



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

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

**Place du Portage, Phase III**

**Core 0B2 / Noyau 0B2**

**11 Laurier St.\11, rue Laurier**

**Gatineau**

**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**

Business Transformation and Systems Integration  
Service/Division de transformation des opérations et  
d'intégrat

Special Procurement Initiative Dir

Dir. des initiatives spéciales

d'approvisionnement

Terrasses de la Chaudière 4th Floo

10 Wellington Street

Gatineau

Québec

<b>Title - Sujet</b> Project Management Services	
<b>Solicitation No. - N° de l'invitation</b> EN912-182003/A	<b>Date</b> 2018-05-25
<b>Client Reference No. - N° de référence du client</b> 20182003	
<b>GETS Reference No. - N° de référence de SEAG</b> PW-\$\$XE-676-33555	
<b>File No. - N° de dossier</b> 676xe.EN912-182003	<b>CCC No./N° CCC - FMS No./N° VME</b>
<b>Solicitation Closes - L'invitation prend fin</b> <b>at - à 02:00 PM</b> <b>on - le 2018-06-13</b>	<b>Time Zone</b> <b>Fuseau horaire</b> Eastern Daylight Saving Time EDT
<b>F.O.B. - F.A.B.</b> <b>Plant-Usine:</b> <input type="checkbox"/> <b>Destination:</b> <input checked="" type="checkbox"/> <b>Other-Autre:</b> <input type="checkbox"/>	
<b>Address Enquiries to: - Adresser toutes questions à:</b> Yang, Annie	<b>Buyer Id - Id de l'acheteur</b> 676xe
<b>Telephone No. - N° de téléphone</b> (613) 858-8340 ( )	<b>FAX No. - N° de FAX</b> ( ) -
<b>Destination - of Goods, Services, and Construction:</b> <b>Destination - des biens, services et construction:</b> DEPARTMENT OF PUBLIC WORKS AND GOVERNMENT SERVICES CANADA PORTAGE III 11 LAURIER ST Gatineau Quebec K1A0S5 Canada	

**Instructions: See Herein**

**Instructions: Voir aux présentes**

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

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**BID SOLICITATION  
FOR A CONTRACT AGAINST A SUPPLY ARRANGEMENT FOR TASK-  
BASED INFORMATICS PROFESSIONAL SERVICES (TBIPS)  
MULTIPLE CATEGORIES – MULTIPLE LEVELS  
FOR  
PUBLIC WORKS AND GOVERNMENT SERVICES CANADA (PWGSC)**

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

Annex A Statement of Work

Appendix A – Tasking Assessment Procedure

Appendix B – Task Authorization Form

Appendix C – Resources Assessment Criteria and Response Table

Appendix D – Certifications at the TA Stage

Annex B Basis of Payment

Annex C Security Requirements Check List

**List of Attachment to Part 3 (Bid Preparation Instructions):**

-Attachment 3.1: Bid Submission Form

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

-Attachment 4.1: Bid Evaluation Criteria

**List of Attachment to Part 5 (Certifications):**

-Attachment 5.1: Federal Contractors Program for Employment Equity – Certification

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**BID SOLICITATION**

**FOR A CONTRACT AGAINST A SUPPLY ARRANGEMENT FOR TASK-  
BASED INFORMATICS PROFESSIONAL SERVICES (TBIPS)  
MULTIPLE CATEGORIES – MULTIPLE LEVELS  
FOR  
PUBLIC WORKS AND GOVERNMENT SERVICES CANADA (PWGSC)**

## **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, the Basis of Payment and the Security Requirements Check List.

### **1.2 Summary**

- (a) This bid solicitation is being issued to satisfy the requirement of Public Works and Government Services Canada (the "**Client**") for Task-Based Informatics Professional Services (TBIPS) under the TBIPS Supply Arrangement (SA) method of supply.
- (b) It is intended to result in the award of one contract for 1 year plus 2 one-year irrevocable options allowing Canada to extend the term of the contract.
- (c) There are security requirements associated with this requirement. For additional information, consult Part 6 - Security, Financial and Other Requirements, and Part 7 – Resulting Contract Clauses. For more information on personnel and organization security screening or security clauses, Bidders should refer to the Contract Security Program of Public Works and Government Services Canada (<http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>) website.
- (d) The requirement is subject to the provisions of *the World Trade Organization Agreement on Government Procurement (WTO-AGP)*, *the North American Free Trade Agreement (NAFTA)*, *the*

*Canada-Chile Free Trade Agreement (CCFTA), the Canada-Peru Free Trade Agreement (CPFTA), the Canada-Colombia Free Trade Agreement (CColFTA), the Canada-Panama Free Trade Agreement (CPanFTA), the Canada-European Union Comprehensive Economic and Trade Agreement (CETA), and the Canadian Free Trade Agreement (CFTA).*

- (e) The Federal Contractor's Program (FCP) for employment equity applies to this procurement; see Part 5 – Certifications and Additional Information, Part 7 – Resulting Contract Clauses and the attachment titled "Federal Contractors Program for Employment Equity – Certification."
- (f) This bid solicitation is to establish a contract with task authorizations for the delivery of the requirement detailed in the bid solicitation in the National Capital Region, excluding locations within Yukon, Northwest Territories, Nunavut, Quebec, and Labrador that are subject to Comprehensive Land Claims Agreements (CLCAs). Any requirement for deliveries within CLCAs areas within Yukon, Northwest Territories, Nunavut, Quebec, or Labrador will be treated as a separate procurement, outside the resulting contract.
- (g) 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.
- (h) Only TBIPS SA Holders currently holding a TBIPS SA for Tier 2, in the National Capital Region under the EN578-170432 series of SAs that are qualified for all of the resource categories listed in (j) below 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.
- (i) SA Holders that are invited to compete as a joint venture must submit a bid as that joint venture SA Holder, forming no other joint venture to bid. Any joint venture must be already qualified under the SA #EN578-170432 as that joint venture at the time of bid closing in order to submit a bid.
- (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 DURING THE INITIAL CONTRACT PERIOD
B.1 Business Analyst	LEVEL 3	4
B.2 Business Architect	LEVEL 3	2
B.3 Business Consultant	LEVEL 3	1
P.1 Change Management Consultant	LEVEL 3	3
P.7 Project Coordinator	LEVEL 2	1
P.9 Project Manager	LEVEL 3	10
P.9 Project Manager	LEVEL 2	5
P.10 Project Scheduler	LEVEL 2	3

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**1.3 Debriefings**

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

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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) Subsection 3.a) of Section 01, Integrity Provisions - Bid of Standard Instructions 2003 incorporated by reference above is deleted in its entirety and replaced with the following:
  - (i) at the time of submitting an arrangement under the Request for Supply Arrangement (RFSA), the Bidder has already provided a list of names, as requested under the *Ineligibility and Suspension Policy*. During this procurement process, the Bidder must immediately inform Canada in writing of any changes affecting the list of names.
- (e) Section 05, Submission of bids of Standard Instructions 2003 incorporated by reference above, is amended as follows:
  - (i) 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."
  - (ii) 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;"
  - (iii) 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,"
  - (iv) subsection 4 of 2003, Standard Instructions – Goods and Services – Competitive Requirements is amended as follows:
    - (A) Delete: 60 days
    - (B) Insert: 180 days
- (f) Section 06, Late bids of Standard Instructions 2003 incorporated by reference above, 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."
- (g) Section 07, Delayed bids of Standard Instructions 2003 incorporated by reference above, is amended as follows:



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- a. 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."
- (h) Section 08, Transmission by facsimile of Standard Instructions 2003 incorporated by reference above, is deleted and replaced by the following:
- "Transmission by facsimile or by epost Connect
1. Facsimile
  - Due to the nature of the bid solicitation, bids transmitted by facsimile or electronic mail to PWGSC 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](mailto:TPSGC.DGAreceptiondessoumissions-ABBidReceiving.PWGSC@tpsgc-pwgsc.gc.ca). The solicitation number must be identified in the epost Connect message field of all electronic transfers.
  - f. It should be noted that the use of epost Connect service requires a Canadian mailing address. Should a bidder not have a Canadian address, they may use the Bid Receiving Unit address specified on page 1 of the solicitation in order to register for the epost Connect service.
  - g. For bids transmitted by epost Connect service, Canada will not be responsible for any failure attributable to the transmission or receipt of the bid including, but not limited to, the following:
    - i. receipt of a garbled or incomplete bid;
    - ii. availability or condition of the epost Connect service;
    - iii. incompatibility between the sending and receiving equipment;
    - iv. delay in transmission or receipt of the bid;
    - v. failure of the Bidder to properly identify the bid;
-

- vi. illegibility of the bid;
  - vii. security of bid data; or
  - viii. inability to create an electronic conversation through the epost Connect service.
- h. A bid transmitted by epost Connect service constitutes the formal bid of the Bidder and must be submitted in accordance with the section entitled Submission of bids."

## 2.2 Submission of Bids

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

## 2.3 Enquiries - Bid Solicitation

- (a) All enquiries must be submitted in writing to the Contracting Authority no later than 7 calendar days before the bid closing date. Enquiries received after that time may not be answered.
- (b) Bidders should reference as accurately as possible the numbered item of the bid solicitation to which the enquiry relates. Care should be taken by Bidders to explain each question in sufficient detail in order to enable Canada to provide an accurate answer. Technical enquiries that are of a proprietary nature must be clearly marked "proprietary" at each relevant item. Items identified as "proprietary" will be treated as such except where Canada determines that the enquiry is not of a proprietary nature. Canada may edit the question(s) or may request that the Bidder do so, so that the proprietary nature of the question(s) is eliminated, and the enquiry can be answered to all Bidders. Enquiries not submitted in a form that can be distributed to all Bidders may not be answered by Canada.

## 2.4 Former Public Servant

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

(b) **Definitions**

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

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

"*lump sum payment period*" means the period measured in weeks of salary, for which payment has been made to facilitate the transition to retirement or to other employment as a result of the

implementation of various programs to reduce the size of the Public Service. The lump sum payment period does not include the period of severance pay, which is measured in a like manner.

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

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

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

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

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

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

(d) **Work Force Adjustment Directive**

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

If so, the Bidder must provide the following information:

- (i). name of former public servant;
- (ii). conditions of the lump sum payment incentive;
- (iii). date of termination of employment;
- (iv). amount of lump sum payment;
- (v). rate of pay on which lump sum payment is based;
- (vi). period of lump sum payment including start date, end date and number of weeks;
- (vii). number and amount (professional fees) of other contracts subject to the restrictions of a work force adjustment program.

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

**2.5 Applicable Laws**

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

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

## **2.6 Improvement of Requirement During Solicitation Period**

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

## **2.7 Basis for Canada's Ownership of Intellectual Property**

Public Works and Government Services Canada has determined that any Material subject to copyright arising from the performance of the Work under the resulting contract will be owned by Canada. Examples of such Material (as such is defined in General Conditions 2035) include the reports as required in the deliverables to be specified in the Task Authorizations.

## **2.8 Volumetric Data**

The estimated number of resources per resource category required during the Initial Contract Period 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 08 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:
  - (A) Section I: Technical Bid
  - (B) Section II: Financial Bid
  - (C) Section III: Certifications

#### (b) Soft Copy Bid Submission (CD or USB)

- (i) If the Bidder chooses to submit its bid in soft copy via the PWGSC Bid Receiving Unit, Canada requests that the Bidder submits its bid in separate sections as follows:
  - (i) Section I: Technical Bid – One soft copy on a CD or USB key
  - (ii) Section II: Financial Bid – One soft copy on a CD or USB key
  - (iii) Section III: Certifications – One soft copy on a CD or USB key
- (c) If the Bidder is simultaneously providing an epost Connect copy and soft copy of the bid and if there is a discrepancy between the wording of the epost Connect copy and soft copy, the wording of the epost Connect copy will have priority over the wording of the soft copy.
- (d) Canada is not requesting a hard copy of the bid. However, if the Bidder submits a hard copy of its bid, and if there is a discrepancy between the wording of the soft or epost Connect copy and the hard copy, the wording of the soft or epost Connect copy will have priority over the wording of the hard copy.
- (e) Prices must appear in the financial bid only. No prices must be indicated in any other section of the bid.
- (f) **Format for Bid:** Canada requests that Bidders follow the format instructions described below in the preparation of their bid:
  - (i) use 8.5 x 11 inch (216 mm x 279 mm) paper;
  - (ii) use a numbering system that corresponds to the bid solicitation;
  - (iii) include a title page at the front of each volume of the bid that includes the title, date, bid solicitation number, bidder's name and address and contact information of its representative; and
  - (iv) include a table of contents.
- (g) **Canada's Policy on Green Procurement:** In April 2006, Canada issued a policy directing federal departments and agencies to take the necessary steps to incorporate environmental considerations into the procurement process. See the Policy on Green Procurement (<http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html>). To assist Canada in reaching its objectives, Bidders should:
  - (i) use paper containing fibre certified as originating from a sustainably-managed forest and/or containing a minimum of 30% recycled content; and

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- (ii) use an environmentally-preferable format including black and white printing instead of colour printing, printing double sided/duplex, and using staples or clips instead of cerlox, duotangs or binders.
- (h) **Submission of Only One Bid:**
- (i) A Bidder, including related entities, will be permitted to submit only one bid in response to this bid solicitation. If a Bidder or any related entities participate in more than one bid (participating means being part of the Bidder, not being a subcontractor), Canada will provide those Bidders with 2 working days to identify the single bid to be considered by Canada. Failure to meet this deadline will result in all the affected bids being disqualified.
  - (ii) For the purposes of this Article, regardless of the jurisdiction where any of the entities concerned is incorporated or otherwise formed as a matter of law (whether that entity is a natural person, corporation, partnership, etc), an entity will be considered to be "**related**" to a Bidder if:
    - (A) they are the same legal entity (i.e., the same natural person, corporation, partnership, limited liability partnership, etc.);
    - (B) they are "related persons" or "affiliated persons" according to the Canada Income Tax Act;
    - (C) the entities have now or in the two years before bid closing had a fiduciary relationship with one another (either as a result of an agency arrangement or any other form of fiduciary relationship); or
    - (D) the entities otherwise do not deal with one another at arm's length, or each of them does not deal at arm's length with the same third party.
  - (iii) Individual members of a joint venture cannot participate in another bid, either by submitting a bid alone or by participating in another joint venture.
- (i) **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
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venture member satisfies the requirement, the Contracting Authority will provide an opportunity to the Bidder to submit this information during the evaluation period. If the Bidder does not submit this information within the period set by the Contracting Authority, its bid will be declared non-responsive.

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

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

That show in total 100 billable days.

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

### 3.2 Section I: Technical Bid

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

- (i) **Bid Submission Form:** Bidders are requested to include the Bid Submission Form - Attachment "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:** The technical bid must substantiate the compliance with the specific articles of Attachment "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 "Substantiation & Cross Reference" column of Attachment "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) **Previous Projects:** Where the bid must include a description of previous projects: (i) a project must have been undertaken or completed by the Bidder itself (and cannot include the experience of any proposed subcontractor or any affiliate of the Bidder); (ii) each project description must include, at minimum, the name and either the telephone number or e-mail address of a customer reference; and (iii) if more projects are provided than requested, Canada will decide in its discretion which projects will be evaluated.
- (v) **For Proposed Resources:** The technical bid must include one résumé, per Resource Category, as identified in Attachment "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:
  - (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.



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- (F) For work experience to be considered by Canada, the technical bid must not simply indicate the title of the individual's position, but must demonstrate that the resource has the required work experience by explaining the responsibilities and work performed by the individual while in that position. Only listing experience without providing any supporting data to describe responsibilities, duties and relevance to the requirement, or reusing the same wording as the qualification requirements, will not be considered "demonstrated" for the purposes of the assessment. The Contractor should provide complete details as to where, when, month and year, and how, through which activities/responsibilities, the stated qualifications / experience were obtained. In situations in which a proposed resource worked at the same time on more than one project, the duration of any overlapping time period will be counted only once toward any requirements that relate to the individual's length of experience.
- (vi) **Customer Reference Contact Information:**
- (A) The Bidder must provide customer references. The customer reference must each confirm, if requested by PWGSC, the facts identified in the Bidder's bid, as required by Attachment "4.1".
- (B) The form of question to be used to request confirmation from customer references is as follows:
- [Sample Question to Customer Reference: "Has [the Bidder] provided your organization with [describe the services and, if applicable, describe any required time frame within which those services must have been provided]?"*
- \_\_\_ Yes, the Bidder has provided my organization with the services described above.
- \_\_\_ No, the Bidder has not provided my organization with the services described above.
- \_\_\_ I am unwilling or unable to provide any information about the services described above.
- (C) For each customer reference, the Bidder must, at a minimum, provide the name and either the telephone number or e-mail address for a contact person. If only the telephone number is provided, it will be used to call to request the e-mail address and the reference check will be done by e-mail.
- Bidders are also requested to include the title of the contact person. It is the sole responsibility of the Bidder to ensure that it provides a contact who is knowledgeable about the services the Bidder has provided to its customer and who is willing to act as a customer reference. Crown references will be accepted.
- (vii) **Corporate Profile:** The Bidder is requested to provide a corporate profile, which should include an overview of the Bidder and any subcontractors, and/or authorized agents of the Bidder that would be involved in the performance of the Work on the Bidder's behalf. The Bidder is requested to provide a brief description of its size, corporate structure, years in business, business activities, major customers, number of employees and their geographic presence. This information is requested for information purposes only and will not be evaluated.

