



ATTACHMENT 4.1 – TECHNICAL EVALUATION

PHASE 1 – MANDATORY CRITERIA

The mandatory technical evaluation consists of 59 mandatory criteria that will be scored as pass or fail.

The table below outlines the mandatory requirements and the applicable bid submission requirements and guidelines that will be used to evaluate each of the mandatory requirements.

As part of their bid response, the Bidder must provide any required product documentation (e.g., sample reports, screenshots, help manuals) that provides an evaluator the ability to confirm they meet each of the mandatory criteria listed below.

- Bidders are strongly encouraged to identify within their bid response the location of the supporting documents or information for each mandatory requirement, by indicating in either their bid response or any provided documentation, the portions of the text (i.e. pages and paragraphs) where they have addressed the mandatory requirement.
- If a referenced document is stored within a website, the Bidder should extract and include this information either within their response or attached to the documentation. Any references by the Bidder to websites must be documented with printed copies of the referenced pages and contained within the proposal or the response will not be considered by evaluators.

A bid must meet all mandatory requirements in order to progress to the next phase of the evaluation process. Failure on the part of the Bidder to meet any one of the Mandatory Criteria will result in its Bid being deemed non-compliant, with the Bid being given no further consideration.

Definitions

- The bid Stakeholder Information Management System software solution is herein referred to as “the solution”.
- “Account Administrator” herein refers to the business client role that includes the responsibilities to manage user and group profiles; this is not an IT role.

Mandatory Number	SOW Reference	Category	Mandatory Requirement	Bid Reference (Page and Paragraph)	Submission requirement	PoP Test
M1	5.1.1	MANAGED SERVICE	The required hardware platforms and storage to support the solution.		Description of solution functionality with screenshots AND/OR documentation.	N/A



Mandatory Number	SOW Reference	Category	Mandatory Requirement	Bid Reference (Page and Paragraph)	Submission requirement	PoP Test
M2	5.1.2 5.1.3	MANAGED SERVICE	Any required network, security & platform software/services (e.g. Operating Systems, Databases, Directories, Firewalls) to support the solution and the required application software to support the solution.		An outline of the network, security & platform software/services support procedures and notification process.	N/A
M3	5.1.4	MANAGED SERVICE	The required services to implement and configure the solution, inclusive of importing existing data in the solution.		Description of solution implementation and importing features with screenshots OR documentation from a help or user manual.	N/A
M4	5.1.5 5.1.6	MANAGED SERVICE	The required services to maintain the solution inclusive of software releases, upgrades and bug fixes, as they become available. Technical support for the solution as described in section 8.13 from the Statement of Work.		Description of technical support features with screenshots OR documentation from a help or user manual.	N/A
M5	5.2.1	SOFTWARE AVAILABILITY	The latest commercial release of the solution must be available by the bid closing.		Date of the latest commercial release of the solution and written confirmation that it will be available by the bid closing date.	N/A
M6	5.2.2	SOFTWARE AVAILABILITY	The solution costing must include software releases, upgrades and bug fixes, as they become available.		Description of software costing package.	N/A
M7	5.3.1	TECHNICAL ENVIRONMENT	The solution and all stored data must be hosted on a dedicated secure server within Canada which aligns with the requirements listed in Appendix A of the Annex A – Statement of Work.		A description and the location of the dedicated secure server to be used to host stored data in Canada.	N/A
M8	5.3.2	TECHNICAL ENVIRONMENT	The solution must provide for real-time security monitoring and notifications to IRCC for security events by e-mail which aligns with the requirements listed in Appendix A of the Annex A – Statement of Work.		An outline of the security monitoring procedures and notification process.	N/A



