



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

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

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

**Place du Portage, Phase III**

**Core 0B2 / Noyau 0B2**

**Gatineau**

**Québec**

**K1A 0S5**

**Bid Fax: (819) 997-9776**

**REQUEST FOR PROPOSAL  
DEMANDE DE PROPOSITION**

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

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

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

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

**Comments - Commentaires**

**Vendor/Firm Name and Address**

**Raison sociale et adresse du**

**fournisseur/de l'entrepreneur**

**Issuing Office - Bureau de distribution**

Informatics Professional Services - EL Division/Services  
professionnels en informatique - division EL

Terrasses de la Chaudière 4th Floor

10 Wellington Street

Gatineau

Québec

K1A 0S5

<b>Title - Sujet</b> Omnibus (BPA, B2B, CECP) IT Profess	
<b>Solicitation No. - N° de l'invitation</b> 47419-251689/A	<b>Date</b> 2018-08-22
<b>Client Reference No. - N° de référence du client</b> 1000341689	
<b>GETS Reference No. - N° de référence de SEAG</b> PW-\$\$EL-606-33760	
<b>File No. - N° de dossier</b> 606el.47419-251689	<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 2018-09-17</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> Mansour, Silvana	<b>Buyer Id - Id de l'acheteur</b> 606el
<b>Telephone No. - N° de téléphone</b> (613) 858-9935 ( )	<b>FAX No. - N° de FAX</b> ( ) -
<b>Destination - of Goods, Services, and Construction:</b> <b>Destination - des biens, services et construction:</b> CANADA BORDER SERVICES AGENCY 16TH FLOOR NORTH RIVER ROAD TW B OTTAWA Ontario K1A0L8 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>

**BID SOLICITATION  
FOR CONTRACTS AGAINST A SUPPLY ARRANGEMENT FOR TASK-  
BASED INFORMATICS PROFESSIONAL SERVICES (TBIPS)  
VARIOUS RESOURCE CATEGORIES - LEVELS 2 AND 3  
FOR  
CANADA BORDER SERVICES AGENCY**

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

Annex A - Statement of Work

Annex B - Basis of Payment

Annex C - Security Requirements Check List

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

-Attachment 3.1: Bid Submission Form

-Attachment 3.2: Electronic Payment Instruments

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

-Attachment 4.1: Bid Evaluation Criteria

-Attachment 4.2: Schedule of Payment

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

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

**BID SOLICITATION  
FOR CONTRACTS AGAINST A SUPPLY ARRANGEMENT FOR TASK-  
BASED INFORMATICS PROFESSIONAL SERVICES (TBIPS)  
VARIOUS RESOURCE CATEGORIES - LEVELS 2 AND 3  
FOR  
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**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, the Security Requirement Check List (SRCL) and any other annexes.

**1.2 Summary**

- (a) This bid solicitation is being issued to satisfy the requirement of Canada Border Services Agency (CBSA) (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 two contracts, each for two years plus two two-year irrevocable options allowing Canada to extend the term of the contracts.
- (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 across Canada, 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 to transmit their bid electronically. Bidders must refer to Part 2 entitled "Bidder Instructions, and Part 3 entitled "Bid Preparation Instructions", of the bid solicitation, for further information.
- (h) Only TBIPS SA Holders currently holding a TBIPS SA for Tier 2, in all the Resource Categories in the National Capital Region under the EN578-170432 series of SAs are eligible to compete. The TBIPS SA EN578-170432 is incorporated by reference and forms part of this bid solicitation, as though expressly set out in it, subject to any express terms and conditions contained in this bid solicitation. The capitalized terms not defined in this bid solicitation have the meaning given to them in the TBIPS SA.
- (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":

<b>TBIPS Reference</b>	<b>Resource Category</b>	<b>Level of Experience 2 or 3</b>	<b>Estimated Number of Resources</b>	<b>Estimated # of Days</b>
A.1	Application/Software Architect	3	1	660
A.11	Tester	2	1	660
A.14	Web Developer (Usability Expert)	3	1	660
A.7	Programmer/Analyst (CECP)	3	1	660
A.7	Programmer/Analyst (JAVA)	3	3	3300
A.7	Programmer/Analyst (MS Dynamics)	3	1	660
A.7	Programmer/Analyst (Prod Support)	2	4	2640
A.7	Programmer/Analyst (UI)	3	2	1760
A.8	System Analyst	3	1	660
B.14	Technical Writer	2	1	1320
I.7	Platform Analyst (B2B)	2	3	1980
I.7	Platform Analyst (Data Power)	2	2	2640
P.9	Project Manager	2	1	1320

### **1.3 Debriefings**

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

## PART 2 - BIDDER INSTRUCTIONS

### 2.1 Standard Instructions, Clauses and Conditions

- (a) All instructions, clauses and conditions identified in the bid solicitation by number, date and title are set out in the *Standard Acquisition Clauses and Conditions Manual* (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.
- (b) Bidders who submit a bid agree to be bound by the instructions, clauses and conditions of the bid solicitation and accept the clauses and conditions of the resulting contract(s).
- (c) The 2003 (2018-05-22) 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) Subsection 4 of Section 05, Submission of bids of Standard Instructions 2003 incorporated by reference above, is amended as follows:

Delete: 60 days

Insert: 180 days
- (f) Subsection 1 of Section 08, Transmission by facsimile or by epost Connect of Standard Instructions 2003 incorporated by reference above, is deleted and replaced by the following:
  - 1. Facsimile

Due to the nature of the bid solicitation, bids transmitted by facsimile or electronic mail to PWGSC will not be accepted.

### 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 **five** calendar days before the bid closing date. Enquiries received after that time may not be answered.
- (b) Bidders should reference as accurately as possible the numbered item of the bid solicitation to which the enquiry relates. Care should be taken by Bidders to explain each question in sufficient detail in order to enable Canada to provide an accurate answer. Technical enquiries that are of a proprietary nature must be clearly marked "proprietary" at each relevant item. Items identified as "proprietary" will be treated as such except where Canada determines that the enquiry is not of a proprietary nature. Canada may edit the questions or may request that the Bidder do so, so that the proprietary nature of the question is eliminated, and the enquiry can be answered with copies



to all Bidders. Enquiries not submitted in a form that can be distributed to all Bidders may not be answered by Canada.

## 2.4 Former Public Servant

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

(b) **Definitions**

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

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

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

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

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

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

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

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

By providing this information, Bidders agree that the successful Bidder's status, with respect to being a former public servant in receipt of a pension, will be reported on departmental websites as part of the published proactive disclosure reports in accordance with Contracting Policy

Notice: 2012-2 and the Guidelines on the Proactive Disclosure of Contracts.

(d) **Work Force Adjustment Directive**

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

If so, the Bidder must provide the following information:

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

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

**2.5 Applicable Laws**

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

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

**2.6 Improvement of Requirement During Solicitation Period**

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

**2.7 Volumetric Data**

The number of resources per category and their respective level of effort data has been provided to Bidders under article 1.2 (j) above to assist them in preparing their bids. The inclusion of this data in this bid solicitation does not represent a commitment by Canada that Canada's future usage of the service identified in this bid solicitation will be consistent with this data. It is provided purely for information purposes.

## PART 3 - BID PREPARATION INSTRUCTIONS

### 3.1 Bid Preparation Instructions

#### (a) 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. 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 – Four soft copies on a CD or USB key
  - (ii) Section II: Financial Bid – One soft copy on a SEPARATE 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) page size;
  - (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
  - (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 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.

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- (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 "Bidder's Response" 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 Similar Projects:** Where the bid must include a description of previous similar projects: (i) a project must have been completed by the Bidder itself (and cannot include the experience of any proposed subcontractor or any affiliate of the Bidder); (ii) a project must have been completed by the bid closing date; (iii) each project description must include, at minimum, the name and either the telephone number or e-mail address of a customer reference; and (iv) if more similar projects are provided than requested, Canada will decide in its discretion which projects will be evaluated. A project will be considered "similar" to the Work to be performed under any resulting contract if the project was for the performance of work that closely matches the descriptions of the Resource Categories identified in Annex A. Work will be considered to "closely match" if the work in the provided project is described in at least 50% of the points of responsibility listed in the description of the given Resource Category.
- (v) **For Proposed Resources:** The technical bid must include the number of résumés, 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 is requested to 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). If the Bidder has not included the copy of the results in its bid, the Contracting Authority will provide an opportunity to the Bidder to submit it during the evaluation period. If the Bidder has not submitted the copy of the results within 2 working days of the request by the Contracting Authority, its bid will be declared non-responsive.
- (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 is requested to 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). If the Bidder has not included the copy of the results in its bid, the Contracting Authority will provide an opportunity to the Bidder to submit it during the evaluation period. If the Bidder has not submitted the copy of the results within 2 working days of the request by the Contracting Authority, its bid will be declared non-responsive.

- (D) For work experience, PWGSC will not consider experience gained as part of an educational program, except for experience gained through a formal co-operative program at a post-secondary institution.
- (E) For any requirements that specify a particular time period (e.g., 2 years) of work experience, PWGSC will disregard any information about experience if the technical bid does not include the relevant dates (month and year) for the experience claimed (i.e., the start date and end date). Canada will evaluate only the duration that the resource actually worked on a project or projects (from his or her start date to end date), instead of the overall start and end date of a project or a combination of projects in which a resource has participated.
- (F) For work experience to be considered by Canada, the technical bid must not simply indicate the title of the individual's position, but must demonstrate that the resource has the required work experience by explaining the responsibilities and work performed by the individual while in that position. 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 [description of the services and, if applicable, description of 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.

### 3.3 Section II: Financial Bid

- (a) **Pricing:** Bidders must submit their financial bid in accordance with the Pricing Schedule provided in Attachment "4.2". The total amount of Applicable Taxes must be shown separately, if applicable. Unless otherwise indicated, bidders must include a single, firm, all-inclusive per diem rate quoted in Canadian dollars in each cell requiring an entry in the pricing tables.
- (b) **Variation in Resource Rates By Time Period:** For any given resource category, where the financial tables provided by Canada allow different firm rates to be charged for a resource category during different time periods:
- (i) the rate bid must not increase by more than 5% from one time period to the next, and
  - (ii) the rate bid for the same resource category during any subsequent time period must not be lower than the rate bid for the time period that includes the first month of the Initial Contract Period.
- (c) **Variation in Resource Rates By Level:** Where the financial tables provided by Canada allow different firm rates to be charged for different levels of experience within the same resource category and time period, for any such resource category and time period:
- (i) the rate bid for level three must be the same or higher than 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) **Blank Prices:** Bidders are requested to insert "\$0.00" for any item for which it does not intend to charge or for items that are already included in other prices set out in the tables. If the Bidder leaves any price blank, Canada will treat the price as "\$0.00" for evaluation purposes and may request that the Bidder confirm that the price is, in fact, \$0.00. No bidder will be permitted to add or change a price as part of this confirmation. Any bidder who does not confirm that the price for a blank item is \$0.00 will be declared non-responsive.
- (f) **Electronic Payment of Invoices – Bid:** If you are willing to accept payment of invoices by Electronic Payment Instruments, complete Attachment "3.2" Electronic Payment Instruments, to identify which ones are accepted. If Attachment "3.2" Electronic Payment Instruments is not completed, it will be considered as if Electronic Payment Instruments are not being accepted for payment of invoices. Acceptance of Electronic Payment Instruments will not be considered as an evaluation criterion.

### 3.4 Section III: Certifications

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



## PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

### 4.1 Evaluation Procedures

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

### 4.2 Technical Evaluation

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

(d) **Reference Checks:**

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

**4.3 Financial Evaluation**

- (a) The financial evaluation will be conducted using the firm per diem rates provided by the responsive bid(s).
- (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 CONTRACT PERIOD (2 Y)		OPTION PERIOD 1 (2 YEARS)		OPTION PERIOD 2 (2 YEARS)		TOTAL POINTS
	Y 1	Y 2	Y 1	Y 2	Y 1	Y 2	
Application/Software Architect – Level 3	110	110	110	110	110	110	660
Tester – Level 2	130	130	100	100	100	100	660
Web Developer (Usability Expert) – Level 3	110	110	110	110	110	110	660
Programmer/Analyst (CECP) – Level 3	100	100	120	120	110	110	660
Programmer/Analyst (JAVA) – Level 3	550	550	550	550	550	550	3300
Programmer/Analyst (MS Dynamics) – Level 3	110	110	110	110	110	110	660
Programmer/Analyst (Prod Support) – Level 2	440	440	440	440	440	440	2640
Programmer/Analyst (UI) – Level 3	290	290	390	390	200	200	1760
System Analyst – Level 3	110	110	110	110	110	110	660
Technical Writer – Level 2	220	220	220	220	220	220	1320
Platform Analyst (B2B) Level 2	330	330	330	330	330	330	1980

Platform Analyst (Data Power) – Level 2	440	440	440	440	440	440	2640
Project Manager – Level 2	220	220	200	200	240	240	1320
<b>TOTAL</b>	<b>3160</b>	<b>3160</b>	<b>3230</b>	<b>3230</b>	<b>3070</b>	<b>3070</b>	<b>18920</b>

- (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:							
Bidder 1:							
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)	
<b>STEP 3 - Financial Score:</b>	
<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.