### 3.3 Section II: Financial Bid

- (a) **Pricing:** Bidders must submit their financial bid in accordance with the Basis of Payment provided in Annex "B". 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.

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- (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 that 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.
- (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) **No Blank Prices:** Bidders must insert a valid price for each item in the tables. If the Bidder leaves any price blank or submit any "\$0.00" item, Canada will treat the blank price or "\$0.00" item as an administrative error and will request that the Bidder provide a valid price for that item within 24 hours of the request. Any bidder who does not respond with a valid price within 24 hours will be declared non-responsive.

### 3.4 Section III: Certifications

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

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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 2 working days of a request by the Contracting Authority.
  - (iii) **Extension of Time:** If additional time is required by the Bidder, the Contracting Authority may grant an extension in his or her sole discretion.

### 4.2 Technical Evaluation

- (a) **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

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

**4.3 Financial Evaluation**

- (a) The financial evaluation will be conducted using the firm per diem rates provided by the responsive bid(s).
- (b) There are two possible financial evaluation methods for this requirement. The first method will be used if three or more bids are determined responsive (see (c) Financial Evaluation - Method A below). The second method will be used if fewer than three bids are determined responsive (see (d) Financial Evaluation - Method B below).
- (c) **Financial Evaluation - Method A:** The following financial evaluation method will be used if three or more bids are determined responsive:
  - (i) **STEP 1 - ESTABLISHING THE LOWER AND UPPER MEDIAN BAND LIMITS FOR EACH PERIOD AND EACH RESOURCE CATEGORY:** The Contracting Authority will establish, for each period and each Resource Category, the median band limits based on the firm per diem rates provided by the technically responsive bids. For each such Resource Category the median will be calculated using the median function in Microsoft Excel and will represent a range that encompasses any rate to a value of minus (-) 20% of the median, and an upper median rate to a value of plus (+) 30% of the median. When

an even number of technically responsive bids have been determined, an average of the middle two rates will be used to calculate the median band limits and for an odd number of technically responsive bids, the middle rate will be used.

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

- (A) A Bidder's proposed firm per diem rate that is either lower than the established lower median band limit or higher than the established upper median band limit for that period and Resource Category will be allocated 0 points.
- (B) A Bidder's proposed firm per diem rate falling within the upper and lower median band limits, for that period and Resource Category, will be allocated points using the following calculation, which will be rounded to two decimal places:

$$\frac{\text{Lowest proposed firm per diem rate within the median band limits}}{\text{Bidder's proposed firm per diem rate within the median band limits}} \times \text{Maximum Points Assigned at Table 1 below}$$

- (C) A Bidder's proposed firm per diem rate falling within the established median band limits which is the lowest proposed firm per diem rate will be allocated the applicable maximum points assigned at Table 1 below.

TABLE 1 - MAXIMUM POINTS ASSIGNED				
RESOURCE CATEGORIES	INITIAL (1 YEAR) CONTRACT PERIOD	OPTION PERIOD 1	OPTION PERIOD 2	TOTAL POINTS
Business Analyst - Level 3	75	75	75	225
Business Architect - Level 3	115	115	115	345
Business Consultant - Level 3	65	65	65	195
Change Management Consultant – Level 3	90	90	90	270
Project Coordinator – Level 2	30	30	30	90
Project Manager – Level 3	100	100	100	300
Project Manager – Level 2	65	65	65	195
Project Scheduler – Level 2	75	75	75	225
TOTAL	615	615	615	1,845

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

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

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

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

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

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

(i) **STEP 1 - POINTS ALLOCATION:** For each period and each Resource Category points will be allocated as follows:

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

$$\frac{\text{Lowest proposed firm per diem rate}}{\text{Bidder's proposed firm per diem rate}} \times \text{Maximum Points Assigned at Table 3 below}$$

The Bidder with the lowest proposed firm per diem rate will be allocated the applicable maximum points assigned at Table 3 below.

TABLE 3 - MAXIMUM POINTS ASSIGNED				
RESOURCE CATEGORIES	INITIAL (1 YEAR) CONTRACT PERIOD	OPTION PERIOD 1	OPTION PERIOD 2	TOTAL POINTS
Business Analyst - Level 3	75	75	75	225
Business Architect - Level 3	115	115	115	345
Business Consultant - Level 3	65	65	65	195
Change Management Consultant – Level 3	90	90	90	270
Project Coordinator – Level 2	30	30	30	90
Project Manager – Level 3	100	100	100	300
Project Manager – Level 2	65	65	65	195
Project Scheduler – Level 2	75	75	75	225
TOTAL	615	615	615	1,845

(ii) **STEP 2 - FINANCIAL SCORE:** Points allocated under STEP 1, for each period and each Resource Category, will be added together and rounded to two decimal places to produce the Financial Score.

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

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

- (i) an invoice (referencing a contract serial number or other unique contract identifier) that shows that the Bidder has provided and invoiced a customer (with whom the Bidder deals at arm's length) for services performed for that customer similar to the services that would be provided in the relevant resource category, where those services were provided for at least three months within the eighteen months before the bid solicitation closing date, and the fees charged were equal to or less than the rate offered to Canada;
- (ii) in relation to the invoice in (i), evidence from the Bidder's customer that the services identified in the invoice include at least 50% of the tasks listed in the Statement of Work

for the category of resource being assessed for an unreasonably low rate. This evidence must consist of either a copy of the contract (which must describe the services to be provided and demonstrate that at least 50% of the tasks to be performed are the same as those to be performed under the Statement of Work in this bid solicitation) or the customer's signed certification that the services subject to the charges in the invoice included at least 50% of the same tasks to be performed under the Statement of Work in this bid solicitation; and

- (iii) in respect of each contract for which an invoice is submitted as substantiation, a résumé for the resource that provided the services under that contract that demonstrates that, in relation to the resource category for which the rates are being substantiated, the resource would meet the mandatory requirements and achieve any required pass mark for any rated criteria; and
- (iv) the name, telephone number and, if available, e-mail address of a contact person at the customer who received each invoice submitted under (i), so that Canada may verify any information provided by the Bidder.

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

**(f) Formulae in Pricing Tables**

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

**4.4 Basis of Selection**

- (a) Selection Process: The following selection process will be conducted:

- (i) A bid must comply with the requirements of the bid solicitation, meet all mandatory evaluation criteria and obtain the required pass marks for the point rated criteria identified in this bid solicitation to be declared responsive.
- (ii) The responsive bid that obtains the highest Total Bidder Score will be recommended for award of a contract. For any given Bidder, the greatest possible Total Technical Score is 70 while the greatest possible Total Financial Score is 30.

- (A) Calculation of Total Technical Score: 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:

$$\frac{\text{Bidder's Technical Score}}{\text{Maximum Technical Points (Bidders, please refer to the maximum technical points at Attachment 4.1)}} \times 70 = \text{Total Technical Score}$$

- (B) 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:

$$\frac{\text{Bidder's Financial Score}}{\text{Total Maximum Points Assigned (Bidders, please refer to the total maximum points assigned)}} \times 30 = \text{Total Financial Score}$$

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



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Total Technical Score + Total Financial Score = Total Bidder Score

- (iii) In the event of identical Total Bidder Scores occurring, then the bid with the highest Total Technical Score will become the top-ranked bidder.
- (b) The amount of the Limitation of Expenditure of the awarded contract will be determined at Canada's discretion.
- (c) Bidders should note that all contract awards are subject to Canada's internal approvals process, which includes a requirement to approve funding in the amount of any proposed contract. Despite the fact that the Bidder may have been recommended for contract award, a contract will only be awarded if internal approval is granted according to Canada's internal policies. If approval is not granted, no contract will be awarded.

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

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

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

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

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "[FCP Limited Eligibility to Bid](https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html)" list available at the bottom of the page of the Employment and Social Development Canada (ESDC) - Labour's website.(<https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html> ).

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](https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html)" 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](https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html)" 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 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.

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(b) **Certification of Language - English Essential**

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

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

### 6.2 Financial Capability

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

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

### 7.2 Task Authorization

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

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- (F) milestone dates for deliverables and payments (if applicable);
  - (G) the number of person-days of effort required;
  - (H) whether the work requires on-site activities and the location;
  - (I) the language profile of the resources required;
  - (J) the level of security clearance required of resources;
  - (K) the price payable to the Contractor for performing the task, with an indication of whether it is a firm price or a maximum TA price (and, for maximum price task authorizations, the TA must indicate how the final amount payable will be determined; where the TA does not indicate how the final amount payable will be determined, the amount payable is the amount, up to the maximum, that the Contractor demonstrates was actually worked on the project, by submitting time sheets filled in at the time of the work by the individual resources to support the charges); and
  - (L) any other constraints that might affect the completion of the task.
- (d) **Contractor's Response to Draft Task Authorization:** The Contractor must provide to the Technical Authority, within 5 working days of receiving the draft Task Authorization (or within any longer time period specified in the draft TA), a quotation with 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, as well as its corresponding proposed resource(s) in accordance with Appendix A to Annex A of the Contract. The Contractor's quotation must be based on the rates set out in the Contract. The Contractor will not be paid for preparing or providing its response or for providing other information required to prepare and validly issue the TA.
- (e) **Task Authorization Limit and Authorities for Validly Issuing Task Authorizations:**
- (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 \$50,000.00 (excluding Applicable Taxes), the TA must be signed by:
      - (1) the Technical Authority; and
      - (2) a representative from Pay Administration Branch, PWGSC; 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; and
      - (2) a representative from Pay Administration Branch, PWGSC; and
      - (3) the Contracting Authority.
- Any TA that does not bear the appropriate signatures is not validly issued by Canada. Any work performed by the Contractor without receiving a validly issued TA is done at the Contractor's own risk. If the Contractor receives a TA that is not appropriately signed, the Contractor must notify the Contracting Authority. By providing written notice to the Contractor, the Contracting Authority may suspend the Client's ability to issue TA's at any time, or reduce the dollar value threshold described in subarticle (A) above; any suspension or reduction notice is effective upon receipt.
- (f) **Periodic Usage Reports:**
- (i) The Contractor must compile and maintain records on its provision of services to the federal government under Task Authorizations validly issued under the Contract. The Contractor must provide this data to Canada in accordance with the reporting requirements detailed below. If some data is not available, the reason must be indicated. If services are not provided during a given period, the Contractor must still provide a

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"NIL" report. The data must be submitted on a quarterly basis to the Contracting Authority. From time to time, the Contracting Authority may also require an interim report during a reporting period.

(ii) The quarterly periods are defined as follows:

- (A) 1<sup>st</sup> quarter: April 1 to June 30;
- (B) 2<sup>nd</sup> quarter: July 1 to September 30;
- (C) 3<sup>rd</sup> quarter: October 1 to December 31; and
- (D) 4<sup>th</sup> quarter: January 1 to March 31.

The data must be submitted to the Contracting Authority no later than 15 calendar days after the end of the reporting period.

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

- (A) the Task Authorization number and the Task Authorization Revision number(s), if applicable;
- (B) a title or a brief description of each authorized task;
- (C) the name, Resource category and level of each resource involved in performing the TA, as applicable;
- (D) the total estimated cost specified in the validly issued TA of each task, exclusive of Applicable Taxes;
- (E) the total amount, exclusive of Applicable Taxes, expended to date against each authorized task;
- (F) the start and completion date for each authorized task; and
- (G) the active status of each authorized task, as applicable (e.g., indicate whether work is in progress or if Canada has cancelled or suspended the TA, etc.).

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

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

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

### 7.3 Minimum Work Guarantee

(a) In this clause,

- (i) **"Maximum Contract Value"** means the amount specified in the **"Limitation of Expenditure"** clause set out in the Contract; and
- (ii) **"Minimum Contract Value"** means 3% of the Maximum Contract Value on the date the contract is first issued.

(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

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- Contract. Canada's maximum liability for work performed under the Contract must not exceed the Maximum Contract Value, unless an increase is authorized in writing by the Contracting Authority.
- (c) In the event that Canada does not request work in the amount of the Minimum Contract Value during the Contract Period, Canada must pay the Contractor the difference between the Minimum Contract Value and the total cost of the Work requested.
- (d) Canada will have no obligation to the Contractor under this article if Canada terminates the entire Contract
- (i) for default;
  - (ii) for convenience as a result of any decision or recommendation of a tribunal or court that the contract be cancelled, re-tendered or awarded to another supplier; or
  - (iii) for convenience within 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:
  - (a) the total amount the Contractor may be paid under this section, together with any amounts paid, becoming due other than payable under the Minimum Work Guarantee, or due to the Contractor as of the date of termination, or
  - (b) the amount payable under the Minimum Work Guarantee, less any amounts paid, due or otherwise becoming due to the Contractor as of the date of termination.
6. The Contractor will have no claim for damages, compensation, loss of profit, allowance arising out of any termination notice given by Canada under this section except to the extent that this section expressly provides. The Contractor agrees to repay immediately to Canada the portion of any advance payment that is unliquidated at the date of the termination.

#### 7.5 Security Requirement

The following security requirements (SRCL # 34 and related clauses provided by the Contract Security Program) as set out under Annex "B" to the Supply Arrangement, applies to and forms part of the Contract.

1. The Contractor must, at all times during the performance of the Contract, hold a valid Facility Security Clearance at the level of SECRET, issued by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC).
2. The Contractor personnel requiring access to PROTECTED/CLASSIFIED information, assets or sensitive work site(s) must EACH hold a valid personnel security screening at the level of **SECRET** as required, granted or approved by CISD/PWGSC.



3. The Contractor MUST NOT remove any PROTECTED/CLASSIFIED information from the identified work site(s), and the Contractor must ensure that its personnel are made aware of and comply with this restriction.
4. Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of CISD/PWGSC.
5. The Contractor must comply with the provisions of the:
  - a. Security Requirements Check List and security guide (if applicable), attached at Annex C;
  - b. *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 one year later; and
  - (ii) The period during which the Contract is extended, if Canada chooses to exercise any options set out in the Contract.
- (b) **Option to Extend the Contract:**
  - (i) The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to two 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.
  - (ii) Canada may exercise this option at any time by sending a written notice to the Contractor before the expiry date of the Contract. The option may only be exercised by the Contracting Authority, and will be evidenced, for administrative purposes only, through a contract amendment.

#### 7.7 Authorities

##### (a) Contracting Authority

The Contracting Authority for the Contract is:

Name: Ian Dooley

Title: A/Manager

Public Works and Government Services Canada

Acquisitions Branch

Directorate: Special Procurement Initiatives Directorate

Address: 10 Wellington, 4<sup>th</sup> floor, Gatineau, Québec

Telephone: (613) 482-9536

E-mail address: [Ian.Dooley@tpsgc-pwgsc.gc.ca](mailto:Ian.Dooley@tpsgc-pwgsc.gc.ca)

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

##### (b) Technical Authority

The Technical Authority for the Contract is:

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Organization: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

Facsimile: \_\_\_\_\_

E-mail address: \_\_\_\_\_

The Technical Authority 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**

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

**7.8 Proactive Disclosure of Contracts with Former Public Servants**

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

**7.9 Payment**

(a) **Basis of Payment**

- (i) **Professional Services provided under a Task Authorization with a Maximum Price:** For professional services requested by Canada, in accordance with a validly issued Task Authorization, Canada will pay the Contractor, in arrears, up to the Maximum Price for the TA, for actual time worked and any resulting deliverables in accordance with the firm all-inclusive per diem rates set out in Annex B, Basis of Payment, Applicable Taxes extra. Partial days will be prorated based on actual hours worked based on a 7.5-hour workday.
- (ii) **Professional Services provided under a Task Authorization with a Firm Price:** For professional services requested by Canada, in accordance with a validly issued Task Authorization, Canada will pay the Contractor the firm price set out in the Task Authorization (based on the firm, all-inclusive per diem rates set out in Annex B), Applicable Taxes extra.
- (iii) **Travel and Living Expenses – National Joint Council Travel Directive:** The Contractor will be reimbursed its authorized travel and living expenses reasonably and properly incurred in the performance of the Work, at cost, without any allowance for profit and/or administrative overhead, in accordance with the meal and private vehicle allowances specified 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”. Canada will not pay the Contractor any incidental expense allowance for authorized travel. All travel must have the prior authorization of the Technical Authority. Travel requests will only be considered for a work location which is located more than 100 kilometers from the National Capital Region. All payments are subject to government audit.
- (iv) **Competitive Award:** The Contractor acknowledges that the Contract has been awarded as a result of a competitive process. No additional charges will be allowed to compensate for errors, oversights, misconceptions or underestimates made by the Contractor when bidding for the Contract.
- (v) **Contractor’s Firm Per Diem Rates:** The Contractor agrees that the rates set out in Annex B remain firm throughout the Contract Period, except as may be provided for in the express terms of the contract. In reference to Article 18(1) of SACC General

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Conditions 2035, the Contractor acknowledges that its obligation to provide services in accordance with the firm rates set out in Annex B is unaffected by the application of any existing law or any new law which may come into effect during the Contract Period.

