamics Specialist)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-12.1	<b>Minimum experience in the resource category.</b>  The proposed resource must have experience in the proposed resource category including:  a) a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as an Enterprise Architect (as defined below in M-12.1 b); and  b) that within that timeframe of experience, the resource has experience performing each of the seven tasks listed below for a minimum of six cumulative months of experience per task:  1) Evaluate the enterprise's business/Information and Communication Technology (ICT) architecture, determine its consistency and integration with the organization's business/ICT strategies, assess the degree of its alignment with Treasury Board CIO Business Transformation Enablement Program (BTEP) and Federated Architecture Program (FAP) and recommend changes to the business/ICT architecture to improve its alignment with these external factors;  2) Identify future business/ICT requirements against the current enterprise architecture, perform gaps analyses, develop Requirements for Technology Architectures (RTA), and prepare migration strategies;  3) Assess the feasibility of migrating from the current state to the target business architecture and enabling technologies and identify the risks associated with migrating to the target business architecture and technologies and make recommendations for risk mitigation;  4) Identify business and technology trends that create opportunities for business improvement, advise business and ICT Senior Executives on ICT trends and emerging technologies and the impact on the organization's and government ICT architectures and business strategies, model "What if" scenarios and recommend appropriate changes to the existing architecture and ICT infrastructure, and recommend alternative solutions, methodologies and strategies;	Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.

Resource Assessment Criteria		
Resource Category	12. Enterprise Architect (Level 3) (Dynamics Specialist)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<div>5) Produce an architectural evolution plan, recommend prioritization of architecture evolution initiatives, and develop and/or implement an architecture evolution plan;</div> <div>6) Manage the development and implementation of an architectural improvement plan; and</div> <div>7) Train the organization to perform any of the above.</div> <div>The required experience can be demonstrated over one or more Customer Reference Projects.</div>	
M-12.2	<div><b>Minimum experience with Dynamics.</b></div> <div>The resource must have experience, on a minimum of three projects, assessing the feasibility and providing recommendations to mitigate the risk, associated with migrating from the current state to the target business architecture and technology based on Dynamics (version 2011 (and above), with at least one project at version 2013 (and above). For each project to be considered, the resource must have worked on the project for a minimum duration of six months within the five years preceding the issuance date of this TA.</div> <div><b>Note:</b> Future versions of Dynamics with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</div>	
M-12.3	<div><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</div> <div>a) The resource must have experience performing the tasks identified in M-12.1 to support the evolution of the legacy environment to a future version of Dynamics up to n-1 of the major version.</div> <div><b>Note:</b> Future versions of Dynamics with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</div>	

**13. Project Manager (Level 2 or Level 3)**

Resource Assessment Criteria		
<b>Resource Category</b>		13. Project Manager (Level 2 or Level 3)
<b>Name of Proposed Resource:</b>		<insert name>
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-13.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this TA, working as a Project Manager (as defined below in M-13.1 b); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Project Manager (as defined below in M-13.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the seven tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"> <li>1) Manage other Project Management resources that are responsible for an element of the project and its associated project team;</li> <li>2) Manage the project during the development, implementation and operations start up by ensuring that resources are made available and that the project is developed and is fully operational within previously agreed time, cost and performance parameters;</li> <li>3) Formulate statements of problems; establishes procedures for the development and implementation of significant, new or modified project elements to solve these problems, and obtains approval thereof;</li> <li>4) Define and document the objectives for the project; determine budgetary requirements, the composition, roles and responsibilities and terms of reference for the project team;</li> <li>5) Report progress of the project on an ongoing basis and at scheduled points in the life cycle;</li> <li>6) Prepare plans, charts, tables and diagrams to assist in analyzing or displaying problems; work with a variety of project management tools; and</li> <li>7) Project sign-off.</li> </ol>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>

Resource Assessment Criteria		
Resource Category	13. Project Manager (Level 2 or Level 3)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	The required experience can be demonstrated over one or more Customer Reference Projects.	
M-13.2	<b>Minimum experience with Business Process Management Solutions.</b>  <u>Level 2:</u> N/A  <u>Level 3:</u> The resource must have experience on a minimum of three projects as a Project Manager on a Business Process Movement Solution implementation project. For each project to be considered, the resource must have worked on the project for a minimum duration of six months within the five years preceding the issuance date of this TA.	
M-13.3	<b>Minimum experience as a senior PM.</b>  <u>Level 2:</u> N/A  <u>Level 3:</u> The resource must have experience as a Project Manager, on a minimum of one project, where the resource was responsible for a complex application development or application implementation project. A complex project is a project which includes multiple (i.e. three or more teams or sub-projects and includes multi-departmental stakeholders). For each project to be considered, the resource must have worked on the project for a minimum duration of twelve months within the five years preceding the issuance date of this TA.	
M-13.4	<b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.  a) The resource must hold a professional accreditation in Project Management (i.e. Project Management Professional (PMP), PRINCE2 Practitioner); or have completed a post-secondary program and obtained a Certificate in Project Management.  b) The resource must have experience as a Project Manager responsible for a Dynamics solution implementation.	

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Resource Assessment Criteria		
Resource Category	13. Project Manager (Level 2 or Level 3)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p>c) The resource must have experience performing the tasks identified in M-13.1 to support the evolution of the legacy environment to a future version of Dynamics up to n-1 of the major version.</p> <p><b>Note:</b> Future versions of Dynamics with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	

**APPENDIX C to ANNEX A**  
**Resource Assessment Criteria and Response Table (WS4)**

**Definitions**

The following definitions apply to the assessment criteria that follows.

Term	Definition
Building	The process of executing the design to deliver the required functionality or solution.
Business Process Management Solution	Refers to commercial-off the shelf (COTS) software application that are implemented to manage Public and Private sector business processes in areas such as but not limited to: <ul style="list-style-type: none"> <li>Contracts and Grants Management (outreach, application, eligibility, administration, management, audit and evaluation, monitoring and reporting);</li> <li>Courts/Judicial Management (registration, intake/identification, knowledge base, scheduling, appeals management, issues management, monitoring, and case tracking);</li> <li>Compliance Management (registration, intake/identification, monitoring, occurrence management, inspections, licensing, certification and reporting);</li> <li>Entitlement Case Management (intake, eligibility, case workflow, entitlement calculation, contract management, monitoring and payment);</li> <li>Client Service (communication, service initiation, contact centre, knowledge base, sales, channel management, inquiries, case tracking);</li> <li>Investigations and Enforcement (communications, correspondence, scheduling, monitoring and reporting).</li> </ul>
Customer Relationship Management (CRM) Solutions	A CRM Solution is defined as a widely implemented model for managing an organizations' interaction with customers, clients, and sales prospects. It involves using technology to organize, automate, and synchronize business processes - principally sales activities, but also those for marketing, customer service, and technical support.
Delivering	Carrying out something that was expected.
Designing	The process of defining software methods, functions, objects, and the overall structure and interaction of software code so that the resulting functionality will satisfy the requirements.
Dynamics	Refers to the Microsoft Dynamics software suite of products (version 10.5 or more recent including ) and including but not limited to the following software modules: <ol style="list-style-type: none"> <li>1) Social listening</li> <li>2) Social media analytics</li> <li>3) Workflows and approvals</li> <li>4) Sales automation</li> <li>5) Customer service automation</li> <li>6) Unified Service Desk</li> <li>7) Sales campaigns</li> <li>8) Reports and personal dashboards</li> <li>9) Integration via web services</li> <li>10) Mobile access</li> <li>11) Access to customizations and extensions</li> <li>12) Full mobile offline access</li> </ol>



Term	Definition
EDRMS	Electronic Document and Records Management System
ERP	An Enterprise Resource Planning (ERP) solution is business process management commercial-off the shelf (COTS) software that allows an organization to use a system of integrated applications to manage the business and automate many back office functions related to technology, services and human resources. Examples of ERP software implemented with the GC includes Oracle's PeopleSoft HCM, SAP Financials, Microsoft Dynamics, Oracle's Siebel CRM.
FreeBalance	Refers to the FreeBalance Accountability Suite of products (version 6.5E or more recent), including but not limited to the following software modules licensed by the Government of Canada: <ol style="list-style-type: none"> <li>1) Financial Accountability,</li> <li>2) Purchasing Accountability,</li> <li>3) Revenue Accountability,</li> <li>4) Asset Accountability,</li> <li>5) FreeBalance Forms Designer, and</li> <li>6) Performance Budgeting.</li> </ol>
Functional role	A functional role is one where an individual performs functional activities related to the management of an application. This could include: <ul style="list-style-type: none"> <li>• troubleshooting,</li> <li>• eliciting, elaborating, analyzing and documenting business requirements,</li> <li>• identifying test scenarios/scripts,</li> <li>• creating testing scripts,</li> <li>• performing functional testing,</li> <li>• documenting communication material (for e.g. release notes),</li> <li>• Business process analysis, mapping,</li> <li>• User interface design</li> <li>• Impact assessments (WBS elaboration of functional tasks)</li> </ul> WBS=Work Breakdown Structure
GC HR environment	Government of Canada Human Resource environment (GC HR environment), is an instance of the Government of Canada (GC) version of the PeopleSoft Human Resource (HR) application that is in operation at a GC department or agency.
Implementation / Implementing	Completed and put into operation as part of the final solution.
integrated end-to-end business process	Integrated end-to-end business process is the human resource (HR) lifecycle management process which commences with recruitment, concludes upon retirement, and includes all steps in between.
OpenText Content Server	Refers to OpenText's Content Server content management software product, version 10.5 or more recent.
PeopleSoft HCM	Refers to Oracle's PeopleSoft Human Capital Management (PeopleSoft HCM) software suite of products (version 9.1 or more recent) including but not limited to the following software modules / sub-modules licensed by the Government of Canada: <ol style="list-style-type: none"> <li>1) Core HR <ol style="list-style-type: none"> <li>a. Workforce Administration</li> <li>b. Workforce Development</li> <li>c. Organizational Development</li> <li>d. Training Development</li> <li>e. Workforce Monitoring</li> </ol> </li> <li>2) Recruiting Solution</li> </ol>

Term	Definition
	3) Profile Management 4) eProfile <ul style="list-style-type: none"> <li>a. Employee Self Service</li> <li>b. Manager Self Service</li> </ul> 5) eProfile Management 6) Absence Management 7) Payroll for North America 8) Payroll Interface 9) eDevelopment 10) Time and Labour 11) ePerformance 12) Career Planning 13) eCompensation 14) Succession Planning
PeopleSoft Pay	Refers to Oracle's PeopleSoft North America (NA) Payroll Module
SAP	Refers to software products from SAP SE including:  1) <b>SAP® ERP Central Component (ECC)</b> software module (version 6.0 or more recent), including but not limited to the following software components licensed by the Government of Canada: <ul style="list-style-type: none"> <li>a. Material Management (MM),</li> <li>b. Accounts Payable (AP),</li> <li>c. Accounts Receivable (AR),</li> <li>d. Asset Accounting (AA),</li> <li>e. Funds Management (FM),</li> <li>f. Controlling (CO),</li> <li>g. Sales and Distribution (SD),</li> <li>h. Real Estate (RE), Project Systems (PS),</li> <li>i. Plant Maintenance (PM),</li> <li>j. General Ledger and Special Purpose Ledgers (GL/SPL) (classic and new GL),</li> <li>k. Business Warehousing (BW), and</li> <li>l. Functionality developed by the Government of Canada such as the Salary Forecasting Tool, Travel Management Solution and the Receiver General Interfaces.</li> </ul>
Performing	To carry out, accomplish, or fulfill an action, task, or function.
Providing	To supply or make available.
SharePoint	Refers to the Microsoft SharePoint software suite of products (version 2013 or more recent)
Software Integration (integrating)	Software integration means that the products work as one solution. Instead of passing information between the two systems over a bridge, the systems share the same code and database
Software Interface	A software interface is a bridge that allows two programs to share information with each other, even though they may have been developed by different sources or use different programming languages. An interface will often use a standard file format such as XML to move information from one system to another.
Support / Supporting	Maintaining the hardware or software environment by troubleshooting and fixing a wide variety of issues.

Term	Definition
Technical role	<p>A technical role is one where an individual performs technical activities related to the development and the implementation of an application. This could include:</p> <ul style="list-style-type: none"><li>• troubleshooting,</li><li>• developing and communicating application architectures,</li><li>• developing and maintaining codes(including application code changes, fixes and configuration) based on the specification that was given by the Functional team,</li><li>• packaging and implementing the codes to different application environments,</li><li>• providing application administration services,</li><li>• administrating the application databases and the Data Base Management System,</li><li>• providing application security services, and</li><li>• unit testing and solution design.</li></ul>
Upgrade / Upgrading	<p>A replacement of <i>software</i> with a newer version, in order to bring the system up to date or to improve its characteristics.</p>
Using	<p>The act of employing something for a specific purpose.</p>

### Mandatory Assessment Criteria (As and when requested Resources)

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

#### Workstream 4 GCDOCS System Professional Services

##### 1. Application / Software Architect (Level 3) (OpenText Content Server)

Resource Assessment Criteria		
Resource Category	1. Application / Software Architect (Level 3) (OpenText Content Server)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-1.1	<p><b>Minimum experience in the resource category.</b> The proposed resource must have experience in the proposed resource category including:</p> <p>a) a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as an Application / Software Architect (as defined below in M-1.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the five tasks listed below for a minimum of six cumulative months of experience per task:</p> <p>1) Develop technical architectures, frameworks and strategies, for an application area, to meet the business and application requirements;</p> <p>2) Analyze functional requirements to identify information, procedures and decision flows. Analyze and evaluate alternative software solutions to meet business problems;</p> <p>3) Ensure the integration of all aspects of software solutions;</p> <p>4) Create an application component roadmap - roadmap to align business vision and functional coverage to IT vision; and</p> <p>5) Create an application architecture framework.</p> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>

Resource Assessment Criteria		
Resource Category	1. Application / Software Architect (Level 3) (OpenText Content Server)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-1.2	<p><b>Minimum experience with OpenText Content Server.</b></p> <p>The resource must have experience on a minimum of three projects developing technical architectures, frameworks or strategies, to meet the business and application requirements for an OpenText Content Server (version 10.5 or more recent) project. For each project to be considered, the resource must have worked on the project for a minimum duration of six months within the five years preceding the issuance date of this TA.</p> <p><b>Note:</b> Future versions of OpenText Content Server with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	
M-1.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must have successfully completed the certification exam and received OpenText Content Server Developer Certification.</p> <p>b) The resource must have experience designing applications that incorporate OpenText Content Server Application Programming Interface.</p> <p>c) The resource must have experience designing applications that incorporate OpenText Content Server Physical Object Module.</p> <p>d) The resource must have experience designing applications that incorporate OpenText Content Server LifeCycle Management Module.</p> <p>e) The resource must have experience performing the tasks identified in M-1.1 to support the evolution of the legacy document management system to a future version up to n-1 of the major version of OpenText Content Server.</p> <p><b>Note:</b> Future versions of OpenText Content Server with which the resource must have experience might include</p>	

Resource Assessment Criteria		
Resource Category		1. Application / Software Architect (Level 3) (OpenText Content Server)
Name of Proposed Resource:		<insert name>
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.	