Mandatory Number	SOW Reference	Category	Mandatory Requirement	Bid Reference (Page and Paragraph)	Submission requirement	PoP Test
M9	5.3.3	TECHNICAL ENVIRONMENT	The solution must permit selected user and administrative actions to be audited/tracked. The auditing function should provide details on who performed changes on specific fields in a record, when a record was last updated and by whom.		Description of auditing features with screenshots OR documentation from a help or user manual.	✓
M10	5.3.4	TECHNICAL ENVIRONMENT	The solution must use data information to and from (interoperate) with Microsoft Outlook 2013 service pack 1 and compatible with future versions of Microsoft Outlook.		Description of solution interoperability with Microsoft Outlook.	✓
M11	5.3.5	TECHNICAL ENVIRONMENT	The solution must use data information to and from (interoperate) with Microsoft Outlook 2007 (12.0.6680.5000) service pack 3 and must be compatible with future versions of Microsoft Outlook.		Description of solution interoperability with Microsoft Outlook.	✓
M12	5.3.6	TECHNICAL ENVIRONMENT	The solution must be compliant with the version of Windows Internet Explorer 11 in use at IRCC - Support only TLS 1.2 - 256-AES cipher as well as future versions of Internet Explorer and other internet browsers (e.g. Firefox, Chrome).		Description of compliancy with requirement.	✓
M13	5.3.7	TECHNICAL ENVIRONMENT	The solution must allow or be configured to allow the use of files with the following formats: jpg, jpg2000, tiff, bmp, xls,xlsx, xlsx, ppt, rtf, mso, txt, pdf, pptx, doc, docx, and docm.		List of file types that can be allowed with the solution.	✓
M14	5.3.8	TECHNICAL ENVIRONMENT	The solution must accommodate at minimum 500 users and has the capability to scale to increase users.		Description of number of users that can be accommodated. If available, provide proof of one previous or existing contract that met this requirement. Please include: a) Name of the Project(s) or contracts; b) Organization for which the work was performed;	N/A



Mandatory Number	SOW Reference	Category	Mandatory Requirement	Bid Reference (Page and Paragraph)	Submission requirement	PoP Test
					c) Duration of work (start and end dates in MM/YY format); and, d) Number of user accounts provided.	
M15	5.4.1	SYSTEM ADMINISTRATION	The solution must permit IRCC Account Administrators to assign access rights to an individual staff member or a group of multiple staff members.		Description of solution functionality with screenshots AND/OR documentation from a help or user manual.	✓
M16	5.4.2	SYSTEM ADMINISTRATION	The solution must not allow operations to be performed on database objects unless the user is authorized for the operation concerned.		Description of solution functionality with screenshots AND/OR documentation from a help or user manual.	✓
M17	5.4.3	SYSTEM ADMINISTRATION	The solution must provide the ability to control the following rights: 5.3.3.1.read-only, 5.3.3.2.view or not to view, 5.3.3.3.right to delete or not delete, 5.3.3.4.right to modify or not modify, 5.3.3.5.right to create/add records, 5.3.3.6.right to generate reports 5.3.3.7.right to perform system administrator tasks.		Description of solution functionality with screenshots AND/OR documentation from a help or user manual.	✓
M18	5.4.4	SYSTEM ADMINISTRATION	The solution must permit IRCC Account Administrators to create, manage and maintain information contained in the user accounts of all IRCC staff members.		Description of solution functionality with screenshots AND/OR documentation from a help or user manual.	✓
M19	5.4.5	SYSTEM ADMINISTRATION	The solution must allow or be configured to allow IRCC Account Administrators to manage the structured keywords or tags that users may associate with records for easy identification, permitting Account Administrators to create, delete/archive, and rename keywords or tags.		Description of solution functionality with screenshots AND/OR documentation from a help or user manual.	✓