- (vi) **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.
- (i) If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority a written estimate for the additional funds required. Providing this information does not increase Canada's liability.

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

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

(d) **Method of Payment for Task Authorizations with a Firm Price – Milestone Payments:**

Canada will make milestone payments in accordance with the Schedule of Milestones detailed in the Task Authorization and the payment provisions of the Contract if:

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- (i) an accurate and complete claim for payment using PWGSC-TPSGC 1111, Claim for Progress Payment, and any other document required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
    - (ii) all the certificates appearing on form PWGSC-TPSGC 1111 have been signed by the respective authorized representatives;
    - (iii) all work associated with the milestone and as applicable any deliverable required has been completed and accepted by Canada.
  - (e) **Method of Payment for Task Authorizations with a Firm Price - Lump Sum Payment on Completion:** Canada will pay the Contractor upon completion and delivery of all the Work associated with the validly issued Task Authorization in accordance with the payment provisions of the Contract if:
    - (iv) an accurate and complete invoice and any other documents required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
    - (v) all such documents have been verified by Canada; and
    - (vi) the Work delivered has been accepted by Canada.
  - (f) **Time Verification**

Time charged and the accuracy of the Contractor's time recording system are subject to verification by Canada, before or after payment is made to the Contractor. If verification is done after payment, the Contractor must repay any overpayment, at Canada's request.
  - (g) **Payment Credits**
    - (i) **Failure to Provide Resource:**
      - (A) 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.
      - (B) **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.
      - (C) **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:
        - (1) the total amount of credits for a given monthly billing cycle reach a level of 10% of the total billing for that month; or
        - (2) 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.
    - (ii) **Credits Apply during Entire Contract Period:** The Parties agree that the credits apply throughout the Contract Period.
    - (iii) **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
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event of the applicable failure. No credit is intended to be, nor will it be construed as, a penalty.

- (iv) **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.
- (v) **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.
- (vi) **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 the credits are inadequate, the Contractor must implement any additional measures required by the Contracting Authority.
- (h) **No Responsibility to Pay for Work not performed due to Closure of Government Offices**
  - (i) Where the Contractor, its employees, subcontractors, or agents are providing services on government premises under the Contract and those premises are inaccessible because of the evacuation or closure of government offices, and as a result no work is performed, Canada is not responsible for paying the Contractor for work that otherwise would have been performed if there had been no evacuation or closure.
  - (ii) If, as a result of any strike or lock-out, the Contractor or its employees, subcontractors or agents cannot obtain access to government premises and, as a result, no work is performed, Canada is not responsible for paying the Contractor for work that otherwise would have been performed if the Contractor had been able to gain access to the premises

#### **7.10 Invoicing Instructions**

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

#### **7.11 Certifications and Additional Information**

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

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**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 Copyright In Material**

- (a) In this section, "Material" means anything that is created by the Contractor as part of the Work under the Contract that is required by the Contract to be delivered to Canada and in which copyright subsists, excluding any computer software code and all documentation manuals or guides intended to assist end users or technicians in respect of that code. "Material" does not include anything created by the Contractor before the award date of the Contract.
- (b) Copyright in the Material belongs to Canada and the Contractor must include the copyright symbol and either of the following notice on the Material: © Her Majesty the Queen in right of Canada (year) or © Sa Majesté la Reine du chef du Canada (année).
- (c) The Contractor must not use, copy, divulge or publish any Material except as is necessary to perform the Contract. The Contractor must execute any conveyance and other documents relating to copyright in the Material as Canada may require.
- (d) The Contractor must provide at the request of Canada a written permanent waiver of moral rights, in a form acceptable to Canada, from every author that contributed to the Material. If the Contractor is the author of the Material, the Contractor permanently waives its moral rights in the Material.

**7.14 Applicable Laws**

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

**7.15 Priority of Documents**

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

- (a) these Articles of Agreement, including any individual SACC clauses incorporated by reference in these Articles of Agreement;
- (b) General Conditions 2035 (2016-04-04), Higher Complexity - Services;
- (c) Annex A, Statement of Work including its Appendices as follows:
  - (i) Appendix A to Annex A - Tasking Assessment Procedure;
  - (ii) Appendix B to Annex A - Task Authorization (TA) Form;
  - (iii) Appendix C to Annex A - Resource Assessment Criteria and Response Table;
  - (iv) Appendix D to Annex A - Certifications at the TA stage;
- (d) Annex B, Basis of Payment;
- (e) Annex C, Security Requirements Check List;
- (f) the validly issued Task Authorizations and any required certifications (including all of their annexes, if any); and
- (g) the Contractor's bid dated \_\_\_\_\_, as clarified on \_\_\_\_\_.

**7.16 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.*

**7.17 Foreign Nationals (Foreign Contractor)**

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

**7.18 Insurance Requirements**

**(a) Compliance with Insurance Requirements**

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

**(b) Commercial General Liability Insurance**

- (i) The Contractor must obtain Commercial General Liability Insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature, but for not less than \$2,000,000 per accident or occurrence and in the annual aggregate.
- (ii) The Commercial General Liability policy must include the following:
  - (A) Additional Insured: Canada is added as an additional insured, but only with respect to liability arising out of the Contractor's performance of the Contract. The interest of Canada should read as follows: Canada, as represented by Public Works and Government Services Canada.
  - (B) Bodily Injury and Property Damage to third parties arising out of the operations of the Contractor.
  - (C) Products and Completed Operations: Coverage for bodily injury or property damage arising out of goods or products manufactured, sold, handled, or distributed by the Contractor and/or arising out of operations that have been completed by the Contractor.
  - (D) Personal Injury: While not limited to, the coverage must include Violation of Privacy, Libel and Slander, False Arrest, Detention or Imprisonment and Defamation of Character.
  - (E) Cross Liability/Separation of Insureds: Without increasing the limit of liability, the policy must protect all insured parties to the full extent of coverage provided.

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Further, the policy must apply to each Insured in the same manner and to the same extent as if a separate policy had been issued to each.

- (F) Blanket Contractual Liability: The policy must, on a blanket basis or by specific reference to the Contract, extend to assumed liabilities with respect to contractual provisions.
- (G) Employees and, if applicable, Volunteers must be included as Additional Insured.
- (H) Employers' Liability (or confirmation that all employees are covered by Worker's compensation (WSIB) or similar program)
- (I) Broad Form Property Damage including Completed Operations: Expands the Property Damage coverage to include certain losses that would otherwise be excluded by the standard care, custody or control exclusion found in a standard policy.
- (J) Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of policy cancellation.
- (K) If the policy is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.
- (L) Owners' or Contractors' Protective Liability: Covers the damages that the Contractor becomes legally obligated to pay arising out of the operations of a subcontractor.
- (M) Advertising Injury: While not limited to, the endorsement must include coverage for piracy or misappropriation of ideas, or infringement of copyright, trademark, title or slogan.

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

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

Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of cancellation.

**7.19 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:



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

In any case, the total liability of the Contractor under subparagraph (v) will not exceed the total estimated cost (as defined above) for the Contract or \$1,000,000.00, whichever is more.
  - (vi) If Canada's records or data are harmed as a result of the Contractor's negligence or willful act, the Contractor's only liability is, at the Contractor's own expense, to restore Canada's records and data using the most recent back-up kept by Canada. Canada is responsible for maintaining an adequate back-up of its records and data.
- (c) **Third Party Claims:**
- (i) Regardless of whether a third party makes its claim against Canada or the Contractor, each Party agrees that it is liable for any damages that it causes to any third party in connection with the Contract as set out in a settlement agreement or as finally determined by a court of competent jurisdiction, where the court determines that the Parties are jointly and severally liable or that one Party is solely and directly liable to the third party. The amount of the liability will be the amount set out in the settlement agreement or determined by the court to have been the Party's portion of the damages to the third party. No settlement agreement is binding on a Party unless its authorized representative has approved the agreement in writing.
  - (ii) If Canada is required, as a result of joint and several liability or joint and solidarily liable, to pay a third party in respect of damages caused by the Contractor, the Contractor must reimburse Canada by the amount finally determined by a court of competent jurisdiction to be the Contractor's portion of the damages to the third party. However, despite Sub-article (i), with respect to special, indirect, and consequential damages of third parties
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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).

## 7.20 Joint Venture Contractor

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

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

## 7.21 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:

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**Replacement of Specific Individuals**

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

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

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

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

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

**7.22 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.

**7.23 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

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

#### **7.24 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.

#### **7.25 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.

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## ANNEX A

### STATEMENT OF WORK (SOW)

#### 1 Introduction

With approximately 300,000 employees, the federal government is one of Canada's largest employers. Under the Department of Public Works and Government Services Act, the Minister of Public Services and Procurement has been mandated, by the Governor in Council, to administer the disbursement of pay to employees of the federal public administration.

In 2009, the Government of Canada approved the Transformation of Pay Administration Initiative (TPA). The initiative was to replace the over 40 year-old legacy federal pay system and consolidate payroll services for those using PeopleSoft HR at that time into a single Pay Centre.

In early 2016, the new federal pay system (Phoenix) was rolled out and is fully operational paying 98 organizations and over 290,000 employees across the federal public service. The Pay Centre in Miramichi, NB is also fully operational responsible for pay service delivery to 46 organizations and over 190,000 employees.

Since spring 2016, early reports of pay issues were not unexpected with the implementation of a major information technology and transformation initiative. However, by summer 2016, it became apparent that there were many pay issues. Efforts to address the increasing number of issues quickly outstripped the Department's capacity to respond. Comprehensive measures were put in place by the Department working in collaboration with central agencies and all departments and agencies, focused on bringing the pay system to a point of stability. The aim is to eliminate the backlog of late transactions and to implement system and process enhancements so that new transactions can be processed as quickly as possible to minimize employee wait times. HR to Pay stabilization measures are formalized and fall into four broad areas (see publicly available information here on background <http://www.tpsgc-pwgsc.gc.ca/remuneration-compensation/services-pay-pay-services/systeme-pay-employees-pay-system-employees/msg/2017-11-17-01-eng.html>).

These stabilization efforts are being actioned in parallel with on-going demands of running bi-weekly pay, issuing tax slips, implementing new collective agreements and other changes in the legislation. As such, PSPC has now a variety of projects on the go, in area of payroll administration that require regular and consistent project management expertise.

PSPC needs project management expertise in the implementation of a variety of information technology projects. Strong demand and tight deadlines have identified a lack of project management capacity of this type within the department and therefore require support from the private sector.

Project management resources will be assigned to a multitude of pilot projects that will be rapidly implemented across government. In both of these cases, without the support of the private sector for project management resources, our employees would require considerable training and mentoring to build the necessary and timely internal capacity. The option of tapping only internally cannot be considered within the required timeframe.

PSPC will therefore take advantage of this request to also build expertise and increase the availability of this resource within the department for greater autonomy in project management. As a result, one of the tasks of private sector project managers will be to transfer their knowledge and share their experience with our employees.

PSPC is looking to the private sector to provide various "business project management office" related services supporting effective implementation of various pay administration projects to support the regular business cycle as well as to align with HR to Pay stabilization measures and with the overall goal of

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stabilizing and improving end to end HR to Pay. Skill sets are required to help with a variety of services within the context as outlined in this document. Skill sets are outlined in table 2.1.1.

The Contractor must make available the corporate expertise, skills and resources identified in its bid to meet requirements.

Skill sets may include providing support to other departments or agencies impacted by the various programs and other business related activities managed by Branches.

The Contractor must assist project leadership in the effective analysis, planning, communications and management of various core mandated and special project initiatives.

The resources will be accessible to 2 main Branches within PSPC, as follows:

**Pay Administration Branch (PAB):** The federal pay administration program is delivered by the Pay Administration Branch (PAB) within Public Services and Procurement Canada (PSPC) under the auspices of the *Department of Public Works and Government Services Act* and a variety of Orders in Council. PSPC administers pay for the Public Service of Canada and other organizations (as a common service organization), to approximately 290,000 public servants in 98 departments, agencies and Crown corporations. PSPC administers pay in accordance with collective agreements, compensation policies and Memoranda of Understanding. Pay and benefits administration includes the development and delivery of services, processes and systems, and the provision of compensation information, training and advice. For most departments using the government accredited HR system (PeopleSoft), PSPC also provides all compensation services. The Federal Pay Administration Program is comprised of two key functions:

- Compensation Sector Pay (CS-Pay) is the largest payroll administrator in Canada. It administers pay and benefits for most federal departments, Crown Corporations and Agencies including the House of Commons administration and Members of Parliament in the National Capital Region. The pay and benefits administration includes pay and benefits processing, consolidated system control, accounting and remittance and pay general ledger accounting functions for the Phoenix pay system, development and delivery of services, processes and pay related systems; insurance policy and operations; the provision of compensation information, training and advice and business planning and performance management activities. CS-Pay works closely with the PSPC IT Branch (CIOB) and the Pay Solutions Branch (PSB), along with other partners, notably IBM, to maintain and enhance Phoenix and its associated business processes.
- Public Service Pay Centre provides pay services for 46 organizations serving over 190,000 clients, in compliance with 27 collective agreements. Compensation advisors process employee pay and benefit transactions in the pay system (hire, promotion, acting, transfer, leave, etc.), respond to employee inquiries on payment issues and provide compensation advice to clients. Due to the many pay issues facing PSPC and the Government as a whole, approximately 1450 employees (including management and support staff), as of March 2018, are processing pay from the Pay Centre and multiple satellite and remote offices. The Pay Centre is also complemented by a Client Contact Centre providing front-line support to answer employee enquiries and a Client Services Bureau addressing hardship and complex cases.

**Project Management Office (PMO):** In July 2017, a stronger governance structure was put in place to bring together collective efforts across government to support a whole-of-government approach for HR to Pay. A new governance structure including an integrated team is led by the Deputy Head responsible for pay administration. The Deputy Head reports to the Minister of PSPC and the President of the Treasury Board. The Deputy is supported by the integrated team including Assistant Deputy Ministers from the TBS Office of the Chief Human Resources Officer (OCHRO) and PSPC, as well as a dedicated Project Management Office (PMO). PMO leads the overall coordination of the work of the HR to Pay integrated team with a focus on policy, planning and engagement.

## 2 Requirements

### 2.1 Scope of Work

- 2.1.1 The contractor must support the Director General Compensation Sector, Pay Administration Branch – PSPC in overseeing Pay system process stabilization initiatives as well as provide services in support of the broader HR to Pay stabilization efforts while ensuring a level of collaboration in the transfer and exchange of knowledge with PSPC employees. The Contractor must provide the following resources on an “as and when requested” basis as initiated through Task Authorizations.

TBIPS ID	Resource Category	Level of Expertise	Estimated # of Resources Required within the Initial Contract Period
B.1	Business Analyst	3	4
B.2	Business Architect	3	2
B.3	Business Consultant	3	1
P.1	Change Management Consultant	3	3
P.7	Project Coordinator	2	1
P.9	Project Manager	3	10
P.9	Project Manager	2	5
P.10	Project Scheduler	2	3

- 2.1.2 The Contractor must make available, at no additional cost to the Contract, methodologies, processes and/or templates (tools) that were proposed (in its bid) to support the provision of services provided pursuant to the Contract.

### 2.2 Tasks of Resources

#### 2.2.1 B.1 Business Analyst – Level 3

The resource(s) will be required to perform various tasks including, but are not limited to the following:

- Develop and document requirements and provide recommendations for considered alternatives;
- Perform business analyses of business issues;
- Perform data analysis and analytics using advanced statistical analysis and artificial intelligence (e.g. Robotic process automation);
- Evaluate existing procedures and methods, identify and document items such as database content, structure, application subsystems;

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- e) Develop and/or implement an organizational improvement plan, business plan, policies and standards;
  - f) Lead and manage various business systems and process improvements (e.g., initiating redesign to promote increased efficiencies and reduce overall costs, implementing improvements to automation of process);
  - g) Manage the implementation of an organizational improvement plan to identify, analyze, plan, track and control organizational improvements on a continuous basis.

#### 2.2.2 **B.2 Business Architect – Level 3**

The resource(s) will be required to perform various tasks including, but are not limited to the following:

- a) Develop processes, procedures 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 (e.g. artificial intelligence) and management responsibilities;
- b) Develop the specifications for where, how and why the various organizational components fit together as they do, and how they support the organization's mandate;
- c) Prepare briefing materials associated with project approval and/or project governance;
- d) Prepare and/or review and/or update any documentation related to Treasury Board submissions.
- e) Analysis and development of architecture requirements design, process development, process mapping and training.

#### 2.2.3 **B.3 Business Consultant- Level 3**

The resource(s) will be required to perform various tasks including, but are not limited to the following:

- a) Analyze, evaluate, develop business processes (financial, operational, systems, etc.);
- b) Identify organizational and/or project business opportunities for improvement and streamlining of business processes;
- c) Identify and evaluate critical success parameters, factors and performance measurements;
- d) Assist other stakeholders in development and implementation of business improvement processes and programs.