**2. Programmer / Analyst (Level 2 or Level 3) (OpenText Content Server)**

Resource Assessment Criteria		
Resource Category	2. Programmer / Analyst (Level 2 or Level 3) (OpenText Content Server)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-2.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this TA, working as a Programmer / Analyst (as defined below in M-2.1 b); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Programmer / Analyst (as defined below in M-2.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the seven tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Analyze functional requirements leading to the execution of the design, development and implementation of changes to the application;</li><li>2) Developing and maintain configuration and programs based on approved requirements working both independently and within a team;</li><li>3) Deliver technical specifications documents using the functional specifications provided by the functional and integration teams;</li><li>4) Create and modify configuration and code for software as per technical specifications;</li><li>5) Produce reports, manuals, programs, data files, and procedures for applications;</li><li>6) Analyze code and objects to determine functional fit; and</li><li>7) Execute tasks related to the implementation of application and database design and fixes, coding and technical documentation.</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>

Resource Assessment Criteria		
Resource Category	2. Programmer / Analyst (Level 2 or Level 3) (OpenText Content Server)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-2.2	<p><b>Minimum experience with OpenText Content Server.</b></p> <p><u>Level 2:</u> The resource must have experience on a minimum of two projects developing solutions using OpenText Content Server (version 10.5 or more recent). For each project to be considered, the resource must have worked on the project for a minimum duration of four months within the three years preceding the issuance date of this TA.</p> <p><u>Level 3:</u> The resource must have experience on a minimum of three projects developing solutions using OpenText Content Server (version 10.5 or more recent). For each project to be considered, the resource must have worked on the project for a minimum duration of six months within the five years preceding the issuance date of this TA.</p> <p><b>Note:</b> Future versions of OpenText Content Server with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	
M-2.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must have successfully completed the certification exam and received OpenText Content Server Developer Certification.</p> <p>b) The resource must have experience performing the tasks identified in M-2.1 to develop an Imaging and Document Management solution.</p> <p>c) The resource must have experience performing the tasks identified in M-2.1 to develop Web retrieval and query applications that access and retrieve content and data stored in an OpenText Content Server repository.</p> <p>d) The resource must have experience performing the tasks identified in M-2.1 utilizing OpenText Content Server LifeCycle management capabilities.</p>	



Resource Assessment Criteria		
Resource Category	2. Programmer / Analyst (Level 2 or Level 3) (OpenText Content Server)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p>e) The resource must have experience performing the tasks identified in M-2.1 utilizing OpenText Content Server Physical Object Module.</p> <p>f) The resource must have experience performing the tasks identified in M-2.1 utilizing OpenText Content Server Application Programming Interface.</p> <p>g) The resource must have experience performing the tasks identified in M-2.1 to support the evolution of the legacy document management system to a future version up to n-1 of the major version of OpenText Content Server.</p> <p><b>Note:</b> Future versions of OpenText Content Server with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	

**3. System Analyst (Level 2 or Level 3) (OpenText Content Server)**

Resource Assessment Criteria		
Resource Category	3. System Analyst (Level 2 or Level 3) (OpenText Content Server)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-3.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this TA, working as a System Analyst (as defined below in M-3.1 b); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a System Analyst (as defined below in M-3.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the five tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Develop requirements, feasibility, cost, design, and specification documents for systems;</li><li>2) Implement systems to support projects, departments, organizations or businesses;</li><li>3) Translate business requirements into systems design and specifications;</li><li>4) Analyze and recommend alternatives and options for solutions; and</li><li>5) Develop technical specifications for systems development, design and implementation.</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>
M-3.2	<p><b>Minimum experience with OpenText Content Server.</b></p> <p><u>Level 2</u>: The resource must have experience on a minimum of two projects designing solutions using OpenText Content Server (version 10.5 or more recent) solution. For each project to be considered, the resource must have worked on the project for a minimum duration of four months within the three years preceding the issuance date of this TA.</p>	

Resource Assessment Criteria		
Resource Category	3. System Analyst (Level 2 or Level 3) (OpenText Content Server)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p><u>Level 3:</u> The resource must have experience on a minimum of three projects designing solutions using OpenText Content Server (version 10.5 or more recent) solution. For each project to be considered, the resource must have worked on the project for a minimum duration of six months within the five years preceding the issuance date of this TA.</p> <p><b>Note:</b> Future versions of OpenText Content Server with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	
M-3.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must have successfully completed the certification exam and received OpenText Content Server Administrator Certification.</p> <p>b) The resource must have experience performing the tasks identified in M-3.1 to develop the design and specification for an Imaging and Document Management solution.</p> <p>c) The resource must have experience performing the tasks identified in M-3.1 utilizing OpenText Content Server LifeCycle management capabilities.</p> <p>d) The resource must have experience performing the tasks identified in M-3.1 to support the evolution of the legacy document management system to a future version up to n-1 of the major version of OpenText Content Server.</p> <p><b>Note:</b> Future versions of OpenText Content Server with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	

**4. Tester (Level 2 or Level 3) (OpenText Content Server)**

Resource Assessment Criteria		
Resource Category	4. Tester (Level 2 or Level 3) (OpenText Content Server)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-4.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this TA, working as a Tester (as defined below in M-4.1 b); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Tester (as defined below in M-4.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the five tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Develop the Test strategy; test planning and coordination;</li><li>2) Manage and monitor test plans for all levels of testing;</li><li>3) Develop test scenarios and test scripts;</li><li>4) Establish and maintain test procedures and script libraries; and</li><li>5) Establish a validation and verification capability which assumes functional and performance compliance.</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>
M-4.2	<p><b>Minimum experience with OpenText Content Server.</b></p> <p><u>Level 2</u>: The resource must have experience on a minimum of two projects executing testing activities for an OpenText Content Server (version 10.5 or more recent) application solution. For each project to be considered, the resource must have worked on the project for a minimum duration of four months within the three years preceding the issuance date of this TA.</p>	

Resource Assessment Criteria		
Resource Category	4. Tester (Level 2 or Level 3) (OpenText Content Server)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p><u>Level 3:</u> The resource must have experience on a minimum of three projects developing test scripts and executing testing activities for an OpenText Content Server (version 10.5 or more recent) solution. For each project to be considered, the resource must have worked on the project for a minimum duration of six months within the five years preceding the issuance date of this TA.</p> <p><b>Note:</b> Future versions of OpenText Content Server with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	
M-4.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must have successfully completed the certification exam and received OpenText Content Server Server Administrator Certification.</p> <p>b) The resource must have experience performing the tasks identified in M-4.1 to support the evolution of the legacy document management system to a future version up to n-1 of the major version of OpenText Content Server</p> <p><b>Note:</b> Future versions of OpenText Content Server with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	

**5. IM Architect (Level 3) (OpenText Content Server)**

Resource Assessment Criteria		
Resource Category	5. IM Architect (Level 3) (OpenText Content Server)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-5.1	<b>Minimum experience in the resource category.</b>  The proposed resource must have experience in the proposed resource category including:  a) A minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as an IM Architect (as defined below in M-5.1 b); and  b) that within that timeframe of experience, the resource has experience performing a minimum of six out of the eight tasks listed below for a minimum of six cumulative months of experience per task:  1) Analyze existing capabilities and requirements, develop redesigned frameworks and recommend areas for improved capability and integration. Develop and document detailed statements of requirements; 2) Evaluate existing procedures and methods, identify and document database content, structure, and application subsystems, and develop data dictionary; 3) Define and document interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems; 4) Prototype potential solutions, provide tradeoff information and suggest recommended courses of action; 5) Perform information modelling in support of BPR implementation; 6) Perform cost/benefit analysis of implementing new processes and solutions; 7) Provide advice in developing and integrating process and information models between business processes to eliminate information and process redundancies; and 8) Provide advice in defining new requirements and opportunities for applying efficient and effective solutions; identify and provide preliminary costs of potential options.	Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.

Resource Assessment Criteria		
Resource Category	5. IM Architect (Level 3) (OpenText Content Server)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	The required experience can be demonstrated over one or more Customer Reference Projects.	
M-5.2	<p><b>Minimum experience with OpenText Content Server.</b></p> <p>The resource must have experience on a minimum of one project authoring an information architecture for unstructured content using OpenText Content Server (version 10.5 or more recent). For the project to be considered, the resource must have worked on the project for a minimum duration of six months within the five years preceding the issuance date of this TA.</p> <p><b>Note:</b> Future versions of OpenText Content Server with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	
M-5.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must have successfully completed the certification exam and received OpenText Content Server Consultant Certification.</p> <p>b) The resource must have experience performing the tasks identified in M-5.1 for an EDRMS solution.</p> <p>c) The resource must have experience:</p> <ul style="list-style-type: none"><li>a. defining existing and new requirements;</li><li>b. developing IM Governance structure;</li><li>c. development architectural frameworks; and</li><li>d. performing Technical Site Surveys.</li></ul> <p>d) The resource must have experience utilizing OpenText Content Server LifeCycle Document Management.</p> <p>e) The resource must have experience utilizing OpenText Content Server Physical Object Module.</p> <p>f) The resource must have experience performing the tasks identified in M-5.1 to support the evolution of the legacy document management system to a future</p>	

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Resource Assessment Criteria		
Resource Category		5. IM Architect (Level 3) (OpenText Content Server)
Name of Proposed Resource:		<insert name>
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<div>version up to n-1 of the major version of OpenText Content Server</div> <div><b>Note:</b> Future versions of OpenText Content Server with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</div>	



**6. Data Conversion Specialist (Level 2 or Level 3) (OpenText Content Server)**

Resource Assessment Criteria		
Resource Category	6. Data Conversion Specialist (Level 2 or Level 3) (OpenText Content Server)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate (in column 'C') that the proposed resource meets the mandatory requirements stipulated in column 'B':		
'A'	'B'	'C'
Criteria	Mandatory Requirement	Contractor's Response
M-6.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this TA, working as a Data Conversion Specialist (as defined in section 3.10 of Annex A, SOW); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Data Conversion Specialist (as defined in section 3.10 of Annex A, SOW); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the four tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Oversee all facets of the conversion process;</li><li>2) Complete mapping, interfaces, mock conversion work, enhancements, actual conversion, and verify completeness and accuracy of converted data;</li><li>3) Analyze and coordinate data file conversions; and</li><li>4) Import files from heterogeneous platforms.</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	
M-6.2	<p><b>Minimum experience with OpenText Content Server.</b></p> <p><u>Level 2</u>: The resource must have experience on a minimum of two projects performing data conversions from legacy systems to OpenText Content Server (version 10.5 or more recent). For each project to be considered, the resource must have worked on the project for a minimum duration of four months within the three years preceding the issuance date of this TA.</p> <p><u>Level 3</u>: The resource must have experience on a minimum of three projects performing data conversions from legacy systems to OpenText Content Server version 10.5 or more recent) project. For each project to be considered, the resource must have worked on the project for a minimum</p>	

Resource Assessment Criteria		
Resource Category	6. Data Conversion Specialist (Level 2 or Level 3) (OpenText Content Server)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate (in column 'C') that the proposed resource meets the mandatory requirements stipulated in column 'B':		
'A'	'B'	'C'
Criteria	Mandatory Requirement	Contractor's Response
	<p>duration of six months within the five years preceding the issuance date of this TA. For each project to be considered, the resource must have worked on the project for a minimum duration of six months within the five years preceding the issuance date of this TA.</p> <p><b>Note:</b> Future versions of OpenText Content Server with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	
M-6.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must have successfully completed the certification exam and received OpenText Content Server Developer Certification or OpenText Content Server Administrator Certification.</p> <p>b) The resource must have experience performing the tasks identified in M-6.1 for an Imaging and Document Management solution.</p> <p>c) The resource must have experience developing mapping, interfaces, mock conversion files, enhancements that access and retrieve content and data stored in an OpenText Content Server repository.</p> <p>d) The resource must have experience utilizing OpenText Content Server LifeCycle management capabilities.</p> <p>e) The resource must have experience utilizing OpenText Content Server Physical Object Module.</p> <p>f) The resource must have experience performing the tasks identified in M-6.1 to support the evolution of the legacy document management system to a future version up to n-1 of the major version of OpenText Content Server.</p> <p><b>Note:</b> Future versions of OpenText Content Server with which the resource must have experience might include Software</p>	

Resource Assessment Criteria		
Resource Category	6. Data Conversion Specialist (Level 2 or Level 3) (OpenText Content Server)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate (in column 'C') that the proposed resource meets the mandatory requirements stipulated in column 'B':		
'A'	'B'	'C'
Criteria	Mandatory Requirement	Contractor's Response
	Publisher new versions up to n-1 of the major version and will be specified herein as applicable.	

