



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

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

11 Laurier St. / 11, rue Laurier

Place du Portage, Phase III

Core 0B2 / Noyau 0B2

Gatineau

Québec

K1A 0S5

Bid Fax: (819) 997-9776

**REQUEST FOR PROPOSAL
DEMANDE DE PROPOSITION**

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

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

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

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

Comments - Commentaires

Vendor/Firm Name and Address

Raison sociale et adresse du

fournisseur/de l'entrepreneur

Issuing Office - Bureau de distribution

Informatics Professional Services Division / Division des
services professionnels en informatique

Les Terrasses de la Chaudière

10, rue Wellington, 4ième

étage/Floor

Gatineau

Québec

K1A 0S5

Title - Sujet TBIPS ISC PROFESSIONAL SERVICES	
Solicitation No. - N° de l'invitation A0156-162605/A	Date 2018-05-24
Client Reference No. - N° de référence du client A0156-162605	
GETS Reference No. - N° de référence de SEAG PW-\$\$ZM-384-33553	
File No. - N° de dossier 384zm.A0156-162605	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2018-06-15	
Time Zone Fuseau horaire Eastern Daylight Saving Time EDT	
F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input type="checkbox"/> Other-Autre: <input type="checkbox"/>	
Address Enquiries to: - Adresser toutes questions à: Beaudoin, Michael	Buyer Id - Id de l'acheteur 384zm
Telephone No. - N° de téléphone (613) 859-0841 ()	FAX No. - N° de FAX () -
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction: Indigenous Services Canada Education Branch Director of Programs Gatineau, QC K1A 0H4 Canada	

Instructions: See Herein

Instructions: Voir aux présentes

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

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BID SOLICITATION FOR A CONTRACT AGAINST A SUPPLY ARRANGEMENT FOR TASK- BASED INFORMATICS PROFESSIONAL SERVICES (TBIPS).

NATIONAL MAINTENANCE AND APPLICATION DEVELOPMENT SERVICES FOR DEPARTMENT OF INDIGENOUS SERVICES CANADA (ISC)

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APPENDIX C TO ANNEX A – RESOURCES ASSESSMENT CRITERIA AND RESPONSE TABLE
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-ATTACHMENT 5.1: FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY – CERTIFICATION

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NATIONAL MAINTENANCE AND APPLICATION DEVELOPMENT SERVICES FOR DEPARTMENT OF INDIGENOUS SERVICES CANADA (ISC)

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.

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1.2 Summary

- (a) This bid solicitation is being issued to satisfy the requirement of the **Department of Indigenous Services Canada (ISC)** (the "**Client**") for Task-Based Informatics Professional Services (TBIPS) under the TBIPS Supply Arrangement (SA) method of supply. ISC has a requirement for the provision IT Business, Project Management, and Instructional/Training resources in support of the functional development, maintenance and production support for the Education and Social Development Programs and Partnership (ESDPP), the Education Information System (EIS) and the First Nations Child and Family Services information Management Systems (FNCFS), the Resolution and Individual Affairs Sector (RIAS) Indian Registration and Estate Management System (IREMS) (referenced as "the Systems"), as well as any new systems that come under development on an "as and when requested" basis
- (b) It is intended to result in the award of up to two Contracts for an initial period of 3 years 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, Industrial Security Program (ISP) of Public Works and Government Services Canada (<http://ssi-iss.tpsgc-pwgsc.gc.ca/index-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, Part 7 – Resulting Contract Clauses and the attachment titled "Federal Contractor's Program for Employment Equity – Certification.
- (f) Only TBIPS SA Holders currently holding a TBIPS SA for Tier 2 in the National Capital Region under the EN578-170432 series of SA's 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 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) 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.
- (i) The Phased Bid Compliance Process applies to this requirement.

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- (j) The Resource Categories described below are required on an as and when requested basis in accordance with the TBIPS SA Annex “A”:

RESOURCE CATEGORY	LEVEL OF EXPERTISE	ESTIMATED NUMBER OF RESOURCES REQUIRED
A.11 TESTER	LEVEL 1	2
A.11 TESTER	LEVEL 2	2
A.11 TESTER	LEVEL 3	2
B.1 BUSINESS ANALYST	LEVEL 1	2
B.1 BUSINESS ANALYST	LEVEL 2	2
B.1 BUSINESS ANALYST	LEVEL 3	2
B.2 BUSINESS ARCHITECT	LEVEL 3	2
B.9 COURSEWARE DEVELOPER	LEVEL 2	2
B.9 COURSEWARE DEVELOPER	LEVEL 3	2
B.11 INSTRUCTOR, IT	LEVEL 2	2
B.11 INSTRUCTOR, IT	LEVEL 3	2
B.14 TECHNICAL WRITER	LEVEL 2	2
B.14 TECHNICAL WRITER	LEVEL 3	2
P.1 CHANGE MANAGEMENT CONSULTANT	LEVEL 1	2
P.1 CHANGE MANAGEMENT CONSULTANT	LEVEL 3	2
P.7 PROJECT COORDINATOR	LEVEL 2	2
P.9 PROJECT MANAGER	LEVEL 2	2
P.9 PROJECT MANAGER	LEVEL 3	2
P.12 RISK MANAGEMENT SPECIALIST	LEVEL 2	2

1.3 Debriefings

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

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PART 2 - BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

- (a) All instructions, clauses and conditions identified in the bid solicitation by number, date and title are set out in the *Standard Acquisition Clauses and Conditions Manual* (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.
- (b) Bidders who submit a bid agree to be bound by the instructions, clauses and conditions of the bid solicitation and accept the clauses and conditions of the resulting contract(s).
- (c) The 2003 (2017-04-27) Standard Instructions - Goods or Services - Competitive Requirements are incorporated by reference into and form part of the bid solicitation. If there is a conflict between the provisions of 2003 and this document, this document prevails.
- (d) The 2003 standard instructions is amended as follows:
 - Section 01, entitled Integrity Provisions – bid, is amended as follows:
 - subsection 3.a) is deleted in its entirety and replaced with the following:

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

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

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

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

Delete: 60 days

Insert: 180 days

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- Section 06, entitled Late bids, is deleted entirely and replaced with the following:
"PWGSC will return bids delivered after the stipulated solicitation closing date and time, unless they qualify as a delayed bid as described in the section entitled Delayed bids. For bids submitted using means other than the Canada Post Corporation's epost Connect service, the bid will be returned. For bids submitted using Canada Post Corporation's epost Connect service, conversations initiated by the Bid Receiving Unit via the epost Connect service that contain access, records and information pertaining to a late bid will be deleted."
- Section 07, entitled Delayed bids, is amended as follows:
 - subsection 1 is amended to add the following piece of evidence:
"d. a CPC epost Connect service date and time record indicated in the epost Connect conversation activity."
- Section 08, entitled Transmission by facsimile, is deleted and replaced by the following:
"Transmission by facsimile or by epost Connect
 1. Facsimile
 - a. Bids transmitted by facsimile will not be accepted.
 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. The solicitation number must be identified in the epost Connect message field of all electronic transfers.

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

2.2 Submission of Bids

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

2.3 Enquiries - Bid Solicitation

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

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2.4 Former Public Servant

- (i) 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.

(ii) Definitions

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

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

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

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

(iii) 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:

- name of former public servant;
- 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

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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](#).

(iv) Work Force Adjustment Directive

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

If so, the Bidder must provide the following information:

- (a) name of former public servant;
- (b) conditions of the lump sum payment incentive;
- (c) date of termination of employment;
- (d) amount of lump sum payment;
- (e) rate of pay on which lump sum payment is based;
- (f) period of lump sum payment including start date, end date and number of weeks;
- (g) number and amount (professional fees) of other contracts subject to the restrictions of a work force adjustment program.

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

2.5 Applicable Laws

- (i) 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 Volumetric Data

The estimated number of days for each resources category 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.

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PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

(a) Epost Connect Bid Submission

- (i) If the Bidder chooses to submit its bid electronically, Canada requests that the Bidder submits its bid in accordance with section 8 of the 2003 standard instructions and as amended in Part 2 - Bidder Instructions, Article 2.1 Standard Instructions, Clauses and Conditions. Bidders are required to provide their bid in a single transmission. The epost Connect service has the capacity to receive multiple documents, up to 1GB per individual attachment.
- (ii) The bid must be gathered per section and separated as follows:
Section I: Technical Bid
Section II: Financial Bid
Section III: Certifications
- (iii) Prices must appear in the financial bid only. No prices must be indicated in any other section of the bid.

(b) Soft Copy Bid Submission (CD/DVD or USB)

- (i) If the Bidder chooses to submit its bid in soft copy, Canada requests that the Bidder submits its bid in separate sections as follows:
Section I: Technical Bid – Two (2) soft copies on a CD/DVD or USB key
Section II: Financial Bid – One (1) soft copy on a CD/DVD or USB key
Section III: Certifications – One (1) soft copy on a CD/DVD or USB key
- (ii) Hard copy bid submissions will not be given any consideration.
- (iii) 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

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- (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.

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3.2 Section I: Technical Bid

(a) The technical bid consists of the following:

- (i) **Bid Submission Form (Attachment 3.1):** Bidders are requested to include the Bid Submission Form - Attachment 3.1 with their bids. It provides a common form in which bidders can provide information required for evaluation and contract award, such as a contact name and the Bidder's Procurement Business Number, etc. Using the form to provide this information is not mandatory, but it is recommended. If Canada determines that the information required by the Bid Submission Form is incomplete or requires correction, Canada will provide the Bidder with an opportunity to do so.
- (ii) **Security Clearance:** Bidders are requested to submit the following security information for each of the proposed resources with their bids on or before the bid closing date:

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

If the Bidder has not included the security information in its bid, the Contracting Authority will provide 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 (Attachments 4.1):** The technical bid must substantiate the compliance with the specific articles of Attachments 4.1 which is the requested format for providing the substantiation. The substantiation must not simply be a repetition of the requirement(s), but must explain and demonstrate how the Bidder will meet the requirements and carry out the required Work. Simply stating that the Bidder or its proposed solution or resources comply is not sufficient. Where Canada determines that the substantiation is not complete, the Bidder will be considered non-responsive and disqualified. The substantiation may refer to additional documentation submitted with the bid - this information can be referenced in the "Bidder's Response" column of Attachments 4.1, where Bidders are requested to indicate where in the bid the reference material can be found, including the title of the document, and the page and paragraph numbers; where the reference is not sufficiently precise, Canada may request that the Bidder direct Canada to the appropriate location in the documentation.
- (iv) **For Proposed Resources:** The technical bid must include the résumés of the proposed resources for each of the resource categories as identified in Attachments 4.1. The same individual must not be proposed for more than one Resource Category. The Technical bid must demonstrate that each proposed individual meets the qualification requirements described (including any educational requirements, work experience requirements, and professional designation or membership requirements). With respect to the proposed resources:

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- (A) Proposed resources may be employees of the Bidder or employees of a subcontractor, or these individuals may be independent contractors to whom the Bidder would subcontract a portion of the Work (refer to Part 5, Certifications).
 - (B) For educational requirements for a particular degree, designation or certificate, PWGSC will only consider educational programs that were successfully completed by the resource by the time of bid closing. If the degree, designation or certification was issued by an educational institution outside of Canada, the Bidder must provide a copy of the results of the academic credential assessment and qualification recognition service issued by an agency or organization recognized by the Canadian Information Centre for International Credentials (CICIC).
 - (C) For requirements relating to professional designation or membership, the resource must have the required designation or membership by the time of bid closing and must continue, where applicable, to be a member in good standing of the profession or membership throughout the evaluation period and Contract Period. Where the designation or membership must be demonstrated through a certification, diploma or degree, such document must be current, valid and issued by the entity specified in this solicitation. If the entity is not specified, the issuer must have been an accredited or otherwise recognized body, institution or entity at the time the document was issued. If the degree, diploma or certification was issued by an educational institution outside of Canada, the Bidder must provide a copy of the results of the academic credential assessment and qualification recognition service issued by an agency or organization recognized by the Canadian Information Centre for International Credentials (CICIC).
 - (D) For work experience, PWGSC will not consider experience gained as part of an educational program, except for experience gained through a formal co-operative program at a post-secondary institution.
 - (E) For any requirements that specify a particular time period (e.g., 2 years) of work experience, PWGSC will disregard any information about experience if the technical bid does not include the relevant dates (month and year) for the experience claimed (i.e., the start date and end date). Canada will evaluate only the duration that the resource actually worked on a project or projects (from his or her start date to end date), instead of the overall start and end date of a project or a combination of projects in which a resource has participated.
 - (F) For work experience to be considered by Canada, the technical bid must not simply indicate the title of the individual's position, but must demonstrate that the resource has the required work experience by explaining the responsibilities and work performed by the individual while in that position. In situations in which a proposed resource worked at the same time on more than one project, the duration of any overlapping time period will be counted only once toward any requirements that relate to the individual's length of experience.
- (v) **Customer Reference Contact Information:**
- (A) 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 information required for M1 Attachment 4.1.
 - (B) For each customer reference, the Bidder must, at a minimum, provide the name and either the telephone number or e-mail address for a contact person.

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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.

- (i) The form of question to be used to request confirmation from customer references is as follows:

1. *“Has the Bidder provided your organization with IM/IT related professional resources for project management and training to support Business applications (e.g. functional maintenance, functional application development, testing, data services, IM/IT project management, IT related Instruction/Training/user guidance/coaching) for a minimum duration of twelve (12) months, within the last seven (7) years (as of bid closing date) and have a minimum billing of two million dollars (\$2M) for professional services only (taxes extra)”*

☐ *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.*

2. *Has the Bidder provided your organization with IM/IT related professional resources with demonstrated experience in providing professional IM/IT services to its clients in support of an IT system related to:*

- i) education programs or education policy; or*
- ii) social programs or social programs policy, or*
- iii) Indigenous individuals.*

☐ *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.*

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3.3 Section II: Financial Bid

- (a) **Pricing:** Bidders must submit their financial bid in accordance with the Pricing Schedule provided in Attachment 4.2. The total amount of Applicable Taxes must be shown separately, if applicable. Unless otherwise indicated, bidders must include a single, firm, all-inclusive per diem rate quoted in Canadian dollars in each cell requiring an entry in the pricing tables.
- (b) **Variation in Resource Rates By Time Period:** For any given resource category, where the financial tables provided by Canada allow different firm rates to be charged for a resource category during different time periods:
 - (i) the rate bid must not increase by more than 5% from one time period to the next and
 - (ii) the rate bid for the same resource category during any subsequent time period must not be lower than the rate bid for the time period that includes the first month of the Initial Contract Period.
- (c) **Variation in Resource Rates By Level:** Where the financial tables provided by Canada allow different firm rates to be charged for different levels of experience within the same resource category and time period, for any such resource category and time period
 - (i) the rate bid for level three must be the same or higher than the rate bid for level two, and
 - (ii) the rate bid for level two must be the same or higher than the rate bid for level one.
 - (iii) The rate bid for level one must be the same or lower than the rate bid for level three and must be the same or lower than the rate bid for level two.
- (d) **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.
- (e) **Blank Prices:** Bidders are requested to insert "\$0.00" for any item for which it does not intend to charge or for items that are already included in other prices set out in the tables. If the Bidder leaves any price blank, Canada will treat the price as "\$0.00" for evaluation purposes and may request that the Bidder confirm that the price is, in fact, \$0.00. No bidder will be permitted to add or change a price as part of this confirmation. Any bidder who does not confirm that the price for a blank item is \$0.00 will be declared non-responsive.

3.4 Section III: Certifications

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

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PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

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

the Bidder must provide the information requested by Canada within 5 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.
 - (iv) **Canada will use the Phased Bid Compliance Process described below.**

4.1.1 Phased Bid Compliance Process (PBCP)

4.1.1.1 General

- (a) Canada is conducting the PBCP described below for this requirement.
- (b) Notwithstanding any review by Canada at Phase I or II of the PBCP, Bidders are and will remain solely responsible for the accuracy, consistency and completeness of their Bids and Canada does not undertake, by reason of this review, any obligations or responsibility for identifying any or all errors or omissions in Bids or in responses by a Bidder to any communication from Canada.

THE BIDDER ACKNOWLEDGES THAT THE REVIEWS IN PHASE I AND II OF THIS PBCP ARE PRELIMINARY AND DO NOT PRECLUDE A FINDING IN PHASE III THAT THE BID IS

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NON-RESPONSIVE, EVEN FOR MANDATORY

REQUIREMENTS WHICH WERE SUBJECT TO REVIEW IN PHASE I OR II AND NOTWITHSTANDING THAT THE BID HAD BEEN FOUND RESPONSIVE

IN SUCH EARLIER PHASE. CANADA MAY DEEM A BID TO BE NON-RESPONSIVE TO A MANDATORY REQUIREMENT AT ANY PHASE.

THE BIDDER ALSO ACKNOWLEDGES THAT ITS RESPONSE TO A NOTICE OR A COMPLIANCE ASSESSMENT REPORT (CAR) (EACH DEFINED BELOW) IN PHASE I OR II MAY NOT BE SUCCESSFUL IN RENDERING ITS BID RESPONSIVE TO THE MANDATORY REQUIREMENTS THAT ARE THE SUBJECT OF THE NOTICE OR CAR, AND MAY RENDER ITS BID NON-RESPONSIVE TO OTHER MANDATORY REQUIREMENTS.

- (c) Canada may, in its discretion, request and accept at any time from a Bidder and consider as part of the Bid, any information to correct errors or deficiencies in the Bid that are clerical or administrative, such as, without limitation, failure to sign the Bid or any part or to checkmark a box in a form, or other failure of format or form or failure to acknowledge; failure to provide a procurement business number or contact information such as names, addresses and telephone numbers; inadvertent errors in numbers or calculations that do not change the amount the Bidder has specified as the price or of any component thereof that is subject to evaluation. This shall not limit Canada's right to request or accept any information after the bid solicitation closing in circumstances where the bid solicitation expressly provides for this right. The Bidder will have the time period specified in writing by Canada to provide the necessary documentation. Failure to meet this deadline will result in the Bid being declared non-responsive.
- (d) The PBCP does not limit Canada's rights under Standard Acquisition Clauses and Conditions (SACC) 2003 (2017-04-27) Standard Instructions – Goods or Services – Competitive Requirements nor Canada's right to request or accept any information during the solicitation period or after bid solicitation closing in circumstances where the bid solicitation expressly provides for this right, or in the circumstances described in subsection (c).
- (e) Canada will send any Notice or CAR by any method Canada chooses, in its absolute discretion. The Bidder must submit its response by the method stipulated in the Notice or CAR. Responses are deemed to be received by Canada at the date and time they are delivered to Canada by the method and at the address specified in the Notice or CAR. An email response permitted by the Notice or CAR is deemed received by Canada on the date and time it is received in Canada's email inbox at Canada's email address specified in the Notice or CAR. A Notice or CAR sent by Canada to the Bidder at any address provided by the Bidder in or pursuant to the Bid is deemed received by the Bidder on the date it is sent by Canada. Canada is not responsible for late receipt by Canada of a response, however caused.