#### 2.2.4 **P.1 Change Management Consultant – Level 3**

The resource(s) will be required to perform various tasks including, but are not limited to the following:

- a) Analysis and development of business "critical success factors".
- b) Responsible for leading other functional staff to define business strategy and processes in support of transformation and change management activities.
- c) Plan and Participate in change impact analysis and change management activities.
- d) Design interventions aimed at improving organizational effectiveness through system-centered change;
- e) Design interventions that improve organizational effectiveness through people-centered change and result in: bringing about change, an improved environment, greater involvement and a more responsive workforce;
- f) Carry out performance monitoring and reporting activities on change management.



- 
- g) Development and implementation of change management strategies, plans, framework to support transformational activities.

#### 2.2.5 P.7 Project Coordinator – Level 2

The resource(s) will be required to perform various tasks including, but are not limited to the following:

- a) Assist project management and data processing professionals, technical users and end users in project coordination and synchronization tasks.
- b) Provide administrative, financial and technical support of a clerical nature as required to a project team.
- c) Assist in performing such tasks as maintaining project documentation and application/system libraries.
- d) Use computer tools, aids, system control languages on PCs, minis, or mainframes to perform work.
- e) Communicate with project management and data processing professionals, technical users and end users on administrative matters related to the project.
- f) Plan, acquire, and control the use of funds so as to meet the goals of an organization and maximize its value (Procurement integration in Project Management, contract process management);

#### 2.2.6 P.9 Project Manager – Level 3

The resource(s) will be required to perform various tasks including, but are not limited to the following:

- a) Manage several Project Managers, each responsible for an element of the project and its associated project team.
- b) Manage the project during the development, implementation and operations startup by ensuring that resources are made available and that the project is developed and is fully operational within previously agreed time, cost and performance parameters.
- c) Formulate statements of problems; establishes procedures for the development and implementation of significant, new or modified project elements to solve these problems, and obtains approval thereof.
- d) Define and document the objectives for the project; determine budgetary requirements, the composition, roles and responsibilities and terms of reference for the project team.
- e) Prepare formal task proposals, work breakdown structures and compliance charts;
- f) Give briefings on progress and concerns of projects;
- g) Prepare draft evaluation plans, criteria and evaluation schedules.

#### 2.2.7 P.9 Project Manager – Level 2

The resource(s) will be required to perform various tasks including, but are not limited to the following:

- a) Manage projects during the development, implementation and operations startup by ensuring that resources are made available and that the project is developed and is fully operational within previously agreed time, cost and performance parameters.
- b) Formulate statements of problems; establishes procedures for the development and implementation of significant, new or modified project elements to solve these problems, and obtains approval thereof.
- c) Prepare formal task proposals, work breakdown structures and compliance charts.
- d) Define and document the objectives for the project; determine budgetary requirements, the composition, roles and responsibilities and terms of reference for the project team.
- e) Track and report progress of the project on an ongoing basis and at scheduled points in the life cycle;
- f) Give briefings on progress and concerns of projects.

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**2.2.8 P.10 Project Scheduler – Level 2**

The resource(s) will be required to perform various tasks including, but are not limited to the following:

- a) Develop and support project schedules.
- b) Prepare, implement, and monitor scopes of work using Work Breakdown Structure (WBS) for control and integrity;
- c) Produce appropriate reports and identify scheduling and/or dependency issues.
- d) Conduct and provide critical path analysis.
- e) Assist in schedule co-ordination efforts with internal and external project stakeholders.
- f) Track project progress against schedule, evaluate performance and identify developing problem areas.

**2.3 Deliverables**

The Contractor must provide all deliverables as described on the approved Task Authorizations.

The schedule, format and content of each deliverable will be described and mutually agreed to by the Technical Authority and the Contractor in writing and will be based on the Technical Authority's organizational standards (e.g. Business requirement template to be used, standard architecture format for business views, etc.). All deliverables are subject to the review and approval of the Technical Authority.

**2.4 Travel Requirements**

There is a potential requirement for the Contractor resources(s) to conduct part of the work at another off-site location, to be determined. Travel and living expenses will only apply when the Contractor resource(s) is requested to work outside of the National Capital Region. If required, the Project Authority must authorize travel in advance, and in writing.

**2.5 Language Requirements**

It is anticipated that the majority of the work associated with each TA will be carried out in English. However, there may be a requirement from time to time for work to be conducted in French or in both official languages. The language requirements will be specified within each TA.

**2.6 Work Location**

It is anticipated that the majority of the work associated with each TA will be carried out on-site at PSPC facilities in the National Capital Region (NCR).

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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. Once a draft TA Form is received, the Contractor must submit to the Technical Authority a quotation of rates to supply the requested Resource Categories based on the information identified in the TA Form. The quotation must be signed and submitted to Canada within the time for response identified in the TA Form. The Contractor will be given a minimum of 5 working days to submit a quotation.
2. With each quotation the Contractor must propose the required number of resources and for each proposed resource the Contractor must supply a résumé, the requested security clearance information and must complete the Response Tables at Appendix C of Annex A applicable to the Resource Categories identified in the draft TA. The same individual must not be proposed for more than one Resource Category. The résumés must demonstrate that each proposed individual meets the qualification requirements described (including any educational requirements, work experience requirements, and professional designation or membership requirements). With respect to the proposed resources:
  - (i) Proposed resources may be employees of the Contractor or employees of a subcontractor, or these individuals may be independent contractors to whom the Contractor would subcontract a portion of the Work. (Refer to Appendix D to Annex A, Certifications).
  - (ii) For educational requirements for a particular degree, designation or certificate, Canada will only consider educational programmes that were successfully completed by the resource before the date the draft TA was first issued to the Contractor.
  - (iii) For requirements relating to professional designation or membership, the resource must have the required designation or membership by the time of draft TA issuance and must continue, where applicable, to be a member in good standing of the profession or membership throughout the assessment period and Contract Period. Where the designation or membership must be demonstrated through a certification, diploma or degree, such document must be current, valid and issued by the entity specified in this Contract or if the entity is not specified, the issuer must have been an accredited or otherwise recognized body, institution or entity at the time the document was issued.
  - (iv) For work experience, Canada will not consider experience gained as part of an educational programme, except for experience gained through a formal co-operative programme at a post-secondary institution.
  - (v) For any requirements that specify a particular time period (e.g., 2 years) of work experience, Canada will disregard any information about experience if the résumé does not include the relevant dates (month and year) for the experience claimed (i.e., the start date and end date). Canada will evaluate only the duration that the resource actually worked on a project or projects (from his or her start date to end date), instead of the overall start and end date of a project or a combination of projects in which a resource has participated.
  - (vi) A résumé must not simply indicate the title of the individual's position, but must demonstrate that the resource has the required work experience by explaining the responsibilities and work performed by the individual while in that position. Only listing experience without providing any supporting data to describe responsibilities, duties and relevance to the requirement, or reusing the same wording as the TA Form, will not be considered "demonstrated" for the purposes of the assessment. The Contractor should provide complete details as to where, when, month and year, and how, through which activities/responsibilities, the stated qualifications / experience were obtained. In situations in which a proposed resource worked at the same time on more than one project, the duration of any overlapping time period will be counted only once toward any requirements that relate to the individual's length of experience.

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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.

## APPENDIX B TO ANNEX A

### TASK AUTHORIZATION FORM

<b>Contract No.:</b>					
<b>Task Authorization (TA) No.:</b>					
<b>Task Authorization (TA) Name:</b>					
<b>Contractor's Name and Address:</b>					
<b>Original TA Authorization</b>					
	Total Estimated Cost of Task (GST/HST, QST, Travel extra)	GST/HST	QST	Travel	Total Estimated Cost of Task (GST/HST, QST, Travel Included)
	\$	\$	\$	\$	\$
<b>TA Revisions Previously Authorized (as applicable)</b>					
TA Revision No.	Authorized Increase or Decrease (GST/HST, Travel extra)	GST/HST	QST	Travel	Total Authorized Increase or Decrease (GST/HST, QST, Travel Included)
1	\$	\$	\$	\$	\$
2	\$	\$	\$	\$	\$
3	\$	\$	\$	\$	\$
<b>New TA Revision (as applicable)</b>					
TA Revision No.	Authorized Increase or Decrease (GST/HST, Travel extra)	GST/HST	QST	Travel	Total Authorized Increase or Decrease (GST/HST, QST, Travel Included)
4	\$	\$	\$		\$
<b>Total Estimated Cost of Task after this Revision</b>					
	Total Estimated Cost (GST/HST, QST, Travel extra)	GST/HST	QST	Travel	Total Estimated Cost (GST/HST, QST, Travel Included)
	\$	\$	\$	\$	\$
Period of Services From: To:					
Work Location:					
Travel Requirements:					
Contract Security Requirements:		This TASK includes Security Requirements: No Yes			

Required Work					
SECTION A - Task Description of the Work required - SOW					
SECTION B - Applicable Basis of Payment					
<input type="checkbox"/> Maximum Price of \$_____ for the professional fees identified in Section C below <input type="checkbox"/> Firm Lot Price of \$_____ for the professional fees identified in Section C below <input type="checkbox"/> Limitation of Expenditure of \$_____ for the authorized travel and living expenses identified in Section C below					
SECTION C - Cost Breakdown of Task					
Professional Fees					
Resource Categories/Level/Name	Level of Security / PWGSC Security File Number	Language Requirement	Per Diem Rate	Level of Effort (Estimated # of days required to perform the Work)	Total Estimated Cost
B.1 Business Analyst – Level 3					
B.2 Business Architect – Level 3					
B.3 Business Consultant – Level 3					
P.1 Change Management Consultant – Level 3					
P.7 Project Coordinator – level 2					
P.9 Project Manager – Level 3					
P.9 Project Manager – Level 2					
P.10 Project Scheduler – Level 2					

Estimated cost					
Total Estimated Travel and Living Cost (if applicable)					
Applicable Taxes (_____%)					
Total Estimated Cost					
<b>SECTION D - Applicable Method of Payment</b>					
<input type="checkbox"/> Monthly payments for professional fees only <input type="checkbox"/> Milestone Payments for professional fees only <input type="checkbox"/> Schedule of Milestone: <p>The schedule of milestones for which payments will be made in accordance with the Contract is as follows:</p>					
MILESTONE	ACTIVITY(IES) TO BE PERFORMED / DELIVERABLE(S) TO SUBMIT	COMPLETION /DELIVERY DATE	FIRM AMOUNT		
1					
2					
3					
4					
<input type="checkbox"/> Monthly payments for authorized travel and living expenses only					
<b>SECTION E – Task Amendment Information</b>					
<b>1.0 Description of the Amendment</b>					
<i>Identify the changes required, additional work to be provided or briefly describe the decrease in scope.</i>					
<b>2.0 Additional Professional Fees or Professional Fees Decrease</b>					
Resource Categories/Level/Name	Level of Security / PWGSC Security File Number	Language Requirement	Per Diem Rate	Level of Effort (Estimated # of days required to	Total Estimated Cost

				perform the Work)	
B.1 Business Analyst – Level 3					
B.2 Business Architect – Level 3					
B.3 Business Consultant – Level 3					
P.1 Change Management Consultant – Level 3					
P.7 Project Coordinator – level 2					
P.9 Project Manager – Level 3					
P.9 Project Manager – Level 2					
P.10 Project Scheduler – Level 2					
Estimated cost					
Total Estimated Travel and Living Cost (if applicable)					
Applicable Taxes (_____%)					
Total Estimated Amendment Value					
<b>3.0 Milestone Changes</b> (if applicable)					
MILESTONE	ACTIVITY(IES) TO BE PERFORMED / DELIVERABLE(S) TO SUBMIT	COMPLETION /DELIVERY DATE	FIRM AMOUNT		
1			\$		
2			\$		
3			\$		
Amendment value \$ -					



**Authorization****A: Technical Authority**

NOTE: For Task Authorizations less than or equal to \$50,000.00 (including Applicable Taxes and any amendment), the Technical Authority may authorize the Task Authorization. In this case, the Technical Authority is required to sign the Section C below. It is to be noted that in cases where the Technical Authority authorizes the Task Authorization by signing Section C, he/she cannot subsequently sign section 34 of the Financial Administration Act.

**PWGSC – Technical Authority**

Name \_\_\_\_\_

Title and Directorate \_\_\_\_\_

Public Works and Government Services Canada

Signature \_\_\_\_\_ Date \_\_\_\_\_

**B. Representative from Pay Administration Branch (PAB)**

Authorization: By signing this TA, the Representative certifies that he/she accepts the TA proposal Level of Effort indicated above and is requesting the PWGSC Contracting Authority acquire the services described herein.

The Representative certifies that pursuant to subsection 32(1) of the Financial Administration Act, funds are available and is requesting the PWGSC Contracting Authority acquire the services described herein.

**PWGSC - PAB Representative**

Name \_\_\_\_\_

Title and Directorate \_\_\_\_\_

Public Works and Government Services Canada

Signature \_\_\_\_\_ Date \_\_\_\_\_

**C: PWGSC – Contracting Authority**

Authorization: By signing this TA, the Contracting Authority certifies that the content of this TA is in accordance with the conditions of the Contract and authorizes this TA.

Name \_\_\_\_\_

Title and Directorate \_\_\_\_\_

Public Works and Government Services Canada	
Signature _____	Date _____
D: Contractor's Signature	
Authorization: Name and title of individual authorized to sign for the Contractor	
Name _____	
Title _____	
Organization _____	
Signature _____	Date _____

**APPENDIX C TO ANNEX A**  
**RESOURCES ASSESSMENT CRITERIA AND RESPONSE TABLE**

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.

**B.1.1. Business Analyst (Level 3)**

Resource Name:			
ID	Resource Mandatory Criteria	Met / Not Met	Substantiation & Cross Reference
M1	The Contractor must demonstrate that the proposed resource has a minimum of 15 years of experience as a Business Analyst within the past 20 years as of the TA issuance date, where the resource must have performed every task listed in Annex A (SoW) for this Resource Category. The proposed resource is not required to have 15 years of experience in each task. Any combination of years and tasks is acceptable.		
M2	The Contractor's proposed resource must demonstrate experience within the last 5 years as of the TA issuance date in reviewing and analysing a minimum of 2 business requirements or business strategies regarding Information Technology (IT) solutions, where the resource must have performed all of the following: <ul style="list-style-type: none"><li>• Providing advice and guidance to management;</li><li>• Analyzing and defining requirements;</li><li>• Determining impacts on systems; and,</li><li>• Providing recommendations.</li></ul>		

Resource Name:				
ID	Resource Point-Rated Criteria	Point Allocation	Maximum Points	Substantiation, Cross Reference & Self Score
R1	<p>The Contractor should demonstrate that the proposed resource has cumulative project experience working as a Business Analyst for a minimum period of 5 years in the last 15 years performing two of the tasks listed below in a project management environment:</p> <ul style="list-style-type: none"> <li>• Providing advice and guidance to management;</li> <li>• Analyzing and defining requirements;</li> <li>• Determining impacts on systems; and,</li> <li>• Providing recommendations.</li> </ul> <p>A project management environment is defined as one which involves a formal project plan with associated project management support roles (i.e. Project Managers etc.).</p>	<p>Points will be allocated for experience over the mandatory 5 years up to a total of 10 years as follows:</p> <ul style="list-style-type: none"> <li>• 5 years or less = 0 point;</li> <li>• 20 points will be allocated for each year of experience over and above the 5 years up to a maximum of 100 points.</li> </ul>	100	
R2	<p>The Contractor should demonstrate that the proposed resource has a minimum of one year of consecutive experience in performing any task specified in Section "R1", above, in support of a government (federal, provincial, municipal or Crown Corporation) project where the project value was at least \$20M.</p>	<ul style="list-style-type: none"> <li>• Project value \$20M or less = 0 point;</li> <li>• Project value greater than \$20M but less than \$50M = 25 points;</li> <li>• Project value greater than or equal to \$50M but less than \$75M = 50 points;</li> </ul>	100	

Resource Name:				
ID	Resource Point-Rated Criteria	Point Allocation	Maximum Points	Substantiation, Cross Reference & Self Score
		<ul style="list-style-type: none"> <li>Project value greater than or equal to \$75M but less than \$100M = 75 points;</li> <li>Project value \$100M or greater = 100 points.</li> </ul>		
R3	The Contractor should demonstrate the proposed resource's experience as a Business Analyst performing any task specified in Section "R1", above, in support of a minimum of 2 government (federal, provincial, municipal or Crown Corporation) projects to implement Commercial Off the Shelf (COTS) Software involving the extension of the functionality of COTS products via custom development for a minimum duration of 3 months for each project.	<ul style="list-style-type: none"> <li>Less than two projects = 0 point;</li> <li>2 projects = 10 points;</li> <li>10 points will be given for each additional project up to a maximum of 40 points.</li> </ul>	40	
R4	The Contractor should demonstrate that the proposed resource has project experience within the past 5 years prior to the TA issuance date in preparing documents for senior management (senior management is considered EX02 equivalent level or above).	<ul style="list-style-type: none"> <li>1 project = 10 points;</li> <li>2 or more projects = 20 points.</li> </ul>	20	