**7. Business Analyst (Level 2 or Level 3) (Imaging and Document Management)**

Resource Assessment Criteria		
Resource Category	7. Business Analyst (Level 2 or Level 3) (Imaging and Document Management)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-7.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this TA, working as a Business Analyst (as defined below in M-7.1 b); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Business Analyst (as defined below in M-7.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the seven tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Determine operational objectives by studying business functions; gathering information; evaluating output requirements and formats;</li><li>2) Perform business analyses of requirements to identify information, procedures, and decision flows;</li><li>3) Evaluate existing procedures and methods, identify and document items such as database content, structure, application subsystems;</li><li>4) Develop data dictionary;</li><li>5) Define and document interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems;</li><li>6) Identify candidate business processes for re-design, prototype potential solutions, provide trade-off information and suggest a recommended course of action. Identify the modifications to the automated processes; and</li><li>7) Establish acceptance test criteria with client.</li></ol>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>
	<p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	

Resource Assessment Criteria		
Resource Category	7. Business Analyst (Level 2 or Level 3) (Imaging and Document Management)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-7.2	<p><b>Minimum experience with Imaging and Document Management Solutions.</b></p> <p><u>Level 2:</u> Not applicable</p> <p><u>Level 3:</u> The resource must have experience on a minimum of three projects analyzing and documenting requirements for an EDRMS solution implementation or upgrade project. For each project to be considered, the resource must have worked on the project for a minimum duration of six months within the five years preceding the issuance date of this TA.</p>	
M-7.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must hold a professional accreditation in Business Analysis [e.g. IIBA Certified Business Analyst Professional (CBAP) or PMI Professional in Business Analysis (PMI-PBA)] or have completed a post-secondary program and obtained a Certificate in Business Analysis.</p> <p>b) The resource must have experience performing the tasks identified in M-7.1 utilizing OpenText Content Server.</p> <p>c) The resource must have experience in the analysis and design of workflow processes.</p> <p>d) The resource must have experience performing the tasks identified in M-7.1 to support the evolution of the legacy document management system to a future version up to n-1 of the major version of OpenText Content Server.</p> <p><b>Note:</b> Future versions of OpenText Content Server with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	

**8. Business Process Re-engineering Consultant (Level 3) (Workflow)**

Resource Assessment Criteria		
Resource Category	8. Business Process Re-engineering Consultant (Level 3) (Workflow)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-8.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Business Process Re-engineering Consultant (as defined below in M-8.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the nine tasks listed below for a minimum of six cumulative months of experience per task:</p> <p>1) Review existing work processes and organizational structure.</p> <p>2) Analyze business functional requirements to identify information, procedures and decision flows.</p> <p>3) Identify candidate processes for re-design; prototype potential solutions, provide trade-off information and suggest a recommended course of action. Identify the modifications to the automated processes.</p> <p>4) Provide recommendations in defining new requirements and opportunities for applying efficient and effective solutions; identify and provide preliminary costs of potential options.</p> <p>5) Provide recommendations in developing and integrating process and information models between processes to eliminate information and process redundancies.</p> <p>6) Identify and recommend new processes and organizational structures.</p> <p>7) Provide recommendations on and/or assist in implementing new processes and organizational changes.</p> <p>8) Document workflows.</p> <p>9) Use business, workflow and organizational modeling software tools.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>

Resource Assessment Criteria		
Resource Category	8. Business Process Re-engineering Consultant (Level 3) (Workflow)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-8.2	<p><b>Minimum experience with Workflow Solutions.</b></p> <p>The resource must have experience on a minimum of three projects designing and implementing workflows, and where at least one project utilized OpenText Content Server 2010 tools and functions (version 10.5 or more recent). For each project to be considered, the resource must have worked on the project for a minimum duration of six months within the five years preceding the issuance date of this TA.</p> <p><b>Note:</b> Future versions of OpenText Content Server with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	
M-8.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must have successfully completed the certification exam and received OpenText Content Server Consultant Certification.</p> <p>b) The resource must have experience performing the tasks identified in M-8.1 for an Imaging and Document Management solution.</p> <p>c) The resource must have experience in the analysis and design of automated workflow processes.</p> <p>d) The resource must have experience performing the tasks identified in M-8.1 to support the evolution of the legacy document management system to a future version up to n-1 of the major version of OpenText Content Server.</p> <p><b>Note:</b> Future versions of OpenText Content Server with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	

**9. Business Transformation Architect (Level 3) (IM)**

Resource Assessment Criteria		
Resource Category	9. Business Transformation Architect (Level 3) (IM)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-9.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Business Transformation Architect (as defined below in M-9.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the four tasks listed below for a minimum of six cumulative months of experience per task:</p> <p>1) Analyze and develop architecture requirements design, process development, process mapping and training;</p> <p>2) Lead other functional resources to define business strategy and processes in support of transformation and change management activities;</p> <p>3) Lead change impact analysis and change management activities; and</p> <p>4) Provide recommendations and support the client in organizational realignment (job re-design organizational re-structuring).</p> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>
M-9.2	<p><b>Minimum experience with Information Management and Recordkeeping Solutions.</b></p> <p>The resource must have a minimum of five years of experience, within the ten years preceding the issuance date of this TA, conducting BTA activities in support of Information Management and Recordkeeping solution projects.</p>	
M9.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of</p>	



Resource Assessment Criteria		
Resource Category		9. Business Transformation Architect (Level 3) (IM)
Name of Proposed Resource:		<insert name>
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p>cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must have experience performing the tasks identified in M-9.1 for an EDRMS solution.</p> <p>b) The resource must have experience analyzing, defining and developing the impact on the departmental business of migrating to OpenText Content Server.</p> <p>c) The resource must have experience preparing and delivering presentations to client Management on business transformation plans.</p> <p>d) The resource must have experience performing the tasks identified in M-9.1 to support the evolution of the legacy document management system to a future version up to n-1 of the major version of OpenText Content Server.</p> <p><b>Note:</b> Future versions of OpenText Content Server with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	

**10. Courseware Developer (Level 2 or Level 3) (OpenText Content Server)**

Resource Assessment Criteria		
Resource Category	10. Courseware Developer (Level 2 or Level 3) (OpenText Content Server)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-10.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this TA, working as a Courseware Developer (as defined below in M-10.1 b); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Courseware Developer (as defined below in M-10.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the eight tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Perform needs assessment/analysis for training purposes;</li><li>2) Plan and monitor training projects;</li><li>3) Perform job, task, and/or content analysis;</li><li>4) Recommend instructional media and strategies;</li><li>5) Develop performance measurement standards;</li><li>6) Develop training materials;</li><li>7) Prepare end-users for implementation of courseware materials; and</li><li>8) Deliver training to end users (individually and in groups).</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>
M-10.2	<p><b>Minimum experience with OpenText Content Server.</b></p> <p><u>Level 2</u>: The resource must have experience on a minimum of two projects developing training materials for an OpenText Content Server (version 10.5 or more recent) implementation or upgrade project. For each project to be considered, the resource must have worked on the project for a minimum duration of four months within the three years preceding the issuance date of this TA.</p>	

Resource Assessment Criteria		
Resource Category	10. Courseware Developer (Level 2 or Level 3) (OpenText Content Server)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p><u>Level 3:</u> The resource must have experience on a minimum of three projects developing training materials for an OpenText Content Server (version 10.5 or more recent) implementation or upgrade project. For each project to be considered, the resource must have worked on the project for a minimum duration of six months within the five years preceding the issuance date of this TA.</p> <p><b>Note:</b> Future versions of OpenText Content Server with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	
M-10.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must have experience delivering training related to OpenText Content Server solutions.</p> <p>b) The resource must have experience developing and coordinating training plans and logistics for training delivery.</p> <p>c) The resource must have experience delivering classroom training to a minimum of 20 participants.</p> <p>d) The resource must have experience working with end-users, subject matter experts, and/or business analysts to design and develop user documentation and instructional materials for OpenText Document Management solutions.</p> <p>e) The resource must have experience developing learning packages and documentation using automated tools such as User Productivity Kit or Productivity Pak.</p> <p>f) The resource must have experience performing the tasks identified in M-10.1 to support the evolution of the legacy document management system to a future version up to n-1 of the major version of OpenText Content Server.</p>	

Resource Assessment Criteria		
Resource Category		10. Courseware Developer (Level 2 or Level 3) (OpenText Content Server)
Name of Proposed Resource:		<insert name>
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<b>Note:</b> Future versions of OpenText Content Server with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.	

**11. Technical Writer (Level 2 and Level 3) (OpenText Content Server)**

Resource Assessment Criteria		
Resource Category	11. Technical Writer (Level 2 and Level 3) (OpenText Content Server)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-11.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this TA, working as a Technical Writer (as defined below in M-11.1 b); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Technical Writer (as defined below in M-11.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the ten tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Document help text, user manuals, technical documentation, web page content, etc.;</li><li>2) Review documentation standards and the existing project documentation;</li><li>3) Determine documentation requirements and makes plans for meeting them;</li><li>4) Gather information concerning the features and functions provided by the developers;</li><li>5) Assess the audience for the documents/manuals which are required and prepare a statement of purpose and scope for each;</li><li>6) Develop a table of content for each document/manual and write or edit the required content;</li><li>7) Investigate the accuracy of the information collected by making direct use of the material being documented;</li><li>8) Prepare or coordinate the preparation of any required illustrations and diagrams;</li><li>9) Design the layout of the documents/manuals; and</li><li>10) Use word-processing, desk-top publishing and graphics software packages to produce final camera-ready copy.</li></ol>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>

Resource Assessment Criteria		
Resource Category	11. Technical Writer (Level 2 and Level 3) (OpenText Content Server)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	The required experience can be demonstrated over one or more Customer Reference Projects.	
M-11.2	<p><b>Minimum experience with OpenText Content Server.</b></p> <p><u>Level 2:</u> The resource must have experience on a minimum of two projects developing manuals for OpenText Content Server. For each project to be considered, the resource must have worked on the project for a minimum duration of four months within the three years preceding the issuance date of this TA.</p> <p><u>Level 3:</u> The resource must have experience on a minimum of three projects developing manuals for OpenText Content Server. For each project to be considered, the resource must have worked on the project for a minimum duration of six months within the five years preceding the issuance date of this TA.</p> <p><b>Note:</b> Future versions of OpenText Content Server with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	
M-11.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must have experience performing the tasks identified in M-11.1 to support the evolution of the legacy document management system to a future version up to n-1 of the major version of OpenText Content Server.</p>	

**12. Change Management Consultant (Level 3) (EDRMS)**

Resource Assessment Criteria		
Resource Category	12. Change Management Consultant (Level 2 and Level 3) (EDRMS)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-12.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this TA, working as a as a Change Management Consultant (as defined below in M-12.1 b); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Change Management Consultant (as defined below in M-2.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the five tasks listed below for a minimum of six cumulative months of experience per task:</p> <p>1) Responsible for leading other functional resources to define business strategy and processes in support of transformation and change management activities;</p> <p>2) Engage and enable the organization to implement solutions by providing practical and actionable tools and templates;</p> <p>3) Participate in change impact analysis and change management activities;</p> <p>4) Work with the target community to ensure alignment, correct skills and experience to enable the change; and</p> <p>5) Provide onsite as well as remote advisory services for the management of change and individuals as required.</p> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>
M-12.2	<p><b>Minimum experience with EDRMS</b></p> <p>Level 2: N/A</p>	

Resource Assessment Criteria		
Resource Category	12. Change Management Consultant (Level 2 and Level 3) (EDRMS)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<u>Level 3:</u> The resource must have a minimum of two years of experience conducting Change Management activities in support of EDRMS projects.	
M-12.3	<b>Minimum experience supporting Communications.</b>  <u>Level 2:</u> N/A  <u>Level 3:</u> The resource must have a minimum of two years of experience developing communications materials in support of a software enabled business transformation initiative.	
M-12.3	<b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.  a) The resource must: a. Hold a professional accreditation in Change Management (e.g. (Association of Change Management Professionals (ACMP) Certified Change Management Professional, Change Management Institute (CMI) Accredited Change Manager (Foundation or Master level)); or b. Has attended a Qualified Education Provider program in Change Management (as defined by ACMP) or a CMI endorsed course with a minimum of twenty hours of instruction (e.g. Prosci Change Management).  b) The resource must have experience conducting Organizational Change management activities in support of an OpenText Content Server project.  c) The resource must have experience performing the tasks identified in M-12.1 to support the evolution of the legacy document management system to a future version up to n-1 of the major version of OpenText Content Server.  <b>Note:</b> Future versions of OpenText Content Server with which the resource must have experience might include	



Resource Assessment Criteria		
Resource Category		12. Change Management Consultant (Level 2 and Level 3) (EDRMS)
Name of Proposed Resource:		<insert name>
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.	

**13. Enterprise Architect (Level 3) (OpenText Content Server)**

Resource Assessment Criteria		
Resource Category	13. Enterprise Architect (Level 3) (OpenText Content Server)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
Criteria	Mandatory Requirement	Contractor's Response
M-13.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as an Enterprise Architect (as defined below in M-13.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the seven tasks listed below for a minimum of six cumulative months of experience per task:</p> <p>1) Evaluate the enterprise's business/Information and Communication Technology (ICT) architecture, determine its consistency and integration with the organization's business/ICT strategies, assess the degree of its alignment with Treasury Board CIO Business Transformation Enablement Program (BTEP) and Federated Architecture Program (FAP) and recommend changes to the business/ICT architecture to improve its alignment with these external factors;</p> <p>2) Identify future business/ICT requirements against the current enterprise architecture, perform gaps analyses, develop Requirements for Technology Architectures (RTA), and prepare migration strategies;</p> <p>3) Assess the feasibility of migrating from the current state to the target business architecture and enabling technologies and identify the risks associated with migrating to the target business architecture and technologies and make recommendations for risk mitigation;</p> <p>4) Identify business and technology trends that create opportunities for business improvement, advise business and ICT Senior Executives on ICT trends and emerging technologies and the impact on the organization's and government ICT architectures and business strategies, model "What if" scenarios and recommend appropriate changes to the existing architecture and ICT infrastructure, and recommend alternative solutions, methodologies and strategies;</p> <p>5) Produce an architectural evolution plan, recommend prioritization of architecture evolution initiatives, and</p>	

Resource Assessment Criteria		
Resource Category	13. Enterprise Architect (Level 3) (OpenText Content Server)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
Criteria	Mandatory Requirement	Contractor's Response
	<p>develop and/or implement an architecture evolution plan;</p> <p>6) Manage the development and implementation of an architectural improvement plan; and</p> <p>7) Train the organization to perform any of the above.</p> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	
M-13.2	<p><b>Minimum experience with OpenText Content Server.</b></p> <p>The resource must have experience, on a minimum of two projects, assessing the feasibility and providing recommendations to mitigate the risk, associated with migrating from the current state to the target business architecture and technology based on OpenText Content Server (version 10.5 or more recent). For each project to be considered, the resource must have worked on the project for a minimum duration of six months within the five years preceding the issuance date of this TA.</p> <p><b>Note:</b> Future versions of OpenText Content Server with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	
M-13.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must have experience performing the tasks identified in M-13.1 to support the evolution of the legacy document management system to a future version up to n-1 of the major version of OpenText Content Server.</p> <p><b>Note:</b> Future versions of OpenText Content Server with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	

**14. Project Coordinator (Level 2 and Level 3)**

Resource Assessment Criteria		
Resource Category	14. Project Coordinator (Level 2 or Level 3)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-14.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this TA, working as a Project Coordinator (as defined below in M-14.1 b); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Project Coordinator (as defined below in M-14.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing at least four out of the five tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Assist project management, business, functional, technical users and end users in project coordination and synchronization tasks;</li><li>2) Provide administrative and technical support of a clerical nature as required to a project team;</li><li>3) Maintain project documentation and application/system libraries;</li><li>4) Track and manage issues, defects and change requests in the service desk database;</li><li>5) Maintain and update relevant project information in manual and/or electronic files; project information might include such things as project activity schedule, status reports, correspondence; etc.</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>
M-14.2	<p><b>Minimum experience with OpenText Content Server.</b></p> <p><u>Level 2</u>: N/A</p> <p><u>Level 3</u>: The resource must have experience on a minimum of two projects as a Project Coordinator for an OpenText Content Server project. For each project to be considered, the resource must have worked on the project for a minimum</p>	

Resource Assessment Criteria		
Resource Category		14. Project Coordinator (Level 2 or Level 3)
Name of Proposed Resource:		<insert name>
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p>duration of six months within the five years preceding the issuance date of this TA.</p> <p><b>Note:</b> Future versions of OpenText Content Server with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	
M-14.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must have experience using MS Project to update / maintain project documents.</p> <p>b) The resource must have experience performing the tasks identified in M-14.1 for an OpenText Content Server project.</p> <p>c) The resource must have experience supporting stakeholders in multiple organizations (e.g. departments or agencies).</p> <p>d) The resource must have experience performing the tasks identified in M-14.1 to support the evolution of the legacy document management system to a future version up to n-1 of the major version of OpenText Content Server.</p> <p><b>Note:</b> Future versions of OpenText Content Server with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	