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M20	5.4.6	SYSTEM ADMINISTRATION	The solution must provide, or can be configured to provide a list of the operations and authorizations that an individual user or group or class of users is able to perform within the solution at either the application level or the database level.		Description of solution functionality with screenshots AND/OR documentation from a help or user manual.	✓
M21	5.4.7	SYSTEM ADMINISTRATION	The solution must provide an auditing facility which records the information for the database updates, insertions, deletions and selects by individual users on any selected individual object.		Description of solution functionality with screenshots AND/OR documentation from a help or user manual.	✓
M22	5.4.8	SYSTEM ADMINISTRATION	The solution must accommodate at minimum 50 concurrent users without change in system performance.		Description of number of users that can be accommodated concurrently.	N/A
M23	5.4.9.	SYSTEM ADMINISTRATION	The solution must allow administrators to segregate or hide certain data (e.g. specific subscription lists) so that only select groups can view and edit it.		Description of solution functionality with screenshots AND/OR documentation from a help or user manual.	✓
M24	5.5.1	BUSINESS FUNCTIONALITY	<p>The solution must include or must be configured to include, standard database fields for contact information, including, but not limited to:</p> <ul style="list-style-type: none"> 5.5.1.1. Contact name and surname 5.5.1.2. Organization 5.5.1.3. Job Title 5.5.1.4. Address 5.5.1.5. E-mail and alternate e-mail address 5.5.1.6. Telephone and alternate telephone numbers (work, cell, fax) 5.5.1.7. Postal Code 5.5.1.8. Country 5.5.1.9. Preferred language of correspondence 		Description of solution functionality with screenshots AND/OR documentation from a help or user manual.	✓



Mandatory Number	SOW Reference	Category	Mandatory Requirement	Bid Reference (Page and Paragraph)	Submission requirement	PoP Test
M25	5.5.2	BUSINESS FUNCTIONALITY	The solution must allow for the ability to set mandatory fields.		Description of solution capabilities and technical limits.	✓
M26	5.5.3	BUSINESS FUNCTIONALITY	The solution must allow users to edit, create and associate at least 50 keywords or tags to each record.		Description of solution capabilities and technical limits.	N/A
M27	5.5.4	BUSINESS FUNCTIONALITY	The solution must allow for users to associate tags or keywords to records for the purpose of grouping/linking records together and facilitate searching.		Description of solution functionality with screenshots AND/OR documentation from a help or user manual.	✓
M28	5.5.5	BUSINESS FUNCTIONALITY	The solution must include a notes function that users can post against a record.		Description of solution capabilities and technical limits.	N/A
M29	5.5.6	BUSINESS FUNCTIONALITY	The solution must not limit the number of notes that users can post against a record.		Description of solution capabilities and technical limits.	N/A
M30	5.5.7	BUSINESS FUNCTIONALITY	The solution must include a calendar/event planning function which allows information to be categorized by date and group.		Description of solution functionality with screenshots AND/OR documentation from a help or user manual.	✓
M31	5.5.8	BUSINESS FUNCTIONALITY	The solution must not limit, or can be configured to not limit the number of calendar items that users can post against a record.		Description of solution capabilities and technical limits.	N/A
M32	5.5.9	BUSINESS FUNCTIONALITY	The solution must have a calendar/event management function that allows internal users to send invitations to external stakeholders through e-mail. Stakeholders should be able to accept, decline and or nominate a delegate through the e-mail invitation (through buttons or integration with MS Outlook).		Description of solution functionality with screenshots AND/OR documentation from a help or user manual.	✓



Mandatory Number	SOW Reference	Category	Mandatory Requirement	Bid Reference (Page and Paragraph)	Submission requirement	PoP Test
M33	5.5.10	BUSINESS FUNCTIONALITY	The solution must have a calendar/event management function that allows internal users to add event records (short entries to mark upcoming events) and manage RSVPs to particular events within the solution or through integration with MS Outlook.		Description of solution capabilities and technical limits.	N/A
M34	5.5.11	BUSINESS FUNCTIONALITY	The solution must not limit, or can be configured to not limit the number of calendar items that users can post against a record.		Description of solution functionality with screenshots AND/OR documentation from a help or user manual.	✓
M35	5.5.12	BUSINESS FUNCTIONALITY	The solution must display, or can be configured to display the name and date of information inputted by users in records, notes or calendar functions.		Description of solution functionality with screenshots AND/OR documentation from a help or user manual.	✓
M36	5.5.13	BUSINESS FUNCTIONALITY	The solution must allow users to associate an unlimited number of electronic documents, including e-mails to records and calendar items. It must allow the use of files with the following formats: jpg, jpg2000, tiff, bmp, xls, xlsx, xslm, ppt, rtf, mso, txt, pdf, pptx, doc, docx, and docm.		Description of solution functionality with screenshots AND/OR documentation from a help or user manual.	✓
M37	5.5.14	BUSINESS FUNCTIONALITY	The solution must allow the launch of an attachment in its native application. It must allow the use of files with the following formats: jpg, jpg2000, tiff, bmp, xls, xlsx, xslm, ppt, rtf, mso, txt, pdf, pptx, doc, docx, and docm.		Description of solution functionality with screenshots AND/OR documentation from a help or user manual.	✓
M38	5.5.15	BUSINESS FUNCTIONALITY	The solution must include a listserv function (customizable subscription forms, ability for individuals to subscribe/unsubscribe from e-mails, and automation of e-mail distribution to a list of subscribers).		Description of solution functionality with screenshots AND/OR documentation from a help or user manual.	✓