4.1.1.2 Phase I: Financial Bid

- (a) After the closing date and time of this bid solicitation, Canada will examine the Bid to determine whether it includes a Financial Bid and whether any Financial Bid includes all information required by the solicitation. Canada's review in Phase I will be limited to identifying whether any information that is required under the bid solicitation to be included in the Financial Bid is missing from the Financial Bid. This review will not assess whether the Financial Bid meets any standard or is responsive to all solicitation requirements.
- (b) Canada's review in Phase I will be performed by officials of the Department of Public Works

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and Government Services.

- (c) If Canada determines, in its absolute discretion that there is no Financial Bid or that the Financial Bid is missing all of the information required by the bid solicitation to be included in the Financial Bid, then the Bid will be considered non-responsive and will be given no further consideration.
- (d) For Bids other than those described in c), Canada will send a written notice to the Bidder (“Notice”) identifying where the Financial Bid is missing information. A Bidder, whose Financial Bid has been found responsive to the requirements that are reviewed at Phase I, will not receive a Notice. Such Bidders shall not be entitled to submit any additional information in respect of their Financial Bid.
- (e) The Bidders who have been sent a Notice shall have the time period specified in the Notice (the “Remedy Period”) to remedy the matters identified in the Notice by providing to Canada, in writing, additional information or clarification in response to the Notice. Responses received after the end of the Remedy Period will not be considered by Canada, except in circumstances and on terms expressly provided for in the Notice.
- (f) In its response to the Notice, the Bidder will be entitled to remedy only that part of its Financial Bid which is identified in the Notice. For instance, where the Notice states that a required line item has been left blank, only the missing information may be added to the Financial Bid, except that, in those instances where the addition of such information will necessarily result in a change to other calculations previously submitted in its Financial Bid, (for example, the calculation to determine a total price), such necessary adjustments shall be identified by the Bidder and only these adjustments shall be made. All submitted information must comply with the requirements of this solicitation.
- (g) Any other changes to the Financial Bid submitted by the Bidder will be considered to be new information and will be disregarded. There will be no change permitted to any other Section of the Bidder’s Bid. Information submitted in accordance with the requirements of this solicitation in response to the Notice will replace, in full, **only** that part of the original Financial Bid as is permitted above, and will be used for the remainder of the bid evaluation process.
- (h) Canada will determine whether the Financial Bid is responsive to the requirements reviewed at Phase I, considering such additional information or clarification as may have been provided by the Bidder in accordance with this Section. If the Financial Bid is not found responsive for the requirements reviewed at Phase I to the satisfaction of Canada, then the Bid shall be considered non-responsive and will receive no further consideration.
- (i) Only Bids found responsive to the requirements reviewed in Phase I to the satisfaction of Canada, will receive a Phase II review.

4.1.1.3 Phase II: Technical Bid

- (a) Canada’s review at Phase II will be limited to a review of the Technical Bid to identify any instances where the Bidder has failed to meet any Eligible Mandatory Criterion. This review will not assess whether the Technical Bid meets any standard or is responsive to all solicitation requirements. Eligible Mandatory Criteria are all mandatory technical criteria that are identified in this solicitation as being subject to the PBCP. Mandatory technical criteria that are not identified in the solicitation as being subject to the PBCP, will not be evaluated until Phase III.

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- (b) Canada will send a written notice to the Bidder (Compliance Assessment Report or “CAR”) identifying any Eligible Mandatory Criteria that the Bid has failed to meet. A Bidder whose Bid has been found responsive to the requirements that are reviewed at Phase II will receive a CAR that states that its Bid has been found responsive to the requirements reviewed at Phase II. Such Bidder shall not be entitled to submit any response to the CAR.
- (c) A Bidder shall have the period specified in the CAR (the “Remedy Period”) to remedy the failure to meet any Eligible Mandatory Criterion identified in the CAR by providing to Canada in writing additional or different information or clarification in response to the CAR. Responses received after the end of the Remedy Period will not be considered by Canada, except in circumstances and on terms expressly provided for in the CAR.
- (d) The Bidder’s response must address only the Eligible Mandatory Criteria listed in the CAR as not having been achieved, and must include only such information as is necessary to achieve such compliance. Any additional information provided by the Bidder which is not necessary to achieve such compliance will not be considered by Canada, except that, in those instances where such a response to the Eligible Mandatory Criteria specified in the CAR will necessarily result in a consequential change to other parts of the Bid, the Bidder shall identify such additional changes, provided that its response must not include any change to the Financial Bid.
- (e) The Bidder’s response to the CAR should identify in each case the Eligible Mandatory Criterion in the CAR to which it is responding, including identifying in the corresponding section of the original Bid, the wording of the proposed change to that section, and the wording and location in the Bid of any other consequential changes that necessarily result from such change. In respect of any such consequential change, the Bidder must include a rationale explaining why such consequential change is a necessary result of the change proposed to meet the Eligible Mandatory Criterion. It is not up to Canada to revise the Bidder’s Bid, and failure of the Bidder to do so in accordance with this subparagraph is at the Bidder’s own risk. All submitted information must comply with the requirements of this solicitation.
- (f) Any changes to the Bid submitted by the Bidder other than as permitted in this solicitation, will be considered to be new information and will be disregarded. Information submitted in accordance with the requirements of this solicitation in response to the CAR will replace, in full, **only** that part of the original Bid as is permitted in this Section.

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- (g) Additional or different information submitted during Phase II permitted by this section will be considered as included in the Bid, but will be considered by Canada in the evaluation of the Bid at Phase II only for the purpose of determining whether the Bid meets the Eligible Mandatory Criteria. It will not be used at any Phase of the evaluation to increase or decrease any score that the original Bid would achieve without the benefit of such additional or different information. For instance, an Eligible Mandatory Criterion that requires a mandatory minimum number of points to achieve compliance will be assessed at Phase II to determine whether such mandatory minimum score would be achieved with such additional or different information submitted by the Bidder in response to the CAR. If so, the Bid will be considered responsive in respect of such Eligible Mandatory Criterion, and the additional or different information submitted by the Bidder shall bind the Bidder as part of its Bid, but the Bidder's original score, which was less than the mandatory minimum for such Eligible Mandatory Criterion, will not change, and it will be that original score that is used to calculate any score for the Bid
- (h) Canada will determine whether the Bid is responsive for the requirements reviewed at Phase II, considering such additional or different information or clarification as may have been provided by the Bidder in accordance with this Section. If the Bid is not found responsive for the requirements reviewed at Phase II to the satisfaction of Canada, then the Bid shall be considered non-responsive and will receive no further consideration.
- (i) Only Bids found responsive to the requirements reviewed in Phase II to the satisfaction of Canada, will receive a Phase III evaluation.

4.1.1.4 Phase III: Final Evaluation of the Bid

- (a) In Phase III, Canada will complete the evaluation of all Bids found responsive to the requirements reviewed at Phase II. Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria.
- (b) A Bid is non-responsive and will receive no further consideration if it does not meet all mandatory evaluation criteria of the solicitation.

4.1.2 Technical Evaluation

4.1.2.1 Mandatory Technical Criteria

The Phased Bid Compliance Process will apply only to mandatory technical criteria.

The Phased Bid Compliance Process will apply only to mandatory technical criteria identified by the superscript (^{PB}). Mandatory technical criteria not identified by the superscript (^{PB}) will not be subject to the Phased Bid Compliance Process

Corporate mandatory technical criterion M1 is subject to PBCP.

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4.2 Technical Evaluation

(a) Mandatory Technical Criteria:

- (i) Each bid will be reviewed for compliance with the mandatory requirements of the bid solicitation. Any element of the bid solicitation that is identified specifically with the words "must" or "mandatory" is a mandatory requirement. Bids that do not comply with each and every mandatory requirement will be declared non-responsive and be disqualified.
- (ii) The mandatory technical criteria are described in Attachment 4.1.

(b) Point-Rated Technical Criteria:

- (i) Each bid will be rated by assigning a score to the rated requirements, which are identified in the bid solicitation by the word "rated" or by reference to a score. Bidders who fail to submit complete bids with all the information requested by this bid solicitation will be rated accordingly.
- (ii) The rated requirements are described in Attachment 4.1.

(c) Number of Resources Evaluated

Only a certain number of resources per Resource Category will be evaluated as part of this bid solicitation as identified in Attachment 4.1. Additional Resources will only be assessed after contract award once specific tasks are requested of the Contractor. After contract award, the Task Authorization process will be in accordance with Part 7 – Resulting Contract Clauses, the Article titled "Task Authorization". When a Task Authorization Form (TA Form) is issued, the Contractor will be requested to propose a resource to satisfy the specific requirement based on the TA Form's Statement of Work. The proposed resource will then be assessed against the criteria identified in the Contract's Statement of Work in accordance with Appendix C of Annex A.

(d) Reference Checks:

- (i) Whether or not to conduct reference checks is discretionary. However, if PWGSC chooses to conduct reference checks for any given rated or mandatory requirement, it will check the references for that requirement for all bidders to be recommended for contract award.
- (ii) For reference checks, Canada will conduct the reference check in writing by e-mail. Canada will send all e-mail reference check requests to contacts supplied by all the Bidders on the same day using the e-mail 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 e-mail 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 e-mail, 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 e-mail address of an alternate contact person from the same customer. Bidders will only be provided with this opportunity once for each customer, and only if the originally named individual is unavailable to respond (i.e., the Bidder will not be provided with an opportunity to submit the name of an alternate contact person if the original contact person indicates that he or she is unwilling or unable to respond). The 5 working days will not be extended to provide additional time for the new contact to respond.

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- (iv) Wherever information provided by a reference differs from the information supplied by the Bidder, the information supplied by the reference will be the information evaluated.
- (v) Points will not be allocated and/or a bidder will not meet the mandatory experience requirement (as applicable) if (1) the reference customer states he or she is unable or unwilling to provide the information requested, or (2) the customer reference is not a customer of the Bidder itself (for example, the customer cannot be the customer of an affiliate of the Bidder instead of being a customer of the Bidder itself). Nor will points be allocated or a mandatory met if the customer is itself an affiliate or other entity that does not deal at arm's length with the Bidder.

4.3 Financial Evaluation

- (a) There are two possible financial evaluation methods for this requirement. The first method will be used if three or more bids are determined responsive (see (b) Financial Evaluation - Method A below). The second method will be used if fewer than three bids are determined responsive (see (c) Financial Evaluation - Method B below).
- (b) **Financial Evaluation - Method A:** The following financial evaluation method will be used if three or more bids are determined responsive:
 - (i) **Calculation of Total Bid Price:** The financial evaluation will be conducted using the pricing tables completed by the Bidders and the Firm Per Diem Median Rate Evaluation Method explained below. A financial calculation will occur for each Bidder by multiplying its firm per diem rates, or Median Rate(s) if applicable, for the Initial Contract Period and the option period(s) with the estimated number of days of work for each period, for all the Resource Categories stated in Attachment 4.2 - Pricing Schedule. The sum of such rates will constitute the Total Bid Price for that Bidder.
 - (ii) **Firm Per Diem Median Rate Evaluation**
 - (A) **Use:** The firm per diem median rate calculation will apply to modify the rate to be assessed in the financial evaluation of a Bidder, where that Bidder submits a firm per diem rate for a resource category that is lower than the Lower Band Limit as calculated below. The firm per diem median rate calculation is for evaluation purposes only, and the actual submitted per diem rate will be used in any resulting contract in all instances.
 - (B) **Calculation for both the Initial Contract Period and the Option Period medians:** Using the per diem rate proposed for each individual Resource Category a Median Rate will be determined for each Resource Category for the Initial Contract Period, and for each of the option period(s). For each Resource Category, the Median Rate will be calculated using the median function in Microsoft Excel. A Lower Band Limit will be calculated for each Resource Category and will represent a range that encompasses the Median Rate to a value of minus (-) 20% of the Median Rate. If a Bidder bids a firm per diem rate for a Resource Category that is lower than the Lower Band Limit, that Bidder's financial evaluation will be conducted using a per diem rate equal to the Median Rate for that Resource Category.

For example, if the Median Rate is determined to be \$500 for a Resource Category, the Lower Band Limit would be minus (-) 20% of \$500, or \$400. If a Bidder proposes a firm per diem rate that is lower than \$400, the Median Rate of \$500 will be used in the Bidder's financial evaluation for that Resource Category.
- (c) **Financial Evaluation - Method B:** The following financial evaluation method will be used if less than three bids are determined responsive:
 - (i) **Calculation of Total Bid Price:** The financial evaluation will be conducted using the pricing tables completed by the Bidders. A financial calculation will occur for each Bidder by multiplying its firm per diem rates for the Initial Contract Period and the option period(s) with

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the estimated number of days of work for each period, for all the Resource Categories stated in Attachment 4.2 - Pricing Schedule. The sum of such rates will constitute the Total Bid Price for that Bidder.

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

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

- (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 date of this request for rate substantiation, and the fees charged were equal to or less than the rate offered to Canada;
- (ii) in relation to the invoice in (i), evidence from the Bidder's customer that the services identified in the invoice include at least 50% of the tasks listed in the Statement of Work for the category of resource being assessed for an unreasonably low rate. This evidence must consist of either a copy of the contract (which must describe the services to be provided and demonstrate that at least 50% of the tasks to be performed are the same as those to be performed under the Statement of Work in this bid solicitation) or the customer's signed certification that the services subject to the charges in the invoice included at least 50% of the same tasks to be performed under the Statement of Work in this bid solicitation; and
- (iii) the name, telephone number and, if available, e-mail address of a contact person at the customer who received each invoice submitted under (i), so that Canada may verify any information provided by the Bidder.

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

(e) **Formulae in Pricing Tables**

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

4.4 Basis of Selection

Selection Process: The following selection process will be conducted as follows:

- (a) A bid must comply with the requirements of the bid solicitation, meet all mandatory evaluation criteria and obtain the required pass marks for the point rated criteria identified in this bid solicitation to be declared responsive.

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- (b) 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 60 while the greatest possible Total Financial Score is 40.
- (i) **Calculation of Total Technical Score:** The Total Technical Score will be computed for each responsive bid by converting the Technical Score obtained for the point-rated technical criteria using the following formula, rounded to two decimal places:
- $$\frac{\text{Technical Score}}{\text{Maximum Technical Points (bidders, please refer to the maximum technical points in Attachment 4.1)}} \times 60 = \text{Total Technical Score}$$
- (ii) **Calculation of Total Financial Score:** The Total Financial Score will be computed for each responsive bid by converting the Financial Score obtained for the financial evaluation using the following formula rounded to two decimal places:
- $$\frac{\text{Lowest Total Bid Price}}{\text{The Bidder's Financial Evaluated Price}} \times 40 = \text{Total Financial Score}$$
- (iii) **Calculation of the Total Bidder Score:** The Total Bidder Score will be computed for each responsive bid in accordance with the following formula:
- $$\text{Total Technical Score} + \text{Total Financial Score} = \text{Total Bidder Score}$$
- (c) In the event of identical Total Bidder Scores occurring, then the bid with the highest Total Technical Score will become the top-ranked bidder. In the event of identical Total Technical Scores occurring, then the highest Total Financial Score will become the top-ranked Bidder.
- (d) A maximum of 2 contracts may be awarded in total as a result of this bid solicitation.
- (e) **Contract Funding Allocation Formula:** Where more than one contract is awarded, each contract will be issued with an amount of funding specified in the article titled "Limitation of Expenditure" calculated based on the following:

Bidder	Total Bidder Score	Fund Allocation Formula (%)	Total Funds Allocated
1	98	$98/180 \times 100 = 54.44$	\$5,444,000.00
2	82	$82/180 \times 100 = 45.56$	\$4,556,000.00
Total	180		\$10,000,000.00
Total funds available: \$10,000,000.00			

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

- (f) Bidders should note that all contract awards are subject to Canada's internal approvals process, which includes a requirement to approve funding in the amount of any proposed contract. Despite the fact that the Bidder may have been recommended for contract award, a contract will only be awarded if internal approval is granted according to Canada's internal policies. If approval is not granted, no contract will be awarded.

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PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

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

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

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

5.1 Certifications Precedent to Contract Award and Additional Information

The certifications and additional information listed below should be submitted with the bid, but may be submitted afterwards. If any of these required certifications or additional information is not completed and submitted as requested, the Contracting Authority will inform the Bidder of a time frame within which to provide the information. Failure to provide the certifications or the additional information listed below within the time frame provided will render the bid non-responsive.

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

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "[FCP Limited Eligibility to Bid](http://www.labour.gc.ca/eng/standards_equity/eq/emp/fcp/list/inelig.shtml)" list (http://www.labour.gc.ca/eng/standards_equity/eq/emp/fcp/list/inelig.shtml) available from Employment and Social Development Canada (ESDC) - Labour's website.

Canada will have the right to declare a bid non-responsive if the Bidder, or any member of the Bidder if the Bidder is a Joint Venture, appears on the "[FCP Limited Eligibility to Bid](http://www.labour.gc.ca/eng/standards_equity/eq/emp/fcp/list/inelig.shtml)" list at the time of contract award.

Canada will also have the right to terminate the Contract for default if a Contractor, or any member of the Contractor if the Contractor is a Joint Venture, appears on the "[FCP Limited Eligibility to Bid](http://www.labour.gc.ca/eng/standards_equity/eq/emp/fcp/list/inelig.shtml)" 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) Professional Services Resources

- (i) By submitting a bid, the Bidder certifies that, if it is awarded a contract as a result of the bid solicitation, every individual proposed in its bid will be available to perform the Work as required by Canada's representatives and at the time specified in the bid solicitation or agreed to with Canada's representatives.
- (ii) By submitting a bid, the Bidder certifies that all the information provided in the résumés and supporting material submitted with its bid, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Bidder to be true and

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accurate. Furthermore, the Bidder warrants that every individual proposed by the Bidder for the requirement is capable of performing the Work described in the resulting contract.

- (iii) If a Bidder has proposed any individual who is not an employee of the Bidder, by submitting a bid, the Bidder certifies that it has the permission from that individual to propose his/her services in relation to the Work to be performed and to submit his/her résumé to Canada. The Bidder must, upon request from the Contracting Authority, provide a written confirmation, signed by the individual, of the permission given to the Bidder and of his/her availability. Failure to comply with the request may result in the bid being declared non-responsive.

(b) Certification of Language – English and Bilingual

- i. 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 for the following resource categories will be 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.11 Instructor IT	Bilingual
B.14 Technical Writer	Bilingual

- ii. 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 for the following resource categories will be 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.