**15. Project Manager (Level 2 or Level 3) (OpenText Content Server)**

Resource Assessment Criteria		
Resource Category	15. Project Manager (Level 2 or Level 3) (OpenText Content Server)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-15.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this TA, working as a Project Manager (as defined below in M-15.1 b); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Project Manager (as defined below in M-15.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the seven tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Manage other Project Management resources that are responsible for an element of the project and its associated project team;</li><li>2) Manage the project during the development, implementation and operations start up by ensuring that resources are made available and that the project is developed and is fully operational within previously agreed time, cost and performance parameters;</li><li>3) Formulate statements of problems; establishes procedures for the development and implementation of significant, new or modified project elements to solve these problems, and obtains approval thereof;</li><li>4) Define and document the objectives for the project; determine budgetary requirements, the composition, roles and responsibilities and terms of reference for the project team;</li><li>5) Report progress of the project on an ongoing basis and at scheduled points in the life cycle;</li><li>6) Prepare plans, charts, tables and diagrams to assist in analyzing or displaying problems; work with a variety of project management tools; and</li><li>7) Project sign-off.</li></ol>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>

Resource Assessment Criteria		
Resource Category	15. Project Manager (Level 2 or Level 3) (OpenText Content Server)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	The required experience can be demonstrated over one or more Customer Reference Projects.	
M-15.2	<p><b>Minimum experience with OpenText Content Server.</b></p> <p><u>Level 2:</u> N/A</p> <p><u>Level 3:</u> The resource must have experience on a minimum of three projects as a Project Manager on an OpenText Content Server implementation project. For each project to be considered, the resource must have worked on the project for a minimum duration of six months within the five years preceding the issuance date of this TA.</p> <p><b>Note:</b> Future versions of OpenText Content Server with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	
M-15.3	<p><b>Minimum experience as a senior PM.</b></p> <p><u>Level 2:</u> N/A</p> <p><u>Level 3:</u> The resource must have experience as a Project Manager, on a minimum of one project, where the resource was responsible for a complex application development or application implementation project. A complex project is a project which includes multiple (i.e. three or more teams or sub-projects and includes multi-departmental stakeholders). For each project to be considered, the resource must have worked on the project for a minimum duration of twelve months within the five years preceding the issuance date of this TA.</p>	
M-15.4	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must hold a professional accreditation in Project Management (i.e. Project Management Professional (PMP), PRINCE2 Practitioner); or have completed a post-secondary program and obtained a Certificate in Project Management.</p>	

Resource Assessment Criteria		
Resource Category	15. Project Manager (Level 2 or Level 3) (OpenText Content Server)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p>b) The resource must have experience managing the design, development and deployment of an EDRMS solution.</p> <p>c) The resource must have experience performing the tasks identified in M-15.1 to support the evolution of the legacy document management system to a future version up to n-1 of the major version of OpenText Content Server.</p> <p><b>Note:</b> Future versions of OpenText Content Server with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	



**16. Quality Assurance Specialist (Level 2 or Level 3)**

Resource Assessment Criteria		
Resource Category	16. Quality Assurance Specialist (Level 2 or Level 3)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-16.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this TA, working as a Quality Assurance Specialist (as defined below in M-16.1 b);</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Quality Assurance Specialist (as defined below in M-16.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the five tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Lead development of test plans, test scripts and test data;</li><li>2) Participate in functional and technical design reviews, perform integration/functional and system testing, and verify test results;</li><li>3) Identify and document software defects;</li><li>4) Collaborate with other project resources to resolve defects; and</li><li>5) Perform regression testing of software applications.</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>
M-16.2	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must have experience conducting QA activities in support of an EDRMS implementation initiative.</p>	

Resource Assessment Criteria		
Resource Category	16. Quality Assurance Specialist (Level 2 or Level 3)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p>b) The resource must have experience conducting QA activities in support of an OpenText Content Server implementation initiative.</p> <p>c) The resource must have experience developing and implementing a QA testing methodology, strategy and documentation that meet organizational standards and audit requirements.</p> <p>d) The resource must have experiencedesigning and customizing an effective defect tracking and controlling tool.</p> <p>e) The resource must have experience generating dashboards and reports for the project team and management.</p> <p>f) The resource must have experience performing the tasks identified in M-16.1 to support the evolution of the legacy document management system to a future version up to n-1 of the major version of OpenText Content Server.</p> <p><b>Note:</b> Future versions of OpenText Content Server with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	

**17. Risk Management Specialist (Level 3)**

Resource Assessment Criteria		
Resource Category	17. Risk Management Specialist (Level 3)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-17.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Risk Management Specialist (as defined below in M-17.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the nine tasks listed below for a minimum of six cumulative months of experience per task:</p> <p>1) Conduct risk assessments;</p> <p>2) Identify project risks and overall project risks;</p> <p>3) Recommend alternative solutions, methodologies and strategies for risk mitigation and management;</p> <p>4) Produce risk management plans;</p> <p>5) Conduct risk assessments for troubled projects to quickly assess associated risks and recommend courses of action to minimize inherent risks;</p> <p>6) Assist in prioritization and assignment of risks;</p> <p>7) Assist in the development and/or implementation of Risk Management Plans;</p> <p>8) Manage the implementation of Risk Management Plans to identify, analyze, plan, track and control project risks on a continuous basis throughout the project life cycle; and</p> <p>9) Train project teams in risk mitigation techniques.</p> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>
M-17.2	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p>	

Resource Assessment Criteria		
Resource Category	17. Risk Management Specialist (Level 3)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p>a) The resource must have experience conducting risk management activities in support of an EDRMS implementation initiative.</p> <p>b) The resource must have experience conducting risk management activities in support of an OpenText Content Server implementation initiative.</p> <p>c) The resource must have experience conducting risk assessments, identifying project risks and recommending alternatives to mitigate the risks.</p> <p>d) The resource must have experience developing and implementing risk management plans.</p> <p>e) The resource must have experience coaching and mentoring project team members on risk mitigation techniques.</p> <p>f) The resource must have experience performing the tasks identified in M-17.1 to support the evolution of the legacy document management system to a future version up to n-1 of the major version of OpenText Content Server.</p> <p><b>Note:</b> Future versions of OpenText Content Server with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	

## Resource Assessment Criteria and Response Table (WS5)

### Definitions

The following definitions apply to the assessment criteria that follows.

Term	Definition
Building	The process of executing the design to deliver the required functionality or solution.
Business Process Management Solution	Refers to commercial-off the shelf (COTS) software application that are implemented to manage Public and Private sector business processes in areas such as but not limited to: <ul style="list-style-type: none"> <li>• Contracts and Grants Management (outreach, application, eligibility, administration, management, audit and evaluation, monitoring and reporting);</li> <li>• Courts/Judicial Management (registration, intake/identification, knowledge base, scheduling, appeals management, issues management, monitoring, and case tracking);</li> <li>• Compliance Management (registration, intake/identification, monitoring, occurrence management, inspections, licensing, certification and reporting);</li> <li>• Entitlement Case Management (intake, eligibility, case workflow, entitlement calculation, contract management, monitoring and payment);</li> <li>• Client Service (communication, service initiation, contact centre, knowledge base, sales, channel management, inquiries, case tracking);</li> <li>• Investigations and Enforcement (communications, correspondence, scheduling, monitoring and reporting).</li> </ul>
Customer Relationship Management (CRM) Solutions	A CRM Solution is defined as a widely implemented model for managing an organizations' interaction with customers, clients, and sales prospects. It involves using technology to organize, automate, and synchronize business processes - principally sales activities, but also those for marketing, customer service, and technical support.
Delivering	Carrying out something that was expected.
Designing	The process of defining software methods, functions, objects, and the overall structure and interaction of software code so that the resulting functionality will satisfy the requirements.
Dynamics	Refers to the Microsoft Dynamics software suite of products (version 10.5 or more recent including ) and including but not limited to the following software modules: <ol style="list-style-type: none"> <li>1) Social listening</li> <li>2) Social media analytics</li> <li>3) Workflows and approvals</li> <li>4) Sales automation</li> <li>5) Customer service automation</li> <li>6) Unified Service Desk</li> <li>7) Sales campaigns</li> <li>8) Reports and personal dashboards</li> <li>9) Integration via web services</li> <li>10) Mobile access</li> <li>11) Access to customizations and extensions</li> <li>12) Full mobile offline access</li> </ol>
EDRMS	Electronic Document and Records Management System

Term	Definition
ERP	An Enterprise Resource Planning (ERP) solution is business process management commercial-off the shelf (COTS) software that allows an organization to use a system of integrated applications to manage the business and automate many back office functions related to technology, services and human resources. Examples of ERP software implemented with the GC includes Oracle's PeopleSoft HCM, SAP Financials, Microsoft Dynamics, Oracle's Siebel CRM.
FreeBalance	Refers to the FreeBalance Accountability Suite of products (version 6.5E or more recent), including but not limited to the following software modules licensed by the Government of Canada: <ol style="list-style-type: none"> <li>1) Financial Accountability,</li> <li>2) Purchasing Accountability,</li> <li>3) Revenue Accountability,</li> <li>4) Asset Accountability,</li> <li>5) FreeBalance Forms Designer, and</li> <li>6) Performance Budgeting.</li> </ol>
Functional role	A functional role is one where an individual performs functional activities related to the management of an application. This could include: <ul style="list-style-type: none"> <li>• troubleshooting,</li> <li>• eliciting, elaborating, analyzing and documenting business requirements,</li> <li>• identifying test scenarios/scripts,</li> <li>• creating testing scripts,</li> <li>• performing functional testing,</li> <li>• documenting communication material (for e.g. release notes),</li> <li>• Business process analysis, mapping,</li> <li>• User interface design</li> <li>• Impact assessments (WBS elaboration of functional tasks)</li> </ul> WBS=Work Breakdown Structure
GC HR environment	Government of Canada Human Resource environment (GC HR environment), is an instance of the Government of Canada (GC) version of the PeopleSoft Human Resource (HR) application that is in operation at a GC department or agency.
Implementation / Implementing	Completed and put into operation as part of the final solution.
integrated end-to-end business process	Integrated end-to-end business process is the human resource (HR) lifecycle management process which commences with recruitment, concludes upon retirement, and includes all steps in between.
OpenText Content Server	Refers to OpenText's Content Server content management software product, version 10.5 or more recent.
PeopleSoft HCM	Refers to Oracle's PeopleSoft Human Capital Management (PeopleSoft HCM) software suite of products (version 9.1 or more recent) including but not limited to the following software modules / sub-modules licensed by the Government of Canada: <ol style="list-style-type: none"> <li>1) Core HR <ol style="list-style-type: none"> <li>a. Workforce Administration</li> <li>b. Workforce Development</li> <li>c. Organizational Development</li> <li>d. Training Development</li> <li>e. Workforce Monitoring</li> </ol> </li> <li>2) Recruiting Solution</li> <li>3) Profile Management</li> </ol>

Term	Definition
	<ul style="list-style-type: none"> <li>4) eProfile <ul style="list-style-type: none"> <li>a. Employee Self Service</li> <li>b. Manager Self Service</li> </ul> </li> <li>5) eProfile Management</li> <li>6) Absence Management</li> <li>7) Payroll for North America</li> <li>8) Payroll Interface</li> <li>9) eDevelopment</li> <li>10) Time and Labour</li> <li>11) ePerformance</li> <li>12) Career Planning</li> <li>13) eCompensation</li> <li>14) Succession Planning</li> </ul>
PeopleSoft Pay	Refers to Oracle's PeopleSoft North America (NA) Payroll Module
SAP	<p>Refers to software products from SAP SE including:</p> <ul style="list-style-type: none"> <li>1) <b>SAP® ERP Central Component (ECC)</b> software module (version 6.0 or more recent), including but not limited to the following software components licensed by the Government of Canada: <ul style="list-style-type: none"> <li>a. Material Management (MM),</li> <li>b. Accounts Payable (AP),</li> <li>c. Accounts Receivable (AR),</li> <li>d. Asset Accounting (AA),</li> <li>e. Funds Management (FM),</li> <li>f. Controlling (CO),</li> <li>g. Sales and Distribution (SD),</li> <li>h. Real Estate (RE), Project Systems (PS),</li> <li>i. Plant Maintenance (PM),</li> <li>j. General Ledger and Special Purpose Ledgers (GL/SPL) (classic and new GL),</li> <li>k. Business Warehousing (BW), and</li> <li>l. Functionality developed by the Government of Canada such as the Salary Forecasting Tool, Travel Management Solution and the Receiver General Interfaces.</li> </ul> </li> </ul>
Performing	To carry out, accomplish, or fulfill an action, task, or function.
Providing	To supply or make available.
SharePoint	Refers to the Microsoft SharePoint software suite of products (version 2013 or more recent)
Software Integration (integrating)	Software integration means that the products work as one solution. Instead of passing information between the two systems over a bridge, the systems share the same code and database
Software Interface	A software interface is a bridge that allows two programs to share information with each other, even though they may have been developed by different sources or use different programming languages. An interface will often use a standard file format such as XML to move information from one system to another.
Support / Supporting	Maintaining the hardware or software environment by troubleshooting and fixing a wide variety of issues.
Technical role	A technical role is one where an individual performs technical activities related to the development and the implementation of an application. This could include:

Term	Definition
	<ul style="list-style-type: none"><li>• troubleshooting,</li><li>• developing and communicating application architectures,</li><li>• developing and maintaining codes(including application code changes, fixes and configuration) based on the specification that was given by the Functional team,</li><li>• packaging and implementing the codes to different application environments,</li><li>• providing application administration services,</li><li>• administrating the application databases and the Data Base Management System,</li><li>• providing application security services, and</li><li>• unit testing and solution design.</li></ul>
Upgrade / Upgrading	A replacement of <i>software</i> with a newer version, in order to bring the system up to date or to improve its characteristics.
Using	The act of employing something for a specific purpose.