<b>TABLE 3 - MAXIMUM POINTS ASSIGNED</b>							
RESOURCE CATEGORIES	INITIAL CONTRACT PERIOD (2 Y)		OPTION PERIOD 1 (2 YEARS)		OPTION PERIOD 2 (2 YEARS)		TOTAL POINTS
	Y 1	Y 2	Y 1	Y 2	Y 1	Y 2	
Application/Software Architect – Level 3	110	110	110	110	110	110	660
Tester – Level 2	130	130	100	100	100	100	660
Web Developer (Usability Expert) – Level 3	110	110	110	110	110	110	660
Programmer/Analyst (CECP) – Level 3	100	100	120	120	110	110	660
Programmer/Analyst (JAVA) – Level 3	550	550	550	550	550	550	3300
Programmer/Analyst (MS Dynamics) – Level 3	110	110	110	110	110	110	660
Programmer/Analyst (Prod Support) – Level 2	440	440	440	440	440	440	2640
Programmer/Analyst (UI) – Level 3	290	290	390	390	200	200	1760
System Analyst – Level 3	110	110	110	110	110	110	660
Technical Writer – Level 2	220	220	220	220	220	220	1320
Platform Analyst (B2B) Level 2	330	330	330	330	330	330	1980
Platform Analyst (Data Power) – Level 2	440	440	440	440	440	440	2640
Project Manager – Level 2	220	220	200	200	240	240	1320
<b>TOTAL</b>	<b>3160</b>	<b>3160</b>	<b>3230</b>	<b>3230</b>	<b>3070</b>	<b>3070</b>	<b>18920</b>

- (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 National Capital Region 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) the name, telephone number and, if available, e-mail address of a contact person at the customer who received each invoice submitted under (i), so that Canada may verify any information provided by the Bidder.

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

**(f) Formulae in Pricing Tables**

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

**4.4 Basis of Selection**

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

**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:

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

- (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:

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

assigned.

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

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) **Contract Funding Allocation:** Where more than one contract is awarded, each contract will be issued with an amount of funding specified in the article titled "Limitation of Expenditure" calculated based on the following:

- (i) when one contract is awarded, the amount of the Limitation of Expenditure will be determined at Canada's discretion;
- (ii) where two contracts are awarded, the amount of the Limitation of Expenditure of each contract will be determined in accordance with the following:
  - (A) the Bidder with the highest Total Bidder Score will receive 55% of the funding initially allocated; and
  - (B) the Bidder with the next highest Total Bidder Score will receive 45% of the funding initially allocated.
- (iii) where three contracts are awarded, the amount of the Limitation of Expenditure of each contract will be determined in accordance with the following:
  - (A) the Bidder with the highest Total Bidder Score will receive 45% of the funding initially allocated;
  - (B) the Bidder with the next highest Total Bidder Score will receive 30% of the funding initially allocated; and
  - (C) the Bidder with the next highest Total Bidder Score will receive 25% of the funding initially allocated.

- (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.



## **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 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**

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

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

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "FCP Limited Eligibility to Bid" list available at the bottom of the page of the Employment and Social Development Canada (ESDC) - Labour's website. (<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" list at the time of contract award.

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

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

#### **(b) 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.

**(c) 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.

**(d) Submission of Only One Bid**

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

## PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS

### 6.1 Security Requirement

- (a) Before award of a contract, the following conditions must be met:
  - (i) the Bidder must hold a valid organization security clearance as indicated in Part 7 - Resulting Contract Clauses; and
  - (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 ADDITIONAL CBSA SECURITY REQUIREMENT:

- (a) The CBSA, will conduct its own personnel Reliability Status assessment on the recommended Bidder and its personnel as per the Treasury Board Secretariat of Canada's (TBS) "Security and Contracting Management Standard" and the "Policy on Government Security – Personnel Security Standard", irrespective of whether such assessment has already been conducted under any such policies. Reliability Status assessment conducted by the CBSA will include a credit check performed by an authorized secure official with CBSA's "Personnel Security Screening Section"(PSSS), which is independent of the Public Works and Government Services Canada's (PWGSC), "Canadian Industrial Security Directorate" (CISD) and the "International Industrial Security Directorate" (IISD).
- (b) For each proposed resource, the Bidder should submit a complete signed original TBS 330-23 Form – Personnel Screening Consent and Authorization (<https://www.tbs-sct.gc.ca/tbsf-fsct/330-23-eng.asp>) with their Bid. If not provided with the bid, the Bidder must provide it upon request and in the timeframe stated by the Contracting Authority (prior to Contract Award).
- (c) Until the credit check, fingerprinting and all other security screening processes required by this Request for Proposal have been completed and the recommended Bidder and the proposed personnel is deemed suitable by the CBSA, no contract will be awarded and the recommended Bidder personnel will not be permitted access to Protected / Classified information or assets, and will not be permitted to enter sites where such information or assets are kept.
- (d) In the event the recommended Bidder is not deemed suitable following the security screening process required by the CBSA, the said recommended Bidder's bid will be deemed non-compliant and the next ranked Bidder will be contacted. If only one bid was obtained and the recommended Bidder does not meet the security requirement, then, the Contracting Authority will determine the next steps in order to ensure all requirements are met.

\*Fees are applicable. Fingerprinting will be at the Bidder's cost.

- (e) In the case of a joint venture bidder, each member of the joint venture must meet the security requirements.

### **6.3 Financial Capability**

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

## PART 7 - RESULTING CONTRACT CLAUSES

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

### 7.1 Requirement

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

### 7.2 Task Authorization

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

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- (iv) The contractor sent a draft TA will have the time set out further below under the sub-paragraph entitled "Contractor's Response to Draft Task Authorization" to respond to the Contracting Authority.
  - (v) If the contractor to whom the draft TA is first sent either fails to respond on time or confirms in writing that it refuses to perform the task, the draft TA will then be forwarded to the contractor with the next-greatest balance remaining of allocated funding. In the event that Canada determines the proposed resource(s) does not meet the minimum experience or other requirements of the categories identified in the draft TA, Canada will send the draft TA to the contractor with the next greatest balance remaining of allocation funding.
  - (vi) The process of sending out a draft TA to the contractor with the greatest balance remaining will continue until Canada either cancels the requirement for the task or it has been validly issued to one of the contractors. If none of the contractors can perform the task (in accordance with all the terms and conditions of this series of contracts), Canada may acquire the required Work by other means.
  - (vii) Once the Task Authorization is issued, for the purposes of calculations for the allocation of Task Authorizations, the value of that Task Authorization, including any applicable options under that TA (and the value of any subsequent amendment to that TA) will be subtracted from the funding allocated to that contractor.
  - (viii) When the next requirement to perform a task is identified, it will be sent to the contractor with the greatest balance remaining of allocated funding. If more than one contractor has the greatest balance remaining of allocated funds (i.e., several contractors have equal amounts of allocated funding), the draft TA will be sent to the contractor among them that ranked highest under the bid solicitation evaluation process. If any contract in this series of contracts is amended to add funding for Task Authorizations, all the remaining contracts (i.e., all contracts that have not previously been terminated) will be amended to add funding in amounts proportionate to the funding initially provided under each contract for Task Authorizations (e.g., if three contracts were awarded with \$2M, \$1M and \$750,000 in funding for Task Authorizations respectively, and \$200,000 is added to the first contract, then \$100,000 will be added to the second contract and \$75,000 will be added to the third).
  - (c) **Assessment of Resources Proposed at TA Stage:** Processes for issuing, responding to and assessing Task Authorizations are further detailed in Appendices A,B, C and D of Annex A.
  - (d) **Form and Content of draft Task Authorization:**
    - (i) The Strategic Procurement and Material Management Division (SPMMD) Representative will provide the Contractor with a description of the task in a draft Task Authorization using the form specified in Appendix B of 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 details of any financial coding to be used;
      - (D) the categories of resources and the number required;
      - (E) a description of the work for the task outlining the activities to be performed and identifying any deliverables (such as reports);
      - (F) the start and completion dates;
      - (G) milestone dates for deliverables and payments (if applicable);
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- (H) the number of person-days of effort required;
  - (I) whether the work requires on-site activities and the location;
  - (J) the language profile of the resources required;
  - (K) the level of security clearance required of resources;
  - (L) the price payable to the Contractor for performing the task, with an indication of whether it is a firm price or a maximum TA price (and, for maximum price task authorizations, the TA must indicate how the final amount payable will be determined; where the TA does not indicate how the final amount payable will be determined, the amount payable is the amount, up to the maximum, that the Contractor demonstrates was actually worked on the project, by submitting time sheets filled in at the time of the work by the individual resources to support the charges); and
  - (M) any other constraints that might affect the completion of the task.
- (e) **Contractor's Response to Draft Task Authorization:** The Contractor must provide to the SPMMD Representative, within 2 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 the proposed resource(s) to perform the task 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.
- (f) **Task Authorization Limit and Authorities for Validly Issuing Task Authorizations:**  
To be validly issued, a TA must include the following signatures:
- (i) for any TA, inclusive of revisions, with a value less than or equal to \$300,000.00 (excluding Applicable Taxes), the TA must be signed by the SPMMD Representative; and
  - (ii) for any TA with a value greater than this amount, a TA must be signed by the SPMMD Representative and the Contracting Authority.
- Any TA that does not bear the appropriate signature(s) is not validly issued by Canada. Any work performed by the Contractor without receiving a validly issued TA is done at the Contractor's own risk. If the Contractor receives a TA that is not appropriately signed, the Contractor must notify the Contracting Authority. By providing written notice to the Contractor, the Contracting Authority may suspend the Client's ability to issue TA's at any time, or reduce the dollar value threshold described in sub-article (i) above; any suspension or reduction notice is effective upon receipt.
- (g) **Periodic Usage Reports:**
- (i) The Contractor must compile and maintain records on its provision of services to the federal government under Task Authorizations validly issued under the Contract. The Contractor must provide this data to Canada in accordance with the reporting requirements detailed below. If some data is not available, the reason must be indicated. If services are not provided during a given period, the Contractor must still provide a "NIL" report. The data must be submitted on a quarterly basis to the Contracting Authority. From time to time, the Contracting Authority may also require an interim report during a reporting period.
  - (ii) The quarterly periods are defined as follows:
    - (A) 1<sup>st</sup> quarter: April 1 to June 30;
    - (B) 2<sup>nd</sup> quarter: July 1 to September 30;

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

### 7.3 Minimum Work Guarantee

(a) In this clause,

(i) **"Maximum Contract Value"** means the amount specified in the **"Limitation of Expenditure"** clause set out in the Contract; and

(ii) **"Minimum Contract Value"** means \$20,000.00.



- (b) Canada's obligation under the Contract is to request Work in the amount of the Minimum Contract Value or, at Canada's option, to pay the Contractor at the end of the Contract in accordance with sub-article (c), subject to sub-article (d). In consideration of such obligation, the Contractor agrees to stand in readiness throughout the Contract Period to perform the Work described in the Contract. Canada's maximum liability for work performed under the Contract must not exceed the Maximum Contract Value, unless an increase is authorized in writing by the Contracting Authority.
- (c) In the event that Canada does not request work in the amount of the Minimum Contract Value during the Contract Period, Canada must pay the Contractor the difference between the Minimum Contract Value and the total cost of the Work requested.
- (d) Canada will have no obligation to the Contractor under this article if Canada terminates the entire Contract
  - (i) for default;
  - (ii) for convenience as a result of any decision or recommendation of a tribunal or court that the contract be cancelled, re-tendered or awarded to another supplier; or
  - (iii) for convenience within 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 (2018/06/21), General Conditions - Higher Complexity - Services, apply to and form part of the Contract.

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

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

(b) **Supplemental General Conditions:**

The following Supplemental General Conditions:

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

apply to and form part of the Contract.

## 7.5 Security Requirement

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

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 **RELIABILITY STATUS, CONFIDENTIAL** or **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).