Resource Name:				
ID	Resource Point-Rated Criteria	Point Allocation	Maximum Points	Substantiation, Cross Reference & Self Score
R5	<p>The Contractor should demonstrate that the proposed resource has project experience within the past 5 years prior to the TA issuance date in:</p> <ul style="list-style-type: none"> <li>Performing Data Analysis<sup>1</sup></li> <li>Performing Data Analysis<sup>1</sup> and Data Analytics<sup>2</sup> using Advanced Statistical Methods and Techniques<sup>3</sup> including Artificial Intelligence<sup>4</sup></li> <li>Providing recommendations based on findings</li> </ul> <p><sup>1</sup> "Performing Data Analysis" : Using data analytics tools and techniques to achieve business objectives</p> <p><sup>2</sup> "Performing Data Analytics": Extracting, compiling and manipulating data using SQL code, executing statistical methods for descriptive, predictive, and prescriptive data analysis, and effectively interpreting and presenting analytic results. "Data Analytics" is a subcomponent of data analysis that involves the use of technical tools and data analysis techniques.</p> <p><sup>3</sup> "Advanced Statistical Methods and Techniques": Techniques such as regression analysis, anova, factor analysis, cluster analysis.</p> <p><sup>4</sup> "Artificial Intelligence": Advanced forms of statistical and mathematical models using techniques such as Heuristics, Support Vector Machines, Neural Networks, the Markov Decision Process and/or Natural Language Processing.</p>	<ul style="list-style-type: none"> <li>1 project = 10 points;</li> <li>2 or more projects = 20 points.</li> </ul>	20	

Resource Name:			
ID	Resource Point-Rated Criteria	Point Allocation	Maximum Points
Maximum Points Available			280
Minimum Required Points (60%)			168
Points Achieved			

**B.2. Business Architect (Level 3)**

<b>Resource Name:</b>			
<b>ID</b>	<b>Resource Mandatory Criteria</b>	<b>Met / Not Met</b>	<b>Substantiation &amp; Cross Reference</b>
M1	The Contractor must demonstrate that the proposed resource has a minimum of 10 years of experience in the past 15 years as of the TA issuance date in providing Business Architecture services, where the resource must have performed every task listed in Annex A (SoW) for this Resource Category. The proposed resource is not required to have 10 years of experience in each task. Any combination of years and tasks is acceptable.		
M2	The Contractor must demonstrate that the proposed resource has a minimum of 7 years of experience in the past 15 years in developing and maintaining business architecture models.		
M3	The Contractor must demonstrate that the proposed resource has supported the implementation of a COTS Software for a minimum 2 projects as a Business Architect involving the extension of the functionality of COTS products via custom development.		
M4	The Contractor must demonstrate, by providing a copy of the diploma or degree, that the proposed resource has a minimum of a university degree, in a business or technology discipline.		



Resource Name:				
ID	Resource Point-Rated Criteria	Point Allocation	Maximum Points	Substantiation, Cross Reference & Self Score
R1	<p>The Contractor should demonstrate that the proposed resource has more than 10 years of cumulative experience in carrying out any 3 of the following tasks:</p> <ul style="list-style-type: none"> <li>a) designing interventions aimed at improving organizational effectiveness;</li> <li>b) providing advisory consulting services;</li> <li>c) preparing business cases;</li> <li>d) carrying out options analysis; and</li> <li>e) developing performance measurement/evaluation frameworks.</li> </ul>	<ul style="list-style-type: none"> <li>• 10 points will be allocated for each year of experience over and above the 10 years up to a maximum of 100 points.</li> </ul>	100	
R2	<p>The Contractor should demonstrate that the proposed resource has a minimum of 1 year of consecutive experience in the last 5 years in developing, establishing and maintaining business architecture models in accounting or banking or compensation systems.</p>	<ul style="list-style-type: none"> <li>• 1 year = 10 points</li> <li>• More than 1 consecutive year = 20 points</li> </ul>	20	
R3	<p>The Contractor should demonstrate that the proposed resource has a minimum of 5 years' experience performing a minimum of 3 of the following tasks in government (federal, provincial, municipal or Crown Corporation) projects:</p>	<ul style="list-style-type: none"> <li>• 5 years = 10 points;</li> <li>• 5 points for each additional year of experience up</li> </ul>	25	

Resource Name:				
ID	Resource Point-Rated Criteria	Point Allocation	Maximum Points	Substantiation, Cross Reference & Self Score
	<ul style="list-style-type: none"> <li>designing interventions aimed at improving organizational effectiveness;</li> <li>providing advisory consulting services;</li> <li>preparing business cases;</li> <li>carrying out options analysis; and,</li> <li>developing performance measurement/evaluation frameworks.</li> </ul>	to a maximum of 25 points.		
R4	<p>The Contractor should demonstrate that the proposed resource has work experience in one of the following:</p> <ul style="list-style-type: none"> <li>a) preparing a business case that was part of a formal submission process that resulted in the grant of Preliminary Project Approval by Treasury Board (or the grant of PPA equivalent) in support of a government project where the value of the project was at least \$100M;</li> <li>b) reviewing and updating a business case that was part of a formal submission process that resulted in the grant of Effective Project Approval by Treasury Board (or the grant of EPA Equivalent) in support of a Government project<sup>1</sup> where the value of the project was at least \$100M;</li> </ul> <p><sup>1</sup> "Government project": a project of federal, provincial or municipal government or Crown Corporations.</p>	<ul style="list-style-type: none"> <li>1 project = 10 points;</li> <li>2 projects or more = 20 points.</li> </ul>	20	

Resource Name:				
ID	Resource Point-Rated Criteria	Point Allocation	Maximum Points	Substantiation, Cross Reference & Self Score
	c) developing and implementing change management frameworks, strategies, and plans, where the value of the project was at least \$100M.			
Maximum Points Available			165	
Minimum Required Points (60%)			99	
Points Achieved				

**B.3 Business Consultant (Level 3)**

<b>Resource Name:</b>			
<b>ID</b>	<b>Resource Mandatory Criteria</b>	<b>Met / Not Met</b>	<b>Substantiation &amp; Cross Reference</b>
M1	The Contractor's proposed resource must demonstrate a minimum of 10 years of experience in the past 15 years as of the TA issuance date in providing Business Consultant services, where the resource must have performed every task listed in Annex A (SoW) for this Resource Category. The proposed resource is not required to have 10 years of experience in each task. Any combination of years and tasks is acceptable.		
M2	The Contractor's proposed resource must demonstrate experience within the last 5 years in reviewing and analysing a minimum of two business requirements or business strategies regarding service delivery using an Information Technology solution and providing advice and guidance to management based on the analysis.		

<b>Resource Name:</b>			
<b>ID</b>	<b>Resource Point-Rated Criteria</b>	<b>Point Allocation</b>	<b>Maximum Points</b>
R1	The Contractor should demonstrate that the proposed resource has a minimum of 5 years of cumulative experience working as a Business Consultant in a minimum of 2 of the following functions: i. risk management; ii. project control; iii. outcomes management;	<ul style="list-style-type: none"> <li>Less than 5 years = 0 point;</li> <li>5 years = 10 points;</li> </ul>	25

Resource Name:				
ID	Resource Point-Rated Criteria	Point Allocation	Maximum Points	Substantiation, Cross Reference & Self Score
	iv. change management; v. quality management; vi. earned value management; vii. financial management.	<ul style="list-style-type: none"> <li>5 points for each additional year of experience up to a maximum of 25 points.</li> </ul>		
R2	The Contractor's proposed resource should demonstrate experience within the past 5 years in analyzing business requirement documents and strategic plans related to Information Technology solutions and providing recommendations and advice based on the analysis.	<ul style="list-style-type: none"> <li>1-2 Documents = 10 points;</li> <li>3 Documents = 20 points;</li> <li>4 Documents = 30 points;</li> <li>5 or more Documents = 40 points.</li> </ul>	40	
R3	The Contractor should demonstrate that the proposed resource has experience as a Business Consultant supporting a minimum of 2 government (federal, provincial, municipal or Crown Corporation) projects in the implementation of COTS Software involving the extension of the functionality of COTS products via custom development.	<ul style="list-style-type: none"> <li>1 project = 0 point;</li> <li>2 projects = 10 points;</li> <li>5 points for each additional project up to a maximum of 25 points.</li> </ul>	25	

Resource Name:				
ID	Resource Point-Rated Criteria	Point Allocation	Maximum Points	Substantiation, Cross Reference & Self Score
R4	<p>The Contractor's proposed resource should demonstrate project experience within the past 5 years in preparing documents for senior management (EX02 equivalent level or above).</p> <p>Documents must include any of the following:</p> <ul style="list-style-type: none"> <li>• Requirements Definition and Analysis;</li> <li>• System Impact Assessments;</li> <li>• Providing recommendations.</li> </ul>	<ul style="list-style-type: none"> <li>• 1 project = 10 points;</li> <li>• 2 or more projects = 20 points.</li> </ul>	20	
Maximum Points Available			110	
Minimum Required Points (60%)			66	
Points Achieved				

**P.1 Change Management Consultant (Level 3)**

<b>Resource Name:</b>			
<b>ID</b>	<b>Resource Mandatory Criteria</b>	<b>Met / Not Met</b>	<b>Substantiation &amp; Cross Reference</b>
M1	The Contractor's proposed resource must demonstrate a minimum of 10 years of experience in the past 15 years as of the TA issuance date in providing Change Management Consultant services, where the resource must have performed every task listed in Annex A (SoW) for this Resource Category. The proposed resource is not required to have 10 years of experience in each task. Any combination of years and tasks is acceptable.		
M2	The Contractor must demonstrate the proposed resource's experience as a Change Management Consultant supporting 2 projects in the implementation of COTS Software.		
M3	The Contractor must demonstrate that the proposed resource has cumulative work experience of at least 10 years in an Information Technology field. For project experience to qualify, the resource must have been on the project for a minimum duration of 6 consecutive months.		
M4	The Contractor must demonstrate, by providing a copy of the certification, that the proposed resource holds an ITIL (Information Technology Infrastructure Library) 3.0 certification at a minimum of Foundation Level.		

Resource Name:				
ID	Resource Point-Rated Criteria	Point Allocation	Maximum Points	Substantiation, Cross Reference & Self Score
R1	The Contractor should demonstrate that the proposed resource has a minimum of one year experience in all tasks specified in Annex A (SOW) under this Resource Category supporting a government (federal, provincial, municipal or Crown Corporation) project where the project value was at least \$20M.	<ul style="list-style-type: none"> <li>Project value is \$20M or less = 0 point;</li> <li>Project value is greater than \$20M but less than \$ 50M = 10 points;</li> <li>Project value is greater than or equal to \$50M but less than \$75M = 20 points;</li> <li>Project value is greater than or equal to \$75M but less than \$100M = 30 points;</li> <li>Project value is \$100M or greater = 40 points.</li> </ul>	40	
R2	The Contractor should demonstrate that the proposed resource has experience as a Change Management Specialist performing any task specified in Annex A (SOW) under this Resource Category, in support of a minimum of 2 government (federal, provincial, municipal or Crown Corporation) projects to implement COTS Software involving the extension of the functionality of COTS products via custom development.	<ul style="list-style-type: none"> <li>1 project = 0 point;</li> <li>2 projects = 10 points;</li> </ul>	25	



Resource Name:				
ID	Resource Point-Rated Criteria	Point Allocation	Maximum Points	Substantiation, Cross Reference & Self Score
	The project reference can be the same as used in M2.	<ul style="list-style-type: none"> <li>5 points for each additional project up to a maximum of 25 points.</li> </ul>		
R3	The Contractor should demonstrate, by providing a copy of the certification, that the proposed resource holds an ITIL 3.0 certification at Practitioner Level or above.	<ul style="list-style-type: none"> <li>Practitioner Level = 10 points;</li> <li>Intermediate Level = 20 points;</li> <li>Expert Level = 30 Points.</li> </ul>	30	
Maximum Points Available			95	
Minimum Required Points (60%)			57	
Points Achieved				

**P.7 Project Coordinator (Level 2)**

<b>Resource Name:</b>			
<b>ID</b>	<b>Resource Mandatory Criteria</b>	<b>Met / Not Met</b>	<b>Substantiation &amp; Cross Reference</b>
M1	The Contractor's proposed resource must demonstrate a minimum of 5 years of experience in the past 10 years as of the TA issuance date in providing Project Coordination services, where the resource must have performed every task listed in Annex A (SoW) for this Resource Category. The proposed resource is not required to have 5 years of experience in each task. Any combination of years and tasks is acceptable.		

<b>Resource Name:</b>			
<b>ID</b>	<b>Resource Point-Rated Criteria</b>	<b>Point Allocation</b>	<b>Maximum Points</b>
R1	<p>The Contractor should demonstrate that the proposed resource has cumulative experience working as a Project Coordinator for a minimum period of 3 years performing all of the following tasks in support of project management:</p> <ul style="list-style-type: none"> <li>a) earned value management;</li> <li>b) planning and coordinating financial management activities, and</li> <li>c) planning, acquiring, and controlling the use of funds.</li> </ul> <p>For project experience to qualify, the resource must have been on the project for a minimum duration of 6 consecutive months.</p>	<ul style="list-style-type: none"> <li>• Less than 3 years = 0 point;</li> <li>• 3 years = 5 points;</li> <li>• 1 point for each additional year of experience up to a maximum of 10 points.</li> </ul>	10

Resource Name:				
ID	Resource Point-Rated Criteria	Point Allocation	Maximum Points	Substantiation, Cross Reference & Self Score
R2	The Contractor should demonstrate the proposed resource has a minimum of one year of consecutive experience in performing any task specified in Section "R1", above, in support of a government (federal, provincial, municipal or Crown Corporation) project where the project value was at least \$20M.	<ul style="list-style-type: none"> <li>• Project value is \$20M or less = 0 point;</li> <li>• Project value is greater than \$20M but less than \$ 50M = 5 points;</li> <li>• Project value is greater than or equal to \$50M but less than \$75M = 10 points;</li> <li>• Project value is greater than or equal to \$75M but less than \$100M = 15 points;</li> <li>• Project value is \$100M or greater = 20 points.</li> </ul>	20	
Maximum Points Available			30	
Minimum Required Points (60%)			18	

Resource Name:				
ID	Resource Point-Rated Criteria	Point Allocation	Maximum Points	Substantiation, Cross Reference & Self Score
Points Achieved				

**P.9 Project Manager (Level 3)**

<b>Resource Name:</b>			
<b>ID</b>	<b>Resource Mandatory Criteria</b>	<b>Met / Not Met</b>	<b>Substantiation &amp; Cross Reference</b>
M1	The Contractor must demonstrate that the proposed resource has a minimum of 15 years of experience as a Project Manager within the past 20 years as of the TA issuance date, where the resource must have performed every task listed in Annex A (SoW) for this Resource Category. The proposed resource is not required to have 15 years of experience in each task. Any combination of years and tasks is acceptable.		
M2	The Contractor must demonstrate that the proposed resource has project management experience on at least one Business Transformation Initiative in Information Technology involving a portfolio of interdependent or intersecting changes, which fundamentally modify how business is conducted.  For project experience to qualify, the resource must have been on the project for a minimum duration of 12 consecutive months within the last 10 years as of the TA issuance date.		
M3	The Contractor must demonstrate that the proposed resource has a minimum of 10 years of experience as a Project Manager in the Information Technology field, within the past 15 years as of the TA issuance date.  For project experience to qualify, the resource must have been on the project for a minimum duration of 6 consecutive months.		
M4	The Contractor must demonstrate, by providing a copy of the certificate, diploma or degree that the proposed resource has qualified as a Project Management Professional (PMP).		