A.11 Tester	English Essential
B.1 Business Analyst	English Essential
B.2 Business Architect	English Essential
B.9 Courseware Developer	English Essential
P.1 Change Management Consultant	English Essential
P.7 Project Coordinator	English Essential
P.9 Project Manager	English Essential
P.12 Risk Management Specialist	English Essential

(c) Submission of Only One Bid

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

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PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS

6.1 Security Requirement

- (a) Before award of a contract, the following conditions must be met:
 - (i) the Bidder must hold a valid organization security clearance as indicated in Part 7 - Resulting Contract Clauses;
 - (ii) the Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work site(s) must meet the security requirements as indicated in Part 7 - Resulting Contract Clauses; and
- (b) Bidders are reminded to obtain the required security clearance promptly. Any delay in the award of a contract to allow the successful Bidder to obtain the required clearance will be at the entire discretion of the Contracting Authority.
- (c) For additional information on security requirements, Bidders should refer to the Industrial Security Program (ISP) of Public Works and Government Services Canada (<http://ssi-iss.tpsgc-pwgsc.gc.ca/index-eng.html>) website.
- (d) In the case of a joint venture bidder, each member of the joint venture must meet the security requirements.

6.2 Financial Capability

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

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PART 7 - RESULTING CONTRACT CLAUSES

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

7.1 Requirement

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

7.2 Task Authorization

- (a) **As-and-when-requested Task Authorizations:** The Work or a portion of the Work to be performed under the Contract will be on an "as-and-when-requested basis" using a Task Authorization (TA). The Work described in the TA must be in accordance with the scope of the Contract. The Contractor must not commence work until a validly issued TA has been issued by Canada and received by the Contractor. The Contractor acknowledges that any work performed before such issuance and receipt will be done at the Contractor's own risk.
- (b) **Allocation of Task Authorizations:** More than one contract has been awarded for this requirement. As a result, the Task Authorizations issued under this series of contracts will be allocated in accordance with the following:
 - (i) At the time this series of contracts was awarded, each Contractor was allocated an amount of funding as specified in the Limitation of Expenditure in respect of Task Authorizations based on the evaluation process described in the bid solicitation that resulted in the award of this series of contracts.
 - (ii) Canada will make a reasonable effort to ensure that the dollar value of the TAs issued to the Contractors are proportionally balanced throughout the Contract Period based on the percentage values in the Fund Allocation Formula. A review of TAs issued to the Contractors will be conducted at six-month intervals and at the beginning of each fiscal year to confirm proportional utilization and distribution of the TA's. Should a contractor refuse a TA under the Contract the next Contractor, under the same allocation process, will be offered the draft TA. The dollar value of the refused TA will be subtracted from the dollar value of the Contractor's Contract and may be re-allocated, at the Contracting

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

- (c) **Assessment of Resources Proposed at TA Stage:** Processes for issuing, responding to and assessing Task Authorizations are further detailed in Appendices A, B, C and D of Annex A.
- (d) **Form and Content of 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 the Contract
 - (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 details of any financial coding to be used;
 - (D) the categories of resources and the number required;
 - (E) a description of the work for the task outlining the activities to be performed and identifying any deliverables (such as reports);
 - (F) the start and completion dates;
 - (G) milestone dates for deliverables and payments (if applicable);
 - (H) the number of person-days of effort required;
 - (I) whether the work requires on-site activities and the location;
 - (J) the language profile of the resources required;
 - (K) the level of security clearance required of resources;
 - (L) 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
 - (M) 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

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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:**

- (i) To be validly issued, a TA must include the following signatures:
 - (A) for any TA, inclusive of revisions, with a value less than or equal to \$0.00 (including Applicable Taxes), the TA must be signed by:
 - (1) the Technical Authority; and
 - (B) for any TA, inclusive of revisions, with a value greater than this amount, a TA must include the following signatures:
 - (1) the Technical Authority;
 - (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 sub article (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. If some data is not available, the reason must be indicated. If services are not provided during a given period, the Contractor must still provide a "NIL" report. The data must be submitted on a quarterly basis to the Contracting Authority. From time to time, the Contracting Authority may also require an interim report during a reporting period.
- (ii) The quarterly periods are defined as follows:
 - (A) 1st quarter: April 1 to June 30;
 - (B) 2nd quarter: July 1 to September 30;
 - (C) 3rd quarter: October 1 to December 31; and
 - (D) 4th quarter: January 1 to March 31.

The data must be submitted to the Contracting Authority no later than 60 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;

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- (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
- (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 (excluding Applicable Taxes); and
 - (ii) **"Minimum Contract Value"** means \$20,000.00 (excluding Applicable Taxes).
- (b) Canada's obligation under the Contract is to request Work in the amount of the Minimum Contract Value or, at Canada's option, to pay the Contractor at the end of the Contract in accordance with sub-article (c), subject to sub-article (d). In consideration of such obligation, the Contractor agrees to stand in readiness throughout the Contract Period to perform the Work described in the Contract. Canada's maximum liability for work performed under the Contract must not exceed the Maximum Contract Value, unless an increase is authorized in writing by the Contracting Authority.

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- (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 ten 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:
 - (i) the total amount the Contractor may be paid under this section, together with any amounts paid, becoming due other than payable under the Minimum Revenue Guarantee, or due to the Contractor as of the date of termination, or
 - (ii) the amount payable under the Minimum Work Guarantee, less any amounts paid, due or otherwise becoming due to the Contractor as of the date of termination.
- 6. The Contractor will have no claim for damages, compensation, loss of profit, allowance arising out of any termination notice given by Canada under this section except to the extent that this section expressly provides. The Contractor agrees to repay immediately to Canada the portion of any advance payment that is unliquidated at the date of the termination.

(b) **Supplemental General Conditions:**

The following Supplemental General Conditions:

- (i) 4006 (2010/08/16), Supplemental General Conditions - Contractor to Own Intellectual Property Rights in Foreground Information;

apply to and form part of the Contract.

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7.5 Security Requirement

The following security requirements (SRCL #6 and related clauses provided by ISP) as set out under Annex "B" to the Supply Arrangement, applies to and forms part of the Contract.

- (a) The Contractor/Offeror must, at all times during the performance of the Contract/Standing Offer/Supply Arrangement, hold a valid Designated Organization Screening (DOS), issued by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC).
- (b) The Contractor/Offeror personnel requiring access to PROTECTED information, assets or sensitive work site(s) must EACH hold a valid RELIABILITY STATUS, granted or approved by CISD/PWGSC.
- (c) The Contractor/Offeror MUST NOT remove any PROTECTED information or assets from the identified work site(s), and the Contractor/Offeror 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 (if applicable), attached at Annex C;
 - (ii) Industrial Security Manual (Latest Edition).

7.6 Contract Period

- (a) **Contract Period:** The "**Contract Period**" is the entire period of time during which the Contractor is obliged to perform the Work, which includes:
 - (i) The "**Initial Contract Period**", which begins on the date the Contract is awarded and ends 3 years later; and
 - (ii) The period during which the Contract is extended, if Canada chooses to exercise any options set out in the Contract.
- (b) **Option to Extend the Contract:**
 - (a) The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to 2 additional 1-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.
 - (b) 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:

Michael Beaudoin
Supply Specialist
Public Works and Government Services Canada
Informatics Professional Services Division (IPSD)
Space, Innovation, and Informatics Projects Directorate

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Les Terrasses de la Chaudière 10, rue Wellington, 4th/Floor Gatineau, Québec K1A 0S5

Telephone: (613) 859-0841

E-mail address: michael.beaudoin@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

The Technical Authority for the Contract is:

TO BE INSERTED UPON CONTRACT AWARD

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

(c) Contractor's Representative

TO BE INSERTED UPON CONTRACT AWARD

7.8 Proactive Disclosure of Contracts with Former Public Servants

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

7.9 Payment

(a) Basis of Payment

- (i) **Professional Services provided under a Task Authorization with a Maximum Price:** For professional services requested by Canada, in accordance with a validly issued Task Authorization, Canada will pay the Contractor, in arrears, up to the Maximum Price for the TA, for actual time worked and any resulting deliverables in accordance with the firm all-inclusive per diem rates set out in Annex B, Basis of Payment, Applicable Taxes extra. Partial days will be prorated based on actual hours worked based on a 7.5-hour workday.
- (ii) **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. All payments are subject to government audit.
- (iii) **Competitive Award:** The Contractor acknowledges that the Contract has been awarded as a result of a competitive process. No additional charges will be allowed to compensate for errors, oversights, misconceptions or underestimates made by the Contractor when bidding for the Contract.

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- (iv) **Professional Services Rates:** In Canada's experience, bidders from time to time propose rates at the time of bidding for one or more Resource Categories that they later refuse to honour, on the basis that these rates do not allow them to recover their own costs and/or make a profit. This denies Canada of the benefit of the awarded contract. If the Contractor does not respond or refuses to provide an individual with the qualifications described in the Contract within the time described in the Contract (or proposes instead to provide someone from an alternate category at a different rate), whether or not Canada terminates the Contract as a whole or in part or chooses to exercise any of the rights provided to it under the general conditions, Canada may impose sanctions or take other measures in accordance with the PWGSC Vendor Performance Corrective Measure Policy (or equivalent) then in effect, which measures may include an assessment that results in conditions applied against the Contractor to be fulfilled before doing further business with Canada, or full debarment of the Contractor from bidding on future requirements.
- (b) **Limitation of Expenditure – Cumulative Total of all Task Authorizations**
- i. Canada's total liability to the Contractor under the Contract for all validly issued Task Authorizations (TAs), inclusive of any revisions, must not exceed the amount set out on page 1 of the Contract, less any Applicable taxes. With respect to the amount set out on page 1 of the Contract, Customs duties are included and Applicable Taxes are included
 - ii. No increase in the total liability of Canada will be authorized or paid to the Contractor unless an increase has been approved, in writing, by the Contracting Authority.
 - iii. The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:
 - a) when it is 75 percent committed, or
 - b) 4 months before the contract expiry date, or
 - c) As soon as the Contractor considers that the sum is inadequate for the completion of the Work required in all authorized TAs, inclusive of any revisions, whichever comes first.
 - iv. If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority a written estimate for the additional funds required. Providing this information does not increase Canada's liability.
- (c) **Method of Payment for Task Authorizations with a Maximum Price:** For each Task Authorization validly issued under the Contract that contains a maximum price:
- (i) Canada will pay the Contractor no more frequently than once a month in accordance with the Basis of Payment. The Contractor must submit time sheets for each resource showing the days and hours worked to support the charges claimed in the invoice.
 - (ii) Once Canada has paid the maximum TA price, Canada will not be required to make any further payment, but the Contractor must complete all the work described in the TA, all of which is required to be performed for the maximum TA price. If the work described in the TA is completed in less time than anticipated, and the actual time worked (as supported by the time sheets) at the rates set out in the Contract is less than the maximum TA price, Canada is only required to pay for the time spent performing the work related to that TA.
- (d) **Time Verification**
- Time charged and the accuracy of the Contractor's time recording system are subject to verification by Canada, before or after payment is made to the Contractor. If verification is done after payment, the Contract must repay any overpayment, at Canada's request.

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v. **Payment Credits**

(A) **Failure to Provide Resource:**

- (1) If the Contractor does not provide a required professional services resource that has all the required qualifications within the time prescribed by the Contract, the Contractor must credit to Canada an amount equal to the per diem rate (based on a 7.5-hour workday) of the required resource for each day (or partial day) of delay in providing the resource, up to a maximum of 10 days.
- (2) **Corrective Measures:** If credits are payable under this Article for two consecutive months or for three months in any 12-month period, the Contractor must submit a written action plan describing measures it will implement or actions it will undertake to eliminate the recurrence of the problem. The Contractor will have five working days to deliver the action plan to the Client and the Contracting Authority and 20 working days to rectify the underlying problem.
- (3) **Termination for Failure to Meet Availability Level:** In addition to any other rights it has under the Contract, Canada may terminate the Contract for default in accordance with the General Conditions by giving the Contractor three months' written notice of its intent, if any of the following apply:
 - (i) the total amount of credits for a given monthly billing cycle reach a level of 10% of the total billing for that month; or
 - (ii) the corrective measures required of the Contractor described above are not met.

This termination will be effective when the three month notice period expires, unless Canada determines that the Contractor has implemented the corrective measures to Canada's satisfaction during those three months.

- (B) **Credits Apply during Entire Contract Period:** The Parties agree that the credits apply throughout the Contract Period.
- (C) **Credits represent Liquidated Damages:** The Parties agree that the credits are liquidated damages and represent their best pre-estimate of the loss to Canada in the event of the applicable failure. No credit is intended to be, nor will it be construed as, a penalty.
- (D) **Canada's Right to Obtain Payment:** The Parties agree that these credits are a liquidated debt. To collect the credits, Canada has the right to hold back, draw back, deduct or set off from and against any money Canada owes to the Contractor from time to time.
- (E) **Canada's Rights & Remedies not Limited:** The Parties agree that nothing in this Article limits any other rights or remedies to which Canada is entitled under the Contract (including the right to terminate the Contract for default) or under the law generally.
- (F) **Audit Rights:** The Contractor's calculation of credits under the Contract is subject to verification by government audit, at the Contracting Authority's discretion, before or after payment is made to the Contractor. The Contractor must cooperate fully with Canada during the conduct of any audit by providing Canada with access to any records and systems that Canada considers necessary to ensure that all credits have been accurately credited to Canada in the Contractor's invoices. If an audit demonstrates that past invoices contained errors in the calculation of the credits, the Contractor must pay to Canada the amount the audit reveals was required to be credited to Canada, plus interest, from the date Canada remitted the excess payment until the date of the refund (the interest rate is the Bank of Canada's discount annual rate of interest in effect on the date the credit was first owed to Canada, plus 1.25% per year). If, as a result of conducting an audit, Canada determines that the Contractor's records or systems for identifying, calculating or recording

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the credits are inadequate, the Contractor must implement any additional measures required by the Contracting Authority.

vi. **No Responsibility to Pay for Work not performed due to Closure of Government Offices**

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

7.10 Invoicing Instructions

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

7.11 Certifications

- (a) The continuous compliance with the certifications provided by the Contractor in its bid, any TA quotation and the ongoing cooperation in providing additional information are conditions of the Contract. Certifications are subject to verification by Canada during the entire Contract Period. If the Contractor does not comply with any certification, or fails to provide the additional information, or if it is determined that any certification made by the Contractor in its bid is untrue, whether made knowingly or unknowingly, Canada has the right, pursuant to the default provision of the Contract, to terminate the Contract for default.

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:

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- (a) these Articles of Agreement, including any individual SACC clauses incorporated by reference in these Articles of Agreement;
- (b) Supplemental General Conditions, in the following order:
 - (i) 4006 (2010/08/16), Supplemental General Conditions - Contractor to Own Intellectual Property Rights in Foreground Information;
- (c) General Conditions 2035 (2016/04/04), Higher Complexity - Services;
- (d) Annex A, Statement of Work – including its Appendices as follows:
 - (a) Appendix A to Annex A - Tasking Assessment Procedure;
 - (b) Appendix B to Annex A - Task Authorization (TA) Form;
 - (c) Appendix C to Annex A - Resource Assessment Criteria and Response Table;
 - (d) 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 **TO BE INSERTED UPON CONTRACT AWARD**, as clarified on "or" as amended **TO BE INSERTED UPON CONTRACT AWARD** if applicable.

7.15 Foreign Nationals (Canadian Contractor)

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

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

7.16 Foreign Nationals (Foreign Contractor)

- (i). SACC Manual clause A2001C (2006/06/16), Foreign Nationals (Foreign Contractor)

7.17 Insurance Requirements

(a) Compliance with Insurance Requirements

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

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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**

- (A) 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.
- (B) The Commercial General Liability policy must include the following:
 - (i) 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.
 - (ii) Bodily Injury and Property Damage to third parties arising out of the operations of the Contractor.
 - (iii) 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.
 - (iv) 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.
 - (v) 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.
 - (vi) 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.
 - (vii) Employees and, if applicable, Volunteers must be included as Additional Insured.
 - (viii) Employers' Liability (or confirmation that all employees are covered by Worker's compensation (WSIB) or similar program)
 - (ix) 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.
 - (x) Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of policy cancellation.
 - (xi) 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.
 - (xii) Owners' or Contractors' Protective Liability: Covers the damages that the Contractor becomes legally obligated to pay arising out of the operations of a subcontractor.

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- (xiii) 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.

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- 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: ***[BIDDERS MUST LIST ALL THE JOINT VENTURE MEMBERS NAMED IN THE CONTRACTOR'S ORIGINAL BID]***.

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

Replacement of Specific Individuals

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

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

- (B) 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:
- (i) 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
 - (ii) 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.

- (C) 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.
- (D) 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.

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7.23 Access to Canada's Property and Facilities

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

7.24 Implementation of Professional Services

If similar professional services are currently being provided by another supplier or by Canada's own personnel, the Contractor is responsible for ensuring that the transition to the professional services it provides under the Contract is completed in a way that does not disrupt Canada's operations or users, and does not result in any interim degradation to the timeliness or quality of service. The Contractor is solely responsible for any additional training required by its resources to perform the Work, and time spent by resources on that training or becoming familiar with the Client's environment must not be charged to Canada. The transition will be considered complete once the Contractor has demonstrated, to the satisfaction of the Technical Authority that it is ready and able to carry out the Work. The transition must be complete by no later than 10 working days after the Contract is awarded. All costs associated with establishing itself to provide the professional services are the responsibility of the Contractor.

7.25 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.

7.26 Transition Period

The Contractor acknowledges that the nature of the services provided under the Contract requires continuity and that a transition period may be required at the end of the Contract. The Contractor agrees that Canada may, at its discretion, extend the Contract by a period of two months under the same conditions to ensure the required transition. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions as set out in the Basis of Payment.

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The Contracting Authority will advise the Contractor of the extension by sending a written notice to the Contractor at least 20 calendar days before the contract expiry date. The extension will be evidenced for administrative purposes only, through a contract amendment.

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ANNEX A **STATEMENT OF WORK (SOW)** **NATIONAL MAINTENANCE AND APPLICATION** **DEVELOPMENT SERVICES**

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1 **Background**

Indigenous Services Canada (ISC, formerly the Department of Indian Affairs and Northern Development and Indigenous and Northern Affairs Canada) supports Indigenous people (First Nations, Inuit and Métis) and northerners in their efforts to:

- improve social well-being and economic prosperity;
- develop healthier, more sustainable Indigenous communities; and
- participate more fully in Canada's political, social and economic development, to the benefit of all Canadians.

ISC is one of the federal government departments responsible for meeting the Government of Canada's (GoC) obligations and commitments to First Nations, Inuit and Métis, and for fulfilling the federal government's constitutional responsibilities in the three Territories.