Mandatory Number	SOW Reference	Category	Mandatory Requirement	Bid Reference (Page and Paragraph)	Submission requirement	PoP Test
M39	5.5.16	BUSINESS FUNCTIONALITY	The solution must have a listserv form that can connect to the IRCC website either through HTML coding or another means.		Description of solution functionality with screenshots AND/OR documentation from a help or user manual.	✓
M40	5.5.17	BUSINESS FUNCTIONALITY	The solution must allow, or can be configured to allow users to create distribution lists based on user-identified criteria, including, but not limited to: 5.5.17.1. stakeholders by name 5.5.17.2. stakeholders by organization 5.5.17.3. stakeholders by activity 5.5.17.4. stakeholders by keyword or tag 5.5.17.5. stakeholders by region (country, province, city) 5.5.17.6. stakeholders by industry or sector 5.5.17.7. The solution must allow users to send individual and bulk e-mails.		Description of solution capabilities and technical limits.	✓
M41	5.5.18	BUSINESS FUNCTIONALITY	The solution must allow users to send individual and bulk e-mail jobs. Bulk jobs must be able to accommodate up to 500,000 or more target e-mail addresses.		Description of solution capabilities and technical limits.	N/A
M42	5.5.19	BUSINESS FUNCTIONALITY	The solution must be able to send bulk e-mails at a minimum rate of 50,000 per hour.		Description of solution capabilities and technical limits.	N/A
M43	5.5.20	BUSINESS FUNCTIONALITY	The solution must not limit the number of individual or bulk e-mail jobs users can send.		Description of solution capabilities and technical limits.	✓
M44	5.5.21	BUSINESS FUNCTIONALITY	The solution must allow the administrator to merge duplicate records (e.g. stakeholders or tags).		Description of solution functionality with screenshots AND/OR documentation from a help or user manual.	✓



Mandatory Number	SOW Reference	Category	Mandatory Requirement	Bid Reference (Page and Paragraph)	Submission requirement	PoP Test
M45	5.5.22	BUSINESS FUNCTIONALITY	The solution must be able to accommodate at minimum 5 million records and must be scalable to increase volumes.		Description of solution capabilities and technical limits.	N/A
M46	5.6.1	SEARCH	<p>The solution must allow users to perform searches using a variety of terms or methods, including, but not limited to:</p> <p>5.6.1.1. Date or date range</p> <p>5.6.1.2. Keyword or tag</p> <p>5.6.1.3. Organization name</p> <p>5.6.1.4. Contact name</p> <p>5.6.1.5. E-mail</p> <p>5.6.1.6. Postal address</p> <p>5.6.1.7. Web site</p> <p>5.6.1.8. Telephone number</p> <p>5.6.1.9. Country, province or city.</p>		Description of solution functionality with screenshots AND/OR documentation from a help or user manual.	✓
M47	5.6.2	SEARCH	The search function must allow users to search using full or truncated keywords or terms.		Description of solution functionality with screenshots AND/OR documentation from a help or user manual.	✓
M48	5.6.3	SEARCH	The solution must be able to perform, or be configured to perform, searches for entries listed in records or notes functions.		Description of solution functionality with screenshots AND/OR documentation from a help or user manual.	✓
M49	5.6.4	SEARCH	The solution must keep, or be configured to keep a record history of certain fields (e.g., keep the names and history of previous contact persons).		Description of solution functionality with screenshots AND/OR documentation from a help or user manual.	✓