Resource Name:				
ID	Resource Point-Rated Criteria	Point Allocation	Maximum Points	Substantiation, Cross Reference & Self Score
R1	<p>The Contractor should demonstrate that the proposed resource has a minimum of 15 years of cumulative experience working as a Project Manager in a minimum 3 of the following functions:</p> <ul style="list-style-type: none"> <li>a) risk management;</li> <li>b) project control;</li> <li>c) outcomes management;</li> <li>d) change management;</li> <li>e) quality management;</li> <li>f) earned value management;</li> <li>g) financial management.</li> </ul>	<ul style="list-style-type: none"> <li>• Less than 15 years = 0 point;</li> <li>• 10 points for greater than or equal to 15 years but less than 20 years;</li> <li>• 20 points for greater than or equal to 20 years but less than 25 years;</li> <li>• 30 points for greater than or equal to 25 years.</li> </ul>	30	
R2	<p>The Contractor should demonstrate that the proposed resource has a minimum of one year of consecutive experience in any function specified in Section "R1", above, in support of a government (federal, provincial, municipal or Crown Corporation) project, where the project value was at least \$20M.</p>	<ul style="list-style-type: none"> <li>• Project value is \$20M or less = 0 point;</li> <li>• Project value is greater than \$20M but less than or equal to \$50M = 10 points;</li> <li>• Project value is greater than \$50M but less than or equal to</li> </ul>	40	

			<p>\$75M = 20 points;</p> <ul style="list-style-type: none"> <li>Project value is greater than \$75M but less than \$100M = 30 points;</li> <li>Project value is \$100M or greater = 40 points.</li> </ul>		
R3	<p>The Contractor should demonstrate that the proposed resource has a minimum of 6 months of continuous experience as a Project Manager on government (federal, provincial, municipal or Crown Corporation) projects for the implementation of either SAP or PeopleSoft within the last 10 years as of the TA issuance date.</p>	<ul style="list-style-type: none"> <li>Less than 6 months = 0 point;</li> <li>6-12 months (not including 12 months) = 10 points;</li> <li>12-18 months (not including 18 months) = 20 points;</li> <li>18-24 months (not including 24 months) = 30 points;</li> <li>24 months and above = 40 points.</li> </ul>	40		
R4	<p>The Contractor should demonstrate by showing proof that the proposed resource has valid project management designation(s) in one or more of the following:</p>	<ul style="list-style-type: none"> <li>CMC Certification = 20 points;</li> </ul>	40		

	<ul style="list-style-type: none"><li>• Certified Management Consultant (CMC)</li><li>• PRINCE2 (Foundation)</li><li>• PRINCE2 (Practitioner)</li><li>• Master's degree in Project Management from an accredited university</li></ul> <p>Proof of valid certification or degree must be included with the bid to be considered.</p>	<ul style="list-style-type: none"><li>• PRINCE2 (Foundation) Accreditation = 10 points;</li><li>• PRINCE2 (Practitioner) Accreditation = 20 points;</li><li>• Master's in project management = 30 points.</li></ul> <p>Any combination of CMC accreditation, one of the PRINCE2 accreditations and the Masters in Project Management can be used to achieve a maximum ceiling of 40 points. For example:</p> <ul style="list-style-type: none"><li>• PRINCE2 (foundation) + CMC = 30 points;</li><li>• CMC + Master's = 40 points;</li><li>• CMC + PRINCE2(Practitioner) = 40 points;</li><li>• PRINCE2 (foundation) +</li></ul>	
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R5	<p>The Contractor should demonstrate by showing proof that the proposed resource has a valid ITIL certification in any of the following:</p> <ul style="list-style-type: none"><li>Any valid ITIL certification; or,</li><li>Any Release Management specific ITIL certification.</li></ul> <p>Proof of valid certification must be included with the bid to be considered.</p>	<p>PRINCE2 (practitioner) = 20 points;</p> <ul style="list-style-type: none"><li>PRINCE 2 (practitioner) + Master's = 40 points.</li><li>10 points for any ITIL certification</li></ul>	10	
Maximum Points Available			160	
Minimum Required Points (60%)			96	
Points Achieved				

**P.9 Project Manager (Level 2)**

<b>Resource Name:</b>			
<b>ID</b>	<b>Resource Mandatory Criteria</b>	<b>Met / Not Met</b>	<b>Substantiation &amp; Cross Reference</b>
M1	The Contractor must demonstrate that the proposed resource has a minimum 5 years of experience as a Project Manager within the past 10 years as of the TA issuance date, where the resource must have performed every task listed in Annex A (SoW) for this Resource Category. The proposed resource is not required to have 5 years of experience in each task. Any combination of years and tasks is acceptable		
M2	The Contractor must demonstrate that the proposed resource has project management experience on at least one Business Transformation Initiative in Information Technology involving a portfolio of interdependent or intersecting changes, which fundamentally modify how business is conducted.  For project experience to qualify, the resource must have been on the project for a minimum duration of 8 consecutive months within the last 5 years as of the TA issuance date.		
M3	The Contractor must demonstrate that the proposed resource has a minimum of 3 years of experience as a Project Manager in the Information Technology field, within the past 10 years as of the TA issuance date.  For project experience to qualify, the resource must have been on the project for a minimum duration of 6 consecutive months.		
M4	The Contractor must demonstrate, by providing a copy of the certificate, diploma or degree, that the proposed resource has qualified as a Project Management Professional (PMP).		

Resource Name:				
ID	Resource Point-Rated Criteria	Point Allocation	Maximum Points	Substantiation, Cross Reference & Self Score
R1	<p>The Contractor should demonstrate that the proposed resource has a minimum of 5 years of cumulative experience working as a Project Manager in a minimum of 3 of the following functions:</p> <ul style="list-style-type: none"> <li>a) risk management;</li> <li>b) project control;</li> <li>c) outcomes management;</li> <li>d) change management;</li> <li>e) quality management;</li> <li>f) earned value management; and</li> <li>g) financial management.</li> </ul>	<ul style="list-style-type: none"> <li>• 0 point for less than 5 years;</li> <li>• 10 points for greater than or equal to 5 years but less than 10 years;</li> <li>• 20 points for greater than or equal to 10 years but less than 15 years;</li> <li>• 30 points for greater than or equal to 15 years.</li> </ul>	30	
R2	<p>The Contractor should demonstrate that the proposed resource has a minimum of one year of consecutive experience in any function specified in Section "R1", above, in support of a government (federal, provincial, municipal or Crown Corporation) project where the project value was at least \$10M.</p>	<ul style="list-style-type: none"> <li>• Project value is \$10M or less = 0 point;</li> <li>• Project value is greater than \$10M but less than or equal to</li> </ul>	40	

Resource Name:				
ID	Resource Point-Rated Criteria	Point Allocation	Maximum Points	Substantiation, Cross Reference & Self Score
		<p>\$20M = 10 points;</p> <ul style="list-style-type: none"> <li>Project value is greater than \$20M but less than or equal to \$50M = 20 points;</li> <li>Project value is greater than \$50M but less than \$75M = 30 points;</li> <li>Project value is \$75M or greater = 40 points.</li> </ul>		
R3	The Contractor should demonstrate that the proposed resource has a minimum of 6 months of consecutive experience as a Project Manager on government (federal, provincial, municipal or Crown Corporation) projects for the implementation of either SAP or PeopleSoft within the last 10 years as of the TA issuance date.	<ul style="list-style-type: none"> <li>Less than 6 months = 0 point;</li> <li>6-12 months (not including 12 months) = 10 points;</li> <li>12-18 months (not including 18 months) = 20 points;</li> </ul>	40	

Resource Name:				
ID	Resource Point-Rated Criteria	Point Allocation	Maximum Points	Substantiation, Cross Reference & Self Score
		<ul style="list-style-type: none"> <li>18-24 months (not including 24 months) = 30 points;</li> <li>24 months and above = 40 points.</li> </ul>		
R4	<p>The Contractor should demonstrate by showing proof that the proposed resource has valid project management designation(s) in one or more of the following:</p> <ul style="list-style-type: none"> <li>Certified Management Consultant (CMC);</li> <li>PRINCE2 (Foundation);</li> <li>PRINCE2 (Practitioner);</li> <li>Master's degree in Project Management from an accredited university.</li> </ul> <p>Proof of valid certification or degree must be included with the bid to be considered.</p>	<ul style="list-style-type: none"> <li>CMC Certification = 20 points;</li> <li>PRINCE2 (Foundation) Accreditation = 10 points;</li> <li>PRINCE2 (Practitioner) Accreditation = 20 points;</li> <li>Master's in Project Management = 30 points.</li> </ul>	40	

Resource Name:			
ID	Resource Point-Rated Criteria	Point Allocation	Maximum Points
		Any combination of CMC accreditation, one of the PRINCE2 accreditations, and the Master's in Project Management can be used to achieve a maximum ceiling of 40 points. For example: <ul style="list-style-type: none"><li>• PRINCE2 (foundation) + CMC = 30 points;</li><li>• CMC + Master's = 40 points;</li><li>• CMC + PRINCE2 (Practitioner) = 40 points;</li><li>• PRINCE2 (foundation) + PRINCE2 (practitioner) = 20 points;</li><li>• PRINCE 2 (practitioner) + Master's = 40 points.</li></ul>	
Maximum Points Available			150

Resource Name:				
ID	Resource Point-Rated Criteria	Point Allocation	Maximum Points	Substantiation, Cross Reference & Self Score
Minimum Required Points (60%)			90	
Points Achieved				

**P.10 Project Scheduler (Level 2)**

<b>Resource Name:</b>			
<b>ID</b>	<b>Resource Mandatory Criteria</b>	<b>Met / Not Met</b>	<b>Substantiation &amp; Cross Reference</b>
M1	The Contractor must demonstrate that the proposed resource has a minimum of 5 years of experience as a Project Scheduler within the past 10 years as of the TA issuance date, where the resource must have performed every task listed in Annex A (SoW) for this Resource Category. The proposed resource is not required to have 5 years of experience in each task. Any combination of years and tasks is acceptable.		
M2	<p>The Contractor must demonstrate that the proposed resource has project scheduling experience on at least one Business Transformation Initiative in Information Technology involving a portfolio of interdependent or intersecting changes, which fundamentally modify how business is conducted.</p> <p>For project experience to qualify, the resource must have been on the project for a minimum duration of 8 consecutive months within the last 5 years as of the TA issuance date.</p>		
M3	<p>The Contractor must demonstrate that the proposed resource has a minimum of 3 years of experience as a Project Scheduler in the Information Technology field, within the past 8 years as of the TA issuance date.</p> <p>For project experience to qualify, the resource must have been on the project for a minimum duration of 6 consecutive months.</p>		



Resource Name:				
ID	Resource Point-Rated Criteria	Point Allocation	Maximum Points	Substantiation, Cross Reference & Self Score
R1	The Contractor should demonstrate that the proposed resource has a minimum of one year of consecutive experience in any of the tasks specified Annex A (SOW) under this Resource Category, in support of a government (federal, provincial, municipal or Crown Corporation) project where the project value was at least \$10M.	<ul style="list-style-type: none"> <li>• Project value is \$10M or less = 0 point;</li> <li>• Project value is greater than \$10M but less than or equal to \$20M = 10 points;</li> <li>• Project value is greater than \$20M but less than or equal to \$50M = 20 points;</li> <li>• Project value is greater than \$50M but less than \$75M = 30 points;</li> <li>• Project value is \$75M or greater = 40 points.</li> </ul>	40	
R2	The Contractor should demonstrate that the proposed resource has experience as a Project Scheduler performing any task specified in Annex A (SOW) under this Resource Category, in support of a minimum 2 government (federal, provincial, municipal or Crown Corporation) projects to implement of COTS Software.	<ul style="list-style-type: none"> <li>• 10 points = 2 projects</li> <li>• 5 points for every additional project up to a maximum of 25 points.</li> </ul>	25	

Resource Name:			
ID	Resource Point-Rated Criteria	Point Allocation	Maximum Points
Maximum Points Available			65
Minimum Required Points (60%)			39
Points Achieved			

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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.

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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.

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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.

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Print name of authorized individual & sign above

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Date

#### 4. CERTIFICATION OF LANGUAGE - English

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

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Print name of authorized individual & sign above

---

Date

## ANNEX B

### BASIS OF PAYMENT

**INITIAL CONTRACT PERIOD:**

Initial Contract Period (Date of Contract award to _____)		
Resource Category	Level of Expertise	Firm Per Diem Rate
B.1 Business Analyst	LEVEL 3	
B.2 Business Architect	LEVEL 3	
B.3 Business Consultant	LEVEL 3	
P.1 Change Management Consultant	LEVEL 3	
P.7 Project Coordinator	LEVEL 2	
P.9 Project Manager	LEVEL 3	
P.9 Project Manager	LEVEL 2	
P.10 Project Scheduler	LEVEL 2	

**OPTION PERIODS:**

Option Period 1 (_____ to _____)		
Resource Category	Level of Expertise	Firm Per Diem Rate
B.1 Business Analyst	LEVEL 3	
B.2 Business Architect	LEVEL 3	
B.3 Business Consultant	LEVEL 3	
P.1 Change Management Consultant	LEVEL 3	
P.7 Project Coordinator	LEVEL 2	
P.9 Project Manager	LEVEL 3	
P.9 Project Manager	LEVEL 2	
P.10 Project Scheduler	LEVEL 2	

<b>Option Period 2</b> (        to        )		
<b>Resource Category</b>	<b>Level of Expertise</b>	<b>Firm Per Diem Rate</b>
B.1 Business Analyst	LEVEL 3	
B.2 Business Architect	LEVEL 3	
B.3 Business Consultant	LEVEL 3	
P.1 Change Management Consultant	LEVEL 3	
P.7 Project Coordinator	LEVEL 2	
P.9 Project Manager	LEVEL 3	
P.9 Project Manager	LEVEL 2	
P.10 Project Scheduler	LEVEL 2	

## ANNEX C

### SECURITY REQUIREMENTS CHECK LIST

COMMON-PS-SRCL#34



Government of Canada  
Gouvernement du Canada

Contract Number / Numéro du contrat <b>EN912 18 2003</b>
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 <b>PWGSC (PSPC)</b>	2. Branch or Directorate / Direction générale ou Direction <b>PAB</b>	
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 <b>PROJECT MANAGEMENT SERVICES</b>		
5. a) Will the supplier require access to Controlled Goods? Le fournisseur aura-t-il accès à des marchandises contrôlées?		<input checked="" type="checkbox"/> No Non <input type="checkbox"/> Yes Oui
5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques?		<input checked="" type="checkbox"/> No Non <input type="checkbox"/> Yes Oui
6. Indicate the type of access required / Indiquer le type d'accès requis		
6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? (Specify the level of access using the chart in Question 7. c) (Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c)		<input type="checkbox"/> No Non <input checked="" type="checkbox"/> Yes Oui
6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé.		<input checked="" type="checkbox"/> No Non <input type="checkbox"/> Yes Oui
6. c) Is this a commercial courier or delivery requirement with no overnight storage? S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit?		<input checked="" type="checkbox"/> No Non <input type="checkbox"/> Yes Oui
7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès		
Canada <input checked="" type="checkbox"/>	NATO / OTAN <input type="checkbox"/>	Foreign / Étranger <input type="checkbox"/>
7. b) Release restrictions / Restrictions relatives à la diffusion		
No release restrictions Aucune restriction relative à la diffusion <input checked="" type="checkbox"/>	All NATO countries Tous les pays de l'OTAN <input type="checkbox"/>	No release restrictions Aucune restriction relative à la diffusion <input type="checkbox"/>
Not releasable À ne pas diffuser <input type="checkbox"/>		
Restricted to: / Limité à: <input type="checkbox"/>	Restricted to: / Limité à: <input type="checkbox"/>	Restricted to: / Limité à: <input type="checkbox"/>
Specify country(ies): / Préciser le(s) pays:	Specify country(ies): / Préciser le(s) pays:	Specify country(ies): / Préciser le(s) pays:
7. c) Level of Information / Niveau d'information		
PROTECTED A PROTÉGÉ A <input type="checkbox"/>	NATO UNCLASSIFIED NATO NON CLASSIFIÉ <input type="checkbox"/>	PROTECTED A PROTÉGÉ A <input type="checkbox"/>
PROTECTED B PROTÉGÉ B <input type="checkbox"/>	NATO RESTRICTED NATO DIFFUSION RESTREINTE <input type="checkbox"/>	PROTECTED B PROTÉGÉ B <input type="checkbox"/>
PROTECTED C PROTÉGÉ C <input type="checkbox"/>	NATO CONFIDENTIAL NATO CONFIDENTIEL <input type="checkbox"/>	PROTECTED C PROTÉGÉ C <input type="checkbox"/>
CONFIDENTIAL CONFIDENTIEL <input type="checkbox"/>	NATO SECRET NATO SECRET <input type="checkbox"/>	CONFIDENTIAL CONFIDENTIEL <input type="checkbox"/>
SECRET SECRET <input checked="" type="checkbox"/>	COSMIC TOP SECRET COSMIC TRÈS SECRET <input type="checkbox"/>	SECRET SECRET <input type="checkbox"/>
TOP SECRET TRÈS SECRET <input type="checkbox"/>		TOP SECRET TRÈS SECRET <input type="checkbox"/>
TOP SECRET (SIGINT) TRÈS SECRET (SIGINT) <input type="checkbox"/>		TOP SECRET (SIGINT) TRÈS SECRET (SIGINT) <input type="checkbox"/>

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité  
UNCLASSIFIED

COMMON-PS-SRCL#34

Government  
of CanadaGouvernement  
du Canada

Contract Number / Numéro du contrat

EN912 18 2003

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

Special comments:

Commentaires spéciaux :

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

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

10. b) May unscreened personnel be used for portions of the work?  
Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail? ☒ No ☐ 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

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité

UNCLASSIFIED

Canada



COMMON-PS-SRCL#34

Government  
of CanadaGouvernement  
du Canada

Contract Number / Numéro du contrat

EN 912 18 2003

Security Classification / Classification de sécurité  
UNCLASSIFIED**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	SECRET	TOP SECRET	NATO RESTRICTED	NATO CONFIDENTIAL	NATO SECRET	COSMIC TOP SECRET COSMIC TRÈS SECRET	PROTECTED PROTÉGÉ			CONFIDENTIAL	SECRET	TOP SECRET
				CONFIDENTIEL		TRÈS SECRET	NATO DIFFUSION RESTREINTE	NATO CONFIDENTIEL				A	B	C	CONFIDENTIEL	
Information / Assets Renseignements / Biens Production																
IT Media / Support IT																
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 (o.g. SECRET with Attachments).