Numerous statutes, negotiated agreements and relevant legal decisions largely determine ISC's responsibilities. Most of the Department's programs, representing a majority of its spending - are delivered through partnerships with Indigenous communities and federal-provincial or federal-territorial agreements. ISC also works with urban Indigenous people, Métis and Non-Status Indians (whom live in rural and urban areas).

1.1 ***Education Branch***

In order to achieve meaningful gains in education outcomes for First Nations, Budget 2016 proposed significant funding to support the transformation of the current on reserve education system, and Budget 2017 proposed additional funding for post-secondary education.

ISC has primary responsibility for education for First Nations on reserve, including administering funding for elementary and secondary education for First Nation students ordinarily resident on-reserve, provides post-secondary education financial support for First Nation and eligible Inuit students, and provides support to Canadian post-secondary institutions for the design and delivery of university and college level courses that respond to the education needs of First Nation and Inuit students. The government believes every First Nation child should get the best start in life, and is committed to working in partnership with First Nations in supporting their goals for a quality education system that delivers improved outcomes for First Nation students on reserve.

Education Information System (EIS)

The Education Information System (EIS) is the computer database that manages the education programs information within the ISC Services Portal. The system tracks performance outcomes in First Nations Education, and the resulting information allows ISC and First Nations to address concerns faster and make enhancements, where necessary, to support improved educational outcomes of students.

The secure system is designed to modernize and replace the old paper-based processes for reporting, while streamlining data collection practices. It supports ISC and First Nations in strengthening accountabilities in the delivery of First Nation education. It also helps ISC and First Nations gain a better understanding of the performance of students and schools.

The EIS exchanges depersonalized and grouped data with the Education Reports and Analysis Solution, to provide timely statistical reporting on First Nations education.

Additional information on the EIS can be found at: <http://www.aadnc-aandc.gc.ca/eng/1100100033778/1100100033779>.

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1.2 Social Policy and Programs Branch

The goal of ISC's First Nations Child and Family Services (FNCFS) program is to support First Nations communities in providing culturally sensitive child welfare services comparable to those available to other provincial and territorial residents in similar circumstances. The FNCFS program is one of many ISC programs and services dedicated to individual and family well-being.

The First Nations Child and Family Services System

The FNCFS System is a redesign of the Indian Child and Family Services legacy application resulting in a web based application to meet established ISC information system standards. The redesign also improves management of maintenance costs and ensures that the system complies with Federal Government software and accessibility standards.

Version 1.0 of the FNCFS System was released in 2014, to implement fixes to legacy issues; provide improved reporting capabilities and data entry and user training. The System was stabilized over the period of 2014-2016.

1.3 Individual Affairs Branch

The Individual Affairs program contributes to ensuring federal stewardship of the legislative and administrative responsibilities of the federal government pertaining to registration, membership, status cards and estates. Results are achieved through direct client services and partnerships with First Nations to determine eligibility for registration under the *Indian Act*, issuing proof of registration documents such as the Secure Certificate of Indian Status, and administering estates under the *Indian Act*. Through client-centric service delivery, the sound administration of individual affairs contributes to the well-being of First Nation individuals, families and communities.

The Individual Affairs' Branch's priorities are to modernize Indian registration and the Secure Certificate of Indian Status issuance processes to improve services across Canada and to continue to promote awareness and enhance capacity for estate planning.

The Individual Affairs Branch relies on four systems, collectively the Indian Registration and Estate Management System (IREMS), to deliver on its mandate:

- The Indian Registration System – to process registration applications, determine entitlement to Indian Status, and maintain the Indian Register;
- The Secure Certificate of Indian Status web application – to process applications for Secure Cards for registered Indians;
- The Treaty Payment System– to monitor and manage monies owing to clients due to Treaty Agreements; and
- The Estate Management System – to support management of individual estates in the event of death, or living estates in the event of dependent adult or minor.

Three of the four current supporting systems were developed using older technology and as such are not scalable to meet current needs. Users have identified numerous new requirements that cannot easily be implemented leaving gaps in system support that have led to manual paper-based workaround situations, process inefficiencies and ultimately data integrity issues.

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All systems and technology use a common set of information about an individual client but sharing that information is a very manual and time-consuming process that generates work and data duplication.

2 **Objective**

ISC has a requirement for the provision of IT Business, Project Management, and Instructional/ Training resources in support of the functional development, maintenance and production support for the ESDPP's EIS and FNCFS Systems, the RIA's IREMS System (referenced as "the Systems"), as well as any new systems that come under development, and related work.

It is expected that these systems will continue to enhance the Department's ability to manage its programs and report on results in a timely fashion without increasing recipients' reporting burden, improving services to clients, and gaining internal efficiency.

2.1 ***Definitions and application documents:***

The following list of terms and acronyms is not exhaustive, but rather is intended to ensure clarity of understanding of critical terms used within this Statement of Work.

Term/Acronym	Definition
ISC (formerly DIAND, INAC, AANDC)	The client, the Indigenous Services Canada (formerly known as the Department of Indigenous Affairs and Northern Development, Indian and Northern Affairs Canada Aboriginal Affairs and Northern Development Canada)
CIDM	ISC's Records and Document Information Management system (RDIMS) is currently the Hummingbird™ Document Management solution, customized as a single integrated solution for all departmental records and correspondence, branded as Corporate Document and Information Management (CIDM).
EIS	Education Information system
FNCFS IMS	First Nations Child and Family Services Information Management system
FNITP	First Nations and Inuit Transfer Payments s (otherwise known as GCIMS)
GCDocs	ISC is transitioning to GCDocs (the GoC's branding of OpenText's enterprise content management (ECM) system - Content Server) - the Federal Government of Canada's official electronic documents and records management solution (EDRMS)
GCIMS	Grants and Contributions Information Management system (otherwise known as FNITP)
GoC	Government of Canada

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Term/Acronym	Definition
IREMS	Indian Registration and Estate Management system
NCR	National Capital Region
SOW	Statement of Work
“the Systems”	ESDPP's EIS and FNCFS Systems and/or RIA's IREMS Systems

- 2.1.1 In addition to any provisions contained within the Contract, the following websites may provide further useful information to the Contractor in determining the context of this requirement, as well as its size and scope:
- 2.1.2 ISC (formerly DIAND) Mandate, Roles and Responsibilities: <https://www.aadnc-aandc.gc.ca/eng/1100100010023/1100100010027>
- 2.1.3 Education Partnerships Program: <https://www.aadnc-aandc.gc.ca/eng/1320335380835/1320335427045>
- 2.1.4 First Nations Child and Family Services (FNCFS): <https://www.aadnc-aandc.gc.ca/eng/1100100035204/1100100035205>
- 2.1.5 Individual Affairs: <http://www.aadnc-aandc.gc.ca/eng/1382702626948/1382702680155>

3 BUSINESS AND TECHNICAL ENVIRONMENT

3.1 Business Environment

- 3.1.1 ISC's ESDPP and RIA sectors are located within the National Capital Region (NCR). The sectors operate within a standard office environment for supporting IT projects, and maintains regular working hours (Monday to Friday, 09:00 to 17:00 Eastern Time, excluding statutory and government holidays (“Regular Working Hours”)) (RIA also has an office in Winnipeg, Manitoba operating under Central time).
- 3.1.2 The Contractor must provide services to the Client in relation to this requirement during the Department's Regular Working Hours, as identified above, with occasional requirements for availability to provide services outside the Regular Working Hours of the Client, as specified in any Task Authorization(s).
- 3.1.3 *Work Outside of Regular Working Hours.* All Contractor personnel must be available to work outside Regular Working Hours for scheduled work as required, during the duration of the Contract. The Technical Authority will advise the Contractor of requirements for scheduled extended hours of work and/or work outside Regular Working Hours at least 48 hours in advance.
- 3.1.4 The Application Development / Database and Data Administration (ADDDA) Directorate will provide technical expertise and conduct any technical work required on any systems with which the Contractor will work.

3.2 Technical Environment

- 3.2.1 The Contractor must provide all written deliverables and services provided in conformance with ISC's standard desktop operating software, currently, Microsoft Office Suite (including Word, Excel, and PowerPoint) format.

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- 3.2.2 The current Education Information System has information input by First Nations users and by public sector employees in one of three ways: through the web portal; through PDF documents, and through xml schema. The FNCFS Information system has information input by public sector employees in one of three ways: through PDF documents; through xml schema; and through excel spreadsheets.
- 3.2.3 In addition, both Systems are integrated with a number of other ISC (formerly DIAND) systems with which information is shared, for example the GCIMS or FNITP and the Indian Registry System (IRS). As a result, a change in one interconnected system may result in a required change in any of the EIS or FNCFS or IREMS System(s).
- 3.2.4 When working on-site at ISC, Contractor Resource(s) will be provided with access to workstations with the following software sets:
- a) Windows 7 Enterprise;
 - b) MS Office Suite;
 - c) CIDM (ISC's RDIMS implementation) / GCDocs.
- 3.2.5 Adobe Captivate software is ISC's course development software, which will be made available for Contractor Resource(s) as and when required for the conduct of the work.
- 3.2.6 ISC uses advanced form-fillable functionality of PDF formats through Adobe software suites. It is anticipated that form development work will be supported by ISC's ADDDA.
- 3.2.7 All technical and/or research documentation gathered or produced during the course of work must be stored in the Client's document management repository (either CIDM or GCDocs, as specified by the Technical Authority).
- 3.2.8 Applicable policies that the Contractor must follow in the performance of related aspects of the project include ISC's Data Collection Policy (which will be provided to the Contractor on request), and the Treasury Board Policy on Information Management (<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12742>).
- 3.2.9 The ESDPP Systems is developed using Microsoft .NET Framework 3.5 with an Oracle database.
- 3.2.10 The CASE tool Enterprise Architect (EA) must be used to capture all requirements and design data. All project deliverables (except those in EA) must be managed within the departmental document management repository.
- 3.2.11 The EIS is currently operational, and in a state of ongoing functional maintenance. In 2015-2016 and 2016-2017, ESDPP has completed consultation with stakeholders to identify and prioritize functional requirements for on-going maintenance and development of the EIS.
- 3.2.12 The FNCFS System is currently operational, and in a state of ongoing functional maintenance.
- 3.2.13 IREMS is a system to be developed.

4 SCOPE OF WORK / TASKS

4.1 *Contractor Responsibilities:*

- 4.1.1 The Contractor must provide support for the functional development and maintenance of the ESDPP's and RIA's Systems, as and when requested by Canada.
- 4.1.2 The Contractor will be requested to perform tasks identified in this Statement of Work, as per each category mentioned below, or as it may be specified in any of the Task Authorization(s).

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4.1.3 All work must be done in conformity with the instructions issued by and to the satisfaction of the Technical Authority.

4.1.4 The Contractor must conduct work related to their Resource Category, and within the following categories, as defined in any Task Authorization:

4.2.0 **Resource Group 1: Business Resources**

The Contractor must provide resources for the following categories:

4.2.1 **A.11 Tester – Level 1**

Tasks include but are not limited to:

- a) Conducting functional testing of system changes and related reporting;
- b) Developing test scenarios and test scripts;
- c) Establishing software testing procedures for unit test, integration testing and regression testing with emphasis on automating the testing procedures;
- d) Creating and maintaining traceability matrices; and
- e) Any other Work related to this category.

4.2.2 **A.11 Tester – Level 2**

Tasks include but are not limited to:

- a) Planning and coordinating testing;
- b) Managing walkthroughs and reviews related to testing and implementation readiness;
- c) Providing status reports to project management and Client representatives;
- d) Establishing and operating "interoperability" testing procedures to ensure that the interaction and co-existence of various software elements, which are proposed to be distributed on the common infrastructure, conform to appropriate departmental standards (e.g. for performance, compatibility, etc.) and have no unforeseen detrimental effects on the shared infrastructure;
- e) Supervising testing in accordance with the established test plan(s) for all levels of testing; and
- f) Any other Work related to this category.

4.2.3 **A.11 Tester – Level 3**

Tasks include but are not limited to:

- a) Managing walkthroughs and reviews related to testing and implementation readiness;
- b) Management and monitoring of test plans for all levels of testing;
- c) Providing status reports to project management and Client representatives; and
- d) Any other Work related to this category.

4.2.4 **B.1 Business Analyst – Level 1**

Tasks include but are not limited to:

- a) Conducting User Acceptance Testing;
- b) Providing Tier 2 help desk support for functional/business issues from users;
- c) Developing and documenting statements of requirements for considered alternatives;
- d) Performing business analyses of functional requirements to identify information, procedures, and decision flows;
- e) Establishing acceptance test criteria with Client;

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- f) Defining and documenting interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems; and
- g) Any other Work related to this category.

4.2.5 B.1 Business Analyst – Level 2

Tasks include but are not limited to:

- a) Fulfilling Performance Measurement functions, particularly developing and/or reviewing or expanding performance measurement strategies;
- b) Fulfilling Business Intelligence functions, including building and adjusting reporting capabilities and reporting formats in Cognos;
- c) Evaluating existing procedures and methods, identifying and documenting items such as database content, structure, application subsystems;
- d) Defining and documenting interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems; and
- e) Any other Work related to this category.

4.2.6 B.1 Business Analyst – Level 3

Tasks include but are not limited to:

- a) Providing expert advice on and leading the implementation of Performance Measurement strategies;
- b) Providing expert advice on and leading the implementation of Business Intelligence strategies;
- c) Supporting the Client in defining functional user requirements and developing system(s) training and user guidance;
- d) Providing training or user coaching/guidance to support functional users in effectively using the system(s); and
- e) Any other Work related to this category.

4.2.7 B.2 Business Architect – Level 3

Tasks include but are not limited to:

- a) Managing business processes;
- b) Assisting and guiding the Client through major business changes;
- c) Developing 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;
- d) Developing the specifications for where, how and why the various organizational components fit together as they do, and how they support the organization's mandate;
- e) Overseeing and/or coordinating development of training and coordination with other stakeholders;
- f) Creating presentations, presenting to various stakeholders, and facilitating meetings and discussions;
- g) Analyzing and developing business "critical success factors";
- h) Analyzing and developing architecture requirements design, process development, process mapping and training;
- i) Being responsible for leading other functional Resources to define business strategy and processes in support of transformation and change management activities;
- j) Participating in change impact analysis and change management activities; and
- k) Any other Work related to this category.

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4.3.0 **Resource Group 2: Training/Instruction**

ISC will be responsible for providing training rooms and any equipment required for the delivery of training, as well as providing access to physical / technological resources for the production of training materials (e.g. paper, printers, photocopiers, and binders).

The Contractor must provide resources for the following categories:

4.3.1 **B.9 Courseware Developer – Level 2**

Tasks include but are not limited to:

- a) Developing new or modifying existing e-learning training courses/material, ensuring business rules are taken into consideration. E-learning courses to be developed in such a way that they are user friendly, and timed properly;
- b) Performing needs assessment / analysis for training purposes;
- c) Planning and monitoring training projects; and
- d) Any other Work related to this category.

4.3.2 **B.9 Courseware Developer – Level 3**

Tasks include but are not limited to:

- a) Recommending instructional media and strategies;
- b) Developing new or modifying existing e-learning training courses/material;
- c) Performing needs assessment / analysis for training purposes;
- d) Developing performance measurement standards;
- e) Planning and monitoring training projects;
- f) Preparing end-users for implementation of courseware materials;
- g) Communicating effectively by visual, oral, and written form with individuals, small groups, and in front of large audiences. and
- h) Any other Work related to this category

4.3.3 **B.11 Instructor, IT – Level 2**

Tasks include but are not limited to:

- a) Conducting in-class and/or e-learning/webinar /live-video-based training courses;
- b) Assessing the relevant characteristics of a target audience;
- c) Preparing end-users for implementation of courseware materials;
- d) Communicating effectively by visual, oral, and written form with individuals, small groups, and in front of large audiences; and
- e) Any other Work related to this category

4.3.4 **B.11 Instructor, IT – Level 3**

Tasks include but are not limited to:

- a) Conducting in-class and/or e-learning/webinar /live-video-based training courses;
- b) Assessing the relevant characteristics of a target audience;
- c) Preparing end-users for implementation of courseware materials;
- d) Communicating effectively by visual, oral, and written form with individuals, small groups, and in front of large audiences;
- e) Providing as-required user coaching and guidance in the effective use of the system(s) to perform business functions; and
- f) Any other Work related to this category

4.3.5 **B.14 Technical Writer – Level 2**

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Tasks include but are not limited to:

- a) Supporting content development for training material;
- b) Documenting help text, user manuals, technical documentation, web page content, etc;
- c) Determining documentation requirements and making plans for meeting them;
- d) Gathering information concerning the features and functions provided by the developers;
- e) Developing a table of content for each document/manual and writing or editing the required content;
- f) Preparing or coordinating the preparation of any required illustrations and diagrams.
- g) Designing the layout of the documents/manuals;
- h) Using word-processing, desk-top publishing and graphics software packages to produce final camera-ready copy; and
- i) Any other Work related to this category

4.3.6 B.14 Technical Writer – Level 3

Tasks include but are not limited to:

- a) Supporting content development for training material;
- b) Documenting help text, user manuals, technical documentation, web page content, etc;
- c) Determining documentation requirements and making plans for meeting them;
- d) Gathering information concerning the features and functions provided by the developers;
- e) Developing a table of content for each document/manual and writing or editing the required content;
- f) Preparing or coordinating the preparation of any required illustrations and diagrams.
- g) Designing the layout of the documents/manuals;
- h) Using word-processing, desk-top publishing and graphics software packages to produce final camera-ready copy;
- i) Reviewing documentation standards and the existing project documentation, and recommending standards and updates;
- j) Assessing the audience for the documents/manuals which are required and preparing a statement of purpose and scope for each;
- k) Performing proofreading and editing of developed materials. As required by the Client, this may include concordant proof-reading / editing between French and English texts; and
- l) Any other Work related to this category

4.4.0 Resource Group 3: Project Management, Coordination and Communication

The Contractor must provide resources for the following categories:

4.4.1 P.1 Change Management Consultant – Level 1

Tasks include but are not limited to:

- a) Analyzing and develop business processes, process mapping and training;
- b) Being responsible for supporting other functional staff to define business strategy and processes in support of transformation and change management activities;
- c) Participating in change impact analysis and change management activities;
- d) Creating presentations and present to various stakeholders, and facilitate meetings and discussions;
- e) Designing interventions aimed at improving organizational effectiveness through system-centered change;
- f) Carrying out performance monitoring and reporting activities on change management; and
- g) Any other Work related to this category.