### ADDITIONAL CBSA SECURITY REQUIREMENT:

- (a) Additionally, resources may be assessed for Reliability or Secret Status by the CBSA prior to commencing the Work, and from time to time throughout the Contract Period. The assessment conducted by the CBSA will include a credit check performed by an authorized security official with the CBSA's "Personnel Security Screening Section" (PSSS), fingerprinting and any other security screening processes required. Upon request of the Technical Authority, in respect of any given resource, the Contractor must submit:
  - (i) the current level of security clearance granted or approved by CISD/PWGSC; and
  - (ii) a completed signed TBS 330-23 Form - Personnel Screening, Consent and Authorization Form (<http://www.tbs-sct.gc.ca/tbsf-fsct/330-23-eng.pdf>).
- (b) In the event a resource does not pass the PSSS assessment, Canada may immediately, and without further notice, terminate the Contract for default in accordance with the General Conditions.

## 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 two years later; and
  - (ii) The period during which the Contract is extended, if Canada chooses to exercise any options set out in the Contract.
- (b) **Option to Extend the Contract:**
  - (i) The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to two additional two-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: Silvana Mansour

Title: Supply Specialist

Public Works and Government Services Canada

Acquisitions Branch

Directorate: Professional Services Procurement Directorate

Address: Terrasses de la Chaudière, 10 Wellington St., Gatineau, Québec

Telephone: (613) 858-9935

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

### **(c) Strategic Procurement and Material Management Division (SPMMD) representative**

The SPMMD representative for the Contract is:

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

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

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

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

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

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

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

The SPMMD representative is the representative of the department or agency for issuance of Task Authorization on behalf of the Technical authority.

(d) **Contractor's Representative**

*[To Be Determined]*

**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 including work performed outside standard hours or on-call work, 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 including work performed outside standard hours or on-call work, in accordance with a validly issued Task Authorization, Canada will pay the Contractor the firm price set out in the Task Authorization (based on the firm, all-inclusive per diem rates set out in Annex B), Applicable Taxes extra.
- (iii) **Travel and Living Expenses – National Joint Council Travel Directive**  
The Contractor will be reimbursed its authorized travel and living expenses reasonably and properly incurred in the performance of the Work, at cost, without any allowance for profit and/or administrative overhead, in accordance with the meal and private vehicle expenses provided in Appendices B, C and D of the National Joint Council Travel Directive and with the other provisions of the directive referring to “travellers”, rather than those referring to “employees”. All travel must have the prior authorization of the Technical Authority. The Contractor will be paid for actual time spent travelling in accordance with the firm per diem rate set out in Annex B which per diem is based on a 7.5-hour workday.
- (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 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 excluded and Applicable Taxes are included
- (ii) No increase in the total liability of Canada will be authorized or paid to the Contractor unless an increase has been approved, in writing, by the Contracting Authority.
- (iii) The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:
  - (A) when it is 75 percent committed, or
  - (B) 4 months before the contract expiry date, or
  - (C) As soon as the Contractor considers that the sum is inadequate for the completion of the Work required in all authorized TAs, inclusive of any revisions, whichever comes first.
- (iv) If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority a written estimate for the additional funds required. Providing this information does not increase Canada's liability.

(c) **Method of Payment - Monthly Payment**

Canada will pay the Contractor on a monthly basis for work performed during the month covered by the invoice in accordance with the payment provisions of the Contract if:

- (i) an accurate and complete invoice and any other documents required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- (ii) all such documents have been verified by Canada; and
- (iii) the Work performed has been accepted by Canada.

(d) **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.

(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:

- (i) an accurate and complete invoice and any other documents required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- (ii) all such documents have been verified by Canada; and
- (iii) the Work delivered has been accepted by Canada.

**Note to Bidders:** If applicable, the Electronic Payment Instrument(s) indicated by the Bidder in Attachment "3.2" will be included in any resulting contract.

(f) **Electronic Payment of Invoices – Contract**

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

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

(g) **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.

(h) **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 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.
- (i) **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 one copy of each invoice to the Technical Authority's paying office (CBSA Finance), and a copy to the Contracting Authority.
- (e) All invoices must be submitted by e-mail on a monthly basis at the following address:

**Email:** [vendors-fournisseurs@cbsa-asfc.gc.ca](mailto:vendors-fournisseurs@cbsa-asfc.gc.ca)

This email address is to be used for submitting invoices and for payment status inquiries. Only legible electronic (PDF, Word, Excel) files will be accepted; all others will be returned.

- (f) Direct Deposit:

The Government of Canada will soon be phasing out federal government cheques; Businesses that supply goods and services to the Government of Canada are strongly encouraged to enrol in direct deposit for account payable.

The Contractor is to contact [ca-ci@cbsa-asfc.gc.ca](mailto:ca-ci@cbsa-asfc.gc.ca) to obtain additional information regarding direct deposit enrolment process and the steps to be followed.

**IMPORTANT NOTE: If the Contractor omits any required information pertaining to payment processing from the invoice, the invoice will be returned at the discretion of the CBSA and will not be paid until valid payment referencing is provided.**

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

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

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

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

#### **7.13 Applicable Laws**

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

#### **7.14 Priority of Documents**

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

- (a) these Articles of Agreement, including any individual SACC clauses incorporated by reference in these Articles of Agreement;
- (b) Supplemental General Conditions, in the following order:
  - (i) 4002 (2010/08/16), Supplemental General Conditions - Software Development or Modification Services;
  - (ii) 4006 (2010/08/16), Supplemental General Conditions - Contractor to Own Intellectual Property Rights in Foreground Information;



- (c) General Conditions 2035 (2018-06-21), Higher Complexity - Services;
- (d) Annex A, Statement of Work - Annex A 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;
- (e) Annex B, Basis of Payment;
- (f) Annex C, Security Requirements Check List;
- (g) the validly issued Task Authorizations and any required certifications (including all of their annexes, if any); and
- (h) the Contractor's bid dated \_\_\_\_\_ (insert date of bid) (if the bid was clarified or amended, insert the time of contract award), as clarified on \_\_\_\_\_ "or" as amended \_\_\_\_\_ (insert date(s) of clarification(s) or amendment(s) if applicable.)

#### **7.15 Foreign Nationals (Canadian Contractor)**

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

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

#### **7.16 Foreign Nationals (Foreign Contractor)**

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

#### **7.17 Insurance Requirements**

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

- (i) The Contractor must comply with the insurance requirements specified in this Article. The Contractor must maintain the required insurance coverage for the duration of the Contract. Compliance with the insurance requirements does not release the Contractor from or reduce its liability under the Contract.
- (ii) The Contractor is responsible for deciding if additional insurance coverage is necessary to fulfill its obligation under the Contract and to ensure compliance with any applicable law. Any additional insurance coverage is at the Contractor's expense, and for its own benefit and protection.
- (iii) The Contractor should forward to the Contracting Authority within 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. Further, the policy must apply to each Insured in the same manner and to the same extent as if a separate policy had been issued to each.
  - (F) Blanket Contractual Liability: The policy must, on a blanket basis or by specific reference to the Contract, extend to assumed liabilities with respect to contractual provisions.
  - (G) Employees and, if applicable, Volunteers must be included as Additional Insured.
  - (H) Employers' Liability (or confirmation that all employees are covered by Worker's compensation (WSIB) or similar program)
  - (I) Broad Form Property Damage including Completed Operations: Expands the Property Damage coverage to include certain losses that would otherwise be excluded by the standard care, custody or control exclusion found in a standard policy.
  - (J) Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of policy cancellation.
  - (K) If the policy is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.
  - (L) Owners' or Contractors' Protective Liability: Covers the damages that the Contractor becomes legally obligated to pay arising out of the operations of a subcontractor.
  - (M) Advertising Injury: While not limited to, the endorsement must include coverage for piracy or misappropriation of ideas, or infringement of copyright, trademark, title or slogan.

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

- (i) The Contractor must obtain Errors and Omissions Liability (a.k.a. Professional Liability) insurance, and maintain it in force throughout the duration of the Contract, in an amount

usual for a contract of this nature but for not less than \$1,000,000 per loss and in the annual aggregate, inclusive of defence costs.

- (ii) If the Professional Liability insurance is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.

- (iii) The following endorsement must be included:

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

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

- (a) This section applies despite any other provision of the Contract and replaces the section of the general conditions entitled "Liability". Any reference in this section to damages caused by the Contractor also includes damages caused by its employees, as well as its subcontractors, agents, and representatives, and any of their employees. This section applies regardless of whether the claim is based in contract, tort, or another cause of action. The Contractor is not liable to Canada with respect to the performance of or failure to perform the Contract, except as described in this section and in any section of the Contract pre-establishing any liquidated damages. The Contractor is only liable for indirect, special or consequential damages to the extent described in this Article, even if it has been made aware of the potential for those damages.

- (b) **First Party Liability:**

- (i) The Contractor is fully liable for all damages to Canada, including indirect, special or consequential damages, caused by the Contractor's performance or failure to perform the Contract that relate to:
  - (A) any infringement of intellectual property rights to the extent the Contractor breaches the section of the General Conditions entitled "Intellectual Property Infringement and Royalties";
  - (B) physical injury, including death.
- (ii) The Contractor is liable for all direct damages caused by the Contractor's performance or failure to perform the Contract affecting real or tangible personal property owned, possessed, or occupied by Canada.
- (iii) Each of the Parties is liable for all direct damages resulting from 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 covered by this Section, the Contractor is only liable for reimbursing Canada for the Contractor's portion of those damages that Canada is required by a court to pay to a third party as a result of joint and several liability that relate to the infringement of a third party's intellectual property rights; physical injury of a third party, including death; damages affecting a third party's real or tangible personal property; liens or encumbrances on any portion of the Work; or breach of confidentiality.
- (iii) The Parties are only liable to one another for damages to third parties to the extent described in this Sub-article (c).

**7.19 Joint Venture Contractor**

- (a) The Contractor confirms that the name of the joint venture is [REDACTED] and that it is comprised of the following members: *[list all the joint venture members named in the Contractor's original bid]*.
- (b) With respect to the relationship among the members of the joint venture Contractor, each member agrees, represents and warrants (as applicable) that:
  - (i) [REDACTED] has been appointed as the "representative member" of the joint venture Contractor and has fully authority to act as agent for each member regarding all matters relating to the Contract;
  - (ii) by giving notice to the representative member, Canada will be considered to have given notice to all the members of the joint venture Contractor; and
  - (iii) all payments made by Canada to the representative member will act as a release by all the members.

- (c) All the members agree that Canada may terminate the Contract in its discretion if there is a dispute among the members that, in Canada's opinion, affects the performance of the Work in any way.
- (d) All the members are jointly and severally or solidarily liable for the performance of the entire Contract.
- (e) The Contractor acknowledges that any change in the membership of the joint venture (i.e., a change in the number of members or the substitution of another legal entity for an existing member) constitutes an assignment and is subject to the assignment provisions of the General Conditions.
- (f) The Contractor acknowledges that all security and controlled goods requirements in the Contract, if any, apply to each member of the joint venture Contractor.

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

## **7.20 Professional Services - General**

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

### **Replacement of Specific Individuals**

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

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

Technical Authority. The replacement must have qualifications and experience that are similar or exceed those obtained for the original resource and be acceptable to Canada. Upon assessment of the replacement, Canada may accept the replacement, exercise the rights in (ii) (A) above, or require another replacement in accordance with this sub-article (c).

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

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

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

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

#### **7.22 Reporting Requirements**

The Contractor must provide status reports and any other reports as and when requested by the Technical Authority through the issuance of a Task Authorization. The Contractor must also provide the Periodic Task Authorization Usage Reports to the Contracting Authority on a quarterly basis in accordance with article 7.2 (g)

#### **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 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 Implementation**

- (a) **Implementation of Professional Services:** If similar professional services are currently being provided by another supplier or by Canada's own personnel, the Contractor is responsible for ensuring that the transition to the professional services it provides under the Contract is completed in a way that does not disrupt Canada's operations or users, and does not result in any interim degradation to the timeliness or quality of service. The Contractor is solely responsible for any additional training required by its resources to perform the Work, and time

spent by resources on that training or becoming familiar with the Client's environment must not be charged to Canada. The transition will be considered complete once the Contractor has demonstrated, to the satisfaction of the Technical Authority that it is ready and able to carry out the Work. The transition must be complete by no later than 10 working days after the Contract is awarded. All costs associated with establishing itself to provide the professional services are the responsibility of the Contractor.

## **7.25 Identification Protocol Responsibilities**

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

- (a) Contractor Representatives who attend a Government of Canada meeting (whether internal or external to Canada's offices) must identify themselves as Contractor Representatives prior to the commencement of the meeting, to ensure that each meeting participant is aware of the fact that the individual is not an employee of the Government of Canada;
- (b) During the performance of any Work at a Government of Canada site, each Contractor Representative must be clearly identified at all times as being a Contractor Representative; and
- (c) If a Contractor Representative requires the use of the Government of Canada's e-mail system in the performance of the Work, then the individual must clearly identify him or herself as an agent or subcontractor of the Contractor in all electronic mail in the signature block as well as under "Properties." This identification protocol must also be used in all other correspondence, communication, and documentation.
- (d) If Canada determines that the Contractor is in breach of any obligation stated in this Article, upon written notice from Canada the Contractor must submit a written action plan describing corrective measures it will implement to eliminate the recurrence of the problem. The Contractor will have five working days to deliver the action plan to the Client and the Contracting Authority, and twenty working days to rectify the underlying problem.
- (e) In addition to any other rights it has under the Contract, Canada may terminate the Contract for default if the corrective measures required of the Contractor described above are not met.