### Mandatory Assessment Criteria (As and when requested Resources)

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

#### Workstream 5 Financial Systems Support Services

##### 1. Application / Software Architect (Level 3) (Financial Systems)

Resource Assessment Criteria		
Resource Category	1. Application / Software Architect (Level 3) (Financial Systems)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
Criteria	Mandatory Requirement	Contractor's Response
M-1.1	<p><b>Minimum experience in the resource category.</b> The proposed resource must have experience in the proposed resource category including:</p> <p>a) a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as an Application / Software Architect (as defined below in M-1.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the five tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Develop technical architectures, frameworks and strategies, for an application area, to meet the business and application requirements;</li><li>2) Analyze functional requirements to identify information, procedures and decision flows. Analyze and evaluate alternative software solutions to meet business problems;</li><li>3) Ensure the integration of all aspects of software solutions;</li><li>4) Create an application component roadmap - roadmap to align business vision and functional coverage to IT vision; and</li><li>5) Create an application architecture framework.</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>
M-1.2	<p><b>Minimum experience with Financial Systems.</b></p> <p>The resource must have experience on a minimum of three projects developing technical architectures, frameworks and</p>	

Resource Assessment Criteria		
<b>Resource Category</b>	1. Application / Software Architect (Level 3) (Financial Systems)	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
Criteria	Mandatory Requirement	Contractor's Response
	<p>strategies for one of the following Financial System technologies (as specified herein) to meet the business and application requirements:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> SAP ECC</li> <li><input type="checkbox"/> SAP Solution Manager</li> <li><input type="checkbox"/> SAP S/4 HANA</li> <li><input type="checkbox"/> FreeBalance</li> </ul> <p>For each project to be considered, the resource must have worked on the project for a minimum duration of six months within the five years preceding the issuance date of this TA.</p> <p><b>Note:</b> Future versions of SAP or FreeBalance (as applicable) with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	
M-1.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must have experience performing the tasks identified in M-1.1 to support one or more specific components or modules of the GC SAP Public Sector Solution, including but not limited to the following within the IFMS (CORE) footprint:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Asset Accounting (AA)</li> <li><input type="checkbox"/> Accounts Payable (AP)</li> <li><input type="checkbox"/> Accounts Receivable (AR)</li> <li><input type="checkbox"/> Controlling (CO)</li> <li><input type="checkbox"/> Central Interfaces</li> <li><input type="checkbox"/> Cross Application Timesheets (CATS)</li> <li><input type="checkbox"/> Funds Management (FM)</li> <li><input type="checkbox"/> General Ledger (GL)/Special Purpose Ledger (SPL)</li> <li><input type="checkbox"/> Materials Management (MM)</li> <li><input type="checkbox"/> Plant Maintenance (PM)</li> <li><input type="checkbox"/> Project Systems (PS)</li> <li><input type="checkbox"/> Salary Forecasting Tool (SFT)</li> <li><input type="checkbox"/> Sales &amp; Distribution (SD)</li> </ul>	

Resource Assessment Criteria		
<b>Resource Category</b>	1. Application / Software Architect (Level 3) (Financial Systems)	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
Criteria	Mandatory Requirement	Contractor's Response
	<input type="checkbox"/> Business Intelligence (BI)/Warehouse Management (WM) <input type="checkbox"/> Components or modules introduced in future versions of the SAP suite up to version n-1 of the major version (to be specified herein). b) The resource must have experience performing the tasks identified in M-1.1 to support one or more specific components or modules of FreeBalance including but not limited to the following: <input type="checkbox"/> Financial Accountability <input type="checkbox"/> Purchasing Accountability <input type="checkbox"/> Revenue Accountability <input type="checkbox"/> Asset Accountability <input type="checkbox"/> FreeBalance Forms Designer <input type="checkbox"/> Performance Budgeting. c) The resource must have experience migrating from FreeBalance or SAP ECC (as specified herein) to SAP S/4 HANA. d) The resource must have experience providing options analysis to migrate from FreeBalance to another Financial System. e) The resource must have experience performing the tasks identified in M-1.1 to support the evolution of the legacy Financial System environment to a future version up to n-1 of the major version. <b>Note:</b> Future versions of SAP or FreeBalance (as applicable) with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.	

**2. ERP Functional Analyst (Level 2 and Level 3) (Financial Systems)**

Resource Assessment Criteria		
Resource Category	2. ERP Functional Analyst (Level 2 and Level 3) (Financial Systems)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate (in column 'C') that the proposed resource meets the mandatory requirements stipulated in column 'B':		
'A'	'B'	'C'
Criteria	Mandatory Requirement	Contractor's Response
M-2.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this TA, working as an ERP Functional Analyst (as defined below in M-2.1 b); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as an ERP Functional Analyst (as defined below in M-2.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the seven tasks listed below for a minimum of twelve cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Research, analyze and document user requirements, map interdependencies, and produce the required functional specifications and/or process re-engineering recommendations;</li><li>2) Perform and document fit gaps;</li><li>3) Model/map administrative process and data requirements;</li><li>4) Create and/or review Functional Design Documents;</li><li>5) Perform configuration based on the functional design documentation and create documentation on the change;</li><li>6) Create test scenarios and scripts according to business requirements; and</li><li>7) Perform testing, monitoring and reconciliation work and provide required documentation.</li></ol> <p>8) Implement the solution/change into the system landscape and perform troubleshooting activities.</p> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>

Resource Assessment Criteria		
Resource Category	2. ERP Functional Analyst (Level 2 and Level 3) (Financial Systems)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate (in column 'C') that the proposed resource meets the mandatory requirements stipulated in column 'B':		
'A'	'B'	'C'
Criteria	Mandatory Requirement	Contractor's Response
M-2.2	<p><b>Minimum experience with Financial Systems.</b></p> <p><input type="checkbox"/> SAP</p> <p><input type="checkbox"/> FreeBalance</p> <p><b>a) SAP ECC.</b></p> <p><u>Level 2:</u> The resource must have a minimum of two years of experience, within the five years preceding the issuance date of this TA, as a Functional Analyst performing the tasks identified in M-2.1 to support SAP ECC (version 6 or more recent), including a minimum of three years of experience designing, configuring, testing, implementing, and supporting one of the SAP modules/functionalities listed below:</p> <p><u>Level 3:</u> The resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this TA, as a Functional Analyst performing the tasks identified in M-2.1 to support SAP ECC (version 6 or more recent), including a minimum of three years of experience designing, configuring, testing, implementing, and supporting specific components, modules or functionalities of the SAP suite including but not limited to the following:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> SAP Security and Authorizations;</li> <li><input type="checkbox"/> Public Service Collection and Disbursements (PSCD);</li> <li><input type="checkbox"/> Asset Accounting (AA);</li> <li><input type="checkbox"/> Plant Maintenance (PM);</li> <li><input type="checkbox"/> Funds Management (FM);</li> <li><input type="checkbox"/> Project Systems (PS);</li> <li><input type="checkbox"/> Cross-Application Timesheets (CATS);</li> <li><input type="checkbox"/> Financial-Accounts Payable (FI-AP);</li> <li><input type="checkbox"/> Financial-Accounts Receivable (FI-AR);</li> <li><input type="checkbox"/> Financial-General Ledger/Special Purpose Ledger (FI-GL/SPL);</li> <li><input type="checkbox"/> Controlling (CO);</li> <li><input type="checkbox"/> Material Management (MM);</li> <li><input type="checkbox"/> Solution Manager (SolMan);</li> <li><input type="checkbox"/> Sales and Distribution (SD), or</li> </ul>	

Resource Assessment Criteria		
<b>Resource Category</b>	2. ERP Functional Analyst (Level 2 and Level 3) (Financial Systems)	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate (in column 'C') that the proposed resource meets the mandatory requirements stipulated in column 'B':		
'A'	'B'	'C'
Criteria	Mandatory Requirement	Contractor's Response
	<input type="checkbox"/> Front-end <sup>1</sup> and Back-end <sup>2</sup> of the SAP BI (version 7.1 or more recent) environment. <input type="checkbox"/> Components or modules introduced in future versions of the SAP suite up to version n-1 of the major version (to be specified herein).  <p style="text-align: center;"><b>or</b></p> <p>b) <b>FreeBalance.</b></p> <p><u>Level 2:</u> N/A</p> <p><u>Level 3:</u> The resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this TA, as a Functional Analyst performing the tasks identified in M-2.1 to support one or more specific components or modules of FreeBalance including but not limited to the following:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Financial Accountability,</li> <li><input type="checkbox"/> Purchasing Accountability,</li> <li><input type="checkbox"/> Revenue Accountability,</li> <li><input type="checkbox"/> Asset Accountability,</li> <li><input type="checkbox"/> FreeBalance Forms Designer, and</li> <li><input type="checkbox"/> Performance Budgeting.</li> </ul> <p><b>Note:</b> Future versions of SAP or FreeBalance (as applicable) with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	
M-2.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must hold one of the following SAP technical certifications (as stipulated herein):</p>	

<sup>1</sup> Front-end is defined as the layers that are close to the user community such as reporting layer which includes the queries and reports.

<sup>2</sup> Back-end is defined as the extractors, inbound data layers and transformation layers.

Resource Assessment Criteria		
Resource Category	2. ERP Functional Analyst (Level 2 and Level 3) (Financial Systems)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate (in column 'C') that the proposed resource meets the mandatory requirements stipulated in column 'B':		
'A'	'B'	'C'
Criteria	Mandatory Requirement	Contractor's Response
	<input type="checkbox"/> SAP NetWeaver – SAP Security Certified Technology Consultant <input type="checkbox"/> SAP Security and Authorizations Certification <input type="checkbox"/> SAP Material Management (MM) Certification <input type="checkbox"/> SAP Plant Maintenance (PM) Certification <input type="checkbox"/> SAP Financial Accounting (FI) Certification <input type="checkbox"/> SAP Project Systems (PS) Certification <input type="checkbox"/> SAP Controlling (CO) Certification <input type="checkbox"/> SAP Public Sector Management (PSM) Certification <input type="checkbox"/> SAP Sales and Distribution (SD) Certification <input type="checkbox"/> SAP Solution Manager Certification <input type="checkbox"/> SAP ABAP Certification <input type="checkbox"/> SAP Human Resources (HR) Certification  b) The resource must have experience configuring additional components or modules with the GC SAP Public Sector Solution, including but not limited to the following components or modules within the IFMS (CORE) footprint: <input type="checkbox"/> Asset Accounting (AA) <input type="checkbox"/> Enterprise Asset Management (EAM) <input type="checkbox"/> Financial-Accounts Payable (FI-AP) <input type="checkbox"/> Financial-Accounts Receivable (FI-AR) <input type="checkbox"/> Controlling (CO) <input type="checkbox"/> Central Interfaces <input type="checkbox"/> Funds Management (FM) <input type="checkbox"/> General Ledger (GL)/Special Purpose Ledger (SPL) <input type="checkbox"/> Materials Management (MM) <input type="checkbox"/> Plant Maintenance (PM) <input type="checkbox"/> Project Systems (PS) <input type="checkbox"/> Cross Application Timesheets (CATS) <input type="checkbox"/> Salary Forecasting Tool (SFT) <input type="checkbox"/> Sales & Distribution (SD) <input type="checkbox"/> Solution Manager (SolMan) <input type="checkbox"/> Business Intelligence (BI)/Warehouse Management (WM) <input type="checkbox"/> Components or modules introduced in future versions of the SAP suite up to version n-1 of the major version (to be specified herein).	

Resource Assessment Criteria		
Resource Category	2. ERP Functional Analyst (Level 2 and Level 3) (Financial Systems)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate (in column 'C') that the proposed resource meets the mandatory requirements stipulated in column 'B':		
'A'	'B'	'C'
Criteria	Mandatory Requirement	Contractor's Response
	<p>c) The resource must have experience supporting an SAP operational environment (i.e. working with live data in a production landscape).</p> <p>d) The resource must have experience preparing and delivering presentations, knowledge transfer and training related to Financial System solution components, modules or functionality.</p> <p>e) The resource must have experience performing specific tasks in support of an SAP ECC environment including but not limited to the following:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Developing and maintaining interfaces between the GC SAP Public Sector solution and other GC central systems (e.g. Standard Payment System, Government Banking System, Regional Pay System, Central Financial Management Reporting System) using SAP Enterprise Resource Planning (ERP).</li> <li><input type="checkbox"/> Developing and maintaining Security Authorizations, including using SAP Profile Generator and Central User Administration (CAU).</li> <li><input type="checkbox"/> Using Ancile Productivity Pak tool for documentation.</li> <li><input type="checkbox"/> Implementing specific functionality within a particular SAP module (e.g. Integrating Enterprise Asset Management (EAM) and/or Procure to Payment (P2P) business processes using SAP Business Workflow, etc.).</li> <li><input type="checkbox"/> Working with specific SAP solution functions (e.g. Solution Manager CHARM, acquisition card, workflow, etc.).</li> <li><input type="checkbox"/> Integration between SAP modules (e.g. FI to FM, FI to MM, SFT to FI, PS to CO etc.).</li> </ul> <p>f) The resource must have experience performing the tasks identified in M-2.1 to support one or more specific components or modules of FreeBalance including but not limited to the following:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Financial Accountability</li> <li><input type="checkbox"/> Purchasing Accountability</li> <li><input type="checkbox"/> Revenue Accountability</li> <li><input type="checkbox"/> Asset Accountability</li> <li><input type="checkbox"/> FreeBalance Forms Designer</li> <li><input type="checkbox"/> Performance Budgeting.</li> </ul>	



Resource Assessment Criteria		
Resource Category	2. ERP Functional Analyst (Level 2 and Level 3) (Financial Systems)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate (in column 'C') that the proposed resource meets the mandatory requirements stipulated in column 'B':		
'A'	'B'	'C'
Criteria	Mandatory Requirement	Contractor's Response
	<p>g) The resource must have experience migrating from FreeBalance or SAP ECC to SAP S/4 HANA.</p> <p>h) The resource must have experience performing tasks identified in M.2.1 in a SAP S/4 HANA environment.</p> <p>i) The resource must have experience performing the tasks identified in M-2.1 to support the evolution of the legacy Financial System environment to a future version up to n-1 of the major version.</p> <p><b>Note:</b> Future versions of SAP or FreeBalance with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	

**3. ERP System Analyst (Level 2 and Level 3) (Financial Systems)**

Resource Assessment Criteria		
Resource Category	3. ERP System Analyst (Level 2 and Level 3) (Financial Systems)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-3.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this TA, working as an ERP System Analyst (as defined below in M-3.1 b); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as an ERP System Analyst (as defined below in M-3.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the eight tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Develop requirements, feasibility, cost, design, and specification documents for ERP systems;</li><li>2) Implement ERP systems to support projects, departments, organizations or businesses;</li><li>3) Translate ERP business requirements into systems design and specifications;</li><li>4) Analyze and recommend alternatives and options for solutions;</li><li>5) Develop technical specifications for ERP systems development, design and implementation;</li><li>6) Research, analyze and document user requirements, map interdependencies, and produce the required functional specifications and/or process re-engineering recommendations;</li><li>7) Provide functional and technical expertise on applications; and</li><li>8) Review Functional and Technical Design Documents to ensure that there is alignment across the application(s).</li></ol>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>
	<p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	