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4.4.2 **P.1 Change Management Consultant – Level 3**

Tasks include but are not limited to:

- a) Providing both internal and external communications, as well as review any written communications (including but not limited to power-point presentations, website content, content of forms, and press releases) for or about Indigenous communities to ensure cultural appropriateness and overall accuracy;
- b) Analyzing and developing business "critical success factors";
- c) Provide change management leadership which aligns to proven methodologies to support end-to-end change;
- d) Leading and participating in change impact identification, analysis and the design, development and implementation of change management activities;
- e) Support definition of training needs and other mediums to assist in implementing effective change;
- f) Creating presentations, briefing materials and decision documents, presenting to various stakeholders, and facilitating meetings and discussions; and
- g) Any other Work related to this category.

4.4.3 **P.7 Project Coordinator – Level 2**

Tasks include but are not limited to:

- a) Developing work breakdown structures, scheduling / work planning, coordinating and documenting tasks, assisting in project reporting;
- b) Assisting with financial management, contracts, security access, technical access (e.g. access to networks);
- c) Providing administrative and technical support of a clerical nature as required to a project team;
- d) Assisting in performing such tasks as maintaining project documentation and application/system libraries;
- e) Tracking project change requests;
- f) 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;
- g) Communicating with project management and other project team members on administrative matters related to the project; and
- h) Any other Work related to this category.

4.4.4 **P.9 Project Manager – Level 2**

Tasks include but are not limited to:

- a) Performing project management duties for one or more concurrent projects;
- b) Developing and delivering presentations to senior management;
- c) Managing several Team Leads, each responsible for an element of the project and its associated project team;
- d) Managing projects 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;
- e) Ensuring that project team members adhere to specified methodologies, standards and guidelines to produce consistent quality products;
- f) Formulating statements of problems; establishing procedures for the development and implementation of significant, new or modified project elements to solve these problems, and obtaining approval thereof;
- g) Defining and documenting the objectives for the project;
- h) Determining budgetary requirements, the composition, roles and responsibilities and terms of reference for the project team;

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- i) Reporting progress of the project on an ongoing basis and at scheduled points in the life cycle;
- j) Meeting in conference with stakeholders and other project managers and states problems in a form capable of being solved;
- k) Preparing plans, charts, tables and diagrams to assist in analyzing or displaying problems;
- l) Working with a variety of project management tools;
- m) Being responsible for project sign-off; and
- n) Any other Work related to this category.

4.4.5 **P.9 Project Manager – Level 3**

Tasks include but are not limited to:

- a) Performing project management duties for one or more concurrent projects.
- b) Developing and delivering presentations to senior management.
- c) Managing several Team Lead, each responsible for an element of the project and its associated project team.
- d) Managing the integration and coordination of projects/initiatives with other complementary branch, sector, departmental and inter-departmental initiatives, coordinating with their associated project managers and its associated project team.
- e) Planning, organizing and coordinating all activities related to IM/IT projects.
- f) Performing cost/benefit, risk and impact analyses of proposed initiatives, including implementation plans.
- g) Managing projects 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.
- h) Ensuring that project team members adhere to specified methodologies, standards and guidelines to produce consistent quality products.
- i) Formulating statements of problems; establishing procedures for the development and implementation of significant, new or modified project elements to solve these problems, and obtaining approval thereof.
- j) Defining and documenting the objectives for the project.
- k) Determining budgetary requirements, the composition, roles and responsibilities and terms of reference for the project team.
- l) Reporting progress of the project on an ongoing basis and at scheduled points in the life cycle.
- m) Meeting in conference with stakeholders and other project managers and states problems in a form capable of being solved.
- n) Preparing plans, charts, tables and diagrams to assist in analyzing or displaying problems.
- o) Working with a variety of project management tools.
- p) Being responsible for project sign-off.
- q) Conducting closeout activities, including post mortems, development of lessons learned.
- r) Ensuring that all processes are documented and that documents are appropriately archived.
- s) Any other Work related to this category.

4.4.6 **P.12 Risk Management Specialist –Level 2**

Tasks include but are not limited to:

- a) Supporting the Project Management function through Program risk analysis, particularly as associated with the risk to the government-Indigenous communities' relationship.
- b) Conducting project risk assessments.
- c) Identifying project risks and overall project risks.
- d) Recommending alternative solutions, methodologies and strategies for risk mitigation and management.
- e) Producing and updating risk management plans.

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- f) Conducting risk assessments for troubled projects to quickly assess associated risks and recommend courses of action to minimize inherent risks.
- g) Assisting in prioritization and assignment of risks.
- h) Assisting in the development and/or implementation of Risk Management Plans.
- i) Managing the implementation of Risk Management Plans to identify, analyze, plan, track and control project risks on a continuous basis throughout the project life cycle.
- j) Coaching, mentoring and training project teams in risk mitigation techniques.
- k) Any other Work related to this category.

5 REPORTING REQUIREMENTS

- 5.1 Prior to commencing work under a Task Authorization, the Contractor must attend a preliminary meeting with the Technical Authority at the time and location designated by ISC.
- 5.2 The Contractor must facilitate and maintain regular communication with the Technical Authority and upon request from the Technical Authority must provide written or oral status updates regarding the progress of work completed under any Task Authorization(s). Specific Contractor reporting requirements and obligations will be further identified by ISC, as required, within each Task Authorization and may include, but not necessarily be limited to, any of the following:
 - a) Status updates, describing the state of ongoing project work, and covering specific issues as requested by the Technical Authority. Status updates must be delivered as required, with fortnightly status updates at a minimum.
 - b) Records of Decision, describing decisions and action items arising from meetings. Records of Decisions must be delivered weekly.
 - c) Time-sheets, delivered as required, with monthly time-sheets at a minimum.
 - d) Milestone Reports, describing the completion of a significant portion of work, delivered as required.
 - e) Other reports, as required.
- 5.3 Reports must be in MS Word format, unless otherwise specified by the Technical Authority.
- 5.4 The Contractor must immediately notify the Technical Authority of any issues, problems, or areas of concern that could adversely affect the ability of the Contractor to complete the work specified under any Task Authorization.

6 GOVERNMENT REPRESENTATIVE AND SUPPORT

- 6.1 As required for the completion of work, ISC will provide:
 - a) Access to ISC's facilities, the Technical Authority and/or other ISC personnel as required for meetings, consultations, and information for the successful completion of the Contractor's work under this Contract and any authorized Task(s);
 - b) Access to relevant documentation and reference materials to which the Contractor would not otherwise have access as required to complete the Work;
 - c) Review of submissions, as required, and the provision of comments/suggested revisions, in a timely manner;
 - d) Other assistance and support as appropriate.

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7 LOCATION OF WORK AND TRAVEL

- 7.1 The majority of the Work to be completed under the Contract must be conducted at the Client's premises, located in the National Capital Region (NCR). Some of the Work may take place at the Contractor's premises.
- 7.2 There may be a requirement for Contractor personnel to travel to major centers outside of the NCR to deliver training as well as for stakeholder engagement, as determined and specified by the Client for any defined task within a Task Authorization.

8 LANGUAGE OF WORK

- 8.1 As a Department of the federal government, ISC is required under the *Official Languages Act* to provide its services in either Official Language of Canada.
- 8.2 The majority of work will be conducted in English, with some resources requiring proficiency in French and Bilingually (English and French), as follows:
 - a) **B.11 IT Instructor Level 3:** When requested by ISC, the specified number of resource(s) to provide training or user coaching and guidance must be proficient (verbal and comprehension) in French and Bilingually (English and French); and
 - b) **B.14 Technical Writer Level 3:** When requested by ISC, the specified number of resource(s) must be proficient in writing, proofreading and editing English, French and Bilingual French/English documentation (e.g. user guidance documents);
- 8.3 The language(s) of work and deliverables will be specified in each Task Authorization.
- 8.4 In order to ensure quality service delivery to ISC and Indigenous communities, ISC reserves the right to require any resource provided by the Contractor to demonstrate his/her language proficiency through providing evidence of his/her previous work experience providing comparable services to those required by ISC (which may include written samples of work produced by the resource) in the language(s) of work, and including the contact information of previous clients who can verify the experience.

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APPENDIX A TO ANNEX A

TASKING ASSESSMENT PROCEDURE

1. Where a requirement for a specific task is identified, a draft Task Authorization Form (TA Form) as attached at Appendix B to Annex A will be provided to the Contractor [in accordance with the allocation methodology stated in the Contract Article titled "Allocation of Task Authorizations".] Once a draft TA Form is received, the Contractor must submit to the 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 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

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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 assess any points or 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. Points will not be allocated or a mandatory criteria considered as met if the reference customer is not a customer of the Contractor itself (for example, the customer cannot be the customer of an affiliate of the Contractor). Nor will points be allocated or a mandatory criteria considered as met if the customer is itself an affiliate or other entity that does not deal at arm's length with the Contractor. Crown references will be accepted.
4. During the assessment of the resources proposed, should the references for two or more resources required under that TA either be unavailable or fail to substantiate the required qualifications of the proposed resources to perform the required services, the Contracting Authority may find the quotation to be non-responsive.
5. Only quotations that meet all of the mandatory criteria will be considered for assessment of the point rated criteria. Each resource proposed must attain the required minimum score for the point rated criteria for the applicable Resource Category. If the minimum score for any proposed resource is less than what is required, the Contractor's quotation will be found to be non-responsive.
6. Once the quotation has been accepted by the Technical Authority, the TA Form will be signed by Canada and provided to the Contractor for signature. The TA Form must be appropriately signed by Canada prior to commencement of any work. The Contractor must not commence work until a validly issued TA Form (the Task Authorization) has been received, and any work performed in its absence is done at the Contractor's own risk.

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APPENDIX B TO ANNEX A

TASK AUTHORIZATION FORM

TASK AUTHORIZATION (TA) FORM				
CONTRACTOR		CONTRACT NUMBER:		
COMMITMENT #		FINANCIAL CODING:		
TASK NUMBER		ISSUE DATE:	RESPONSE REQUIRED BY:	
1. STATEMENT OF WORK (WORK ACTIVITIES, CERTIFICATIONS AND DELIVERABLES)				
SEE ATTACHED FOR STATEMENT OF WORK AND CERTIFICATIONS REQUIRED.				
2. PERIOD OF SERVICES:	FROM (DATE):		TO (DATE):	
3. WORK LOCATION:				
4. TRAVEL REQUIREMENTS:				
5. LANGUAGE REQUIREMENTS:				
6. OTHER				
7. LEVEL OF SECURITY				
CLEARANCE REQUIRED FOR THE				
8. CONTRACTOR'S RESPONSE:				
CATEGORY AND NAME OF PROPOSED	PWGSC SECURITY FILE NUMBER	PER DIEM RATE	ESTIMATED # OF DAYS	TOTAL COST
ESTIMATED COST				
GST/HST				
TOTAL LABOUR COST				
TOTAL TRAVEL & LIVING COST				
FIRM PRICE OR MAXIMUM TA PRICE				

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CONTRACTOR'S SIGNATURE			
Name, Title and Signature of Individual Authorized to Sign on behalf of Contractor (type or print)		Signature: _____ Date: _____	
TASK AUTHORIZATION (TA) FORM			
CONTRACTOR		CONTRACT NUMBER:	
COMMITMENT #		FINANCIAL CODING:	
TASK NUMBER		ISSUE DATE:	RESPONSE REQUIRED BY:
7. APPROVAL - SIGNING AUTHORITY			
<p style="text-align: center;">Signatures (Client)</p> Name, Title and Signature of Individual Authorized to sign: Technical Authority: _____		<p style="text-align: center;">Signatures (PWGSC)</p> Contracting Authority : _____	
You are requested to sell to her Majesty the Queen in Right of Canada, in accordance with the terms and conditions set out herein, referred to herein, or attached hereto, the services listed herein and in any attached sheets at the price set out there of.			

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APPENDIX C TO ANNEX A

RESOURCES ASSESSMENT CRITERIA AND RESPONSE TABLE

Note to Bidders: This information will only be completed upon Contract award, Canada will also include the Mandatory and Rated Criteria from Attachment 4.1

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

RESOURCE GROUP 1 – BUSINESS RESOURCES

A.11 Tester, Level 1

A.11 Tester, Level 1			
M#	Mandatory Technical Criteria	Met / Not Met	Contractor's Response (Cross Reference to Résumé)
M1	<p>The proposed resource must clearly demonstrate at least 1 year of experience as a Tester in an IM/IT environment</p> <p>For each project listed under the proposed resource's résumé, it must include the following information:</p> <ul style="list-style-type: none"> i) The specified number of years of experience in accordance with the resource category level; ii) A summary of the project objectives, needs and issues which necessitated the contribution of the proposed resource; iii) A description of the services and deliverables provided by the resource; iv) The duration, including start and end dates (month and year); and v) The client organization name where the services were provided, along with the contact reference information (name, phone number and valid email address) that can confirm the stated experience. <p>Only experience claimed within the last 5 years will be accepted for evaluation purposes.</p>		

A.11 Tester, Level 1					
R#	Rated Technical Criteria	Years of Experience	Point Rating	Score	Contractor's Response (Cross Reference to Résumé)
R1	The project summaries submitted for M1 will be evaluated on the basis of the resource's demonstrated	1 to 2 years 2+ to 3 years 3+ years	2 points 4 points 6 points		

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A.11 Tester, Level 1					
R#	Rated Technical Criteria	Years of Experience	Point Rating	Score	Contractor's Response (Cross Reference to Résumé)
	experience in providing Testing Services in defining/documenting or analyzing testing scenarios, as well as conducting testing for IT systems which included personal and/or sensitive data.				
R2	The project summaries submitted for M1 will be evaluated on the basis of the resource's demonstrated experience in providing Testing Services in testing functions for IT applications that support public sector (federal, provincial, territorial and/or municipal) users.	1 to 2 years 2+ to 3 years 3+ years	2 points 4 points 6 points		
Maximum Points Available:				12	
Minimum Points Required :				8	
Points Obtained :					

A.11 Tester, Level 2

A.11 Tester, Level 2			
M#	Mandatory Technical Criteria	Met / Not Met	Contractor's Response (Cross Reference to Résumé)
M1	<p>The proposed resource must clearly demonstrate at least 5 years of experience as a Tester in an IM/IT environment.</p> <p>For each project listed under the proposed resource's résumé, it must include the following information:</p> <ul style="list-style-type: none"> i) The specified number of years of experience in accordance with the resource category level; ii) A summary of the project objectives, needs and issues which necessitated the contribution of the proposed resource; iii) A description of the services and deliverables provided by the resource; iv) The duration, including start and end dates (month and year); and v) The client organization name where the services were provided, along with the contact reference information (name, phone number and valid email address) that can confirm the stated experience. <p>Only experience claimed within the last 10 years will be accepted for evaluation purposes.</p>		

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A.11 Tester, Level 2					
R#	Rated Technical Criteria	Years of Experience	Point Rating	Score	Contractor's Response (Cross Reference to Résumé)
R1	The project summaries submitted for M1 will be evaluated on the basis of the resource's demonstrated experience in providing Testing Services in defining/documenting or analyzing testing scenarios, as well as conducting testing for IT systems which included personal and/or sensitive data.	1 to 2 years 2+ to 3 years 3+ to 4 years 4+ years	2 points 4 points 6 points 8 points		
R2	The project summaries submitted for M1 will be evaluated on the basis of the resource's demonstrated experience in providing Testing Services in testing functions for IT applications that support public sector (federal, provincial, territorial and/or municipal) users.	1 to 2 years 2+ to 3 years 3+ to 4 years 4+ years	2 points 4 points 6 points 8 points		
Maximum Points Available:				16	
Minimum Points Required :				11	
Points Obtained :					

B.1 Business Analyst, Level 1

B.1 Business Analyst, Level 1			
M#	Mandatory Technical Criteria	Met / Not Met	Contractor's Response (Cross Reference to Résumé)
M1	<p>The proposed resource must clearly demonstrate at least 1 year of experience as a Business Analyst in an IM/IT environment.</p> <p>For each project listed under the proposed resource's résumé, it must include the following information:</p> <ul style="list-style-type: none"> i) The specified number of years of experience in accordance with the resource category level; ii) A summary of the project objectives, needs and issues which necessitated the contribution of the proposed resource; iii) A description of the services and deliverables provided by the resource; iv) The duration, including start and end dates (month and year); and v) The client organization name where the services were provided, along with the contact reference information (name, phone number and valid email address) that can confirm the stated experience. 		