Mandatory Number	SOW Reference	Category	Mandatory Requirement	Bid Reference (Page and Paragraph)	Submission requirement	PoP Test
M50	5.7.1	USER INTERFACE	The solution must function in a web-based user interface.		Description of solution functionality with screenshots AND/OR documentation from a help or user manual.	✓
M51	5.7.2	USER INTERFACE	The solution must permit the use of the complete Canadian English and Canadian French language character sets based on Unicode UTF-8 v4.1 at a minimum.		Description of solution language setting.	✓
M52	5.7.3	USER INTERFACE	The solution must allow, or can be configured to allow users to work in the official language of their choice: Canadian English, and Canadian French.		Description of solution language setting.	✓
M53	5.7.4	USER INTERFACE	The solution must provide the users the ability to view all screens, prompts, and on-line help in Canadian English or Canadian French.		Description of solution language setting.	✓
M54	5.7.5	USER INTERFACE	The solution must permit the security classification [Protected A] to be marked on all database screens and reports.		Description of how the solution can be configured to comply with requirement.	N/A
M55	5.8.1	REPORTS	<p>The solution must provide, or can be configured to provide a set of common reports that the user can execute within the system, including reports of:</p> <ul style="list-style-type: none"> 5.8.1.1. stakeholder records by keyword or tag 5.8.1.2. stakeholder records by region (city, province, country) 5.8.1.3. stakeholder notes/interactions by keyword or tag 5.8.1.4. stakeholder events by date or date range 5.8.1.5. stakeholder events by keyword or tag 		Description of the solution's reporting function and configuration possibilities. Also include one sample report for each listed sub-bullet.	✓



Mandatory Number	SOW Reference	Category	Mandatory Requirement	Bid Reference (Page and Paragraph)	Submission requirement	PoP Test
			5.8.1.6. number of e-mail campaigns/jobs sent by date range 5.8.1.7. number of active user accounts.			
M56	5.8.2	REPORTS	The solution must provide, or can be configured to provide analytic reports on sent e-mails, which include: 5.8.2.1. Read-rate or open-rate 5.8.2.2. Click-rate (the rate at which a URL within an e-mail was clicked on) 5.8.2.3. Opt-outs or unsubscribe 5.8.2.4. Bounces or undeliverable e-mails.		Include a sample e-mail analytic report OR a screenshot of where the analytics can be viewed/generated in the solution.	✓
M57	5.8.3	REPORTS	The solution must be able to save and print standardized and ad hoc reports.		Description of solution functionality with screenshots AND/OR documentation from a help or user manual.	✓
M58	5.8.4	REPORTS	The solution must allow, or can be configured to allow users to export reports in xlsx or csv and pdf.		Description of solution functionality with screenshots AND/OR documentation from a help or user manual.	✓
M59	6. 7. 8.	DOCUMENTATION , TRAINING, PROFESSIONAL SERVICES	The Bidder must demonstrate experience in providing the following services for the proposed solution within the last two years: a) User training for system administrators b) Web-based customer support (to be provided for the duration of the contract period) c) Services to support design, installation, configuration, development, testing and deployment of the solution.		For each criteria, provide one project or contract for which the work was completed. The same project/contract can be used more than once. Please include the following information: e) Name of the Project(s) or contracts; f) Organization for which the work was performed; g) Duration of work (start and end dates in MM/YY format); and, h) List of tasks preformed.	N/A



PHASE 2 – POINT RATED CRITERIA

- Only those Proposals meeting ALL of the above Mandatory Criteria (M1-M59) will be deemed compliant and will be evaluated by the Evaluation Team on the basis of the Point-Rated Criteria.
- The rated technical evaluation consists of 7 rated criteria that will be scored as shown in the tables below
- Total points available for Point Rated Criteria = 38.
- There is no minimum score required for any of the rated requirements.