Resource Assessment Criteria		
<b>Resource Category</b>	3. ERP System Analyst (Level 2 and Level 3) (Financial Systems)	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-3.2	<p><b>Minimum experience with Financial Systems.</b></p> <p><input type="checkbox"/> SAP ECC</p> <p><input type="checkbox"/> SAP Solution Manager</p> <p><input type="checkbox"/> FreeBalance</p> <p><u>Level 2:</u> The resource must have experience, on a minimum of two projects, implementing or upgrading the Financial System technology as specified herein. For each project to be considered, the resource must have worked on the project for a minimum duration of four months within the three years preceding the issuance date of this TA.</p> <p><u>Level 3:</u> The resource must have experience, on a minimum of three projects, implementing or upgrading one of the Financial System technology as specified herein. For each project to be considered, the resource must have worked on the project for a minimum duration of six months within the five years preceding the issuance date of this TA.</p> <p><b>Note</b> Future versions of SAP or FreeBalance with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	
M-3.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must have experience performing the tasks identified in M-3.1 to support one or more specific modules with the GC SAP Public Sector Solution, including but not limited to the following components or modules within the IFMS (CORE) footprint:</p> <p><input type="checkbox"/> Asset Accounting (AA)</p> <p><input type="checkbox"/> Financial-Accounts Payable (FI-AP)</p> <p><input type="checkbox"/> Financial -Accounts Receivable (FI-AR)</p> <p><input type="checkbox"/> Controlling (CO)</p> <p><input type="checkbox"/> Central Interfaces</p> <p><input type="checkbox"/> Cross Application Timesheets (CATS)</p> <p><input type="checkbox"/> Funds Management (FM)</p> <p><input type="checkbox"/> General Ledger/Special Purpose Ledger (GL/SPL)</p>	

Resource Assessment Criteria		
<b>Resource Category</b>	3. ERP System Analyst (Level 2 and Level 3) (Financial Systems)	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<input type="checkbox"/> Materials Management (MM) <input type="checkbox"/> Plant Maintenance (PM) <input type="checkbox"/> Project Systems (PS) <input type="checkbox"/> Salary Forecasting Tool (SFT) <input type="checkbox"/> Sales & Distribution (SD) <input type="checkbox"/> Business Intelligence (BI), /Warehouse Management (WM) <input type="checkbox"/> Components or modules introduced in future versions of the SAP suite up to version n-1 of the major version (to be specified herein). b) The resource must have experience performing the tasks identified in M-3.1 to support SAP® Solution Manger (version 7.1or more recent).  c) The resource must have experience performing the tasks identified in M-3.1 to support SAP Netweaver (version 7.40 or higher).  d) Experience performing the tasks identified in M-3.1 to support one or more specific components or modules of FreeBalance (version 6.5E or more recent): <input type="checkbox"/> Financial Accountability <input type="checkbox"/> Purchasing Accountability <input type="checkbox"/> Revenue Accountability <input type="checkbox"/> Asset Accountability <input type="checkbox"/> FreeBalance Forms Designer <input type="checkbox"/> Performance Budgeting.  e) The resource must have experience migrating from FreeBalance or SAP ECC to SAP S/4 HANA (as specified herein).  f) The resource must have experience performing the tasks identified in M-3.1 to support the evolution of the legacy Financial System environment to a future version up to n-1 of the major version.  <b>Note:</b> Future versions of SAP or FreeBalance with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable:	

**5. ERP Technical Analyst (Level 3) (SAP)**

Resource Assessment Criteria		
Resource Category	5. ERP Technical Analyst (Level 3) (SAP)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-5.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as an ERP Technical Analyst (as defined below in M-5.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the eight tasks listed below for a minimum of six cumulative months of experience per task:</p> <p>1) Plan and provide recommendations to management regarding system landscape architectures including upgrade strategies;</p> <p>2) Translate functional and business requirements into technical requirements;</p> <p>3) Develop and/or manage technical aspects of application software, user interfaces, and third-party components;</p> <p>4) Conduct, assist with, and/or manage unit and system tests;</p> <p>5) Establish technical standards for the technical framework;</p> <p>6) Analyze and coordinate data file conversions;</p> <p>7) Complete mapping, interfaces, mock conversion work, enhancements, actual conversion, and verify completeness and accuracy of converted data; and</p> <p>8) Import files from heterogeneous platforms.</p> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>
M-5.2	<p><b>Minimum experience with SAP.</b></p> <p>The resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this TA, monitoring and performing administrative tasks required to maintain an SAP landscape including, at a minimum, the following environments:</p> <p>a) SAP ECC (version 6 or more recent);</p> <p>b) SAP Solution Manger (version 7.1 or more recent);</p>	

Resource Assessment Criteria		
Resource Category	5. ERP Technical Analyst (Level 3) (SAP)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p>c) SAP NetWeaver Business Warehouse (version 7.4 or more recent); and</p> <p>d) SAP NetWeaver Portal (version 7.4 or more recent).</p> <p><b>Note:</b> Future versions of SAP with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	
M-5.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must have experience applying support packs to the various SAP landscapes.</p> <p>b) SAP NetWeaver Application The resource must have experience performing the tasks identified in M-5.1 to support specific SAP NetWeaver components or modules version 7.4 (or more recent) , including but not limited to the following:</p> <ul style="list-style-type: none"><li><input type="checkbox"/> SAP NetWeaver Application Server</li><li><input type="checkbox"/> SAP NetWeaver Business Intelligence</li><li><input type="checkbox"/> SAP NetWeaver Composition Environment (CE)</li><li><input type="checkbox"/> SAP NetWeaver Enterprise Portal (EP)</li><li><input type="checkbox"/> SAP NetWeaver Identity Management (IdM)</li><li><input type="checkbox"/> SAP NetWeaver Master Data Management (MDM)</li><li><input type="checkbox"/> SAP NetWeaver Mobile</li><li><input type="checkbox"/> SAP NetWeaver Process Integration (PI).</li></ul> <p>c) The resource must have experience configuring, administering, supporting and maintaining a variety of file servers and Active Directory services in support of the SAP landscape.</p> <p>d) The resource must have experience supporting, upgrading, configuring, and administering Oracle and SQL databases for SAP ECC or SAP Solution Manager on an AIX operation system.</p> <p>e) The resource must have experience supporting, upgrading, configuring, and administering Oracle and</p>	

Resource Assessment Criteria		
Resource Category		5. ERP Technical Analyst (Level 3) (SAP)
Name of Proposed Resource:		<insert name>
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p>SQL databases for SAP ECC or SAP Solution Manager on a Windows 2008 operation system.</p> <p>f) The resource must have experience configuring, administering, supporting and maintaining a SAP ECC or SAP Solution Manager database in a HANA environment.</p> <p>g) The resource must have experience migrating from SAP ECC to SAP S/4 HANA.</p> <p>h) The resource must have experience performing the tasks identified in M-5.1 to support the evolution of the legacy Financial System environment to a future version up to n-1 of the major version.</p> <p><b>Note:</b> Future versions of SAP with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	

**6. Programmer / Analyst (Level 3) (SAP)**

Resource Assessment Criteria		
Resource Category	6. Programmer / Analyst (Level 3) (SAP)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-6.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as an ERP Programmer / Analyst (as defined below in M-6.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the seven tasks listed below for a minimum of six cumulative months of experience per task:</p> <p>1) Analyze functional requirements leading to the execution of the design, development and implementation of changes to the application;</p> <p>2) Develop, test, and maintain configuration and programs based on approved requirements working both independently and within a team;</p> <p>3) Deliver technical specifications documents using the functional specifications provided by the functional and integration teams;</p> <p>4) Create and modify configuration and code for software as per technical specifications;</p> <p>5) Produce reports, manuals, programs, data files, and procedures for applications;</p> <p>6) Analyze code and objects to determine functional fit; and</p> <p>7) Execute tasks related to the implementation of application and database design and fixes, coding and technical documentation.</p> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>
M-6.2	<p><b>Minimum experience with SAP.</b></p> <p>a) The resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this TA, using the SAP ABAP programming language in SAP (version 6.0 or more recent).</p>	



Resource Assessment Criteria		
Resource Category	6. Programmer / Analyst (Level 3) (SAP)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p>b) The resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this TA, using SAP Solution Manager to create, document, and manage transportable changes in the SAP ECC landscape.</p> <p><b>Note:</b> Future versions of SAP with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	
M-6.3	<p><b>SAP Certification.</b></p> <p>The resource must hold one of the following SAP technical certifications (as stipulated herein):</p> <ul style="list-style-type: none"><li><input type="checkbox"/> SAP Development Professional ABAP certification</li><li><input type="checkbox"/> SAP Certified Development Associate – Process Integration with SAP NetWeaver</li><li><input type="checkbox"/> SAP Certified Development Consultant SAP NetWeaver – Exchange Infrastructure</li><li><input type="checkbox"/> SAP ABAP Workbench Certification</li><li><input type="checkbox"/> SAP Technology Consultant Certification</li><li><input type="checkbox"/> SAP Basis Certification Web AS for Oracle.</li></ul>	
M-6.4	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must have experience performing the tasks identified in M-6.1 to support one or more specific modules with the GC SAP Public Sector Solution, including but not limited to the following components or modules within the IFMS (CORE) footprint:</p> <ul style="list-style-type: none"><li><input type="checkbox"/> Asset Accounting (AA)</li><li><input type="checkbox"/> Financial-Accounts Payable (FI-AP)</li><li><input type="checkbox"/> Financial-Accounts Receivable (FI-AR)</li><li><input type="checkbox"/> Controlling (CO)</li><li><input type="checkbox"/> Central Interfaces</li><li><input type="checkbox"/> Cross Application Timesheets (CATS)</li><li><input type="checkbox"/> Funds Management (FM)</li></ul>	

Resource Assessment Criteria		
Resource Category	6. Programmer / Analyst (Level 3) (SAP)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<div><div><input type="checkbox"/> General Ledger/Special Purpose Ledger (GL/SPL)</div><div><input type="checkbox"/> Materials Management (MM)</div><div><input type="checkbox"/> Plant Maintenance (PM)</div><div><input type="checkbox"/> Project Systems (PS)</div><div><input type="checkbox"/> Salary Forecasting Tool (SFT)</div><div><input type="checkbox"/> Sales &amp; Distribution (SD)</div><div><input type="checkbox"/> Business Intelligence (BI)/Warehouse Management (WM)</div><div><input type="checkbox"/> Components or modules introduced in future versions of the SAP suite up to version n-1 of the major version (to be specified herein).</div></div> <div>b) The resource must have experience configuring, testing, supporting and maintaining SAP Process Integration (PI) or SAP Exchange Infrastructure (XI) or a combination of both.</div> <div>c) The resource must have experience using SAP Workflow including but not limited to the conducting the following activities:<div><div>a. Establish workflow settings in IFMS optimization prototype environment;</div><div>b. Create an HR structure to support workflow scenarios;</div><div>c. Update SAP workflow definitions as required;</div><div>d. Assist in the definition and implementation of business rules as they relate to workflow;</div><div>e. Assist in the integration of workflow to the SAP portal;</div><div>f. Test workflows;</div><div>g. Document workflow configuration and set up as required; and</div><div>h. Mentor the team members in the processes involved in the application of Workflow for SAP.</div></div></div> <div>d) The resource must have experience using the SAP ABAP programming language to support the GC SAP Public Sector solution.</div> <div>e) The resource must have experience developing Technical software documentation for an SAP application.</div> <div>f) The resource must have experience conducting ABAP Programming to perform the following functions:<div><div>a. Develop interfaces to other corporate systems;</div><div>b. Develop ABAP reports;</div></div></div>	

Resource Assessment Criteria		
Resource Category	6. Programmer / Analyst (Level 3) (SAP)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<div><div><div>c. Develop Web Dynpro;</div><div>d. Develop Web Services;</div><div>e. Develop Workflow;</div><div>f. Develop SAP Script;</div><div>g. Develop BADIs;</div><div>h. Develop BAPIs;</div><div>i. Use SmartForms;</div><div>j. Use Class methods; and</div><div>k. Use Function modules.</div></div><div><div>g) The resource must have experience conducting ABAP Programming using SAP ERP Enhancement and Switch Framework.</div><div>h) Experience migrating from SAP ECC to SAP S/4 HANA.</div><div>i) The resource must have experience performing the tasks identified in M-6.1 to support the evolution of the legacy Financial System environment to a future version up to n-1 of the major version.</div></div><div><div><b>Note:</b> Future versions of SAP with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</div></div></div>	

**7. Data Conversion Specialist (Level 3) (Financial Systems)**

Resource Assessment Criteria		
Resource Category	7. Data Conversion Specialist (Level 3) (Financial Systems)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-7.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this TA, working as a Data Conversion Specialist (as defined below in M-7.1 b); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Data Conversion Specialist (as defined below in M-7.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the four tasks listed below for a minimum of six cumulative months of experience per task:</p> <p>1) Oversee all facets of the conversion process;</p> <p>2) Complete mapping, interfaces, mock conversion work, enhancements, actual conversion, and verify completeness and accuracy of converted data;</p> <p>3) Analyze and coordinate data file conversions; and</p> <p>4) Import files from heterogeneous platforms.</p> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>
M-7.2	<p><b>Minimum experience with Financial Systems.</b></p> <p>The resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this TA, performing data conversions for one of the following Financial System technologies (as specified herein):</p> <p><input type="checkbox"/> SAP ECC</p> <p><input type="checkbox"/> FreeBalance.</p> <p><b>Note:</b> Future versions of SAP or FreeBalance (as applicable) with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	

Resource Assessment Criteria		
<b>Resource Category</b>	7. Data Conversion Specialist (Level 3) (Financial Systems)	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-7.4	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must have experience, , performing the tasks identified in M-7.1 to support one or more specific components or modules with the GC SAP Public Sector Solution, including but not limited to the following modules within the IFMS (CORE) footprint:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Asset Accounting (AA)</li> <li><input type="checkbox"/> Financial-Accounts Payable (FI-AP)</li> <li><input type="checkbox"/> Financial -Accounts Receivable (FI-AR)</li> <li><input type="checkbox"/> Controlling (CO)</li> <li><input type="checkbox"/> Central Interfaces</li> <li><input type="checkbox"/> Cross Application Timesheets (CATS)</li> <li><input type="checkbox"/> Funds Management (FM)</li> <li><input type="checkbox"/> General Ledger/Special Purpose Ledger (GL/SPL)</li> <li><input type="checkbox"/> Materials Management (MM)</li> <li><input type="checkbox"/> Plant Maintenance (PM)</li> <li><input type="checkbox"/> Project Systems (PS)</li> <li><input type="checkbox"/> Salary Forecasting Tool (SFT)</li> <li><input type="checkbox"/> Sales &amp; Distribution (SD)</li> <li><input type="checkbox"/> Business Intelligence (BI), /Warehouse Management (WM)</li> <li><input type="checkbox"/> Components or modules introduced in future versions of the SAP suite up to version n-1 of the major version (to be specified herein).</li> </ul> <p>b) The resource must have experience performing the tasks identified in M-7.1 to support SAP® Solution Manager (version 7.1or more recent).</p> <p>c) The resource must have experience performing the tasks identified in M-7.1 to support one or more specific components or modules of FreeBalance (version 6.5E or more recent):</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Financial Accountability</li> <li><input type="checkbox"/> Purchasing Accountability</li> </ul>	