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	Only experience claimed within the last 5 years will be accepted for evaluation purposes.				
B.1 Business Analyst, Level 1					
R#	Rated Technical Criteria	Years of Experience	Point Rating	Score	Contractor's Response (Cross Reference to Résumé)
R1	The project summaries submitted for M1 will be evaluated on the basis of the resource's demonstrated experience in providing Business Analysis Services in defining/documenting or analysing functional user requirements that relate to one or more of the following: - Indigenous groups, Indigenous issues, programs focused on Indigenous issues or needs; - Education or social applications; or - Programs delivering public services (to the Canadian public).	1 to 2 years 2+ to 3 years 3+ years	2 points 4 points 6 points		
R2	The project summaries submitted for M1 will be evaluated on the basis of the resource's demonstrated experience in providing Business Analysis Services in fulfilling performance measurement or business intelligence functions for IT applications that support public sector or public users.	1 to 2 years 2+ to 3 years 3+ years	2 points 4 points 6 points		
Maximum Points Available:				12	
Minimum Points Required :				8	
Points Obtained :					

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B.1 Business Analyst, Level 2

B.1 Business Analyst, Level 2			
M#	Mandatory Technical Criteria	Met / Not Met	Contractor's Response (Cross Reference to Résumé)
M1	<p>The proposed resource must clearly demonstrate at least 5 years of experience as a Business Analyst in an IM/IT environment.</p> <p>For each project listed under the proposed resource's résumé, it must include the following information:</p> <ul style="list-style-type: none"> i) The specified number of years of experience in accordance with the resource category level; ii) A summary of the project objectives, needs and issues which necessitated the contribution of the proposed resource; iii) A description of the services and deliverables provided by the resource; iv) The duration, including start and end dates (month and year); and v) The client organization name where the services were provided, along with the contact reference information (name, phone number and valid email address) that can confirm the stated experience. <p>Only experience claimed within the last 10 years will be accepted for evaluation purposes.</p>		

B.1 Business Analyst, Level 2					
R#	Rated Technical Criteria	Years of Experience	Point Rating	Score	Contractor's Response (Cross Reference to Résumé)
R1	<p>The project summaries submitted for M1 will be evaluated on the basis of the resource's demonstrated experience in providing Business Analysis Services in defining/documenting or analysing functional user requirements that relate to one or more of the following:</p> <ul style="list-style-type: none"> - Indigenous groups, Indigenous issues, programs focused on Indigenous issues or needs; - Education or social applications; or - Programs delivering public services (to the Canadian public). 	1 to 2 years 2+ to 3 years 3+ to 4 years 4+ years	2 points 4 points 6 points 8 points		

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B.1 Business Analyst, Level 2					
R#	Rated Technical Criteria	Years of Experience	Point Rating	Score	Contractor’s Response (Cross Reference to Résumé)
R2	The project summaries submitted for M1 will be evaluated on the basis of the resource’s demonstrated experience in providing Business Analysis Services in fulfilling performance measurement or business intelligence functions for IT applications that support public sector or public users.	1 to 2 years 2+ to 3 years 3+ to 4 years 4+ years	2 points 4 points 6 points 8 points		
Maximum Points Available:				16	
Minimum Points Required :				11	
Points Obtained :					

RESOURCE GROUP 2 – PROJECT MANAGEMENT RESOURCES

B.9 Courseware Developer, Level 2

B.9 Courseware Developer, Level 2			
M#	Mandatory Technical Criteria	Met / Not Met	Contractor’s Response (Cross Reference to Résumé)
M1	<p>The proposed resource must clearly demonstrate at least 5 years of experience as a Courseware Developer in an IM/IT environment.</p> <p>For each project listed under the proposed resource’s résumé, it must include the following information:</p> <ul style="list-style-type: none"> i) The specified number of years of experience in accordance with the resource category level; ii) A summary of the project objectives, needs and issues which necessitated the contribution of the proposed resource; iii) A description of the services and deliverables provided by the resource; iv) The duration, including start and end dates (month and year); and v) The client organization name where the services were provided, along with the contact reference information (name, phone number and valid email address) that can confirm the stated experience. <p>Only experience claimed within the last 10 years will be accepted for evaluation purposes.</p>		

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B.9 Courseware Developer, Level 2					
R#	Rated Technical Criteria	Years of Experience	Point Rating	Score	Contractor's Response (Cross Reference to Résumé)
R1	The project summaries submitted for M1 will be evaluated on the basis of the resource's demonstrated experience in development of courseware for users of IM/IT systems in gathering information concerning the features and functions of a system and developing courseware and learning materials related to one or more of the following: <ul style="list-style-type: none"> - Indigenous groups, Indigenous issues, programs focused on Indigenous issues or needs; - Education or social applications; or - Programs delivering public services (to the Canadian public). 	1 to 2 years 2+ to 3 years 3+ to 4 years 4+ years	2 points 4 points 6 points 8 points		
R2	The project summaries submitted for M1 will be evaluated on the basis of the resource's demonstrated experience in assessing audience requirements and developing a variety of courseware and training tools (e.g. training manuals, training documents with screenshots and other visuals, job aids and other tips tools, training documentation) for multiple type(s) of IT system users (e.g. public sector administrators, public users, etc.).	1 to 2 years 2+ to 3 years 3+ to 4 years 4+ years	2 points 4 points 6 points 8 points		
Maximum Points Available:				16	
Minimum Points Required :				11	
Points Obtained :					

B.11 Instructor, IT, Level 2

B.11 Instructor, IT, Level 2			
M#	Mandatory Technical Criteria	Met / Not Met	Contractor's Response (Cross Reference to Résumé)
M1	The proposed resource must clearly demonstrate at least 5 years of experience as an IT Instructor in an IM/IT environment. For each project listed under the proposed resource's résumé, it must include the following information: <ul style="list-style-type: none"> i) The specified number of years of experience in accordance with the resource category level; 		

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ii) A summary of the project objectives, needs and issues which necessitated the contribution of the proposed resource; iii) A description of the services and deliverables provided by the resource; iv) The duration, including start and end dates (month and year); and v) The client organization name where the services were provided, along with the contact reference information (name, phone number and valid email address) that can confirm the stated experience. Only experience claimed within the last 10 years will be accepted for evaluation purposes.		
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B.11 Instructor, IT, Level 2					
R#	Rated Technical Criteria	Years of Experience	Point Rating	Score	Contractor's Response (Cross Reference to Résumé)
R1	The project summaries submitted for M1 will be evaluated on the basis of the resource's demonstrated experience in development of courseware for users of IM/IT systems in delivering in person and virtual training/instruction to one or more of the following: <ul style="list-style-type: none"> - Indigenous groups, Indigenous issues, programs focused on Indigenous issues or needs; - Education or social applications; or - Programs delivering public services (to the Canadian public). 	1 to 2 years 2+ to 3 years 3+ to 4 years 4+ years	2 points 4 points 6 points 8 points		
R2	The project summaries submitted for M1 will be evaluated on the basis of the resource's demonstrated experience in assessing audience requirements and developing training approaches adequate for the different audiences for multiple type(s) of IT system users (e.g. public sector administrators, public users, etc.)	1 to 2 years 2+ to 3 years 3+ to 4 years 4+ years	2 points 4 points 6 points 8 points		
Maximum Points Available:				16	
Minimum Points Required :				11	
Points Obtained :					

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B.14 Technical Writer, Level 2

B.14 Technical Writer, Level 2			
M#	Mandatory Technical Criteria	Met / Not Met	Contractor's Response (Cross Reference to Résumé)
M1	<p>The proposed resource must clearly demonstrate at least 5 years of experience as a Technical Writer in an IM/IT environment.</p> <p>For each project listed under the proposed resource's résumé, it must include the following information:</p> <ul style="list-style-type: none"> a) The specified number of years of experience in accordance with the resource category level; b) A summary of the project objectives, needs and issues which necessitated the contribution of the proposed resource; c) A description of the services and deliverables provided by the resource; d) The duration, including start and end dates (month and year); and e) The client organization name where the services were provided, along with the contact reference information (name, phone number and valid email address) that can confirm the stated experience. <p>Only experience claimed within the last 10 years will be accepted for evaluation purposes.</p>		

B.14 Technical Writer, Level 2					
R#	Rated Technical Criteria	Years of Experience	Point Rating	Score	Contractor's Response (Cross Reference to Résumé)
R1	<p>The project summaries submitted for M1 will be evaluated on the basis of the resource's demonstrated experience in development of written documentation for users of IM/IT systems and its relevance and similarity to ISC's requirements as described in the SOW of this bid solicitation in terms of nature, size, scope and complexity in gathering information concerning the features and functions of a system and developing systems documentation for functional requirements related to one or more of the following:</p> <ul style="list-style-type: none"> - Indigenous groups, Indigenous issues, programs focused on Indigenous issues or needs; 	<p>1 to 2 years 2+ to 3 years 3+ to 4 years 4+ years</p>	<p>2 points 4 points 6 points 8 points</p>		

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B.14 Technical Writer, Level 2					
R#	Rated Technical Criteria	Years of Experience	Point Rating	Score	Contractor's Response (Cross Reference to Résumé)
	<ul style="list-style-type: none"> - Education or social applications; or - Programs delivering public services (to the Canadian public). 				
R2	The project summaries submitted for M1 will be evaluated on the basis of the resource's demonstrated experience in assessing audience requirements and developing a variety of systems documentation (e.g. help text, user manuals, technical documentation, web page content) for multiple type(s) of IT system users (e.g. public sector administrators, public users, etc.)	1 to 2 years 2+ to 3 years 3+ to 4 years 4+ years	2 points 4 points 6 points 8 points		
Maximum Points Available:				16	
Minimum Points Required :				11	
Points Obtained :					

RESOURCE GROUP 3 – PROJECT MANAGEMENT RESOURCES

P.1 Change Management Consultant, Level 1

P.1 Change Management Consultant, Level 1			
M#	Mandatory Technical Criteria	Met / Not Met	Contractor's Response (Cross Reference to Résumé)
M1	<p>The proposed resource must clearly demonstrate at least 1 year of experience as a Change Management Consultant in an IM/IT environment.</p> <p>For each project listed under the proposed resource's résumé, it must include the following information:</p> <ul style="list-style-type: none"> I. The specified number of years of experience in accordance with the resource category level; II. A summary of the project objectives, needs and issues which necessitated the contribution of the proposed resource; III. A description of the services and deliverables provided by the resource; IV. The duration, including start and end dates (month and year); and V. The client organization name where the services were provided, along with the contact reference information (name, phone number and valid email address) that can confirm the stated experience. 		

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	Only experience claimed within the last 5 years will be accepted for evaluation purposes.		
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P.1 Change Management Consultant, Level 1					
R#	Rated Technical Criteria	Years of Experience	Point Rating	Score	Contractor's Response (Cross Reference to Résumé)
R1	The project summaries submitted for M1 will be evaluated on the basis of the resource's demonstrated experience in providing Change Management Services and its relevance and similarity to ISC's requirements as described in the SOW of this bid solicitation in terms of nature, size, scope and complexity in providing both internal and external communications (including written communications) (e.g. power-point presentations, website content, content of forms, and press releases, etc.) for or about Indigenous communities to ensure cultural appropriateness and overall accuracy.	1 to 2 years 2+ to 3 years 3+ years	2 points 4 points 6 points		
R2	The project summaries submitted for M1 will be evaluated on the basis of the resource's demonstrated experience in leading and participating in change impact identification, analysis and the design, development and implementation of change management activities in a public sector environment.	1 to 2 years 2+ to 3 years 3+ years	2 points 4 points 6 points		
Maximum Points Available:				12	
Minimum Points Required :				8	
Points Obtained :					

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P.9 Project Manager, Level 2

P.9 Project Manager, Level 2			
M#	Mandatory Technical Criteria	Met / Not Met	Contractor’s Response (Cross Reference to Résumé)
M1	<p>The proposed resource must clearly demonstrate at least 5 years of experience as a Project Manager in an IM/IT environment.</p> <p>For each project listed under the proposed resource’s résumé, it must include the following information:</p> <ul style="list-style-type: none"> i) The specified number of years of experience in accordance with the resource category level; ii) A summary of the project objectives, needs and issues which necessitated the contribution of the proposed resource; iii) A description of the services and deliverables provided by the resource; iv) The duration, including start and end dates (month and year); and v) The client organization name where the services were provided, along with the contact reference information (name, phone number and valid email address) that can confirm the stated experience. <p>Only experience claimed within the last 10 years will be accepted for evaluation purposes.</p>		

P.9 Project Manager, Level 2					
R#	Rated Technical Criteria	Years of Experience	Point Rating	Score	Contractor’s Response (Cross Reference to Résumé)
R1	The project summaries submitted for M1 will be evaluated on the basis of the resource’s demonstrated in managing IM/IT projects 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, for IM/IT projects.	1 to 2 years 2+ to 3 years 3+ to 4 years 4+ years	2 points 4 points 6 points 8 points		
R2	The project summaries submitted for M1 will be evaluated on the basis of the resource’s demonstrated experience in meeting in conference with stakeholders and other project managers and stating problems in a form capable of being solved, involving	1 to 2 years 2+ to 3 years 3+ to 4 years 4+ years	2 points 4 points 6 points		

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<i>P.9 Project Manager, Level 2</i>					
R#	Rated Technical Criteria	Years of Experience	Point Rating	Score	Contractor's Response (Cross Reference to Résumé)
	a variety of stakeholders (e.g. public sector, Indigenous, general public, etc.).		8 points		
Maximum Points Available:				16	
Minimum Points Required :				11	
Points Obtained :					

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APPENDIX D TO ANNEX A

CERTIFICATIONS AT THE TA STAGE

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

1. CERTIFICATION OF EDUCATION AND EXPERIENCE

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

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

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4. CERTIFICATION OF LANGUAGE - English or Bilingual

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

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ANNEX B BASIS OF PAYMENT

Note to Bidders: This information will only be completed upon Contract award.

INITIAL CONTRACT PERIODS:

Initial Contract Period (3 years from date of Contract Award)		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.11 - Tester	Level 1	To be inserted upon contract award
A.11 – Tester	Level 2	To be inserted upon contract award
A.11 – Tester	Level 3	To be inserted upon contract award
B.1 - Business Analyst	Level 1	To be inserted upon contract award
B.1 - Business Analyst	Level 2	To be inserted upon contract award
B.1 - Business Analyst	Level 3	To be inserted upon contract award
B.2 - Business Architect	Level 3	To be inserted upon contract award
B.9 - Courseware Developer	Level 2	To be inserted upon contract award
B.9 - Courseware Developer	Level 3	To be inserted upon contract award
B.11 - Instructor, IT	Level 2	To be inserted upon contract award
B.11 - Instructor, IT	Level 3	To be inserted upon contract award
B.14 - Technical Writer	Level 2	To be inserted upon contract award
B.14 - Technical Writer	Level 3	To be inserted upon contract award
P.1 - Change Management Consultant	Level 1	To be inserted upon contract award
P.1 - Change Management Consultant	Level 3	To be inserted upon contract award
P.7 Project Coordinator	Level 2	To be inserted upon contract award
P.9 Project Manager	Level 2	To be inserted upon contract award
P.9 Project Manager	Level 3	To be inserted upon contract award
P.12 Risk Management Specialist	Level 2	To be inserted upon contract award

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OPTION PERIODS

Option Contract Period (Year One)		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.11 - Tester	Level 1	<i>To be inserted upon contract award</i>
A.11 – Tester	Level 2	<i>To be inserted upon contract award</i>
A.11 – Tester	Level 3	<i>To be inserted upon contract award</i>
B.1 - Business Analyst	Level 1	<i>To be inserted upon contract award</i>
B.1 - Business Analyst	Level 2	<i>To be inserted upon contract award</i>
B.1 - Business Analyst	Level 3	<i>To be inserted upon contract award</i>
B.2 - Business Architect	Level 3	<i>To be inserted upon contract award</i>
B.9 - Courseware Developer	Level 2	<i>To be inserted upon contract award</i>
B.9 - Courseware Developer	Level 3	<i>To be inserted upon contract award</i>
B.11 - Instructor, IT	Level 2	<i>To be inserted upon contract award</i>
B.11 - Instructor, IT	Level 3	<i>To be inserted upon contract award</i>
B.14 - Technical Writer	Level 2	<i>To be inserted upon contract award</i>
B.14 - Technical Writer	Level 3	<i>To be inserted upon contract award</i>
P.1 - Change Management Consultant	Level 1	<i>To be inserted upon contract award</i>
P.1 - Change Management Consultant	Level 3	<i>To be inserted upon contract award</i>
P.7 Project Coordinator	Level 2	<i>To be inserted upon contract award</i>
P.9 Project Manager	Level 2	<i>To be inserted upon contract award</i>
P.9 Project Manager	Level 3	<i>To be inserted upon contract award</i>
P.12 Risk Management Specialist	Level 2	<i>To be inserted upon contract award</i>

Option Contract Period (Year Two)		
Resource Category	Level of Expertise	Firm Per Diem Rate
A.11 - Tester	Level 1	<i>To be inserted upon contract award</i>
A.11 – Tester	Level 2	<i>To be inserted upon contract award</i>
A.11 – Tester	Level 3	<i>To be inserted upon contract award</i>
B.1 - Business Analyst	Level 1	<i>To be inserted upon contract award</i>
B.1 - Business Analyst	Level 2	<i>To be inserted upon contract award</i>
B.1 - Business Analyst	Level 3	<i>To be inserted upon contract award</i>

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B.2 - Business Architect	Level 3	<i>To be inserted upon contract award</i>
B.9 - Courseware Developer	Level 2	<i>To be inserted upon contract award</i>
B.9 - Courseware Developer	Level 3	<i>To be inserted upon contract award</i>
B.11 - Instructor, IT	Level 2	<i>To be inserted upon contract award</i>
B.11 - Instructor, IT	Level 3	<i>To be inserted upon contract award</i>
B.14 - Technical Writer	Level 2	<i>To be inserted upon contract award</i>
B.14 - Technical Writer	Level 3	<i>To be inserted upon contract award</i>
P.1 - Change Management Consultant	Level 1	<i>To be inserted upon contract award</i>
P.1 - Change Management Consultant	Level 3	<i>To be inserted upon contract award</i>
P.7 Project Coordinator	Level 2	<i>To be inserted upon contract award</i>
P.9 Project Manager	Level 2	<i>To be inserted upon contract award</i>
P.9 Project Manager	Level 3	<i>To be inserted upon contract award</i>
P.12 Risk Management Specialist	Level 2	<i>To be inserted upon contract award</i>



Contract Number / Numéro du contrat

 Security Classification / Classification de sécurité
 UNCLASSIFIED

SECURITY REQUIREMENTS CHECK LIST (SRCL)

LISTE DE VÉRIFICATION DES EXIGENCES RELATIVES À LA SÉCURITÉ (LVERS)

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



Contract Number / Numéro du contrat

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PART A (continued) / PARTIE A (suite)

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

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

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

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

Special comments:

Commentaires spéciaux : _____

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

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

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

PART C - SAFEGUARDS (SUPPLIER) / PARTIE C - MESURES DE PROTECTION (FOURNISSEUR)**INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS**

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

PRODUCTION

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

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

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



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

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

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

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

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

SUMMARY CHART / TABLEAU RÉCAPITULATIF

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

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

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



No
Non



Yes
Oui

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

Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée

« Classification de sécurité » au haut et au bas du formulaire.

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

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



No
Non



Yes
Oui

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

Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée

« Classification de sécurité » au haut et au bas du formulaire et indiquer qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).



Contract Number / Numéro du contrat

Security Classification / Classification de sécurité
UNCLASSIFIED

PART D - AUTHORIZATION / PARTIE D - AUTORISATION**13. Organization Project Authority / Chargé de projet de l'organisme**

Name (print) - Nom (en lettres moulées)		Title - Titre	Signature
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date

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

Name (print) - Nom (en lettres moulées)		Title - Titre	Signature
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date

15. Are there additional instructions (e.g. Security Guide, Security Classification Guide) attached?
Des instructions supplémentaires (p. ex. Guide de sécurité, Guide de classification de la sécurité) sont-elles jointes?