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## **ANNEX A**

### **STATEMENT OF WORK**

#### **1. INTRODUCTION**

Canada Border Services Agency (CBSA) is responsible for providing integrated border services that support national security and public safety priorities and facilitate the free flow of persons and goods.

Under this mandate, CBSA enables effective and efficient administration and operation of border management and its internal operation through the design, development, implementation and ongoing support of innovative tools and solutions.

The Information, Science and Technology Branch (ISTB) provides technology leadership of business applications in support of CBSA's strategic priorities including administrative and corporate programs of the Agency. It ensures effective delivery of technology products, applications and services to meet business needs, while ensuring integrity and availability of all technology infrastructures.

Organizational readiness and stability allows the Agency to achieve its mandate, deliver on its priorities and adapt to an evolving business environment. Investing in a modern IT infrastructure, introducing innovative productivity tools and administrative applications allows CBSA to maintain a high standard of service delivery and improve efficiencies.

To that end, the Common and Corporate Systems Division (CCSD) is responsible for the development, production support and maintenance of innovative business applications. These include mission critical and high-availability systems as well as applications that serve as common components for internal and external stakeholders. The division is also responsible for the design, development and delivery of enterprise and corporate solutions in support of CBSA's mandate and priorities.

Key divisional activities include:

- Providing the planning, analysis, design, development, and implementation of enterprise and corporate applications in support of common and corporate programs and administrative functions across the Agency;
- Promote reusability through established CBSA best practices and standards by meeting the overlapping needs of the various IT projects, thus eliminating the need for each initiative or project to fund and build these common components;
- Serving as the center of expertise for all IT development projects related to common and corporate business programs, functions and activities;
- Serving as Technical Leaders for common and corporate application releases and upgrades which includes developing System Use Cases, Detailed Design Documents, participating in System Engineering Method (SEM) reviews and other development related documentation;
- Prioritizing and promoting IT development initiatives with end-users and other IT management areas;
- Coordinating the procurement, integration and ongoing support of commercial off-the-



shelf (COTS) software products and IT hardware needed to meet the business requirements;

- Providing maintenance and production support for a wide-range of common and corporate applications.

The Common and Corporate Systems Division is composed of four sections. The mandate of each section is explained below.

#### Electronic Data Warehouse and Business Intelligence (EDW & BI)

The EDW and BI section is responsible for the development of Business Intelligence and Mining solutions of the Canada Border Services Agency's data warehouse and all its components. Key activities include, analysis, design and acquisition of source data for reporting purposes. The data warehouse is the main source of information for report generation, analysis, and presentation through ad-hoc reports, portals, and executive dashboards.

#### Business Process Automation (BPA), Business to Business (B2B) Integration and Customs Electronic Commerce Platform (CECP)

The BPA, B2B integration and CECP section is comprised of four units.

The B2Bi and CECP units consist of the B2Bi development team (supporting B2B services), the CECP development team (supporting the development of the CECP set of applications), and the B2Bi support team (providing client support of both the B2B and CECP applications and services). These units specialize in application development of enterprise-level Web and Enterprise Data Exchange based services (EDI). These services provide the capability to manage data exchange between external organizations, and CBSA internal applications and services. This team maintains critical COTS and custom products that directly support enterprise applications.

As for the Business Process Automation (BPA) team, they specialize in software development and maintenance of various line-of-business critical and non-critical COTS and custom applications that meet the specific needs of our corporate clients.

#### Administrative and Corporate Applications

The mandate of the Administrative and Corporate Application section is to lead the design, development, integration and ongoing support of the administrative and corporate applications for a multitude of clients. These systems provide direct support of key and common functions performed across every GoC departments and agencies such as, ministerial correspondence, access to information, communication services, property management, document and records management, etc. These include both customized and commercial off-the-shelf software products.

### SAP Technical Competency Centre (SAP TCC)

The SAP Technical Competency Centre is composed of subject matter experts responsible for the development and integration of SAP-based solutions for the Agency. This includes direction, technical advice and ongoing support of SAP-based applications and underlying technical infrastructure. The SAP TCC is also responsible for maintaining the operational aspects needed for the applications to function properly and also has responsibility for the design, testing and improvement of applications that form part of SAP application portfolio.

### Line-of-Business Applications and Tools

The Common and Corporate Systems Division (CCSD) is responsible for the development, integration, implementation and ongoing support of numerous line-of-business applications and systems. A list of current applications including commercial-off-the-shelf software products with an indication of the primary development languages is provided below:

<b>Applications / Systems / COTS</b>	<b>Development Languages</b>
Access to Information	COTS
Accounts Receivable Ledger	ABAP
AIS Help Desk	ASP
ANCILE uPerform (SAP Productivity Pak)	COTS
Apollo - Electronic Document and Records Management System (GCDOCS)	COTS
Articulate Storyline	COTS
Automated Personal Security Screening	MS Access, VBA
Business Warehouse	ABAP
CA Clarity	COTS
CBSA Intranet	ASP, HTML, JAVASCRIPT, XML
CBSA Wiki	COTS
Central Course Registration System	ASP
Communications Portal	ASP
Consolidated Management Reporting System	Cognos Framework Manager V10.2
Consolidated Management Reporting System Enterprise Data Warehouse	Cognos Framework Manager V10.2
Correspondence Tracking System	COTS
Customs Electronic Commerce Platform	Java, C++ , Visual Basic 6.0, Various Scripting Languages, PERL, DB2 Stored Procedures, Spring Framework
Customs Electronic Commerce Platform - Query & Data Viewing Utility	Microsoft Visual Basic V6, DB2 Stored Procedures
Customs Interest Calculation Program	Java 1.6 / Spring 1.2 / HTML / Javascript / CSS
Customs Internet Gateway	Java

Customs Officer Scheduling System	MS Access 2000
Customs Query	Java
Directory of Offices	Java, JavaScript
Enforcement Library	Smalltalk
Global Case Management System (GCMS) Printing Solution	N/A
Global Query Component	Java
Incident Management Reporting System	Java 6, Flex 3.4.1, Adobe LiveCycle ES4
Integrated Border Query	Java
Integrated Customs Enforcement System	PowerScript
Intelligence Management System	Smalltalk
Interdiction and Border Alerting Service	Java
Internal Placement Process	Java 1.6 / Hibernate 4.1 / Spring 3.1 / HTML / Javascript
Marine Domain Awareness (MDA) Watchkeeper	COTS
MEI-B2B - Administration and Configuration Web Application	Java, Jersey
MEI-B2B - Electronic Data Interchange (EDI) Gateway	BPML, Java
MEI-B2B - Tracking Service	Java
MEI-B2B - Web Services Gateway	Java
Occurrence Reporting System	Smalltalk
Personnel Security Screening System	Java 1.7, Spring 4.1, Hibernate 4.2
Question Mark	COTS
Recourse Content Management System – Enforcement	Java 6, Flex 4.6
Recourse Content Management System – Trade	Java 6, Flex 4.6, Adobe LiveCycle, Cognos Reporting
Revenue Ledger	ABAP
Salary Forecasting System	COTS
SAP Process Orchestrator	Java
SAP Solution Manager	ABAP
System Access Management	ASP, JavaScript, CSS
Teammate Audit Management	COTS
Trade Compliance Management System	Java
Virtual Learning Environment	COTS
Work Order Database	ASP, JavaScript, CSS

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### Existing and Upcoming Projects and Initiatives

Besides the ongoing maintenance and operational support of existing line-of-business applications and systems, CCSD is currently leading multiple projects to further enhance and deliver new capabilities and services across the Agency. These include but are not limited to:

- a)** Development and implementation of a Port of Entry Management System (POEMS) designed to produce daily shift schedules. The application will also allow front line management to track daily events, disseminate administrative information and broadcast the daily schedule.
- b)** Replacement and enhancement of the existing Recourse Content Management System (RCMS) Trade, RCMS Enforcement and Incident Management Reporting System (IMRS) due to an urgent need to change front-end interface technology.
- c)** Integration, implementation and ongoing support of a COTS software product that will accept data from the Public Service Commission's GC Jobs and permit CBSA staffing employees to manage selection and appointment processes. This project is referred to the HR Integrated Staffing Solution (ISS).
- d)** Integration of the Accounts Receivable Ledger (ARL) and the Revenue Ledger systems into the CBSA Assessment and Revenue Management (CARM) application.
- e)** Integration of B2B into the CBSA Assessment and Revenue Management (CARM) application.
- f)** CBSA is working on a Planning, Forecasting and Budgeting initiative based on a SAP Business Warehouse (BW), Business Planning & Consolidation and Business Objects platform extracting Corporate Administration System (CAS) data from Canada Revenue Agency (CRA) and also from Account Receivable Ledger (ARL). The scope of the project was expanded to include additional CRA CAS-HR and CBSA Salary Forecasting System data as well as providing extended reporting capability. The project was amended to include construction and migration of the SAP BW information assets and applications to an appliance-based SAP-HANA database.
- g)** Development and implementation of any B2B and/or EDW BI work that could be required for the Passenger Protect Program. The Passenger Protect Program works with air carriers to screen commercial passenger flights to, from and within Canada in order to protect safety at home and abroad.

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## Technical Environments

### a) SAP Enterprise Resource Planning (ERP)

- The SAP **Enterprise Central Component (ECC)** technical environment is an Enterprise level, 3 tiered ABAP version 6.00 EHP5 hosted on Windows 2008 server R2 and Sybase database. The system configuration is based on a 6 server landscape including a Sandbox, Development, Quality Assurance, Volume, Training and Production systems.
- The SAP Process Orchestration technical environment is Enterprise level, 3 tiered Java hosted on Windows 2008 server R2 with Sybase database.
- The SAP Solution Manager technical environment is Enterprise level, 3 tiered ABAP and Java hosted on Windows 2008 server R2 with Sybase database.
- The SAP Business Warehouse (BW) technical environment is Enterprise level 3-tier ABAP hosted on Windows 2008 server R2 with Sybase database. The system configuration is based on a 4 server landscape including a Sandbox, Development, Quality Assurance and Production system. The components are: SAP\_BW, BI\_CONT and BPC with ICM using HTTP/HTTPS connectivity through SAP Web Dispatcher.
- Other technical characteristics:
  - SAP BASIS
  - SAP HANA
  - SAP PSCD
  - SAP FI
  - SAP Process Orchestration (SAP PO)
  - SAP NetWeaver Development Infrastructure
  - SAP NetWeaver Development Studio
  - SAP Solution Manager
  - SAP BusinessObjects
  - SAP Security Authorizations
  - SAP NetWeaver BI
  - SAP Human Capital Management (HCM)
  - SAP Redwood Scheduler
  - ANCILE uPerform (SAP Productivity Pak)
  - PowerShell scripting
  - Linux
  - Unix

### b) Business to Business (B2B) and CECF

The Canada Border Services Agency (CBSA) processes an immense number of electronic information with external Trading partners as part of its mandate. The Common & Corporate Services Division (CCSD) implemented Multi-Enterprise Integration (MEI) also known as Business-to-Business integration solutions (B2B). B2B integration is an enterprise capability meant to facilitate the capture and sharing of electronic information exchanged between CBSA, Participating Government Agencies (PGAs) / Other Government Departments (OGDs), and private enterprise upon a common centralized integration model. The Business to Business foundational components providing the CBSA with a technological communications hub that allows IT systems belonging to one organization to

communicate with the systems of another organization, while minimizing costly changes for either system. The B2B/CECP technical environment consists of:

- Extensible Markup Language (XML)
  - XML Schema Definition (XSD)
  - Document Type Definition (DTD)
  - XPATH
  - XSLT
  - Xquery
- Java
  - IBM Rational Software Architect:
  - Eclipse 3.x and 4.x IDE
  - J2EE (WebSphere)
  - JMS (WebsphereMQ)
  - WebSphere Application Server (WAS)
  - JDBC and Hibernate
  - Spring and Spring Integration Framework
  - Jersey
  - ANT, Apache Maven, SVN, git
  - IBM DataPower
  - GatewayScript
  - Multi-protocol Adapters
  - IBM Transformation Extender Maps
  - IBM Integration Bus (IIB)
- Communication Protocols
  - File Transfer Protocol (FTP)
  - Hypertext Transfer Protocol (HTTP)
  - Simple Mail Transfer Protocol (SMTP)
  - Managed File Transfer including PWGSC's MSFT solution
- Service Oriented Architecture (SOA)
  - Simple Object Access Protocol (SOAP)
  - Web Service, Representational State Transfer (REST)
  - WS-Security
  - SSL, TLS
- Electronic Data Interchange (EDI)
  - ANSI X.12
  - EDIFACT
  - IATA Standards
  - World Customs Organization (WCO) Data Model
  - Financial, Transportation data models
- Interoperability & Integration
  - Web Services standards – SOAP and REST
  - Web Services Definition Language (WSDL)
  - Business Rules Management Solution
  - Enterprise Service Bus
  - Encryption/Decryption

- CA-Idm/SM
- Request/Response

c) Business Process Automation (BPA)

- Java
- Hibernate 4.1
- Spring 3.1
- Spring Integration Framework
- HTML5
- JavaScript
- Adobe Flex 3.4.1 and 4
- Adobe LiveCycle ES4
- Adobe Designer ES4
- Adobe Experience Manager (AEM)
- PowerScript

d) Electronic Data Warehouse (EDW) & Business Intelligence (BI)

- Cognos 10.2 BI Suite
  - IBM Cognos Report Studio
  - IBM Cognos Analysis Studio
  - IBM Cognos Query Studio
  - IBM Cognos Transformer
  - IBM Cognos Framework Manager
- Database ETL (Extract, Transform, Load) techniques and tools
- DB2 DBMS
- IBM WebSphere DataStage
- DataStage ETL
- IBM DB2 RDBMS (Relational Database Management System)
- erwin Data Modeler
- IBM IDA
- IBM Pure Data
- IBM InfoSphere Information Server Suite

e) Office Productivity Suite and Tools

- Microsoft Word
- Microsoft Excel
- Microsoft PowerPoint
- Office Suite (Word, Excel, PowerPoint)
- Microsoft Visio
- Microsoft Project
- Internet Explorer
- Microsoft Access
- OpenText GCDocs

- f) Operating Systems
  - Unix
  - Linux
  - Microsoft Windows 7
  - Microsoft Windows 10
  - OS/360
- g) Other development tools and programming languages
  - Smalltalk object-oriented language
  - Business Process Modeling Language (BPML)



## 2. REQUIREMENTS

The Business Process Automation, Business to Business Integration and Customs Electronic Commerce Platform section has requirements for the services of informatics professional resources, as outlined in Table A-1 below, to fulfill different roles and perform a wide range of tasks. The resources will work on existing and upcoming CBSA IT projects and will also provide operational support for the upkeep of line-of-business applications identified earlier. The detailed tasks for each resource requirement are described below.

The Contractor must provide these TBIPS resource categories to work with CCSD employees and other contractor supplied resources, on an "as and when requested" basis as initiated through Task Authorizations (TA's).

**Table A-1**

<b>TBIPS Reference</b>	<b>Resource Category</b>
A.1	Application/Software Architect
A.11	Tester
A.14	Web Developer (Usability Expert)
A.7	Programmer/Analyst (CECP)
A.7	Programmer/Analyst (JAVA)
A.7	Programmer/Analyst (MS Dynamics)
A.7	Programmer/Analyst (Prod Support)
A.7	Programmer/Analyst (UI)
A.8	System Analyst
B.14	Technical Writer
I.7	Platform Analyst (B2B)
I.7	Platform Analyst (Data Power)
P.9	Project Manager

## 3. DELIVERABLES

For each Task Authorization (TA) that is issued against this contract, the Contractor will be required to provide various deliverables and other related documents as specified in the respective TA.

## 4. CONSTRAINTS

### 4.1 Regular Meetings

The Contractor's selected resource must meet with the Technical Authority or his/her representative on a priority basis or as requested to discuss any issues associated with the provision of the required services. These meetings will be at no additional cost.

**4.2 Work Guidance**

The resource will work under the guidance of the Technical Authority or his/her representative.

**4.3 Status Reports**

Status reports are to be provided as detailed within the Task Authorization.

**4.4 Support Resources**

The CBSA will provide a workstation, email and system access.

**4.5 Normal Working Hours**

Work must be performed during core business hours between 7:00 – 18:00, Monday to Friday. From time to time, operational support may be required outside core business hours. It is also important to note that some resources will be required on a part-time basis. Working hours including the need for after-hour support will be identified in each TA.

**4.6 Work Location**

It is anticipated that the majority of the work associated with each TA will be carried out on-site at CBSA facilities in the National Capital Region (NCR). The Contractor may be required to attend meetings at CBSA and at key GoC stakeholder locations.

**4.7 Travel Requirement**

There is no travel requirement expected outside the NCR. If travel is required outside the NCR, it will be identified in the TA. All expenses for travel within the NCR are to be paid by the Contractor.

**4.8 Language Requirements**

The resource must be able to communicate with ease and effectively in English, both orally and written. There may be a requirement from time to time for a resource to conduct business in the French language and have acceptable bilingual capability. Language requirements will be identified in each TA.

**5. RESOURCE TASKS AND DELIVERABLES**

The following are the tasks, skills and deliverables associated with each resource requirement. Tasks and deliverables will be further specified in each Task Authorization (TA).

**TBIPS Category:** A.1 Application/Software Architect

**Experience Level:** Level 3

**Tasks**

Tasks could include but not limited to:

1. Develop technical architectures, frameworks and strategies, either for an organization or for a major application area, to meet the business and application requirements
2. Identify the policies and requirements that drive out a particular solution

3. Analyze and evaluate alternative technology solutions to meet business problems
4. Ensure the integration of all aspects of technology solutions
5. Monitor industry trends to ensure that solutions fit with government and industry directions for technology
6. Analyze functional requirements to identify information, procedures and decision flows
7. Evaluate existing procedures and methods, identify and document database content, structure, and application sub-systems, and develop data dictionary
8. Define and document interfaces of manual to automated operations within application sub-systems, to external systems and between new and existing systems
9. Define input/output sources, including detailed plan for technical design phase, and obtain approval of the system proposal
10. Identify and document system specific standards relating to programming, documentation and testing, covering program libraries, data dictionaries, naming conventions, etc.
11. Define, document, and communicate architectural standards
12. Participate in code reviews to ensure that standards are followed
13. Assist with troubleshooting and performance tuning
14. Participate in road map exercise, architecture definition, product evaluation and selection, application and integration design
15. Participate and provide technical leadership and guidance throughout the project lifecycle with emphasis on the up-front analysis and selection of the most viable option, the conceptual design and during the development phase
16. Architect and design line-of-business applications
17. Work closely with Portfolio Service Management and share ideas with fellow architects, software developers, technical advisors and team leads
18. Remain at the forefront of new technology solutions, explore new avenues, industry trends, technological changes, and how they would benefit the organization
19. Work with development teams and Project/Team Leads to drive, advise and learn how to best implement the targeted architecture
20. Ensure platforms, development tools, hardware environments and commercial off-the-shelf software products remain highly performant and maintained to ensure continuous availability
21. Promote development of best practices, architecture/design patterns and software development frameworks & techniques across the organization.

### **Specialties / Skills**

Specialties could include but not limited to:

- a) HTML
- b) Java
- c) Javascript

- d) SQL Server
- e) PL/SQL
- f) DB2
- g) XML
- h) JSP
- i) J2EE
- j) Mainframe environnement
- k) Distributed environnement
- l) Rational Rose
- m) Magic Draw
- n) TogetherJ
- o) Enterprise Architect
- p) Balsamiq
- q) Visio

### **Deliverables**

Deliverables could include but not limited to:

- a) Develop technical architectures, frameworks and strategies
- b) Gather the policies and requirements that drive out a particular solution
- c) Analyze and evaluate alternative technology solutions to meet business problems
- d) Integrate all aspects of technology solutions
- e) Define and document interfaces of manual to automated operations within application sub-systems, to external systems and between new and existing systems
- f) Define input/output sources, including detailed plan for technical design phase, and obtain approval of the system proposal
- g) Identify and document system specific standards relating to programming, documentation and testing
- h) Prepare and conduct demonstrations, walkthroughs and coaching of project team resources including knowledge transfer
- i) Produce technical documentation as required by CBSA's SLMF (Service Life Cycle Management Framework) to develop and implement solutions, including Application Design Specifications (ADS).

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**TBIPS Category:**                    **A.11 Tester**  
**Experience Level:**                **Level 2**

### **Tasks**

Tasks could include but not limited to:

1. Test the components of the application to ensure accuracy of captured requirements as well as quality of product
2. Verify accuracy and completeness of programs by preparing sample data, and testing them by means of system acceptance test runs
3. Create and update test plans, test cases and defect reports
4. Create and update instructions, results, traceability matrix and guides to document aspects of the application for later reference
5. Create and run automatic testing scripts and plans
6. Assist and knowledge transfer to junior team members and perform demonstrations
7. Provide status reports and impact analysis
8. Conduct testing in accordance with the test plan
9. Monitor test plans for all levels of testing
10. Perform walkthroughs and reviews
11. Prepare readiness assessment reports
12. Develop software testing procedures for unit test, integration testing and regression testing with emphasis on automating the testing procedures
13. Establish and operate "interoperability" testing procedures to ensure that the interaction and co-existence of various software elements, conform to appropriate standards (e.g. performance, compatibility, etc.) and have no unforeseen detrimental effects on the infrastructure
14. Establish validation and verification capability which assumes functional and performance compliance.

### **Specialties / Skills**

Specialties could include but not limited to:

- a) HP Quality Center management software
- b) Selenium automated testing tool
- c) JIRA
- d) ITIL Certification

### **Deliverables**

Deliverables could include but not limited to:

- a) Produce test plans, test cases for manual testing as well as using an automated testing tool
- b) Create and update technical documentation regarding all aspects and levels of testing
- c) Produce impact analysis
- d) Produce status reports and project plans
- e) Prepare and conduct demonstrations, walkthroughs and coaching of project team resources including knowledge transfer
- f) Produce and provide documentation in electronic format (presentations, procedures, instructions, FAQs, etc.)
- g) Produce technical documentation as required by CBSA's Service Lifecycle Management Framework (SLMF) to develop and implement solutions, including Application Design Specifications (ADS).

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**TBIPS Category:**                    **A.14 Web Developer (Usability Expert)**  
**Experience Level:**                **Level 3**

### **Tasks**

Tasks could include but not limited to:

1. Research, analyze and design the user interface of the application
2. Design and document the various web pages of the application
3. Ensure the application meets the usability and reliability requirements
4. Create and prepare screen shots, product workflow maps, and plans for business solutions
5. Create/update various technical documents
6. Verify accuracy and completeness and ease of use of programs by preparing sample data, and testing them by means of system acceptance test runs made by operating personnel
7. Organize, lead, and participate in usability testing
8. Develop and implement usability tests, analyses result and modify design accordingly
9. Create test plans and test cases
10. Assist and knowledge transfer to junior team members and perform peer reviews and demonstrations
11. Provide status reports and impact analysis
12. Work and collaborate with development team to explain design documents and ensure feasibility based on technology being used to develop the application
13. Create and apply designs that maximize usability of existing objects
14. Create web pages including graphic design
15. Develop flowcharts (web site flow maps) depicting navigation and content
16. Develop line drawings or block diagrams illustrating the priority of information, links, navigation and space requirements
17. Develop content diagrams showing the interactive connection between pages
18. Utilization of Subversion (SVN)
19. Develop interactive prototypes showing basic form, flow and functionality used for both usability testing and presentations.

### **Specialties / Skills**

Specialties could include but not limited to:

- a) Balsamiq
- b) HTML5
- c) Web Experience Toolkit (WET)
- d) Government of Canada Web standards
- e) SVN (Subversion)

### **Deliverables**

Deliverables could include but not limited to:

- a) Produce/update design documents such as manuals/guides, technical documents and procedures, product workflows, etc. according to the SLMF and using SLMF templates.
- b) Use Balsamiq software for UI (User Interface) design documents, prototypes and wireframes
- c) Design web applications pages and electronic documents to enhance user experience and content understanding based on requirements
- d) Produce impact analysis on deliverables and provide estimates
- e) Collaborate with stakeholders to derive and document design specifications
- f) Create usability test plans and cases and conduct usability testing
- g) Provide status reports and project plans
- h) Demonstrations, walkthroughs and coaching of project team resources including knowledge transfer
- i) Create and deliver demonstrations and peer reviews.