Resource Assessment Criteria		
Resource Category	7. Data Conversion Specialist (Level 3) (Financial Systems)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<div><input type="checkbox"/> Revenue Accountability</div> <div><input type="checkbox"/> Asset Accountability</div> <div><input type="checkbox"/> FreeBalance Forms Designer</div> <div><input type="checkbox"/> Performance Budgeting.</div> <div>d) The resource must have experience migrating from FreeBalance or SAP ECC to SAP S/4 HANA.</div> <div>e) The resource must have experience creating documentation including but not limited to conversion strategies, data mapping, conversion steps, and test scripts, related to the performing the tasks identified in M-7.1.</div> <div>f) The resource must have experience performing the tasks identified in M-7.1 to support the evolution of the legacy Financial System environment to a future version up to n-1 of the major version.</div> <div><b>Notes:</b> Future versions of SAP or FreeBalance with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</div>	

**8. Business Analyst (Level 2 or Level 3) (Financial Systems)**

Resource Assessment Criteria		
Resource Category	8. Business Analyst (Level 2 or Level 3) (Financial Systems)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-8.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this TA, working as a Business Analyst (as defined below in M-8.1 b); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Business Analyst (as defined below in M-8.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the seven tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Determine operational objectives by studying business functions; gathering information; evaluating output requirements and formats;</li><li>2) Perform business analyses of requirements to identify information, procedures, and decision flows;</li><li>3) Evaluate existing procedures and methods, identify and document items such as database content, structure, application subsystems;</li><li>4) Develop data dictionary;</li><li>5) Define and document interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems;</li><li>6) Identify candidate business processes for re-design, prototype potential solutions, provide trade-off information and suggest a recommended course of action. Identify the modifications to the automated processes; and</li><li>7) Establish acceptance test criteria with client.</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>

Resource Assessment Criteria		
<b>Resource Category</b>	8. Business Analyst (Level 2 or Level 3) (Financial Systems)	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-8.2	<p><b>Minimum experience with Financial Systems.</b></p> <p><u>Level 2:</u> The resource must have experience analyzing and documenting requirements for one of the following Financial System technologies (as specified herein). For each project to be considered, the resource must have worked on the project for a minimum duration of four months within the three years preceding the issuance date of this TA.</p> <p><input type="checkbox"/> SAP ECC</p> <p><input type="checkbox"/> FreeBalance.</p> <p><u>Level 3:</u> The resource must have experience on a minimum of three projects, analyzing and documenting requirements for one of the following Financial System technologies (as specified herein). For each project to be considered, the resource must have worked on the project for a minimum duration of six months within the five years preceding the issuance date of this TA.</p> <p><input type="checkbox"/> SAP ECC</p> <p><input type="checkbox"/> FreeBalance.</p> <p><b>Note:</b> Future versions of SAP or FreeBalance (as applicable) with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	
M-8.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) Experience performing the tasks identified in M-8.1 to support SAP® ERP Central Component (ECC) software module (version 6.0 or more recent).</p> <p>b) Experience performing the tasks identified in M-8.1 to support SAP® Solution Manager (version 7.1 or more recent).</p> <p>c) Experience performing the tasks identified in M-8.1 to support Ancile® uPerform (version 5.1 or more recent).</p> <p>d) Experience performing the tasks identified in M-8.1 to support FreeBalance (version 6.5E or more recent).</p>	



Resource Assessment Criteria		
Resource Category	8. Business Analyst (Level 2 or Level 3) (Financial Systems)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p>e) Experience migrating from FreeBalance or SAP ECC to SAP S/4 HANA.</p> <p>f) The resource must have experience performing the tasks identified in M-8.1 to support the evolution of the legacy Financial System environment to a future version up to n-1 of the major version.</p> <p><b>Notes:</b> Future versions of SAP or FreeBalance with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	

**9. Courseware Developer (Level 3) (Financial Systems)**

Resource Assessment Criteria		
<b>Resource Category</b>	9. Courseware Developer (Level 3) (Financial Systems)	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-9.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <ul style="list-style-type: none"> <li>a) <u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Courseware Developer (as defined below in M-9.1 b); and</li> <li>b) that within that timeframe of experience, the resource has experience performing each of the eight tasks listed below for a minimum of six cumulative months of experience per task: <ul style="list-style-type: none"> <li>1) Perform needs assessment/analysis for training purposes;</li> <li>2) Plan and monitor training projects;</li> <li>3) Perform job, task, and/or content analysis;</li> <li>4) Recommend instructional media and strategies;</li> <li>5) Develop performance measurement standards;</li> <li>6) Develop training materials;</li> <li>7) Prepare end-users for implementation of courseware materials; and</li> <li>8) Deliver training to end users (individually and in groups).</li> </ul> </li> </ul> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>
M-9.2	<p><b>Minimum experience with Financial System technology.</b></p> <p>The resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this TA, developing training materials for one of the following Financial System technologies (as specified herein):</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> SAP ECC</li> <li><input type="checkbox"/> SAP S/4 HANA</li> <li><input type="checkbox"/> FreeBalance.</li> </ul> <p><b>Note:</b> Future versions of SAP or FreeBalance (as applicable) with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	

Resource Assessment Criteria		
Resource Category	9. Courseware Developer (Level 3) (Financial Systems)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-9.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must have experience performing the tasks identified in M-9.1 to support SAP® ECC (version 6.0 or more recent).</p> <p>b) The resource must have experience performing the tasks identified in M-9.1 to support FreeBalance (version 6.5E or more recent).</p> <p>c) The resource must have experience performing the tasks identified in M-9.1 to support the evolution of the legacy Financial System environment to a future version up to n-1 of the major version.</p> <p><b>Notes:</b> Future versions of SAP or FreeBalance with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	

**10. Courseware Developer (Level 2 and Level 3) (uPerform)**

Resource Assessment Criteria		
Resource Category	10. Courseware Developer (Level 2 and Level 3) (uPerform)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-10.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) <u>Level 2</u>: A minimum of five years of cumulative experience, within the eight years preceding the issuance date of this TA, working as a Courseware Developer (as defined below in M-10.1 b); and</p> <p><u>Level 3</u>: A minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Courseware Developer (as defined below in M-10.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the eight tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Perform needs assessment/analysis for training purposes;</li><li>2) Plan and monitor training projects;</li><li>3) Perform job, task, and/or content analysis;</li><li>4) Recommend instructional media and strategies;</li><li>5) Develop performance measurement standards;</li><li>6) Develop training materials;</li><li>7) Prepare end-users for implementation of courseware materials; and</li><li>8) Deliver training to end users (individually and in groups).</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.
	M-10.2	<p><b>Minimum experience with uPerform.</b></p> <p><u>Level 2</u>: The resource must have a minimum of three years of experience, within the five years preceding the issuance date of this TA, as an Administrator for Info Pak Suite and Productivity Pak Suite (also known as uPerform), including conducting <u>each</u> of the activities listed below.</p>

Resource Assessment Criteria		
Resource Category	10. Courseware Developer (Level 2 and Level 3) (uPerform)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p><u>Level 3:</u> The resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this TA, as an Administrator for Info Pak Suite and Productivity Pak Suite (also known as uPerform), including conducting <u>each</u> of the activities listed below.</p> <p>a) installing and supporting the products; b) testing and deploying product updates; c) developing and delivering training and/or knowledge transfer sessions on the products; and d) acting as the centre of expertise and best practices for the products with the organization</p> <p><b>Note:</b> Future versions of uPerform with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	
M-10.3	<p><b>Minimum experience with SAP.</b></p> <p><u>Level 2:</u> The resource must have a minimum of three years of experience, within the five years preceding the issuance date of this TA, supporting of an SAP application including conducting <u>each</u> of the activities listed below.</p> <p><u>Level 3:</u> The resource must have a minimum of five years of experience, within the eight years preceding the issuance date of this TA, supporting of an SAP application including conducting <u>each</u> of the activities listed below.</p> <p>a) developing and implementing standards and processes for SAP documentation; and b) providing technical presentations, demonstrations and training materials.</p> <p><b>Note:</b> Future versions of SAP with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	
M-10.4	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p>	

Resource Assessment Criteria		
Resource Category	10. Courseware Developer (Level 2 and Level 3) (uPerform)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p>a) The resource must have experience designing, developing and delivering training to support an SAP ECC application (version 6.0 or more recent).</p> <p>b) The resource must have experience developing and delivering knowledge transfer sessions on Productivity Pak.</p> <p>c) The resource must have experience managing glossaries, roles and responsibilities, user groups and customized templates for Productivity Pak.</p> <p>d) The resource must have experience performing technical upgrades to Productivity Pak.</p> <p>e) The resource must have experience converting Info Pak Suite documentation to Productivity Pak documentation.</p> <p>f) The resource must have experience creating document templates for Productivity Pak.</p> <p>g) The resource must have experience creating documents and simulations using Productivity Pak.</p> <p>h) The resource must have experience managing documentation development for an ERP system.</p> <p>i) The resource must have experience performing the tasks identified in M-10.1 to support the evolution of the legacy Financial System environment to a future version up to n-1 of the major version.</p> <p><b>Notes:</b> Future versions of SAP or uPerform with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	

**11. Change Management Consultant (Level 3) (Financial Systems)**

Resource Assessment Criteria		
Resource Category	11. Change Management Consultant (Level 3) (Financial Systems)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-11.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Change Management Consultant (as defined below in M-11.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the five tasks listed below for a minimum of six cumulative months of experience per task:</p> <p>1) Responsible for leading other functional resources to define business strategy and processes in support of transformation and change management activities;</p> <p>2) Engage and enable the organization to implement solutions by providing practical and actionable tools and templates;</p> <p>3) Participate in change impact analysis and change management activities;</p> <p>4) Work with the target community to ensure alignment, correct skills and experience to enable the change; and</p> <p>5) Provide onsite advisory services for the management of change and individuals as required.</p> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>
M-11.2	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must have experience conducting Change Management activities in support of a Financial System implementation project.</p>	

Resource Assessment Criteria		
Resource Category	11. Change Management Consultant (Level 3) (Financial Systems)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p>b) The resource must have experience performing the tasks identified in M-11.1 to support a SAP® ECC system implementation.</p> <p>c) The resource must have experience performing the tasks identified in M-11.1 to support a SAP Solution Manager implementation.</p> <p>d) The resource must have experience performing the tasks identified in M-11.1 to support a FreeBalance system implementation.</p> <p>e) The resource must have experience performing the tasks identified in M-11.1 to support the transformation from FreeBalance or SAP ECC to SAP S/4 HANA or other financial system solution.</p> <p>f) The resource must have experience performing the tasks identified in M-11.1 to support the evolution of the legacy Financial System environment to a future version up to n-1 of the major version.</p> <p><b>Notes:</b> Future versions of SAP with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.).</p>	



**12. Enterprise Architect (Level 3) (Financial Systems)**

Resource Assessment Criteria		
Resource Category	12. Enterprise Architect (Level 3) (Financial Systems)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-12.1	<b>Minimum experience in the resource category.</b>  The proposed resource must have experience in the proposed resource category including:  a) a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as an Enterprise Architect (as defined below in M-12.1 b); and  b) that within that timeframe of experience, the resource has experience performing each of the seven tasks listed below for a minimum of six cumulative months of experience per task:  1) Evaluate the enterprise's business/Information and Communication Technology (ICT) architecture, determine its consistency and integration with the organization's business/ICT strategies, assess the degree of its alignment with Treasury Board CIO Business Transformation Enablement Program (BTEP) and Federated Architecture Program (FAP) and recommend changes to the business/ICT architecture to improve its alignment with these external factors;  2) Identify future business/ICT requirements against the current enterprise architecture, perform gaps analyses, develop Requirements for Technology Architectures (RTA), and prepare migration strategies;  3) Assess the feasibility of migrating from the current state to the target business architecture and enabling technologies and identify the risks associated with migrating to the target business architecture and technologies and make recommendations for risk mitigation;  4) Identify business and technology trends that create opportunities for business improvement, advise business and ICT Senior Executives on ICT trends and emerging technologies and the impact on the organization's and government ICT architectures and business strategies, model "What if" scenarios and recommend appropriate changes to the existing architecture and ICT infrastructure, and recommend alternative solutions, methodologies and strategies;	Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.

Resource Assessment Criteria		
Resource Category	12. Enterprise Architect (Level 3) (Financial Systems)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<div>5) Produce an architectural evolution plan, recommend prioritization of architecture evolution initiatives, and develop and/or implement an architecture evolution plan;</div> <div>6) Manage the development and implementation of an architectural improvement plan; and</div> <div>7) Train the organization to perform any of the above.</div> <div>The required experience can be demonstrated over one or more Customer Reference Projects.</div>	
M-12.2	<div><b>Minimum experience with Financial System technology.</b></div> <div>The resource must have a minimum of five years of experience, within the seven years preceding the issuance date of this TA, assessing the feasibility of migrating from the current state to the target business architecture and enabling technologies and providing recommendations to mitigate risk associated with migrating to the target business architecture and technologies to support a Financial System implementation (as specified herein):</div> <div><div><input type="checkbox"/> SAP ECC</div><div><input type="checkbox"/> SAP S/4 HANA</div><div><input type="checkbox"/> SAP Solution Manager</div><div><input type="checkbox"/> FreeBalance.</div></div> <div><b>Note:</b> Future versions of SAP or FreeBalance (as applicable) with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</div>	
M-12.3	<div><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</div> <div>a) The resource must have experience performing the tasks identified in M-12.1 to support one or more specific modules with the GC SAP Public Sector Solution, including but not limited to the following modules within the IFMS (CORE) footprint:</div> <div><div><input type="checkbox"/> Asset Accounting (AA)</div><div><input type="checkbox"/> Accounts Payable (AP)</div><div><input type="checkbox"/> Accounts Receivable (AR)</div></div>	

Resource Assessment Criteria		
<b>Resource Category</b>	12. Enterprise Architect (Level 3) (Financial Systems)	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<input type="checkbox"/> Controlling (CO) <input type="checkbox"/> Central Interfaces <input type="checkbox"/> Cross Application Timesheets (CATS) <input type="checkbox"/> Funds Management (FM) <input type="checkbox"/> General Ledger (GL)/Special Purpose Ledger (SPL) <input type="checkbox"/> Materials Management (MM) <input type="checkbox"/> Plant Maintenance (PM) <input type="checkbox"/> Project Systems (PS) <input type="checkbox"/> Salary Forecasting Tool (SFT) <input type="checkbox"/> Sales & Distribution (SD) <input type="checkbox"/> Business Intelligence (BI)/Warehouse Management (WM) <input type="checkbox"/> Components or modules introduced in future versions of the SAP suite up to version n-1 of the major version (to be specified herein).  b) Experience performing the tasks identified in M-12.1 to support one or more specific modules of FreeBalance (version 6.5E or more recent), including but not limited to the following: <input type="checkbox"/> Financial Accountability <input type="checkbox"/> Purchasing Accountability <input type="checkbox"/> Revenue Accountability <input type="checkbox"/> Asset Accountability <input type="checkbox"/> FreeBalance Forms Designer <input type="checkbox"/> Performance Budgeting.  c) Experience migrating from FreeBalance or SAP ECC to SAP S/4 HANA.  d) The resource must have experience performing the tasks identified in M-12.1 to support the evolution of the legacy Financial System environment to a future version up to n-1 of the major version.  <b>Notes:</b> Future versions of SAP or FreeBalance with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.	