Rated Number	Rated Requirement	MAX Points	Scoring Guidelines	Bid Reference (Page and Paragraph)	Submission requirement	POP Test
R1	The solution should allow users to set and manage keywords or tags within the system itself.	4	Yes = 4 points No = 0 points		Description of solution functionality with screenshots AND/OR documentation from a help or user manual.	✓
R2	The solution should have a function to search calendar entries.	4	Yes = 4 points No = 0 points		Description of solution functionality with screenshots AND/OR documentation from a help or user manual.	✓
R3	The solution should have a function to filter calendar entries	4	Yes = 4 points No = 0 points		Description of solution functionality with screenshots AND/OR documentation from a help or user manual.	✓
R4	The solution should allow for user to input the following information in individual fields within a stakeholder profile. a) Website URL b) Twitter name c) Facebook username d) Areas of interest e) Record of stakeholder feedback or comments	10	a) Yes = 2 points b) Yes = 2 points c) Yes = 2 points d) Yes = 2 points e) Yes = 2 points If no = 0 points		Description of solution functionality with screenshots AND/OR documentation from a help or user manual.	✓



Rated Number	Rated Requirement	MAX Points	Scoring Guidelines	Bid Reference (Page and Paragraph)	Submission requirement	POP Test
R5	In addition to the Mandatory Criteria M18 where the solution must accommodate at minimum 50 concurrent users in the system, extra points will be awarded for a solution that offers the option of having more than 50 concurrent users.	4	If the solution accommodates: 51 – 75 Users = 2 points 76 – 100 = 3 points 100 and more = 4 points		Description of solution functionality with screenshots AND/OR documentation from a help or user manual.	N/A
R6	The solution should allow or be configured to allow users to set a custom passwords which aligns with the requirements listed in Section 5 in Appendix A – Statement of Work.	4	Yes = 4 points No = 0 points		Description of solution functionality with screenshots AND/OR documentation from a help or user manual.	✓
R7	In addition to the Mandatory Criteria M32 where the solution must be able to send bulk e-mails at a minimum rate of 50,000 per hour, extra points will be awarded for a solution that offers the option that accommodates higher delivery rate.	8	If the solution accommodates and e-mail delivery rate of: 50,001 – 100,000 e-mails per hour = 4 points Over 100,000 e-mails per hour = 8 points		Description of solution capabilities and technical limits.	N/A
TOTAL POINTS		38				



CALCULATING THE BID'S TECHNICAL RATED EVALUATION SCORE

The Technical Rated evaluation score is worth 30% (30 pts) of each bidder's overall bid score that will be used to determine the top ranked Bidder. Canada will calculate each bidder's technical rated evaluation score as follows:

1. Canada will determine each bidder's Technical Rated evaluation score by calculating the sum of the bidder's score for all rated technical requirements listed in R1 to R7 (out of a total of 38 points).
2. Once each bidder's rated technical score has been calculated, Canada will adjust that score (calculated out of 38 points) to become the technical rated evaluation score (out of 30 points) by using the following formula:

$$\text{Bidder's Technical Rated Evaluation Score} = \left\{ \frac{\text{Bidder's total score for all rated technical requirements (R1 to R7)}}{38} \right\} \times 30$$

Please see the following example that demonstrates how Canada will calculate each bidder's Financial Evaluation Score

Bidder	Bidder's total score for all rated technical requirements (R1 to R7)	Calculation of the Bidder's Financial Evaluation Score	Assigned Bidder's Technical Rated Evaluation Score
A	28	$\left(\frac{28}{38}\right) \times 30$	22.11
B	30	$\left(\frac{30}{38}\right) \times 30$	23.68
C	32	$\left(\frac{32}{38}\right) \times 30$	25.26
D	15	$\left(\frac{15}{38}\right) \times 30$	11.84
E	27	$\left(\frac{27}{38}\right) \times 30$	21.32