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**TBIPS Category:**                    **A.7 Programmer Analyst (CECP)**  
**Experience Level:**                **Level 3**

### **Tasks**

Tasks and responsibilities could include but not limited to:

1. Create and modify application code
2. Create and modify screens
3. Create and modify regular and ad-hoc reports
4. Gather and analyze data for the development and modification of functional and system design specifications
5. Design methods and procedures for computer systems and/or sub-systems
6. Develop and test computer systems and/or sub-systems of larger systems as part of releases and emergency fixes
7. Produce forms, manuals, programs, data files, and procedures for systems and/or applications
8. Develop requirements, feasibility, cost, system design, and specification documents for systems
9. Analyze and recommend alternatives and options for solutions
10. Develop technical specifications for systems development, design and implementation
11. Develop new or enhanced C++ programs or interfaces for High Availability Systems
12. Develop new or enhanced JAVA programs or interfaces for High Availability Systems
13. Work with Business Analysts on understanding business use cases
14. Work with the development and support teams on understanding business use cases
15. Assist in preparing or reviewing high-level design, system use case documents
16. Prepare and modify technical level design documents and detail level design documents
17. Prepare and conduct system walkthroughs with Development, Production Support and Business groups
18. Develop with C++ Version 6 application programming language
19. Develop object oriented applications using the Java development framework (including Spring Framework)
20. Analyze, develop or enhance EDI IT applications that use MQ series
21. Analyze, develop or enhance EDI IT applications using message standards ANSI ASC X12 EDI or UN/EDIFACT
22. Utilization of the DB2 database
23. Develop and deploy applications on IBM WebSphere Application Server on Microsoft Windows and IBM Mainframe OS/390 environment

- 24. Utilization of Subversion (SVN)
- 25. Analyze EDI for syntax errors
- 26. Coordinate fixes to system outages along with other support groups
- 27. Analyze upcoming infrastructure changes and assess the impact on the CECF systems
- 28. Transfer relevant knowledge to the project team and client staff on an ongoing basis.

### **Specialties / Skills**

Specialties could include but not limited to:

- a) C++
- b) JAVA
- c) MQ Series
- d) ANSI
- e) EDIFACT Technologies
- f) JIRA
- g) TCP/IP
- h) EDI mapping: ANSI/EDIFACT standards
- i) MS Windows 7 workstation software
- j) MS Office Professional
- k) DB2 Database
- l) SVN (Subversion)
- m) Spring Framework
- n) Microsoft Windows
- o) IBM Mainframe OS/390 Environment
- p) WebSphere Studio Application Development
- q) HTML
- r) Unified Modeling Language (UML)
- s) Rational Unified Process (RUP)

### **Deliverables**

Deliverables could include but not limited to:

- a) Program code in C++ and JAVA
- b) Interface and user screens
- c) Problem, status, performance, issue, outage reports

- d) Impact assessments
- e) Functional specifications
- f) System specifications
- g) Procedure documents
- h) Operational manuals
- i) Lessons-learned documents
- j) Meeting minutes
- k) Develop application screens and reports
- l) Create application forms, manual, programs, data files and procedures for systems and/or applications
- m) Create technical level design documents and detail level design documents
- n) Create System Use Cases
- o) Provide Progress/Status reports
- p) Prepare and conduct demonstrations, walkthroughs and coaching of other resources including knowledge transfer
- q) Produce technical documentation as required by CBSA's Service Lifecycle Management Framework (SLMF) to develop and implement solutions, including Application Design Specifications (ADS).

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**TBIPS Category:**                    **A.7 Programmer/Analyst (Java)**  
**Experience Level:**                **Level 3**

### **Tasks**

Tasks could include but not limited to:

1. Create and modify application code
2. Create and modify screens and reports
3. Gather and analyze data for the conduct of studies to establish the technical and economic feasibility of proposed computer systems, and for the development of functional and system design specifications
4. Design methods and procedures for small computer systems, and sub-system of larger systems
5. Develop, test and implement small computer systems, and sub-systems of larger systems.
6. Produce forms, manuals, programs, data files, and procedures for systems and/or applications
7. Design and document the database changes
8. Create and update various technical documents such as the System Requirements specifications, System Use Cases, etc. as per CBSA's Service Level Management Framework (SLMF)
9. Create test plans and test cases
10. Utilization of Subversion (SVN)
11. Assist and knowledge transfer to junior team members and perform peer reviews, code walkthroughs and demonstrations.

### **Specialties / Skills**

Specialties could include but not limited to:

- a) Java EE 6
- b) HTML5
- c) Java Persistence API (JPA)
- d) XML
- e) REST
- f) SOAP
- g) IBM WebSphere DB2

- h) MS SQL Server
- i) IBM RSA
- j) JavaScript
- k) Spring
- l) Spring Integration
- m) SVN (Subversion)

### **Deliverables**

Deliverables could include but not limited to:

- a) Produce operational systems including all electronic manuals, programs, data files and procedures
- b) Provide impact analysis on all tasks
- c) Prepare and conduct test plans and cases
- d) Provide status reports and project plans
- e) Prepare and conduct demonstrations, walkthroughs and coaching of project team resources including knowledge transfer
- f) Produce and provide documentation in electronic format (presentations, procedures, instructions, FAQs, etc.)
- g) Produce technical documentation as required by CBSA's Service Lifecycle Management Framework (SLMF) to develop and implement solutions, including Application Design Specifications (ADS).

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**TBIPS Category:**                    **A.7 Programmer/Analyst (MS Dynamics)**  
**Experience Level:**                **Level 3**

**Tasks**

Tasks could include but not limited to:

1. Create and modify application code
2. Create and modify screens and reports
3. Gather and analyze data for the conduct of studies to establish the technical and economic feasibility of proposed computer systems, and for the development of functional and system design specifications
4. Design methods and procedures for small computer systems, and sub-system of larger systems
5. Develop, test and implement small computer systems, and sub-systems of larger systems
6. Produce forms, manuals, programs, data files, and procedures for systems and/or applications
7. Define and document interfaces of manual to automated operations within application sub-systems, to external systems and between new and existing systems
8. Develop, configure and/or manage technical aspects of application software, user interfaces and third-party components
9. Conduct and manage unit, system tests and regression testing
10. Production monitoring, technical support, troubleshooting, and resolution for solution
11. Provide hands-on third-level support for MS Dynamics applications
12. Implement enhancements and upgrades to remain compatible with the evolving MS Dynamics platform
13. Conduct business process modeling, automation and integration with MS Dynamics and non-MS Dynamics applications
14. Develop SQL Server Reporting Services (SSRS) reports
15. Develop SQL server Integration Services (SSIS)
16. Utilization of Subversion (SVN)
17. Establish Security Model for the MS Dynamics applications.

**Specialties / Skills**

Specialties could include but not limited to:

- a) Microsoft Dynamics 2013 or later
- b) Microsoft SQL Server 2012 or later
- c) ASP.NET

- d) HTML
- e) JavaScript
- f) C#
- g) SVN (Subversion)
- h) Microsoft Dynamics concepts including:
  - i. Configuration
  - ii. Customization
  - iii. Workflow
  - iv. Integration
  - v. SSIS
  - vi. SSRS
  - vii. Security Model

### **Deliverables**

Deliverables could include but not limited to:

- a) Implementing, configuring and customizing the Dynamics applications
- b) Develop the MS Dynamics business processes in line with stakeholder requirements
- c) Provide technical guidance and MS Dynamics Architecture
- d) Perform gap analyses, provide solution guidance and prepare estimates of effort, duration and technical approach to achieve project goals based on review of business and functional requirements
- e) Modeling, Configuration, development, troubleshooting and support activities of end-to-end business processes utilizing MS Dynamics
- f) Prepare and conduct demonstrations, walkthroughs and coaching of project team resources including knowledge transfer
- g) Produce technical documentation as required by CBSA's Service Life Cycle Management Framework (SLMF) to develop and implement solutions, including Application Design Specifications (ADS).

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**TBIPS Category:**                    **A.7 Programmer/Analyst (Prod Support)**  
**Experience Level:**                **Level 2**

### **Tasks**

Tasks could include but not limited to:

1. Provide high availability production support
2. Interaction with business clients, in person, via phone and in writing
3. Producing daily and monthly reports on production support activities for Management which include but not limited to:
  - Outage Reports
  - Incident Report
  - Volumetrics
  - Ad-Hoc Reports
  - System requirements
4. 24/7 on-call activities (will include afterhours activities)
5. Analyze, develop or enhance EDI IT applications that use MQ series
6. Perform SQL queries on DB2 database
7. Analyze, develop or enhance EDI IT applications using message standards ANSI ASC X12 EDI or UN/EDIFACT
8. Use of SMART Ticket Process
9. Develop and deploy applications on IBM WebSphere Application Server on Microsoft Windows and IBM Mainframe OS/390 environment
10. Provide analysis of EDI for syntax errors in support of the production systems
11. Provide fixes to system outages in coordination with other support areas
12. Assist business clients in responding to external client requests regarding CECP systems & B2B operations
13. Provide analysis of upcoming infrastructure changes to assess the impact on the CECP & B2B systems
14. Gather and analyze data for the development and modification of functional and system design specifications
15. Design methods and procedures for computer systems and/or sub-systems
16. Develop, test and migrate computer systems and/or sub-systems of larger systems as part of releases and emergency fixes
17. Produce forms, manuals, programs, data files, and procedures for systems and/or applications
18. Analyze and recommend alternatives and options for solutions
19. Develop technical specifications for systems development, design and implementation



20. Work with the development and support teams on understanding business use cases
21. Review and analyze high-level design and system use case documents
22. Review and analyze technical level design documents and detail level design documents
23. Review and analyze system walkthroughs with Development, Production Support and Business groups
24. Transfer knowledge to the project team and client staff on an ongoing basis
25. Perform Metric Analysis or Statistical Analysis based on Incident Management for a production support environment.

### **Specialties / Skills**

Specialties could include but not limited to:

- a) DB2
- b) Microsoft Office Suite (Word, Excel, PowerPoint)
- c) IBM WebSphere
- d) IBM Mainframe OS/390 environment
- e) EDI Message standards ANSI ASC X12 EDI or UN/EDIFACT
- f) IBM MQSeries
- g) C++
- h) Java
- i) SMART Ticket Process
- j) JIRA
- k) Microsoft Windows Server

### **Deliverables**

Deliverables could include but not limited to:

- a) Program code
- b) Interface and user screens
- c) Problem, status, performance, issue, outage reports
- d) Impact assessments
- e) Functional specifications
- f) System specifications
- g) Procedure documents
- h) Operational manuals
- i) Lessons-learned documents
- j) Meeting minutes

- k) Emergency fixes reports
- l) Application screens and reports
- m) Application forms, manual, programs, data files and procedures for systems and/or applications
- n) Demonstrations, walkthroughs and coaching of other resources including knowledge transfer
- o) Technical documentation as required by CBSA's Service Lifecycle Management Framework (SLMF) to develop and implement solutions, including Application Design Specifications (ADS).

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**TBIPS Category:**                      **A.7 Programmer/Analyst (UI)**  
**Experience Level:**                      **Level 3**

### **Tasks**

Tasks could include but not limited to:

1. Create and modify application code
2. Create and modify screens and reports
3. Gather and analyze data for the conduct of studies to establish the technical and economic feasibility of proposed computer systems, and for the development of functional and system design specifications
4. Design methods and procedures for small computer systems, and sub-system of larger systems
5. Develop, test and implement small computer systems, and sub-systems of larger systems
6. Produce forms, manuals, programs, data files, and procedures for systems and/or applications
7. Design and document the database changes
8. Develop the components of the application using React & Redux libraries along with ECMAScript and HTML5 coding as per requirements
9. Create/update various technical documents such as the System Requirements specifications, System Use Cases, etc. as per CBSA's Service Level Management Framework
10. Create test plans and test cases
11. Utilization of Subversion (SVN)
12. Assist and knowledge transfer to junior team members and perform peer reviews, code walkthroughs and demonstrations.

### **Specialties / Skills**

Specialties could include but not limited to:

- a) React and Redux libraries
- b) HTML5
- c) ECMAScript 5.1 or later
- d) Java EE 6
- e) XML

- f) JavaScript
- g) SVN (Subversion)

### **Deliverables**

Deliverables could include but not limited to:

- a) Produce operational systems including all electronic manuals, programs, data files and procedures
- b) Provide impact analysis on all tasks
- c) Prepare and conduct test plans and cases
- d) Provide status reports and project plans
- e) Prepare and conduct demonstrations, walkthroughs and coaching of project team resources including knowledge transfer
- f) Produce and provide documentation in electronic format (presentations, procedures, instructions, FAQs, etc.)
- g) Produce technical documentation as required by CBSA's Service Lifecycle Management Framework (SLMF) to develop and implement solutions, including Application Design Specifications (ADS).