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



**ATTACHMENT 3.1**  
**BID SUBMISSION FORM**

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

<b>If it does not, the security clearance is not valid for the Bidder.]</b>		
<p>On behalf of the Bidder, by signing below, I confirm that I have read the entire bid solicitation including the documents incorporated by reference into the bid solicitation and I certify that:</p> <ol style="list-style-type: none"><li>1. The Bidder considers itself and its proposed resources able to meet all the mandatory requirements described in the bid solicitation;</li><li>2. This bid is valid for the period requested in the bid solicitation;</li><li>3. All the information provided in the bid is complete, true and accurate; and</li><li>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.</li></ol>		
<b>Signature of Authorized Representative of Bidder</b>		

**ATTACHMENT 4.1**  
**BID EVALUATION CRITERIA**

**(AS ATTACHED)**

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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 permanent full-time and/or permanent part-time employees.
- A5. The Bidder has a combined workforce in Canada of 100 or more employees; and
- ☐ A5.1 The Bidder certifies already having a valid and current [Agreement to Implement Employment Equity](#) (AIEE) in place with ESDC-Labour.

OR

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

B. Check only one of the following:

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

OR

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

## **ATTACHMENT 4.1**

### **BID EVALUATION CRITERIA**

**ATTACHMENT 4.1**  
**BID EVALUATION CRITERIA**

**Corporate Mandatory Criteria:**

ID	Corporate Mandatory Criteria	Met / Not Met	Substantiation & Cross Reference																																				
M1	<p>The Bidder must demonstrate its contract experience, through Billable Days<sup>1</sup>, in supplying resources under all Resource Categories, as identified in the table below.</p> <p><i><sup>1</sup>Billable Days are defined as working days billed to external clients. A workday day is equivalent to 7.5 hours or more per day.</i></p> <table border="1" data-bbox="743 1050 1128 1850"> <thead> <tr> <th>TBIPS ID</th><th>RESOURCE CATEGORY</th><th>LEVEL OF EXPERTISE</th><th>MINIMUM NUMBER OF BILLABLE DAYS</th></tr> </thead> <tbody> <tr> <td>B.1</td><td>Business Analyst</td><td>3</td><td>1,536</td></tr> <tr> <td>B.2</td><td>Business Architect</td><td>3</td><td>864</td></tr> <tr> <td>B.3</td><td>Business Consultant</td><td>3</td><td>432</td></tr> <tr> <td>P.1</td><td>Change Management Consultant</td><td>3</td><td>1,152</td></tr> <tr> <td>P.7</td><td>Project Coordinator</td><td>2</td><td>432</td></tr> <tr> <td>P.9</td><td>Project Manager</td><td>3</td><td>3,840</td></tr> <tr> <td>P.9</td><td>Project Manager</td><td>2</td><td>2,160</td></tr> <tr> <td>P.10</td><td>Project Scheduler</td><td>2</td><td>1,296</td></tr> </tbody> </table> <p>To be accepted:</p> <ol style="list-style-type: none"> <li>The Bidder must meet the Minimum Number of Billable Days per Resource Category, as identified in Table above;</li> <li>The Billable Days must have been provided in support of Information Management or</li> </ol>	TBIPS ID	RESOURCE CATEGORY	LEVEL OF EXPERTISE	MINIMUM NUMBER OF BILLABLE DAYS	B.1	Business Analyst	3	1,536	B.2	Business Architect	3	864	B.3	Business Consultant	3	432	P.1	Change Management Consultant	3	1,152	P.7	Project Coordinator	2	432	P.9	Project Manager	3	3,840	P.9	Project Manager	2	2,160	P.10	Project Scheduler	2	1,296		
TBIPS ID	RESOURCE CATEGORY	LEVEL OF EXPERTISE	MINIMUM NUMBER OF BILLABLE DAYS																																				
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P.9	Project Manager	2	2,160																																				
P.10	Project Scheduler	2	1,296																																				

ID	Corporate Mandatory Criteria	Met / Not Met	Substantiation & Cross Reference
	<p>Information Technology contracts;</p> <p>3. The Billable Days must have been provided under a maximum of five distinct and separate contracts<sup>2</sup>.</p> <p><i>2 If the Bidder references more than 5 contracts, Canada will choose in its discretion which 5 it will use to evaluate the Bidder.</i></p> <p>4. Each contract must have been for a single external customer, with whom the Bidder deals at arm's length;</p> <p>5. The Billable Days for each contract must have occurred within the five years preceding the posting date of this bid solicitation;</p> <p>6. Each contract must have a total billing value of \$2M or more;</p> <p>7. The Bidder must identify (by first and last name) each resource whose Billable Days are included as part of the Bidder's total Billable Days claimed;</p> <p>8. The Bidder must demonstrate that the tasks performed by each named resource includes at least 50%<sup>3</sup> of the associated tasks listed in Annex A (SoW) for the same Resource Category under which the Bidder is claiming Billable Days for;</p> <p><i>For evaluation purposes, when the number of tasks are odd, the % of tasks that are met will have to be higher than 50%. For example, if a Change Management consultant has 7 tasks, the bidder will need to meet at least 4 out of the 7 tasks.</i></p> <p>9. For each demonstrated task, the Bidder must cross-reference to the associated tasks listed in Annex A for that Resource Category of that level;</p> <p><i>Notes to the Bidder:</i></p> <p>(i) <i>It is the Bidder's responsibility to ensure it has obtained any required permissions to divulge any information about persons named in its bid.</i></p> <p>(ii) <i>The Bidder must have been the prime contractor, rather than a subcontractor, for all contracts it references. This means that the Bidder was contracted the services directly by the client organization. If the Bidder's contract was to perform work which another entity had itself first contracted to perform, the Bidder will not be considered the prime contractor. For example, Z (customer) contracted with Y for services. Y, in turn, entered into a contract with X to provide all or part of these services to Z. In this example, Y is a prime contractor and X is a subcontractor.</i></p>		

ID	Corporate Mandatory Criteria	Met / Not Met	Substantiation & Cross Reference
	<p>(iii) A Supply Arrangement or Standing Offer is not a contract and therefore any reference to this type of document will not be accepted for the purpose of evaluating contract experience. For example if the Bidder references it's Task-Based Informatics Professional Services Supply Arrangement (TBIPS SA) number such as EN578-055605XXX/EL for the purpose of demonstrating experience under the evaluation criteria, Canada will disregard this experience because it does not relate to a specific contract.</p> <p>The Bidder must complete both "Appendix A1 to Attachment 4.1" (Bidders Response Template for Billable Days) and "Appendix B to Attachment 4.1" (Bidders Response Template for Contract/Project Reference) for each contract/project reference submitted as part of its response to M1.</p>		
M2	<p>The Bidder must demonstrate revenues of at least \$5,000,000 in Informatics professional services in each of the 5 consecutive 12-month periods within the 5 years preceding the posting date of this bid solicitation.</p> <p>The bidder must complete "Appendix A2 to Attachment 4.1" (Bidders Response Template for Annual Revenues) and "Appendix B to Attachment 4.1" (Bidders Response Template for Contract/Project Reference) for each contract/project reference used as part of its response to M2.</p>		
M3	<p>The Bidder must demonstrate one contract experience in supplying 10 resources or more within a period of 90 consecutive days within the 5 years preceding the posting date of this bid solicitation.</p> <p>To be accepted:</p> <ol style="list-style-type: none"> <li>The contract must be one of the contracts referenced in response to meet Criterion M1;</li> <li>The start date for all 10 resources or more must have occurred within the same 90 day period within the 5 years preceding the posting date of this bid solicitation; and</li> <li>Each resource must have remained on the contract for at least 3 months.</li> </ol> <p>The 90 day period referred to above can be any 90 day period, within which 10 resources or</p>		



ID	Corporate Mandatory Criteria	Met / Not Met	Substantiation & Cross Reference
	<p>more started Work. The 90 day period starts when the first resource commences Work and ends 90 days thereafter. All 10 resources or more must have commenced Work under the contract during this 90 day period.</p> <p>The bidder must complete "Appendix A3 to Attachment 4.1" (Bidders Response Template for Supplying Multiple Resources within 90 Days).</p>		

**Resource Mandatory/Rated Criteria:**

**B.1.1. Business Analyst (Level 3)**

<b>Resource Name:</b>			
<b>ID</b>	<b>Resource Mandatory Criteria</b>	<b>Met / Not Met</b>	<b>Substantiation &amp; Cross Reference</b>
M1	The Bidder must demonstrate that the proposed resource has a minimum of 15 years of experience as a Business Analyst within the past 20 years as of the posting date of this bid solicitation, where the resource must have performed every task listed in Annex A (SoW) for this Resource Category. The proposed resource is not required to have 15 years of experience in each task. Any combination of years and tasks is acceptable.		
M2	<p>The Bidder's proposed resource must demonstrate experience within the last 5 years as of the posting date of this bid solicitation in reviewing and analysing a minimum of 2 business requirements or business strategies regarding Information Technology (IT) solutions, where the resource must have performed all of the following:</p> <ul style="list-style-type: none"> <li>• Providing advice and guidance to management;</li> <li>• Analyzing and defining requirements;</li> <li>• Determining impacts on systems; and,</li> <li>• Providing recommendations.</li> </ul>		

<b>Resource Name:</b>			
<b>ID</b>	<b>Resource Point-Rated Criteria</b>	<b>Point Allocation</b>	<b>Maximum Points</b>
	The Bidder should demonstrate that the proposed resource has cumulative project experience working as a Business Analyst for a minimum period of 5 years in the last	Points will be allocated for experience over the mandatory 5 years up	100

Resource Name:				
ID	Resource Point-Rated Criteria	Point Allocation	Maximum Points	Substantiation, Cross Reference & Self Score
R1	<p>15 years performing two of the tasks listed below in a project management environment:</p> <ul style="list-style-type: none"> <li>• Providing advice and guidance to management;</li> <li>• Analyzing and defining requirements;</li> <li>• Determining impacts on systems; and,</li> <li>• Providing recommendations.</li> </ul> <p>A project management environment is defined as one which involves a formal project plan with associated project management support roles (i.e. Project Managers etc.).</p>	<p>to a total of 10 years as follows:</p> <ul style="list-style-type: none"> <li>• 5 years or less = 0 point;</li> <li>• 20 points will be allocated for each year of experience over and above the 5 years up to a maximum of 100 points.</li> </ul>		
R2	<p>The Bidder should demonstrate that the proposed resource has a minimum of one year of consecutive experience in performing any task specified in Section "R1", above, in support of a government (federal, provincial, municipal or Crown Corporation) project where the project value was at least \$20M.</p>	<ul style="list-style-type: none"> <li>• Project value \$20M or less = 0 point;</li> <li>• Project value greater than \$20M but less than \$ 50M = 25 points;</li> <li>• Project value greater than or equal to \$50M but less than \$75M = 50 points;</li> <li>• Project value greater than or equal to \$75M but less than \$100M = 75</li> </ul>	100	

Resource Name:				
ID	Resource Point-Rated Criteria	Point Allocation	Maximum Points	Substantiation, Cross Reference & Self Score
		points: <ul style="list-style-type: none"> <li>Project value \$100M or greater = 100 points.</li> </ul>		
R3	The Bidder should demonstrate the proposed resource's experience as a Business Analyst performing any task specified in Section "R1", above, in support of a minimum of 2 government (federal, provincial, municipal or Crown Corporation) projects to implement Commercial Off the Shelf (COTS) Software involving the extension of the functionality of COTS products via custom development for a minimum duration of 3 months for each project.	<ul style="list-style-type: none"> <li>Less than two projects = 0 point;</li> <li>2 projects = 10 points;</li> <li>10 points will be given for each additional project up to a maximum of 40 points.</li> </ul>	40	
R4	The Bidder should demonstrate that the proposed resource has project experience within the past 5 years prior to the posting date of this bid solicitation in preparing documents for senior management (senior management is considered EX02 equivalent level or above).	<ul style="list-style-type: none"> <li>1 project = 10 points;</li> <li>2 or more projects = 20 points.</li> </ul>	20	
R5	The Bidder should demonstrate that the proposed resource has project experience within the past 5 years prior to the posting date of this bid solicitation in: <ul style="list-style-type: none"> <li>Performing Data Analysis<sup>1</sup></li> </ul>	<ul style="list-style-type: none"> <li>1 project = 10 points;</li> <li>2 or more projects = 20</li> </ul>	20	

Resource Name:				
ID	Resource Point-Rated Criteria	Point Allocation	Maximum Points	Substantiation, Cross Reference & Self Score
	<ul style="list-style-type: none"> <li>Performing Data Analysis<sup>1</sup> and Data Analytics<sup>2</sup> using Advanced Statistical Methods and Techniques<sup>3</sup> including Artificial Intelligence<sup>4</sup></li> <li>Providing recommendations based on findings</li> </ul> <p><sup>1</sup> "Performing Data Analysis" : Using data analytics tools and techniques to achieve business objectives</p> <p><sup>2</sup> "Performing Data Analytics": Extracting, compiling and manipulating data using SQL code, executing statistical methods for descriptive, predictive, and prescriptive data analysis, and effectively interpreting and presenting analytic results. "Data Analytics" is a subcomponent of data analysis that involves the use of technical tools and data analysis techniques.</p> <p><sup>3</sup> "Advanced Statistical Methods and Techniques": Techniques such as regression analysis, anova, factor analysis, cluster analysis.</p> <p><sup>4</sup> "Artificial Intelligence": Advanced forms of statistical and mathematical models using techniques such as Heuristics, Support Vector Machines, Neural Networks, the Markov Decision Process and/or Natural Language Processing.</p>	points.		
Maximum Points Available			280	
Minimum Required Points (60%)			168	
Points Achieved				

### B.2. Business Architect (Level 3)

Resource Name:				
ID	Resource Mandatory Criteria	Met / Not Met	Substantiation & Cross Reference	
M1	The Bidder must demonstrate that the proposed resource has a minimum of 10 years of experience in the past 15 years as of the posting date of this bid solicitation in providing Business Architecture services, where the resource must have performed every task listed in Annex A (SoW) for this Resource Category. The proposed resource is not required to have 10 years of experience in each task. Any combination of years and tasks is acceptable.			
M2	The Bidder must demonstrate that the proposed resource has a minimum of 7 years of experience in the past 15 years in developing and maintaining business architecture models.			
M3	The Bidder must demonstrate that the proposed resource has supported the implementation of a COTS Software for a minimum 2 projects as a Business Architect involving the extension of the functionality of COTS products via custom development.			
M4	The Bidder must demonstrate, by providing a copy of the diploma or degree, that the proposed resource has a minimum of a university degree, in a business or technology discipline.			

Resource Name:				
ID	Resource Point-Rated Criteria	Point Allocation	Maximum Points	Substantiation, Cross Reference & Self Score
R1	The Bidder should demonstrate that the proposed resource has more than 10 years of cumulative experience in carrying out any 3 of the following tasks: a) designing interventions aimed at improving organizational effectiveness;	<ul style="list-style-type: none"> <li>10 points will be allocated for</li> </ul>	100	

Resource Name:				
ID	Resource Point-Rated Criteria	Point Allocation	Maximum Points	Substantiation, Cross Reference & Self Score
	b) providing advisory consulting services; c) preparing business cases; d) carrying out options analysis; and e) developing performance measurement/evaluation frameworks.	each year of experience over and above the 10 years up to a maximum of 100 points.		
R2	The Bidder should demonstrate that the proposed resource has a minimum of 1 year of consecutive experience in the last 5 years in developing, establishing and maintaining business architecture models in accounting or banking or compensation systems.	<ul style="list-style-type: none"> <li>1 year = 10 points</li> <li>More than 1 consecutive year = 20 points</li> </ul>	20	
R3	The Bidder should demonstrate that the proposed resource has a minimum of 5 years' experience performing a minimum of 3 of the following tasks in government (federal, provincial, municipal or Crown Corporation) projects: <ul style="list-style-type: none"> <li>designing interventions aimed at improving organizational effectiveness;</li> <li>providing advisory consulting services;</li> <li>preparing business cases;</li> <li>carrying out options analysis; and,</li> <li>developing performance measurement/evaluation frameworks.</li> </ul>	<ul style="list-style-type: none"> <li>5 years = 10 points;</li> <li>5 points for each additional year of experience up to a maximum of 25 points.</li> </ul>	25	
R4	The Bidder should demonstrate that the proposed resource has work experience in one of the following:	<ul style="list-style-type: none"> <li>1 project = 10 points;</li> <li>2 projects or</li> </ul>	20	

Resource Name:				
ID	Resource Point-Rated Criteria	Point Allocation	Maximum Points	Substantiation, Cross Reference & Self Score
	<p>a) preparing a business case that was part of a formal submission process that resulted in the grant of Preliminary Project Approval by Treasury Board (or the grant of PPA equivalent) in support of a government project where the value of the project was at least \$100M;</p> <p>b) reviewing and updating a business case that was part of a formal submission process that resulted in the grant of Effective Project Approval by Treasury Board (or the grant of EPA Equivalent) in support of a Government project<sup>1</sup> where the value of the project was at least \$100M;</p> <p><sup>1</sup> "Government project": a project of federal, provincial or municipal government or Crown Corporations.</p> <p>c) developing and implementing change management frameworks, strategies, and plans, where the value of the project was at least \$100M.</p>	more = 20 points.		
Maximum Points Available			165	
Minimum Required Points (60%)			99	
Points Achieved				



### B.3 Business Consultant (Level 3)

Resource Name:				
ID	Resource Mandatory Criteria	Met / Not Met	Substantiation & Cross Reference	
M1	The Bidder's proposed resource must demonstrate a minimum of 10 years of experience in the past 15 years as of the posting date of this bid solicitation in providing Business Consultant services, where the resource must have performed every task listed in Annex A (SoW) for this Resource Category. The proposed resource is not required to have 10 years of experience in each task. Any combination of years and tasks is acceptable.			
M2	The Bidder's proposed resource must demonstrate experience within the last 5 years in reviewing and analysing a minimum of two business requirements or business strategies regarding service delivery using an Information Technology solution and providing advice and guidance to management based on the analysis.			