☐ No
Non ☐ Yes
Oui

16. Procurement Officer / Agent d'approvisionnement

Name (print) - Nom (en lettres moulées)		Title - Titre	Signature
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date

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

Name (print) - Nom (en lettres moulées)		Title - Titre	Signature
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date

Jacques Saumur
Contract Security Officer
Contracts Security Division | Division des contrats sécurité /
Contract Security Program | Programme de sécurité des contrats /
Public Services and Procurement Canada | Services publics et Approvisionnement Canada
Jacques.Saumur@tpsgc-pwgsc.gc.ca
Telephone | Téléphone 613-948-1732
Facsimile | Télécopieur 613-948-1712

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ATTACHMENT 3.1

BID SUBMISSION FORM		
Bidder's full legal name		
Authorized Representative of Bidder for evaluation purposes (e.g., clarifications)	Name	
	Title	
	Address	
	Telephone #	
	Fax #	
	Email	
Bidder's Procurement Business Number (PBN) [see the Standard Instructions 2003] [Note to Bidders: Please ensure that the PBN you provide matches the legal name under which you have submitted your bid. If it does not, the Bidder will be determined based on the legal name provided, not based on the PBN, and the Bidder will be required to submit the PBN that matches the legal name of the Bidder.]		
Jurisdiction of Contract: Province or territory in Canada the Bidder wishes to be the legal jurisdiction applicable to any resulting contract (if other than as specified in solicitation)		
Bidder's Proposed Site(s) or Premises Requiring Safeguard Measures. See Part 3 for instructions.	Address of proposed site or premise: _____ City: _____ Province: _____ Postal Code: _____ Country: _____	
Former Public Servants See the Article in Part 2 of the bid solicitation entitled Former Public Servant for a definition of "Former Public Servant".	Is the Bidder a FPS in receipt of a pension as defined in the bid solicitation? Yes ____ No ____ If yes, provide the information required by the Article in Part 2 entitled "Former Public Servant"	
	Is the Bidder a FPS who received a lump sum payment under the terms of the Work Force Adjustment Directive? Yes ____ No ____	

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		If yes, provide the information required by the Article in Part 2 entitled "Former Public Servant"	
Security Clearance Level of Bidder [include both the level and the date it was granted] [Note to Bidders: Please ensure that the security clearance matches the legal name of the Bidder. If it does not, the security clearance is not valid for the Bidder.]			
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: <ol style="list-style-type: none"> 1. The Bidder considers itself and its proposed resources able to meet all the mandatory requirements described in the bid solicitation; 2. This bid is valid for the period requested in the bid solicitation; 3. All the information provided in the bid is complete, true and accurate; and 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. 			
Signature of Authorized Representative of Bidder			

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ATTACHMENT 4.1 BID EVALUATION CRITERIA

1. The evaluation criteria contained in this attachment will be used to evaluate bids during the solicitation and to facilitate resource assessment after contract award.
2. The Bidder must provide a qualifying resume for each of the Resource Categories requested for evaluation (the Bidder must not propose the same resource more than once in response to this solicitation).
3. The Bidder must complete an evaluation grid for each of the resumes being provided as described in Table 1 below. For each criterion the Bidder must indicate the section in the resume where compliance with the criteria is described. Failure to provide a qualifying resume for each Resource Category results in a non-responsive bid.

Table 1: Bidders must submit the following number of résumés per resource category in response to this evaluation. The actual numbers of resources required are listed in are listed in Part 1, 1.2 Summary, of the bid solicitation;

Resource Category	Level	Number of Résumés
A.11 Tester	3	1
B.1 Business Analyst	3	1
B.2 Business Architect	3	1
B.9 Courseware Developer	3	1
B.11 Instructor IT	3	1
B.14 Technical Writer	3	1
P.1 Change Management Consultant	3	1
P.7 Project Coordinator	2	1
P.9 Project Manager	3	1
P.12 Risk Management Specialist	2	1

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1. **MANDATORY CORPORATE CRITERIA**

Mandatory Technical Criteria		Bidder's Response (Reference to additional substantiating materials included in Bid)
M1^(PB)	<p>Bidder's Contract Experience:</p> <p>The Bidder must demonstrate its experience and capacity in providing IM/IT related professional resources for project management and training to support Business applications (e.g. functional maintenance, functional application development, testing, data services, IM/IT project management, IT related Instruction/Training/user guidance/coaching). The experience requested must have been for the delivery or implementation of:</p> <ul style="list-style-type: none"> i) Education programs or education policy; or ii) Social programs or social programs policy, or iii) Indigenous individuals. <p>This experience must be demonstrated in submitting a minimum of two Contracts, completed in the last seven (7) years (as of bid closing date), for client organizations external to the Bidder's organization. Each Contract must each be of a minimum duration of twelve (12) months, within the last seven (7) years (as of bid closing date) and have a minimum billing of two million dollars (\$2M) for professional services only (taxes extra).</p> <p>For each of the Contracts submitted, the Bidder must include the following:</p> <ul style="list-style-type: none"> i) A brief description of the scope of services provided (including the value and resource categories and levels); ii) The duration of the Contract, including start and end dates (dates should be identified by month and year, for example June, 2011 – February 2017); iii) A brief summary of the Contract objectives, needs and issues which necessitated the Bidder's contribution; iv) The extent to which the services were provided on-time, on-budget and in accordance with the established project objectives; v) The total dollar-value invoiced for each Contract presented. Canada reserves the right to request documents to validate the billings claimed (e.g. copies of invoices paid by the client, a letter signed by the client attesting to the volume of work delivered for the amount cited, etc.); and vi) The client organization name where the services were provided, along with the contact reference information (name, phone number and valid email address) that can confirm the stated experience. <p>Only experience claimed from May 1, 2011 to bid closing will be accepted for evaluation purposes.</p>	

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2.0 RATED CORPORATE CRITERIA

2.1 BIDDER'S DEMONSTRATED CONTRACT EXPERIENCE

R1 Bidder's Demonstrated Contract Experience

In addition to the experience requested in technical criterion M1, the Bidder should demonstrate additional experience and capacity in providing IM/IT related professional resources for project management and training to support Business applications (e.g. functional maintenance, functional application development, testing, data services, IM/IT project management, IT related Instruction/Training/user guidance/coaching). The experience requested must have been for the delivery or implementation of:

- i) Education programs or education policy; or
- ii) Social programs or social programs policy, or
- iii) Indigenous individuals.

In order to demonstrate the required experience and achieve full score, the Bidder must provide three (3) additional Contracts completed in the last seven (7) years (as of bid closing date), for client organizations external to the Bidder's organization. Each Contract must each be of a minimum duration of twelve (12) months, within the last seven (7) years (as of bid closing date) and have a minimum billing of four million dollars (\$2M) for professional services only (taxes extra).

***In order to demonstrate the required experience, the Bidder must not provide the same Contracts that are provided in response to technical criterion M1.**

For each of the Contracts submitted, the Bidder must include the following:

- i) A brief description of the scope of services provided (including the value and resource categories and levels)
- ii) The duration of the Contract, including start and end dates (dates should be identified by month and year – for example June, 2011 – February 2017);
- iii) A brief summary of the Contract objectives, needs and issues which necessitated the Bidder's contribution;
- iv) The extent to which the services were provided on-time, on-budget and in accordance with the established project objectives;
- v) The total dollar-value invoiced for each Contract presented. Canada reserves the right to request documents to validate the billings claimed (e.g. copies of invoices paid by the client, a letter signed by the client attesting to the volume of work delivered for the amount cited, etc.); and
- vi) The client organization name where the services were provided, along with the contact reference (name, phone number and valid email address) that can confirm the stated experience.

Only experience claimed from May 1, 2011 to bid closing will be accepted for evaluation purposes

Rated Technical Criteria		Points Scale	Total Points	Bidder's Response
R1 a)	Scope and Complexity: The scope and complexity of the services provided by the Bidder during the cited projects, and the extent to which this scope of services is consistent with ISC's requirement as expressed within the SOW of this bid solicitation and			

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R1 b)	based on the following: Similar and relevant services include: i. Providing business services for a large (over 250-users) IT system by establishing business requirements, documenting the system's business architecture, running requirements sessions and prioritization sessions. ii. Providing training services to IT system users, including IT-related Instruction/Training/user guidance/coaching services, creation of training materials (e.g. manuals, e-learning modules), preparation of training plans, provision of technical writing services for manuals, instructions and other documents. iii. Providing project management services, including project change or risk management activities with stakeholders as well as internal and external IT system users, internal and external communications with clients and/or stakeholders, financial and budget management, briefing senior management, or other related project management activities.	R1 a) i.: 4 points per Contract			
		R1 a) ii: 4 points per Contract			36
		R1 a) iii: 4 points per Contract			
	Nature: The nature of the services provided by the Bidder during the cited Contracts demonstrate experience, understanding and knowledge relevant and similar to ISC's requirements as expressed in the SOW of this bid solicitation and based on the following: i. Application/project supported by the Bidder involved services for the support of Indigenous organizations and First Nation band councils; ii. Application/project supported by the Bidder involved the fields of education; or social programs; or policy; or services to Indigenous individuals. iii. The experience, understanding and knowledge demonstrated by the Bidder involved in the following a. The obligations of ISC in providing services to Indigenous communities; and b. Case management systems.	R1 b) i: 2 points per Contract R1 b) ii: 2 points per Contract R1 b) iii: 2 points per Contract			18
			Total Points Available:		54
			Minimum Points Required:		38

2.2 BIDDERS APPROACH AND METHODOLOGY

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R2 Bidder's Approach and Methodology

The Bidder should include within its bid a written description of its approach and methodology in providing professional IM/IT resources to support Business applications (e.g. functional maintenance, functional application development, testing and data services), and Production Support (i.e. Project Management and IT-related Instruction/Training/user guidance/coaching).

In this section of its bid, the Bidder should address each of the Technical Criteria listed below detailing how it proposes to provide quality services to ISC and demonstrating how its approach has been applied effectively in delivery of services to its clients.

The Bidder will be evaluated based on the description of its proposed work approach and methodologies in each of the areas of Resourcing Availability, and Transition and Work Management with respect to the thoroughness of the approach and demonstration of delivering previous quality outcomes for clients, as described below.

Rated Technical Criteria		Points Scale	Total Points	Bidder's Response
R2 a)	Resourcing: The Bidder's approach to effectively address Resourcing, evaluated for the following elements: 1. Resource identification; 2. Hiring practices of resources and multi-disciplined teams; 3. Placement of resources with the client; and 4. Resource retention.	2 points per element 2 points per element 2 points per element	8	
R2 b)	Availability: Bidder's approach demonstrates experience ensuring availability of resources in a variety of categories, levels and skill sets and mitigation of resource transition/turnover.	4 points	4	
R2 c)	Transition and Project Management: The Bidder's approach to Transition Management and Project Management at the Task, Project/System and contract level, will be evaluated as follows: i) Bidder's approach provides for effective knowledge transfer to incoming and outgoing project resources (including both Client staff and any contractors/external resources, as appropriate), resulting in timely ramp-up(s) and close-out(s) and a sustainable and reusable knowledge base that is readily accessible by the client, and; ii) Bidder's overall approach to Work Management at the Task, Project and Contract levels demonstrates a thorough approach to planning,	R2 c) i) and ii) will each be assessed using the following scale (as applicable to the Total number of points available per criterion): 5 points= Very Good The response demonstrates a very good knowledge transfer to incoming and from outgoing project resources (i.e. timely ramp-up(s) and close-out(s) and a sustainable and reusable knowledge) and demonstrates a very good approach to planning, implementation and management of timelines, delivery of deliverables/milestones, cost/budget expenditures, quality assurance and reporting. 3 points= Acceptable	10	

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<p>implementation and management of timelines, delivery of deliverables/milestones, cost/budget and expenditures, quality assurance and reporting.</p>		<p>The response demonstrates an acceptable knowledge transfer to incoming and from outgoing project resources (i.e. timely ramp-up(s) and close-out(s) and a sustainable and reusable knowledge) and demonstrates an acceptable approach to planning, implementation and management of timelines, delivery of deliverables/milestones, cost/budget expenditures, quality assurance and reporting.</p> <p>1 point= Poor</p> <p>The response demonstrates a poor knowledge transfer to incoming and from outgoing project resources (i.e. timely ramp-up(s) and close-out(s) and a sustainable and reusable knowledge) and demonstrates a poor approach to planning, implementation and management of timelines, delivery of deliverables/milestones, cost/budget expenditures, quality assurance and reporting.</p>	
<p>R2</p> <p>d)</p> <p>Capacity on Demand:</p> <p>The Bidder should demonstrate the number of resources simultaneously managed under any contract(s) within the last five years (as of bid closing date) including the following for each Contract:</p> <ul style="list-style-type: none"> • The organization name; • The start and end dates for the contract(s) • The contract numbers; and • The number of resources managed per contract. <p>Only experience claimed from May 1, 2013 up to bid closing will be accepted for evaluation purposes.</p>		<p>40+ resources= 10 points 30 to 39 resources= 8 points 20 to 29 resources= 6 points 10 to 19 resources= 4 points 5 to 10 resources= 2 points</p>	<p>10</p>
		<p>Total Points Available: 32</p> <p>Minimum Points Required: 22</p>	

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3 RESOURCE GROUP 1 – BUSINESS RESOURCES • MANDATORY CRITERIA

Mandatory Technical Criteria		Bidder's Response
M2	<p>Bidder's Proposed Resources under Resource Group 1 – Business Resources:</p> <p>The Bidder must provide a total of three resources as follows:</p> <ul style="list-style-type: none"> a) Resource Category: A.11 Tester - Level 3, one resource; b) Resource Category: B.1 Business Analyst - Level 3, one resources; and c) Resource Category: B.2 Business Architect – Level 3, one resource. <p>For each proposed resource, the Bidder must demonstrate the resource's experience providing professional IM/IT services relevant and similar to the tasks for the Resource Category as described in the SOW of this bid solicitation. In order to be considered, project experience summaries must include sufficient information in order to allow Canada to determine its similarity and relevance to the SOW requirements of this bid solicitation. This includes:</p> <ul style="list-style-type: none"> i. The name of the client organization for whom the services were provided; ii. A summary of the project objectives, needs and issues which necessitated the contribution of the resource; iii. A description of the services and deliverables provided by the resource and how they relate to the SOW of this bid solicitation; and iv. The duration, including start and finish dates (dates should be identified by month and year – for example May, 2011 – February, 2012). <p>Only experience claimed from May 1, 2003 to bid closing will be accepted for evaluation purposes.</p>	
M3	<p>Each proposed resource must meet the minimum years of experience in accordance to the Resource Category under which they have been proposed as indicated below:</p> <ul style="list-style-type: none"> a) A.11 Tester – Level 3 (10+ years of experience); b) B.1 Business Analyst – Level 3 (10+ years of experience); and c) B.2 Business Architect – Level 3 (10+ years of experience). <p>For each project(s) listed under the proposed resource's résumé, it must include the following information:</p> <ul style="list-style-type: none"> i) The specified number of years of experience; 	

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	<p>ii) A summary of the project objectives, needs and issues which necessitated the contribution of the proposed resource;</p> <p>iii) A description of the services and deliverables provided by the resource;</p> <p>iv) The duration, including start and end dates (month and year); and</p> <p>v) The client organization name where the services were provided, along with the contact reference information (name, phone number and valid email address) that can confirm the stated experience.</p>	
	Only experience claimed from May 1, 2003 to bid closing will be accepted for evaluation purposes.	

4 RESOURCE GROUP 1 – BUSINESS RESOURCES • RATED CRITERIA

A.11 Tester – Level 3

Rated Technical Criteria		Points Scale	Total Points	Bidder's Response
R3	<p>The project summaries submitted for the A.11 Tester – Level 3 will be evaluated on the basis of the resource's demonstrated experience in providing Testing Services as follows:</p> <p>a) Experience in defining/documenting or analyzing testing scenarios, as well as conducting testing for IT systems which included personal and/or sensitive data; and</p> <p>b) Experience in testing functions for IT applications that support public sector (federal, provincial, territorial and/or municipal) users.</p> <p>Only experience claimed from May 1, 2003 to bid closing will be accepted for evaluation purposes.</p>	<p>a) 2 points per year, up to 10 years.</p> <p>b) 2 points per year, up to 10 years.</p>	<p>20</p> <p>20</p>	
		Total Points Available:	40	
		Minimum Points Required:	28	

B.1 Business Analyst – Level 3

Rated Technical Criteria		Points Scale	Total Points	Bidder's Response
R4	The project summaries submitted for the B.1 Business Analyst – Level 3 will			

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Rated Technical Criteria	Points Scale	Total Points	Bidder's Response
<p>be evaluated on the basis of the resource's demonstrated experience in providing Business Analysis Services as follows:</p> <p>a) Experience in defining/documenting or analyzing functional user requirements that relate to one or more of the following:</p> <ul style="list-style-type: none"> - Indigenous groups, Indigenous issues, programs focused on Indigenous issues or needs; - Education or social applications; or - Programs delivering public services (to the Canadian public). <p>b) Experience in fulfilling performance measurement or business intelligence functions for IT applications that support public sector and public users.</p> <p>Only experience claimed from May 1, 2003 to bid closing will be accepted for evaluation purposes.</p>	<p>a) 2 points per year, up to 10 years</p> <p>b) 2 points per year, up to 10 years</p>	<p>20</p> <p>20</p>	
Total Points Available:		40	
Minimum Points Required:		28	

B.2 Business Architect – Level 3

Rated Technical Criteria	Points Scale	Total Points	Bidder's Response
<p>R5</p> <p>The project summaries submitted for the B.2 Business Architect – Level 3 will be evaluated on the basis of the Resource's demonstrated experience in providing one or more of the following Business Services:</p> <p>a) Experience in analysing and developing architecture requirements design, process development, process mapping and training that relate to</p>	<p>a) 2 points per year, up to 10 years.</p>	<p>20</p>	

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Rated Technical Criteria	Points Scale	Total Points	Bidder's Response
<p>one or more of the following:</p> <ul style="list-style-type: none"> - Indigenous groups, Indigenous issues, programs focused on Indigenous issues or needs; - Education or social applications; or - Programs delivering public services (to the Canadian public). <p>b) Experience in developing 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 a public sector environment.</p> <p>Only experience claimed from May 1, 2003 to bid closing will be accepted for evaluation purposes.</p>	b) 2 points per year, up to 10 years.	20	
Total Points Available:		40	
Minimum Points Required:		28	

5 RESOURCE GROUP 2 – TRAINING/INSTRUCTION RESOURCES MANDATORY CRITERIA

Mandatory Technical Criteria		Bidder's Response
M4	<p>Bidder's Proposed Resources under Resource Group 2 – Training/Instruction Resources:</p> <p>The Bidder must provide a total of three resources as follows:</p> <ul style="list-style-type: none"> a) Resource Category: B.9 Courseware Developer - Level 3, one resource; b) Resource Category: B.11 Instructor, IT -Level 3, one resource; and c) Resource Category: B.14 Technical Writer – Level 3, one resource. <p>The Bidder must provide with its bid a résumé for each proposed resources. For each proposed resource, the Bidder</p>	