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**TBIPS Category:**                    **A.8 System Analyst**  
**Experience Level:**                **Level 3**

### **Tasks**

Tasks could include but not limited to:

1. Interact with business clients and translate business requirements into technical specifications for systems development, design and implementation
2. Develop requirements, feasibility, cost, design, and specification documents
3. Identify and document systems requirements
4. Implement systems to support projects, departments, organizations or businesses
5. Analyze and recommend alternatives and options for solutions
6. Define and document interfaces of manual to automated operations within application sub-systems, to external systems and between new and existing systems
7. Develop, configure and/or manage technical aspects of application software, user interfaces and third-party components
8. Conduct and manage unit, system tests and regression tests
9. Production monitoring, technical support, troubleshooting, and resolution for solution
10. Provide hands-on third-level support for applications
11. Implement enhancements and upgrades to remain compatible with the evolving software and/or platform
12. Stay abreast of new technologies
13. Make recommendations on improving business process and practices
14. Assist with creating User's Guide and training material
15. Conduct business process modeling, automation and integration with other applications.

### **Specialties / Skills**

Specialties could include but not limited to:

- a) HTML
- b) Java
- c) JavaScript

- d) SQL Server 2012 or later
- e) PL/SQL
- f) XML
- g) JSP
- h) CSS
- i) Project Management
- j) Software development process/life cycle
- k) ITIL
- l) Confluence
- m) GCDocs
- n) MS Office Suite (Word, Excel, PowerPoint)
- o) JIRA
- p) MS Visio

### **Deliverables**

Deliverables could include but not limited to:

- a) Implementing, configuring and customizing the various applications
- b) Develop business processes in line with stakeholder requirements
- c) Technical guidance and solutions architecture
- d) Perform gap analyses, provide solution guidance and prepare estimates of effort, duration and technical approach to achieve project goals based on review of business and functional requirements
- e) Modeling, configuration, development, troubleshooting and support activities of end-to-end business processes
- f) Demonstrations, walkthroughs and coaching of project team resources including knowledge transfer
- g) Technical documentation as required by CBSA's Service Lifecycle Management Framework (SLMF) to develop and implement solutions, including Application Design Specifications (ADS).

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**TBIPS Category:**                      **B.14 Technical Writer**  
**Experience Level:**                      **Level 2**

### **Tasks**

Tasks could include but not limited to:

1. Create and update various business and technical documents such as Standard Operating Procedures (SOPs), user guides, Technical Design Documents, manuals, web page content, technical presentations, etc.
2. Gather information from business and technical resources on processes and to translate them into defined and structured procedures
3. Produce instructions, and assemble specifications, flow charts, diagrams, layouts, operating instructions and illustrations to document applications for later modification or reference
4. Assist and knowledge transfer to junior team members and perform reviews of existing documentation
5. Establish documentation standards
6. Review existing project documentation for accuracy and completeness
7. Coordinate the preparation and revision of project and system documentation
8. Design the layout of the documents and manuals
9. Provide status reports and impact analysis.

### **Specialties / Skills**

Specialties could include but not limited to:

- a) Microsoft Office Suite (Word, Excel, PowerPoint)
- b) Microsoft Visio
- c) ITIL Foundation certification
- d) Specialized certification or diploma in Technical Writing
- e) Must be fluent in both official languages of Canada (French and English)
- f) HTML
- g) Confluence
- h) GCDocs

### **Deliverables**

Deliverables could include but not limited to:

- a) Produce business as well as technical documentation including:
  - presentations

- procedures
  - FAQs
  - training manuals
  - user's guide
  - technical design document
  - installation instructions
- b) Produce impact analysis
- c) Produce status reports and project plans
- d) Prepare and conduct demonstrations and document reviews
- e) Gather information on processes and translate them into defined and structured procedures
- f) Use word-processing, desktop publishing and graphics software packages
- g) Produce technical documentation as required by CBSA's Service Life Cycle Management Framework (SLMF) to develop and implement solutions, including Application Design Specifications (ADS).



**TBIPS Category: I.7 Platform Analyst (B2B)**

**Experience Level: Level 2**

### **Tasks**

Tasks could include but not limited to:

1. Meet with CBSA Business clients and technical stakeholders to analyze and document detailed B2B requirements
2. Analyze and document in detail interfaces, existing or legacy system processes, components, and supporting systems within the CBSA to determine their functions within the B2B capability
3. Design data structures and files, sub-systems and modules, programs, batch, on line message processing, and production monitoring procedures, testing strategy and systems
4. Develop and maintain XML artefacts such as XML Schemas and XSLT Transformation
5. Develop Custom Service Adapters for Sterling Business Integrator (SBI) product using the MESA tool
6. Develop Web Services using technologies such as Jersey and Spring Framework development applications
7. Develop Business Processes by integrating with Simple Object Access Protocol (SOAP) or RESTFUL API
8. Develop and implement B2B processes using Graphical Process Modeler (GPM) and Business Process Modeling Language (BPML)
9. Conduct performance analysis, troubleshooting, and tuning of the IBM SBI COTS product and Data Maps
10. Manage Electronic Data Interchange (EDI) processing and exchange of routine business data between trading partners in standard data formats
11. Perform displaying of data flows and simplifying data flow processes
12. Develop and implement:
  - adaptor service configurations
  - data transformation
  - data content parsing and extraction
  - data routing
13. Perform IBM SBI COTS product customization to meet CBSA requirements for facilitating, capturing and sharing of information exchanged with Participating Government Agencies (PGAs), Other Government Departments and Trading Partners
14. Use supported industry standards, prebuilt processes and services (for example: EDI, EDIINT, etc.) to implement data mapping and map conversion
15. Create Data Map Source and Destination Schemas

16. Design, develop, administer Inbound and Outbound Data Maps and view Maps results using IBM Sterling Business Integrator (SBI) or equivalent technology
17. Test Web Service Gateway application by using service-oriented architecture SOAPUI tool
18. Develop System Use Case documents
19. Develop Test Plan, Test data, and Test result documents
20. Translate corporate strategy and business requirements into an application environment
21. Produce best practices and standards for business process development and mapping
22. Provide status and tracking of business transactions with trading partners
23. Create briefing notes intended for senior management on issues related to technical requirements and challenges on large scale IT projects.

### **Specialties / Skills**

Specialties could include but not limited to:

- a) IBM Sterling Business Integrator COTS product:
  - Graphical Business Process Modeller (GPM)
  - GPM Services and Adapters
  - Business Process Modelling Language (BPML)
  - Visual Data Mapper
  - Business Process Development
  - Custom Service Adapters (MESA API)
- b) Extensible Markup Language (XML):
  - XML Schema Definition (XSD)
  - Document Type Definition (DTD)
  - XPATH
  - XSLT
  - Xquery
- c) Java
  - IBM Rational Software Architect
  - Eclipse 3.x and 4.x IDE
  - J2EE (WebSphere)
  - JMS (WebSphereMQ)
  - WebSphere Application Server (WAS)
  - JDBC and Hibernate
  - Spring Framework
  - ANT, Apache Maven, SVN, git
  - IBM Integration BUS
    - Service Bus Components
  - IBM DataPower
    - Multi-protocol Adapters
    - IBM Transformation Extender
- d) Communication Protocols:

- File Transfer Protocol (FTP)
- Hypertext Transfer Protocol (HTTP)
- Simple Mail Transfer Protocol (SMTP)
- Managed File Transfer including PWGSC's MSFT solution
- e) Service Oriented Architecture (SOA):
  - Simple Object Access Protocol (SOAP)
  - Web Service, Representational State Transfer (REST)
  - WS-Security
  - SSL, TLS
- f) Electronic Data Interchange (EDI):
  - ANSI X.12
  - EDIFACT
  - IATA Standards
  - World Customs Organization (WCO) Data Model
  - Financial, Transportation data models
- g) Interoperability & Integration:
  - Web Services standards – SOAP and REST
  - Web Services Definition Language (WSDL)
  - Business Rules Management Solution
  - Enterprise Service Bus
  - Encryption/Decryption
  - CA-Idm/SM
  - Request/Response
  - Fire and Forget

### **Deliverables**

Deliverables could include but not limited to:

- a) Provide Impact Analysis documents
- b) Provide System Requirements Specification (SRS) documents (Word format)
- c) Provide Architecture and Design Specification (ADS) documents (Word format)
- d) Provide System Use Case (SUC) documents (Word format)
- e) Develop Business Processes (REST, EDI, XML, JAVA coding language), Web Service capability (XML and Java coding), Appliance Configuration Modules (IBM DataPower and GatewayScript)
- f) Provide test plan, test data, and test result documents (Word and Excel format)
- g) Provide weekly status updates in writing supported by meetings / presentations to update the technical authority on progress or delays
- h) Prepare and conduct demonstrations, walkthroughs and coaching of other resources including knowledge transfer
- i) Provide lessons learned narrative.

**TBIPS Category: I.7 Platform Analyst (Data Power)**

**Experience Level: Level 2**

### **Tasks**

Tasks could include but not limited to:

1. Meet with CBSA Business clients and technical stakeholders to analyze and document detailed B2B requirements
2. Analyze and document in detail interfaces, existing or legacy system processes, components, and supporting systems within the CBSA to determine their functions within the B2B capability
3. Design data structures and files, sub-systems and modules, programs, batch, on line message processing, and production monitoring procedures, testing strategy and systems
4. Develop and maintain XML artefacts such as XML Schemas and XSLT Transformation
5. Develop Custom Modules for IBM DataPower product using GatewayScript
6. Develop Web Services using technologies such as Jersey and Spring Framework development applications
7. Develop Business Processes by integrating with Simple Object Access Protocol (SOAP) or RESTFUL API
8. Conduct performance analysis, troubleshooting, and tuning of the IBM DataPower product and IBM Transformation Extender Maps
9. Manage Electronic Data Interchange (EDI) processing and exchange of routine business data between trading partners in standard data formats
10. Perform displaying of data flows and simplifying data flow processes
11. Develop and implement
  - adaptor service configurations
  - data transformation
  - data content parsing and extraction
  - data routing
12. Perform IBM DataPower product customization/configuration to meet CBSA requirements for facilitating, capturing and sharing of information exchanged with Partner Government Agencies, Other Government Departments and Trading Partners
13. Use supported industry standards, prebuilt processes and services (for example: EDI, EDIINT, etc.) to implement data mapping and map conversion
14. Create Data Map Source and Destination Schemas and Data format definitions
15. Design, develop, administer Inbound and Outbound Data Transformations and view Maps results using IBM DataPower, IBM Transformation Extender or equivalent technology
16. Test Web Service Gateway applications by using service-oriented architecture SOAPUI tool
17. Develop System Use Case documents

18. Develop Test Plan, Test data, and Test result documents
19. Translate corporate strategy and business requirements into an application environment
20. Produce best practices and standards for business process development and mapping
21. Provide status and tracking of business transactions with trading partners
22. Create briefing notes intended for senior management on issues related to technical requirements and challenges on large scale IT projects.

### **Specialties / Skills**

Specialties could include but not limited to:

- a) Extensible Markup Language (XML)
  - XML Schema Definition (XSD)
  - Document Type Definition (DTD)
  - XPATH
  - XSLT
  - Xquery
- b) Java
  - IBM Rational Software Architect:
  - Eclipse 3.x and 4.x IDE
  - J2EE (WebSphere)
  - JMS (WebsphereMQ)
  - WebSphere Application Server (WAS)
  - JDBC and Hibernate
  - Spring Framework
  - ANT, Apache Maven, SVN, git
  - IBM DataPower
    - Multi-protocol Adapters
    - IBM Transformation Extender
- c) Communication Protocols
  - File Transfer Protocol (FTP)
  - Hypertext Transfer Protocol (HTTP)
  - Simple Mail Transfer Protocol (SMTP)
  - Managed File Transfer including PWGSC's MSFT solution
- d) Service Oriented Architecture (SOA)
  - Simple Object Access Protocol (SOAP)
  - Web Service, Representational State Transfer (REST)
  - WS-Security
  - SSL, TLS

- e) Electronic Data Interchange (EDI)
  - ANSI X.12
  - EDIFACT
  - IATA Standards
  - World Customs Organization (WCO) Data Model
  - Financial, Transportation data models
- f) Interoperability & Integration
  - Web Services standards – SOAP and REST
  - Web Services Definition Language (WSDL)
  - Business Rules Management Solution
  - Enterprise Service Bus
  - Encryption/Decryption
  - CA-Idm/SM
  - Request/Response

### **Deliverables**

Deliverables could include but not limited to:

- a) Provide Impact Analysis documents
- b) Provide System Requirements Specification (SRS) documents (Word format)
- c) Provide Architecture and Design Specification (ADS) documents (Word format)
- d) Provide System Use Case (SUC) documents (Word format)
- e) Develop Business Processes (REST, EDI, XML, JAVA coding language), Web Service capability (XML and Java coding), Appliance Configuration Modules (IBM DataPower and GatewayScript)
- f) Provide test plan, test data, and test result documents (Word and Excel format)
- g) Provide weekly status updates in writing supported by meetings / presentations to update the technical authority on progress or delays
- h) Prepare and conduct demonstrations, walkthroughs and coaching of other resources including knowledge transfer
- i) Provide lessons learned narrative.