**13. Project Coordinator (Level 2 or Level 3)**

Resource Assessment Criteria		
<b>Resource Category</b>	13. Project Coordinator (Level 2 or Level 3)	
<b>Name of Proposed Resource:</b>	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-13.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this TA, working as a Project Coordinator (as defined below in M-13.1 b); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Project Coordinator (as defined below in M-13.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing at least four out of the five tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"> <li>1) Assist project management, business, functional, technical users and end users in project coordination and synchronization tasks;</li> <li>2) Provide administrative and technical support of a clerical nature as required to a project team;</li> <li>3) Maintain project documentation and application/system libraries;</li> <li>4) Track and manage issues, defects and change requests in the service desk database;</li> <li>5) Maintain and update relevant project information in manual and/or electronic files; project information might include such things as project activity schedule, status reports, correspondence; etc.</li> </ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered..</p>
M-13.2	<p><b>Minimum experience with Financial Systems.</b></p> <p><u>Level 2</u>: N/A</p> <p><u>Level 3</u>: The resource must have experience as a Project Coordinator for a Financial System implementation project. For each project to be considered, the resource must have</p>	

Resource Assessment Criteria		
Resource Category	13. Project Coordinator (Level 2 or Level 3)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	worked on the project for a minimum duration of six months within the five years preceding the issuance date of this TA.	
M-13.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must have experience using MS Project to update / maintain project documents.</p> <p>b) The resource must have experience supporting stakeholders in multiple organizations (e.g. departments or agencies).</p> <p>c) The resource must have experience performing the tasks identified in M-13.1 to support the evolution of the legacy Financial System environment to a future version up to n-1 of the major version.</p>	

**14. Project Manager (Level 2 or Level 3) (Financial ERP)**

Resource Assessment Criteria		
Resource Category	14. Project Manager (Level 2 or Level 3)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-14.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this TA, working as a Project Manager (as defined below in M-14.1 b); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Project Manager (as defined below in M-14.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the seven tasks listed below for a minimum of six cumulative months of experience per task:</p> <p>1) Manage other Project Management resources that are responsible for an element of the project and its associated project team;</p> <p>2) Manage the project during the development, implementation and operations start up by ensuring that resources are made available and that the project is developed and is fully operational within previously agreed time, cost and performance parameters;</p> <p>3) Formulate statements of problems; establishes procedures for the development and implementation of significant, new or modified project elements to solve these problems, and obtains approval thereof;</p> <p>4) Define and document the objectives for the project; determine budgetary requirements, the composition, roles and responsibilities and terms of reference for the project team;</p> <p>5) Report progress of the project on an ongoing basis and at scheduled points in the life cycle;</p> <p>6) Prepare plans, charts, tables and diagrams to assist in analyzing or displaying problems; work with a variety of project management tools; and</p> <p>7) Project sign-off.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>

Resource Assessment Criteria		
Resource Category	14. Project Manager (Level 2 or Level 3)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	The required experience can be demonstrated over one or more Customer Reference Projects.	
M-14.2	<b>Minimum experience with Financial Systems.</b>  <u>Level 2:</u> N/A  <u>Level 3:</u> The resource must have experience on a minimum of three projects as a Project Manager on a Financial System implementation project. For each project to be considered, the resource must have worked on the project for a minimum duration of six months within the five years preceding the issuance date of this TA.	
M-14.3	<b>Minimum experience as a senior PM.</b>  <u>Level 2:</u> N/A  <u>Level 3:</u> The resource must have experience as a Project Manager, on a minimum of one project, where the resource was responsible for a complex application development or application implementation project. A complex project is a project which includes multiple (i.e. three or more teams or sub-projects and includes multi-departmental stakeholders). For each project to be considered, the resource must have worked on the project for a minimum duration of twelve months within the five years preceding the issuance date of this TA.	
M-14.4	<b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.  a) The resource must hold a professional accreditation in Project Management (i.e. Project Management Professional (PMP), PRINCE2 Practitioner); or have completed a post-secondary program and obtained a Certificate in Project Management.  b) The resource must have experience as a Project Manager responsible for the management of a SAP ECC, SAP S/4 Hana, or SAP Solution Manager implementation.	

Resource Assessment Criteria		
Resource Category	14. Project Manager (Level 2 or Level 3)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p>c) The resource must have experience performing the tasks identified in M-14.1 to support the evolution of the legacy Financial System environment to a future version up to n-1 of the major version.</p> <p><b>Notes:</b> Future versions of SAP with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	



**15. Quality Assurance Specialist (Level 2 or Level 3)**

Resource Assessment Criteria		
Resource Category	15. Quality Assurance Specialist (Level 2 or Level 3)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-15.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this TA, working as a Quality Assurance Specialist (as defined below in M-15.1 b);</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Quality Assurance Specialist as defined below in M-15.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the five tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Lead development of test plans, test scripts and test data;</li><li>2) Participate in functional and technical design reviews, perform integration/functional and system testing, and verify test results;</li><li>3) Identify and document software defects;</li><li>4) Participate with other project resources to resolve defects; and</li><li>5) Perform regression testing of software applications.</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>
M-15.2	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must have experience conducting QA activities in support of a Financial System implementation initiative.</p>	

Resource Assessment Criteria		
Resource Category	15. Quality Assurance Specialist (Level 2 or Level 3)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p>b) The resource must have experience conducting QA activities in support of an SAP ECC implementation or upgrade initiative.</p> <p>c) The resource must have experience conducting QA activities in support of an SAP S/4 HANA implementation initiative.</p> <p>d) The resource must have experience developing and implementing a QA testing methodology, strategy and documentation that meet organizational standards and audit requirements.</p> <p>e) The resource must have experience designing and customizing an effective defect tracking and controlling tool.</p> <p>f) The resource must have experience generating dashboards and reports for the project team and management.</p> <p>g) The resource must have experience performing the tasks identified in M-15.1 to support the evolution of the legacy Financial System environment to a future version up to n-1 of the major version.</p> <p><b>Notes:</b> Future versions of SAP with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	

**16. Risk Management Specialist (Level 3) (Financial)**

Resource Assessment Criteria		
Resource Category	16. Risk Management Specialist (Level 3)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-16.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Risk Management Specialist (as defined below in M-16.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the nine tasks listed below for a minimum of six cumulative months of experience per task:</p> <p>1) Conduct risk assessments;</p> <p>2) Identify project risks and overall project risks;</p> <p>3) Recommend alternative solutions, methodologies and strategies for risk mitigation and management;</p> <p>4) Produce risk management plans;</p> <p>5) Conduct risk assessments for troubled projects to quickly assess associated risks and recommend courses of action to minimize inherent risks;</p> <p>6) Assist in prioritization and assignment of risks;</p> <p>7) Assist in the development and/or implementation of Risk Management Plans;</p> <p>8) Manage the implementation of Risk Management Plans to identify, analyze, plan, track and control project risks on a continuous basis throughout the project life cycle; and</p> <p>9) Train project teams in risk mitigation techniques.</p> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>
M-16.2	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p>	

Resource Assessment Criteria		
Resource Category	16. Risk Management Specialist (Level 3)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	<p>a) The resource must have experience conducting risk management activities in support of a Financial System implementation initiative.</p> <p>b) The resource must have experience conducting risk management activities in support of an SAP ECC implementation or upgrade initiative.</p> <p>c) The resource must have experience conducting risk management activities in support of an SAP S/4 HANA implementation initiative.</p> <p>d) The resource must have experience conducting risk assessments, identifying project risks and recommending alternatives to mitigate the risks.</p> <p>e) The resource must have experience developing and implementing risk management plans.</p> <p>f) The resource must have experience coaching and mentoring project team members on risk mitigation techniques.</p> <p>g) The resource must have experience performing the tasks identified in M-16.1 to support the evolution of the legacy Financial System environment to a future version up to n-1 of the major version.</p> <p><b>Notes:</b> Future versions of SAP with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	

**17. Tester (Level 2 or Level 3) (Financial Systems)**

Resource Assessment Criteria		
Resource Category	17. Tester (Level 2 or Level 3) (Financial Systems)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-17.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this TA, working as a Tester (as defined below in M-17.1 b); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Tester (as defined below in M-17.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the five tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Develop the Test strategy; test planning and coordination;</li><li>2) Manage and monitor test plans for all levels of testing;</li><li>3) Develop test scenarios and test scripts;</li><li>4) Establish and maintain test procedures and script libraries; and</li><li>5) Establish a validation and verification capability which assumes functional and performance compliance.</li></ol> <p>The required experience can be demonstrated over one or more Customer Reference Projects.</p>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>
M-17.2	<p><b>Minimum experience with Financial Systems.</b></p> <p><u>Level 2</u>: The resource must have experience on a minimum of two projects executing testing activities for a Financial System application. For each project to be considered, the resource must have worked on the project for a minimum duration of four months within the three years preceding the issuance date of this TA.</p> <p><u>Level 3</u>: The resource must have experience on a minimum of three projects developing test scripts and executing</p>	

Resource Assessment Criteria		
Resource Category	17. Tester (Level 2 or Level 3) (Financial Systems)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	testing activities for Financial System application. For each project to be considered, the resource must have worked on the project for a minimum duration of six months within the five years preceding the issuance date of this TA.	
M-17.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must have experience performing the tasks identified in M-17.1 to support an SAP ECC implementation or upgrade project.</p> <p>b) The resource must have experience performing the tasks identified in M-17.1 to support an SAP Solution Manager implementation or upgrade project.</p> <p>c) The resource must have experience performing the tasks identified in M-17.1 to support an SAP S/4 HANA implementation project.</p> <p>d) The resource must have experience performing the tasks identified in M-17.1 to support the evolution of the legacy Financial System environment to a future version up to n-1 of the major version.</p> <p><b>Notes:</b> Future versions of SAP with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	

**18. Technical Writer (Level 2 and Level 3) (Financial Systems)**

Resource Assessment Criteria		
Resource Category	18. Technical Writer (Level 2 and Level 3) (Financial Systems)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
M-18.1	<p><b>Minimum experience in the resource category.</b></p> <p>The proposed resource must have experience in the proposed resource category including:</p> <p>a) <u>Level 2</u>: a minimum of five years of cumulative experience, within the eight years preceding the issuance date of this TA, working as a Technical Writer (as defined below in M-18.1 b); and</p> <p><u>Level 3</u>: a minimum of ten years of cumulative experience, within the twelve years preceding the issuance date of this TA, working as a Technical Writer (as defined below in M-18.1 b); and</p> <p>b) that within that timeframe of experience, the resource has experience performing each of the ten tasks listed below for a minimum of six cumulative months of experience per task:</p> <ol style="list-style-type: none"><li>1) Document help text, user manuals, technical documentation, web page content, etc.;</li><li>2) Review documentation standards and the existing project documentation;</li><li>3) Determine documentation requirements and makes plans for meeting them;</li><li>4) Gather information concerning the features and functions provided by the developers;</li><li>5) Assess the audience for the documents/manuals which are required and prepare a statement of purpose and scope for each;</li><li>6) Develop a table of content for each document/manual and write or edit the required content;</li><li>7) Investigate the accuracy of the information collected by making direct use of the material being documented;</li><li>8) Prepare or coordinate the preparation of any required illustrations and diagrams;</li><li>9) Design the layout of the documents/manuals; and</li><li>10) Use word-processing, desk-top publishing and graphics software packages to produce final camera-ready copy.</li></ol>	<p>Substantiation of demonstrated experience must be included in the table, resumes are not required. The Contractor must substantiate all claims of experience by providing a description of the identified resource's role including context or other pertinent information which corroborates the information provided (e.g. deliverable provided, tools used, method utilized, outcome achieved, etc.) otherwise the experience will not be considered.</p>

Resource Assessment Criteria		
Resource Category	18. Technical Writer (Level 2 and Level 3) (Financial Systems)	
Name of Proposed Resource:	<insert name>	
The Contractor must demonstrate that the proposed resource meets the Assessment Criteria:		
ID	Assessment Criteria	Demonstrated Experience (Contractor to Insert Data)
	The required experience can be demonstrated over one or more Customer Reference Projects.	
M-18.2	<p><b>Minimum experience with Financial Systems.</b></p> <p><u>Level 2:</u> The resource must have experience on a minimum of two projects developing manuals for a Financial System application. For each project to be considered, the resource must have worked on the project for a minimum duration of four months within the three years preceding the issuance date of this TA.</p> <p><u>Level 3:</u> The resource must have experience on a minimum of three projects developing manuals for a Financial System application. For each project to be considered, the resource must have worked on the project for a minimum duration of six months within the five years preceding the issuance date of this TA.</p>	
M-18.3	<p><b>Additional Technical Qualifications (Level 3 only).</b> At the time of Task Authorization (TA) the Technical Authority will identify if any of the following specialized experience requirements are applicable to the specific TA. The Level 3 resource must demonstrate a minimum of one year of cumulative experience in each of the identified requirements as indicated below.</p> <p>a) The resource must have experience performing the tasks identified in M-18.1 to support an SAP ECC implementation or upgrade project.</p> <p>b) The resource must have experience performing the tasks identified in M-18.1 to support an SAP S/4 HANA implementation project.</p> <p>c) The resource must have experience performing the tasks identified in M-18.1 to support the evolution of the legacy Financial System environment to a future version up to n-1 of the major version.</p> <p><b>Notes:</b> Future versions of SAP with which the resource must have experience might include Software Publisher new versions up to n-1 of the major version and will be specified herein as applicable.</p>	



## APPENDIX D TO ANNEX A

### CERTIFICATIONS AT THE TA STAGE

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

#### 1. CERTIFICATION OF EDUCATION AND EXPERIENCE

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

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

\_\_\_\_\_  
Date

#### 2. CERTIFICATION OF AVAILABILITY OF PERSONNEL

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

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

\_\_\_\_\_  
Date

#### 3. CERTIFICATION OF STATUS OF PERSONNEL

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

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

\_\_\_\_\_  
Date

#### 4. CERTIFICATION OF LANGUAGE

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

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

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

Print name of authorized individual & sign above

Date

**ATTACHMENT 5.1**  
**FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY -**  
**CERTIFICATION**

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

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

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

Complete both A and B.

A. Check only one of the following:

- ( ) A1. The Bidder certifies having no work force in Canada.
- ( ) A2. The Bidder certifies being a public sector employer.
- ( ) A3. The Bidder certifies being a federally regulated employer being subject to the [Employment Equity Act](#).
- ( ) A4. The Bidder certifies having a combined work force in Canada of less than 100 permanent full-time and/or permanent part-time employees.
- A5. The Bidder has a combined workforce in Canada of 100 or more employees; and
- ( ) A5.1 The Bidder certifies already having a valid and current [Agreement to Implement Employment Equity](#) (AIEE) in place with ESDC-Labour.

OR

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

B. Check only one of the following:

- ( ) B1. The Bidder is not a Joint Venture.

OR

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