Resource Name:				
ID	Resource Point-Rated Criteria	Point Allocation	Maximum Points	Substantiation, Cross Reference & Self Score
R1	<p>The Bidder should demonstrate that the proposed resource has a minimum of 5 years of cumulative experience working as a Business Consultant in a minimum of 2 of the following functions:</p> <ul style="list-style-type: none"> <li>i. risk management;</li> <li>ii. project control;</li> <li>iii. outcomes management;</li> <li>iv. change management;</li> <li>v. quality management;</li> <li>vi. earned value management;</li> </ul>	<ul style="list-style-type: none"> <li>• Less than 5 years = 0 point;</li> <li>• 5 years = 10 points;</li> <li>• 5 points for each additional year of experience up to a maximum of 25 points.</li> </ul>	25	

Resource Name:				
ID	Resource Point-Rated Criteria	Point Allocation	Maximum Points	Substantiation, Cross Reference & Self Score
	vii. financial management.			
R2	The Bidder's proposed resource should demonstrate experience within the past 5 years in analyzing business requirement documents and strategic plans related to Information Technology solutions and providing recommendations and advice based on the analysis.	<ul style="list-style-type: none"> <li>1-2 Documents = 10 points;</li> <li>3 Documents = 20 points;</li> <li>4 Documents = 30 points;</li> <li>5 or more Documents = 40 points.</li> </ul>	40	
R3	The Bidder should demonstrate that the proposed resource has experience as a Business Consultant supporting a minimum of 2 government (federal, provincial, municipal or Crown Corporation) projects in the implementation of COTS Software involving the extension of the functionality of COTS products via custom development.	<ul style="list-style-type: none"> <li>1 project = 0 point;</li> <li>2 projects = 10 points;</li> <li>5 points for each additional project up to a maximum of 25 points.</li> </ul>	25	
R4	<p>The Bidder's proposed resource should demonstrate project experience within the past 5 years in preparing documents for senior management (EX02 equivalent level or above).</p> <p>Documents must include any of the following:</p> <ul style="list-style-type: none"> <li>Requirements Definition and Analysis;</li> <li>System Impact Assessments;</li> <li>Providing recommendations.</li> </ul>	<ul style="list-style-type: none"> <li>1 project = 10 points;</li> <li>2 or more projects = 20 points.</li> </ul>	20	

Resource Name:				
ID	Resource Point-Rated Criteria	Point Allocation	Maximum Points	Substantiation, Cross Reference & Self Score
	Maximum Points Available		110	
	Minimum Required Points (60%)		66	
	Points Achieved			

**P.1 Change Management Consultant (Level 3)**

<b>Resource Name:</b>			
<b>ID</b>	<b>Resource Mandatory Criteria</b>	<b>Met / Not Met</b>	<b>Substantiation &amp; Cross Reference</b>
M1	The Bidder's proposed resource must demonstrate a minimum of 10 years of experience in the past 15 years as of the posting date of this bid solicitation in providing Change Management Consultant services, where the resource must have performed every task listed in Annex A (SoW) for this Resource Category. The proposed resource is not required to have 10 years of experience in each task. Any combination of years and tasks is acceptable.		
M2	The Bidder must demonstrate the proposed resource's experience as a Change Management Consultant supporting 2 projects in the implementation of COTS Software.		
M3	The Bidder must demonstrate that the proposed resource has cumulative work experience of at least 10 years in an Information Technology field.  For project experience to qualify, the resource must have been on the project for a minimum duration of 6 consecutive months.		
M4	The Bidder must demonstrate, by providing a copy of the certification, that the proposed resource holds an ITIL (Information Technology Infrastructure Library) 3.0 certification at a minimum of Foundation Level.		

Resource Name:				
ID	Resource Point-Rated Criteria	Point Allocation	Maximum Points	Substantiation, Cross Reference & Self Score
R1	The Bidder should demonstrate that the proposed resource has a minimum of one year experience in all tasks specified in Annex A (SOW) under this Resource Category supporting a government (federal, provincial, municipal or Crown Corporation) project where the project value was at least \$20M.	<ul style="list-style-type: none"> <li>Project value is \$20M or less = 0 point;</li> <li>Project value is greater than \$20M but less than \$ 50M = 10 points;</li> <li>Project value is greater than or equal to \$50M but less than \$75M = 20 points;</li> <li>Project value is greater than or equal to \$75M but less than \$100M = 30 points;</li> <li>Project value is \$100M or greater = 40 points.</li> </ul>	40	
R2	<p>The Bidder should demonstrate that the proposed resource has experience as a Change Management Specialist performing any task specified in Annex A (SOW) under this Resource Category, in support of a minimum of 2 government (federal, provincial, municipal or Crown Corporation) projects to implement COTS Software involving the extension of the functionality of COTS products via custom development.</p> <p>The project reference can be the same as used in M2.</p>	<ul style="list-style-type: none"> <li>1 project = 0 point;</li> <li>2 projects = 10 points;</li> <li>5 points for each additional project up to a maximum</li> </ul>	25	

Resource Name:				
ID	Resource Point-Rated Criteria	Point Allocation	Maximum Points	Substantiation, Cross Reference & Self Score
R3	The Bidder should demonstrate, by providing a copy of the certification, that the proposed resource holds an ITIL 3.0 certification at Practitioner Level or above.	of 25 points. <ul style="list-style-type: none"> <li>Practitioner Level = 10 points;</li> <li>Intermediate Level = 20 points;</li> <li>Expert Level = 30 Points.</li> </ul>	30	
Maximum Points Available			95	
Minimum Required Points (60%)			57	
Points Achieved				

**P.9 Project Manager (Level 3)**

<b>Resource Name:</b>			
<b>ID</b>	<b>Resource Mandatory Criteria</b>	<b>Met / Not Met</b>	<b>Substantiation &amp; Cross Reference</b>
M1	The Bidder must demonstrate that the proposed resource has a minimum of 15 years of experience as a Project Manager within the past 20 years as of the posting date of this bid solicitation, where the resource must have performed every task listed in Annex A (SoW) for this Resource Category. The proposed resource is not required to have 15 years of experience in each task. Any combination of years and tasks is acceptable.		
M2	The Bidder must demonstrate that the proposed resource has project management experience on at least one Business Transformation Initiative in Information Technology involving a portfolio of interdependent or intersecting changes, which fundamentally modify how business is conducted.  For project experience to qualify, the resource must have been on the project for a minimum duration of 12 consecutive months within the last 10 years as of the posting date of this bid solicitation.		
M3	The Bidder must demonstrate that the proposed resource has a minimum of 10 years of experience as a Project Manager in the Information Technology field, within the past 15 years as of the posting date of this bid solicitation.  For project experience to qualify, the resource must have been on the project for a minimum duration of 6 consecutive months.		
M4	The Bidder must demonstrate, by providing a copy of the certificate, diploma or degree that the proposed resource has qualified as a Project Management Professional (PMP).		

Resource Name:				
ID	Resource Point-Rated Criteria	Point Allocation	Maximum Points	Substantiation, Cross Reference & Self Score
R1	<p>The Bidder should demonstrate that the proposed resource has a minimum of 15 years of cumulative experience working as a Project Manager in a minimum 3 of the following functions:</p> <ul style="list-style-type: none"> <li>a) risk management;</li> <li>b) project control;</li> <li>c) outcomes management;</li> <li>d) change management;</li> <li>e) quality management;</li> <li>f) earned value management;</li> <li>g) financial management.</li> </ul>	<ul style="list-style-type: none"> <li>• Less than 15 years = 0 point;</li> <li>• 10 points for greater than or equal to 15 years but less than 20 years;</li> <li>• 20 points for greater than or equal to 20 years but less than 25 years;</li> <li>• 30 points for greater than or equal to 25 years.</li> </ul>	30	
R2	<p>The Bidder should demonstrate that the proposed resource has a minimum of one year of consecutive experience in any function specified in Section "R1", above, in support of a government (federal, provincial, municipal or Crown Corporation) project, where the project value was at least \$20M.</p>	<ul style="list-style-type: none"> <li>• Project value is \$20M or less = 0 point;</li> <li>• Project value is greater than \$20M but less than or equal to \$50M = 10 points;</li> <li>• Project value is greater than \$50M but less than or equal to</li> </ul>	40	



Resource Name:				
ID	Resource Point-Rated Criteria	Point Allocation	Maximum Points	Substantiation, Cross Reference & Self Score
		\$75M = 20 points; <ul style="list-style-type: none"> <li>Project value is greater than \$75M but less than \$100M = 30 points;</li> <li>Project value is \$100M or greater = 40 points.</li> </ul>		
R3	The Bidder should demonstrate that the proposed resource has a minimum of 6 months of continuous experience as a Project Manager on government (federal, provincial, municipal or Crown Corporation) projects for the implementation of either SAP or PeopleSoft within the last 10 years as of the posting date of this bid solicitation.	<ul style="list-style-type: none"> <li>Less than 6 months = 0 point;</li> <li>6-12 months (not including 12 months) = 10 points;</li> <li>12-18 months (not including 18 months) = 20 points;</li> <li>18-24 months (not including 24 months) = 30 points;</li> <li>24 months and above = 40 points.</li> </ul>	40	

Resource Name:				
ID	Resource Point-Rated Criteria	Point Allocation	Maximum Points	Substantiation, Cross Reference & Self Score
R4	<p>The Bidder should demonstrate by showing proof that the proposed resource has valid project management designation(s) in one or more of the following:</p> <ul style="list-style-type: none"> <li>• Certified Management Consultant (CMC)</li> <li>• PRINCE2 (Foundation)</li> <li>• PRINCE2 (Practitioner)</li> <li>• Master's degree in Project Management from an accredited university</li> </ul> <p>Proof of valid certification or degree must be included with the bid to be considered.</p>	<ul style="list-style-type: none"> <li>• CMC Certification = 20 points;</li> <li>• PRINCE2 (Foundation) Accreditation = 10 points;</li> <li>• PRINCE2 (Practitioner) Accreditation = 20 points;</li> <li>• Master's in project management = 30 points.</li> </ul> <p>Any combination of CMC accreditation, one of the PRINCE2 accreditations and the Masters in Project Management can be used to achieve a maximum ceiling of 40 points. For example:</p> <ul style="list-style-type: none"> <li>• PRINCE2 (foundation) + CMC = 30 points;</li> <li>• CMC + Master's</li> </ul>	40	

Resource Name:				
ID	Resource Point-Rated Criteria	Point Allocation	Maximum Points	Substantiation, Cross Reference & Self Score
		= 40 points; <ul style="list-style-type: none"> <li>• CMC + PRINCE2(Practitioner) = 40 points;</li> <li>• PRINCE2 (foundation) + PRINCE2 (practitioner) = 20 points;</li> <li>• PRINCE 2 (practitioner) + Master's = 40 points.</li> </ul>		
R5	The Bidder should demonstrate by showing proof that the proposed resource has a valid ITIL certification in any of the following: <ul style="list-style-type: none"> <li>• Any valid ITIL certification; or,</li> <li>• Any Release Management specific ITIL certification.</li> </ul> Proof of valid certification must be included with the bid to be considered.	<ul style="list-style-type: none"> <li>• 10 points for any ITIL certification</li> </ul>	10	
Maximum Points Available			160	
Minimum Required Points (60%)			96	
Points Achieved				

**APPENDIX A1 TO ATTACHMENT 4.1**

**BIDDERS RESPONSE TEMPLATE FOR BILLABLE DAYS**

Bidder Name: \_\_\_\_\_

By providing a response, the Bidder certifies that billable days provided below occurred during the billing period as indicated in Appendix B for the following contract/project references for each resource category listed. The Bidder also certifies that the work billed for each resource category included at least 50% of the applicable tasks listed in Annex A, Statement of Work for that resource category.

TBIPS ID	Resource Category	Cross Reference to Contract/Project Reference #	Cross Reference to Contract/Project Reference #	Cross Reference to Contract/Project Reference #	Cross Reference to Contract/Project Reference #	Cross Reference to Contract/Project Reference #	Cross Reference to Contract/Project Reference #	Total Number of Billable Days
		Number of Billable Days	Number of Billable Days	Number of Billable Days	Number of Billable Days	Number of Billable Days	Number of Billable Days	
B.1	Business Analyst – Level 3							
B.2	Business Architect – Level 3							
B.3	Business Consultant – Level 3							
P.1	Change Management Consultant – Level 3							
P.7	Project Coordinator – Level 2							
P.9	Project Manager – Level 3							
P.9	Project Manager – Level 2							
P.10	Project Scheduler – Level 2							

## APPENDIX A2 TO ATTACHMENT 4.1

### BIDDERS RESPONSE TEMPLATE FOR ANNUAL REVENUES

Bidder Name: \_\_\_\_\_

By providing a response, the Bidder certifies that the revenues provided below occurred during the periods indicated, and were for Informatics Professional Services.

Bidder may use more than one (1) page if necessary to list contracts/projects.

	Revenues (Year 1)	Revenues (Year 2)	Revenues (Year 3)	Revenues (Year 4)	Revenues (Year 5)
	<u>(dd/mm/yy)</u>	<u>(dd/mm/yy)</u>	<u>(dd/mm/yy)</u>	<u>(dd/mm/yy)</u>	<u>(dd/mm/yy)</u>
	To	To	To	To	To
	<u>(dd/mm/yy)</u>	<u>(dd/mm/yy)</u>	<u>(dd/mm/yy)</u>	<u>(dd/mm/yy)</u>	<u>(dd/mm/yy)</u>
Cross Reference to Contract/Project Reference  # _____					
Cross Reference to Contract/Project Reference  # _____					
Cross Reference to Contract/Project Reference  # _____					
Cross Reference to Contract/Project Reference  # _____					
Cross Reference to Contract/Project Reference  # _____					
Cross Reference to Contract/Project Reference  # _____					
Cross Reference to Contract/Project Reference  # _____					
Cross Reference to Contract/Project Reference  # _____					
Cross Reference to Contract/Project Reference  # _____					
<b>TOTAL</b>					

# **APPENDIX A3 TO ATTACHMENT 4.1**

## **BIDDERS RESPONSE TEMPLATE FOR SUPPLYING MULTIPLE RESOURCES WITHIN 90 DAYS**

**Bidder Name:** \_\_\_\_\_

**Bidder may use more than one (1) page if necessary.**

			<b>Named Resource(s)</b>	<b>Date Resource Started (dd/mm/yy)</b>	<b>Date Resource Left (dd/mm/yy)</b>
<b>1</b>	<b>Cross Reference to Contract/ Project Reference</b>	<b>1</b>			
		<b>2</b>			
		<b>3</b>			
		<b>4</b>			
		<b>5</b>			
		<b>6</b>			
		<b>7</b>			
		<b>8</b>			
		<b>9</b>			
		<b>10</b>			
		<b>11</b>			
		<b>12</b>			
		<b>13</b>			
		<b>14</b>			
		<b>15</b>			

**APPENDIX B TO ATTACHMENT 4.1**

**BIDDERS RESPONSE TEMPLATE FOR CONTRACT/PROJECT REFERENCE**

Bidder Name: _____ Bidder Contract/Project Reference #: _____				
<b>SECTION 1: CLIENT INFORMATION</b>				
Client Organization Name				
Client Contact Name				
Address				
Telephone				
Fax				
E-mail				
<b>SECTION 2: CONTRACT/PROJECT INFORMATION</b>				
Contract/Project Name				
Billing Value				
Start Date				
End Date				
Description of Requirement:				
<b>SECTION 3: BILLING DETAILS (RESOURCES) – Required for M1</b>				
Cross Reference to Resource Category and Level (as per table in M1)	Resource Name	Start Date (dd/mm/yy)	End Date (dd/mm/yy)	Number of Billable Days

#### SECTION 4: TASK DETAILS (RESOURCES) – Required for M1

[illegible]