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Mandatory Technical Criteria		Bidder's Response
	<p>must demonstrate the resource's experience providing professional IM/IT services relevant and similar to the tasks for the Resource Category as described in the SOW of this bid solicitation. In order to be considered, project experience summaries must include sufficient information in order to allow Canada to determine its similarity and relevance to the SOW requirements of this bid solicitation. This includes:</p> <ul style="list-style-type: none"> i. The name of the client organization for whom the services were provided; ii. A summary of the project objectives, needs and issues which necessitated the contribution of the Resource; iii. A description of the services and deliverables provided by the Resource and how they relate to the SOW of this bid solicitation; and iv. The duration, including start and finish dates (dates should be identified by month and year – for example May 2010 – February 2012). <p>Only experience claimed from May 1, 2003 to bid closing will be accepted for evaluation purposes.</p>	
M5	<p>Each proposed resource must meet the minimum years of experience in accordance to the Resource Category under which they have been proposed as indicated below:</p> <ul style="list-style-type: none"> a) B.9 Courseware Developer – Level 3 (10+ years of experience); b) B.11 Instructor, IT – Level 3 (10+ years of experience); c) B.14 Technical Writer – Level 3 (10+ years of experience). <p>For each project listed under the proposed resource's résumé, it must include the following information:</p> <ul style="list-style-type: none"> i) The specified number of years of experience; ii) A summary of the project objectives, needs and issues which necessitated the contribution of the proposed resource; iii) A description of the services and deliverables provided by the resource; iv) The duration, including start and end dates (month and year); and v) The client organization name where the services were provided, along with the contact reference information (name, phone number and valid email address) that can confirm the stated experience. <p>Only experience claimed from May 1, 2003 to bid closing will be accepted for evaluation purposes.</p>	

6 RESOURCE GROUP 2 – TRAINING/INSTRUCTION RESOURCES RATED CRITERIA

B.9 Courseware Developer – Level 3

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Rated Technical Criteria	Points Scale	Total Points	Bidder's Response
R6			
<p>The project summaries submitted for the B.9 Courseware Developer – Level 3 will be evaluated on the basis of the resource's demonstrated experience in development of courseware for users of IM/IT systems as follows:</p> <p>a) Experience in gathering information concerning the features and functions of a system and developing courseware and learning materials related to one or more of the following:</p> <ul style="list-style-type: none"> - Indigenous groups, Indigenous issues, programs focused on Indigenous issues or needs; - Education or social applications; or - Programs delivering public services (to the Canadian public) <p>b) Experience assessing audience requirements and developing a variety of courseware and training tools (e.g. training manuals, training documents with screenshots and other visuals, job aids and other tips tools, training documentation) for multiple type(s) of IT system users (e.g. public sector administrators, public users, etc.).</p> <p>Only experience claimed from May 1, 2003 to bid closing will be accepted for evaluation purposes.</p>	<p>a) 2 points per year, up to 10 years</p> <p>b) 2 points per year, up to 10 years</p>	<p>20</p> <p>20</p>	
Total Points Available:		40	
Minimum Points Required:		28	

B.11 Instructor, IT – Level 3

Rated Technical Criteria	Points Scale	Total Points	Bidder's Response
R7			
The project summaries submitted for the B.11 Instructor, IT – Level 3 will be evaluated on the basis of the resource's demonstrated			

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	experience in the delivery of training services for users of IM/IT systems as follows: a) Experience in delivering in person and virtual training/instruction to one or more of the following: - Indigenous groups, Indigenous issues, programs focused on Indigenous issues or needs; - Education or social applications; or - Programs delivering public services (to the Canadian public) b) Experience assessing audience requirements and developing training approaches adequate for the different audiences for multiple type(s) of IT system users (e.g. public sector administrators, public users, etc.) Only experience claimed from May 1, 2003 to bid closing will be accepted for evaluation purposes.	a) 2 points per year, up to 10 years <
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B.14 Technical Writer – Level 3

Rated Technical Criteria		Points Scale	Total Points	Bidder's Response
R8	<p>The project summaries submitted for the B.14 Technical Writer – Level 3 will be evaluated on the basis of the resource's demonstrated experience in development of written documentation for users of IM/IT systems and its relevance and similarity to ISC's requirements as described in the SOW of this bid solicitation in terms of nature, size, scope and complexity, as follows:</p> <p>a) Experience in gathering information concerning the features and functions of a system and developing systems documentation for</p>	a) 2 points per year, up to 10 years	20	

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Rated Technical Criteria		Points Scale	Total Points	Bidder's Response
	<p>functional requirements related to one or more of the following:</p> <ul style="list-style-type: none">- Indigenous groups, Indigenous issues, programs focused on Indigenous issues or needs;- Education or social applications; or- Programs delivering public services to Canadian citizens. <p>b) Experience assessing audience requirements and developing a variety of systems documentation (e.g. help text, user manuals, technical documentation, web page content) for multiple type(s) of IT system users (e.g. public sector administrators, public users, etc.)</p> <p>Only experience claimed from May 1, 2003 to bid closing will be accepted for evaluation purposes.</p>	<p>b) 2 points per year, up to 10 years</p>	<p>20</p>	
Total Points Available:			<p>40</p>	
Minimum Points Required:			<p>28</p>	

7 RESOURCE GROUP 3 –PROJECT MANAGEMENT RESOURCES – MANDATORY CRITERIA

Mandatory Technical Criteria		Bidder's Response
M6	<p>Bidder's Proposed Resources under Resource Group 3 – Project Management Resources:</p> <p>The Bidder must provide a total of four resources as follows:</p> <ul style="list-style-type: none"> a) Resource Category: P.1 Change Management Consultant – Level 3, one resource; b) Resource Category: P.7 Project Coordinator – Level 2, one resource; c) Resource Category: P.9 Project Manager – Level 3, one resource; and d) Resource Category: P.12 Risk Management Specialist – Level 2, one resource. <p>For each proposed resource, the Bidder must demonstrate the resource's experience providing professional IM/IT services relevant and similar to the tasks for the resource category as described in the SOW of this bid solicitation.</p> <p>In order to be considered, project experience summaries must include sufficient information in order to allow Canada to determine its</p>	

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Mandatory Technical Criteria		Bidder's Response
	<p>similarity and relevance to the SOW requirements of this bid solicitation. This includes:</p> <ol style="list-style-type: none"> The name of the client organization for whom the services were provided; A summary of the project objectives, needs and issues which necessitated the contribution of the Resource; A description of the services and deliverables provided by the resource and how they relate to the SOW of this bid solicitation; and The duration, including start and finish dates (identified by month and year – for example, May 2015 – February 2017). <p>Only experience claimed from May 1, 2003 to bid closing will be accepted for evaluation purposes.</p>	
M7	<p>Each proposed resource must meet the minimum years of experience in accordance to the Resource Category under which they have been proposed as indicated below:</p> <ol style="list-style-type: none"> P.1 Change Management Consultant – Level 3 (10+ years of experience); P.7 Project Coordinator – Level 2 (5 to 10 years of experience); P.9 Project Manager – Level 3 (10+ years of experience); and P.12 Risk Management Specialist – Level 2 (5 to 10 years of experience). <p>For each project(s) listed under the proposed resource's résumé, it must include the following information:</p> <ol style="list-style-type: none"> The specified number of years of experience; A summary of the project objectives, needs and issues which necessitated the contribution of the proposed resource; A description of the services and deliverables provided by the resource; The duration, including start and end dates (month and year); and The client organization name where the services were provided, along with the contact reference information (name, phone number and valid email address) that can confirm the stated experience. <p>Only experience claimed from May 1, 2003 to bid closing will be accepted for evaluation purposes.</p>	

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8 RESOURCE GROUP 3 –PROJECT MANAGEMENT RESOURCES – RATED CRITERIA

P.1 Change Management Consultant – Level 3

Rated Technical Criteria		Points Scale	Total Points	Bidder's Response
R9	<p>The project summaries submitted for the P.1 Change Management Consultant – Level 3 will be evaluated on the basis of the resources' demonstrated experience in providing Change Management Services and its relevance and similarity to ISC's requirements as described in the SOW of this bid solicitation in terms of nature, size, scope and complexity, as follows:</p> <p>a) Experience in providing both internal and external communications (including written communications) (e.g. power-point presentations, website content, content of forms, and press releases, etc.) for or about Indigenous communities to ensure cultural appropriateness and overall accuracy.</p> <p>b) Experience in leading and participating in change impact identification, analysis and the design, development and implementation of change management activities in a public sector environment.</p> <p>Only experience claimed from May 1, 2003 to bid closing will be accepted for evaluation purposes.</p>	<p>a) 2 points per year, up to 10 years</p> <p>b) 2 points per year, up to 10 years</p>	<p>20</p> <p>20</p>	
		Total Points Available:	40	
		Minimum Points Required:	28	

P.7 Project Coordinator – Level 2

Rated Technical Criteria		Points Scale	Total Points	Bidder's Response
R10	<p>The project summaries submitted for the P.7 Project Coordinator – Level 2 will be evaluated on the basis of the resource's demonstrated experience in coordinating team members' work within IM/IT projects as follows:</p> <p>a) Experience coordinating projects during the development, implementation and operations start-up (e.g. coordination of human resources/contractors, tracking of</p>			
		a) 2 points per year, up to 10 years	20	

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	financial transactions, work plans, documentation) for IM/IT projects. b) Experience coordinating projects related to one or more of the following: Indigenous groups, issues, programs focused on Indigenous issues or needs, or education or social applications, or programs delivering public services to Canadian citizens. Only experience claimed from May 1, 2003 to bid closing will be accepted for evaluation purposes.	b) 2 points per year, up to 10 years 20	
Total Points Available:		40	
Minimum Points Required:		28	

P.9 Project Manager – Level 3

Rated Technical Criteria		Points Scale	Total Points	Bidder's Response
R11	The project summaries submitted for the P.9 Project Manager – Level 3 will be evaluated on the basis of the resource's demonstrated experience in managing IM/IT as follows: a) Experience managing projects 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, for IM/IT projects. b) Experience in meeting in conference with stakeholders and other project managers and stating problems in a form capable of being solved, involving a variety of stakeholders (e.g. public sector, Indigenous, general public, etc.). Only experience claimed from May 1, 2003 to bid closing will be accepted for evaluation purposes.	a) 2 points per year, up to 10 years b) 2 points per year, up to 10 years	20 20	
Total Points Available:			40	
Minimum Points Required:			28	

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P.12 Risk Management Specialist – Level 2

Rated Technical Criteria		Points Scale	Total Points	Bidder's Response
R12	<p>The project summaries submitted for the P.12 Risk Management Specialist – Level 2 will be evaluated on the basis of the resource's demonstrated experience in providing expert services to manage the risks related to IM/IT projects as follows:</p> <p>a) Experience providing risk management services during the development, implementation and operations start-up where risks and issues are identified and mitigation strategies considered and/or implemented to support the manager in ensuring that the project is developed and is fully operational within previously agreed time, cost and performance parameters, for IM/IT projects.</p> <p>b) Experience in meeting in conference with stakeholders, the project management team and other team members in a setting involving multiple groups such as the public sector, Indigenous groups, general public, etc.).</p> <p>Only experience claimed from May 1, 2003 to bid closing will be accepted for evaluation purposes.</p>	a) 2 points per year, up to 10 years	20	
		b) 2 points per year, up to 10 years	20	
		Total Points Available: 40 Minimum Points Required: 28		

9 POINTS SUMMARY

Reference	Subtotal	Total Points	Minimum Points Required
R1 Corporate Criteria: - Contract Experience			
R1 a) Scope and Complexity	36 18	54	38
R1 b) -Nature			

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R2 Corporate Criteria - Approach and Methodology					
R2 a) -Resourcing		8	32	22	
R2 b) -Availability		4			
R2 c) -Transition and Project Management		10			
R2 d) -Capacity on Demand		10			
Resource Group 1 – Business Resources					
R3 - A.11 Tester – Level 3, one resource		40	120	28	
R4 - B.1 Business Analyst – Level 3, one resource		40			
R5 - B.2 Business Architect – Level 3, one resource		40			
Resource Group 2 – Training/Instruction Resources					
R6 - B.9 Courseware Developer – Level 3, one resource		40	120	28	
R7 - B.11 Instructor, IT – Level 3, one resource		40			
R8 - B.14 Technical Writer – Level 3, one resource		40			
Resource Group 3 – Project Management Resources					
R9 - P.1 Change Management Consultant – Level 3, one resource		40	160	28	
R10 - P.7 Project Coordinator – Level 2, one resource		40			
R11 - P.9 Project Manager – Level 3, one resource		40			
R12 - P.12 Risk Management Specialist – Level 2, one resource		40			
Total Points		486	486	340	

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ATTACHEMENT 4.2 PRICING SCHEDULE

INITIAL CONTRACT PERIOD:

Initial Contract Period (which begins on the date the Contract is awarded and ends 3 years later)

Resource Group 1 - Business Resources

(A)	(B)	(C)	(D)	(E)	(F)
Resource Category	Level of expertise	Estimated Numbers of Resources	Estimated Numbers of Days	Firm Per Diem Rate	TOTAL COST (C x D x E)
A.11 - Tester	1	2	720		\$ -
A.11 - Tester	2	2	720		\$ -
A.11 - Tester	3	2	720		\$ -
B.1 - Business Analyst	1	2	720		\$ -
B.1 - Business Analyst	2	2	720		\$ -
B.1 - Business Analyst	3	2	720		\$ -
B.2 - Business Architect	3	2	720		\$ -

Resource Group 2 - Training/Instruction Resources

(A)	(B)	(C)	(D)	(E)	(F)
Resource Category	Level of expertise	Estimated Numbers of Resources	Estimated Numbers of Days	Firm Per Diem Rate	TOTAL COST (C x D x E)
B.9 - Courseware Developer	2	2	720		\$ -
B.9 - Courseware Developer	3	2	720		\$ -
B.11 - Instructor, IT	2	2	720		\$ -
B.11 - Instructor, IT	3	2	720		\$ -
B.14 - Technical Writer	2	2	720		\$ -
B.14 - Technical Writer	3	2	720		\$ -

Resource Group 3 - Project Management Resources

(A)	(B)	(C)	(D)	(E)	(F)
Resource Category	Level of expertise	Estimated Numbers of Resources	Estimated Numbers of Days	Firm Per Diem Rate	TOTAL COST (C x D x E)
P.1 - Change Management Consultant	1	2	720		\$ -
P.1 - Change Management Consultant	3	2	720		\$ -
P.7 - Project Coordinator	2	2	720		\$ -
P.9 - Project Manager	2	2	720		\$ -
P.9 - Project Manager	3	2	720		\$ -
P.12 - Risk Management Specialist	2	2	720		\$ -

TOTAL PRICE INITIAL CONTRACT PERIOD: \$ -

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OPTIONAL CONTRACT PERIODS:

Option Period Year 1					
Resource Group 1 - Business Resources					
(A)	(B)	(C)	(D)	(E)	(F)
Resource Category	Level of expertise	Estimated Numbers of Resources	Estimated Numbers of Days	Firm Per Diem Rate	TOTAL COST (C x D x E)
A.11 - Tester	1	2	240		\$ -
A.11 - Tester	2	2	240		\$ -
A.11 - Tester	3	2	240		\$ -
B.1 - Business Analyst	1	2	240		\$ -
B.1 - Business Analyst	2	2	240		\$ -
B.1 - Business Analyst	3	2	240		\$ -
B.2 - Business Architect	3	2	240		\$ -
Resource Group 2 - Training/Instruction Resources					
B.9 - Courseware Developer	2	2	240		\$ -
B.9 - Courseware Developer	3	2	240		\$ -
B.11 - Instructor, IT	2	2	240		\$ -
B.11 - Instructor, IT	3	2	240		\$ -
B.14 - Technical Writer	2	2	240		\$ -
B.14 - Technical Writer	3	2	240		\$ -
Resource Group 3 - Project Management Resources					
P.1 - Change Management Consultant	1	2	240		\$ -
P.1 - Change Management Consultant	3	2	240		\$ -
P.7 - Project Coordinator	2	2	240		\$ -
P.9 - Project Manager	2	2	240		\$ -
P.9 - Project Manager	3	2	240		\$ -
P.12 - Risk Management Specialist	2	2	240		\$ -
TOTAL PRICE OPTION PERIOD YEAR 1:					\$ -

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Option Period Year 2					
Resource Group 1 - Business Resources					
(A)	(B)	(C)	(D)	(E)	(F)
Resource Category	Level of expertise	Estimated Numbers of Resources	Estimated Numbers of Days	Firm Per Diem Rate	TOTAL COST (C x D x E)
A.11 - Tester	1	2	240		\$ -
A.11 - Tester	2	2	240		\$ -
A.11 - Tester	3	2	240		\$ -
B.1 - Business Analyst	1	2	240		\$ -
B.1 - Business Analyst	2	2	240		\$ -
B.1 - Business Analyst	3	2	240		\$ -
B.2 - Business Architect	3	2	240		\$ -
Resource Group 2 - Training/Instruction Resources					
B.9 - Courseware Developer	2	2	240		\$ -
B.9 - Courseware Developer	3	2	240		\$ -
B.11 - Instructor, IT	2	2	240		\$ -
B.11 - Instructor, IT	3	2	240		\$ -
B.14 - Technical Writer	2	2	240		\$ -
B.14 - Technical Writer	3	2	240		\$ -
Resource Group 3 - Project Management Resources					
P.1 - Change Management Consultant	1	2	240		\$ -
P.1 - Change Management Consultant	3	2	240		\$ -
P.7 - Project Coordinator	2	2	240		\$ -
P.9 - Project Manager	2	2	240		\$ -
P.9 - Project Manager	3	2	240		\$ -
P.12 - Risk Management Specialist	2	2	240		\$ -
TOTAL PRICE OPTION PERIOD YEAR 2:					\$ -

TOTAL BID PRICE	
INITIAL CONTRACT PERIOD (3 years) + OPTION PERIODS (Year 1 + Year 2)	(TBD)

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ATTACHMENT 5.1

FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY - CERTIFICATION

I, the Bidder, by submitting the present information to the Contracting Authority, certify that the information provided is true as of the date indicated below. The certifications provided to Canada are subject to verification at all times. I understand that Canada will declare a bid non-responsive, or will declare a contractor in default, if a certification is found to be untrue, whether during the bid evaluation period or during the contract period. Canada will have the right to ask for additional information to verify the Bidder's certifications. Failure to comply with 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 employees (combined work force includes: permanent full-time, permanent part-time and temporary employees [temporary employees only includes those who have worked 12 weeks or more during a calendar year and who are not full-time students]).
- A5. The Bidder has a combined workforce in Canada of 100 or more employees; and
- ☐ A5.1 The Bidder certifies already having a valid and current [Agreement to Implement Employment Equity](#) (AIEE) in place with ESDC-Labour.

OR

- ☐ A5.2 The Bidder certifies having submitted the Agreement to Implement Employment Equity (LAB1168) to ESDC-Labour. As this is a condition to contract award, proceed to completing the form Agreement to Implement Employment Equity (LAB1168), duly signing it, and transmit it to ESDC-Labour.

B. Check only one of the following:

- ☐ B1. The Bidder is not a Joint Venture.

OR

- ☐ B2. The Bidder is a Joint venture and each member of the Joint Venture must provide the Contracting Authority with a completed annex Federal Contractors Program for Employment Equity - Certification. (Refer to the Joint Venture section of the Standard Instructions).