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**TBIPS Category:**                      **P.7 Project Manager**  
**Experience Level:**                      **Level 2**

### **Tasks**

Tasks could include but not limited to:

1. Assist project management personnel, team leads, technical subject matter experts, end users in project coordination and managing tasks spanning across the CBSA and other government agencies/departments
2. Create, maintain, review and update relevant project documentation and artifacts
3. Maintain documentation on departmental Electronic Document and Records Management Solution (EDRMS)
4. Track and monitor project change requests
5. Provide regular input to periodically update release schedules, project timelines, financial forecasts and other estimates related to a subset of the overall project deliverables
6. Use various desktop tools and office automation software products
7. Communicate orally and in writing with project personnel, technical subject matter experts, team leads and end users on various matters related to projects and various undertakings
8. In collaboration with Project/Team Leads, Portfolio Service Management, document project objectives, budgetary requirements, timeline, roles and responsibilities of team members, deliverables, constraints, etc.
9. Assist and support Team/Project Leader in coordinating projects activities during the development and implementation phases
10. Assist and support Team/Project Leader in managing releases and upgrades to existing applications
11. Ensure project deliverables, those that are relevant to Common and Corporate Systems, are on time, within budget and meet expectations
12. Notify management when issues arise and consult team for corrective actions
13. Identify and monitor risks and constraints
14. Review, monitor and comment on project activities, deliverables and timelines
15. Identify and report to Team/Project Leader any issues and risks
16. Provide regular status reports
17. Participate in reviews and walkthroughs with project team members
18. Organize, lead and facilitate meetings, including the creation of agendas, preparation of material and maintain record of decisions
19. Prepare presentations using MS PowerPoint

20. Prepare schedules using MS Project.

### **Specialties / Skills**

Specialties could include but not limited to:

- a) Project Management Professional (PMP) certification or PRINCE2 Practitioner certification
- b) PMBOK standards and guidelines
- c) Microsoft Project
- d) ITIL (Information Technology Infrastructure Library) or ITSM (Information Technology Service Management) certification
- e) Microsoft Office Suite (Word, Excel, PowerPoint)
- f) Microsoft Visio
- g) Adobe Acrobat
- h) Project management methodologies
- i) Risk management practices
- j) Strong written and verbal communication skills.

### **Deliverables**

Deliverables could include but not limited to:

- a) Project Overview
- b) Impact Statement
- c) Constraints and Assumptions
- d) Financial Summary
- e) Project Approach
- f) Project Organization
- g) Work Breakdown Structure (WBS)
- h) Preliminary Estimates
- i) Project Schedule
- j) Coordinate the review and provide feedback on Test Plans, Scripts and Use Case
- k) Coordinate the review and provide feedback on Architecture Variance
- l) Coordinate the review and provide feedback on Business Context Models such as Business Use Case (BUC) models
- m) Coordinate the review and provide feedback on Preliminary Options Analysis (POA)
- n) Coordinate the review and provide feedback on Conceptual System Design (CSD)
- o) Coordinate the review and provide feedback on Technical Design Document (TDD)



- p) Coordinate the review and provide feedback on Development Strategy
- q) Review documentation according to CBSA's set of best practices, standards and methodologies
- r) Prepare Progress and Status Reports including presentations
- s) Risk and Issue tracking.

## **APPENDIX A TO ANNEX A**

### **TASKING ASSESSMENT PROCEDURE**

1. Where a requirement for a specific task is identified, a draft Task Authorization Form (TA Form) as attached at Appendix B to Annex A will be provided to the Contractor in accordance with the allocation methodology stated in the Contract Article titled "Allocation of Task Authorizations". Once a draft TA Form is received, the Contractor must submit to the Technical Authority a quotation of rates to supply the requested Resource Categories based on the information identified in the TA Form, as well as its corresponding proposed resource(s). 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 48 hours (or any longer time period specified in the draft TA) turnaround time 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.

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. 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**

*(Provided under separate cover)*

## 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.

#### 1.0 Mandatory Resource Assessment Criteria:

##### 1.1 A.1 Application/Software Architect - Level 3

<b>Name of Resource:</b> _____			
#	Mandatory Technical Criteria	Contractor's Response	
		Demonstrated Experience (Contractor to Insert Data)	Insert Page # of Resume
<b>M.1.1.1</b>	The Contractor must demonstrate that the proposed resource has a minimum of 10 years of experience working as an Application/Software Architect performing at least 15 of the 21 tasks listed in the Statement of Work.		
<b>M.1.1.2</b>	<p>The Contractor must demonstrate that the proposed resource has a minimum of 5 years of experience with the design, development, testing, and deployment of large-scale* web-based and distributed applications.</p> <p>*Large scale is defined as:</p> <ul style="list-style-type: none"> <li>• Scope spans multiple programs and services</li> <li>• User base of 500 users or more</li> </ul>		
<b>M.1.1.3</b>	<p>The Contractor must demonstrate that the proposed resource has a minimum of 5 years of experience analyzing, designing, integrating and documenting technical architectures, frameworks, strategies and interfaces for enterprise-wide applications.*</p> <p>*An enterprise-wide application is a system that operates in a corporate environment such as a business or government, designed to satisfy the</p>		

Name of Resource: _____			
#	Mandatory Technical Criteria	Contractor's Response	
		Demonstrated Experience (Contractor to Insert Data)	Insert Page # of Resume
	needs of a large organization of 1,000 employees or more rather than individual users.		
<b>M.1.1.4</b>	The Contractor must demonstrate that the proposed resource has a minimum of 5 years of experience designing Web APIs or Web Services including JavaScript and CSS.		
<b>M.1.1.5</b>	<p>The Contractor must demonstrate that the proposed resource has a minimum of 5 years of experience in:</p> <ul style="list-style-type: none"> <li>• exploring and evaluating new technologies</li> <li>• researching industry trends</li> <li>• maintaining current and evolving solutions</li> <li>• leading technical discussions aimed at promoting and adopting technological directions, frameworks, strategies, and development practices and techniques</li> <li>• establishing a long-term vision of web-based applications and the path to get there (roadmap).</li> </ul>		

**1.2 A.11 Tester - Level 2**

Name of Resource: _____			
#	Mandatory Technical Criteria	Contractor's Response	
		Demonstrated Experience (Contractor to Insert Data)	Insert Page # of Resume
<b>M.1.2.1</b>	The Contractor must demonstrate that the proposed resource has a minimum of 5 years of experience, within the last 10 years, working as Web Application Software Tester in an IM/IT technical environment performing at least 10 of the 14 tasks listed in the Statement of Work.		
<b>M.1.2.2</b>	The Contractor must demonstrate that the proposed resource has a minimum of 3 years of experience, within the past 5 years, in the creation of test deliverables, test cases, anticipated results and test plans.		
<b>M.1.2.3</b>	The Contractor must demonstrate that the proposed resource has a minimum of 3 years of experience in establishing testing procedures and the use of automated testing tools for: <ul style="list-style-type: none"> <li>• unit testing</li> <li>• integration testing</li> <li>• regression testing</li> </ul>		
<b>M.1.2.4</b>	The Contractor must demonstrate that the proposed resource has a minimum of 3 years of experience developing automated unit and integration tests for: <ul style="list-style-type: none"> <li>• Java built web applications</li> <li>• HTML web applications</li> <li>• Web services (SOAP, REST, WEB API)</li> </ul>		
<b>M.1.2.5</b>	The Contractor must demonstrate that the proposed resource has experience within the last 10 years working on large scale IT projects* <p>*Large scale IT project is defined as:</p> <ul style="list-style-type: none"> <li>• Scope spans multiple programs and services</li> <li>• User base of 500 users or more</li> </ul>		

**1.3 A.14 Web Developer (Usability Expert) - Level 3**

Name of Resource: _____			
#	Mandatory Technical Criteria	Contractor's Response	
		Demonstrated Experience (Contractor to Insert Data)	Insert Page # of Resume
<b>M.1.3.1</b>	The Contractor must demonstrate that the proposed resource has a minimum of 10 years of experience working as a Web Developer (Usability Expert) performing at least 13 of the 19 tasks listed in the Statement of Work.		
<b>M.1.3.2</b>	The Contractor must demonstrate that the proposed resource has a minimum of 5 years of experience, within the past 8 years, designing web application interfaces for an IM/IT project with 500 users or more.		
<b>M.1.3.3</b>	The Contractor must demonstrate that the proposed resource has a minimum of 5 years of experience, within the past 8 years, developing usability tests, organizing, leading and participating in usability testing, documenting, analyzing results and modifying design accordingly.		
<b>M.1.3.4</b>	The Contractor must demonstrate that the proposed resource has a minimum of 5 years of experience, within the past 8 years, documenting workflow maps and user interfaces.		
<b>M.1.3.5</b>	<p>The Contractor must demonstrate that the proposed resource has a minimum of 2 years of experience, within the past 5 years, designing web application interfaces that meet and are in line with the internationally recognized Web Content Accessibility Guidelines (WCAG) 2.0 on accessibility and usability*.</p> <p>*A common definition of the WCAG 2.0 standards and guidelines is available at the following sites:</p> <p><a href="https://en.wikipedia.org/wiki/Web_Content_Accessibility_Guidelines">https://en.wikipedia.org/wiki/Web_Content_Accessibility_Guidelines</a></p> <p><a href="https://en.wikipedia.org/wiki/Web_accessibility#Guidelines_on_accessible_web_design">https://en.wikipedia.org/wiki/Web_accessibility#Guidelines_on_accessible_web_design</a></p>		



**1.4 A.7 Programmer/Analyst (CECP) - Level 3**

Name of Resource: _____			
#	Mandatory Technical Criteria	Contractor's Response	
		Demonstrated Experience (Contractor to Insert Data)	Insert Page # of Resume
<b>M.1.4.1</b>	The Contractor must demonstrate that the proposed resource has a minimum of 10 years of experience, within the last 15 years, working as a Programmer/Analyst performing at least 19 of the 28 tasks listed in the Statement of Work.		
<b>M.1.4.2</b>	The Contractor must demonstrate that the proposed resource has a minimum of 7 years of experience, within the last 15 years, in programming using Java.		
<b>M.1.4.3</b>	The Contractor must demonstrate that the proposed resource has a minimum of 5 years of experience in designing and building applications using IBM WebSphere Application Server running on Mainframe z/OS or OS/390.		

**1.5 A.7 Programmer/Analyst (Java) - Level 3**

Name of Resource: _____			
#	Mandatory Technical Criteria	Contractor's Response	
		Demonstrated Experience (Contractor to Insert Data)	Insert Page # of Resume
<b>M.1.5.1</b>	The Contractor must demonstrate that the proposed resource has a minimum of 10 years of experience working as a Java Programmer/Analyst performing at least 8 of the 11 tasks listed in the Statement of Work.		
<b>M.1.5.2</b>	The Contractor must demonstrate that the proposed resource has a minimum of 5 years of experience, within the past 10 years, designing, developing and implementing RESTful Java Web Services.		
<b>M.1.5.3</b>	The Contractor must demonstrate that the proposed resource has a minimum of 3 years of experience, within the past 5 years, developing applications using Java EE 6 or later.		
<b>M.1.5.4</b>	The Contractor must demonstrate that the proposed resource has a minimum of 2 years of experience, within the past 5 years, developing applications using Java Persistence API.		
<b>M.1.5.5</b>	The Contractor must demonstrate that the proposed resource has a minimum of 2 years of experience, within the last 5 years, creating and normalizing relational databases.		
<b>M.1.5.6</b>	<p>The Contractor must demonstrate that the proposed resource has a minimum of 2 years of experience, within the last 5 years, in developing code that meets and is in line with the internationally recognized Web Content Accessibility Guidelines (WCAG) 2.0 on accessibility and usability*.</p> <p>*A common definition of the WCAG 2.0 standards and guidelines is available at the following sites:</p> <p><a href="https://en.wikipedia.org/wiki/Web_Content_Accessibility_Guidelines">https://en.wikipedia.org/wiki/Web_Content_Accessibility_Guidelines</a></p> <p><a href="https://en.wikipedia.org/wiki/Web_accessibility#Guidelines_on_accessible_web_design">https://en.wikipedia.org/wiki/Web_accessibility#Guidelines_on_accessible_web_design</a></p>		

**1.6 A.7 Programmer/Analyst (MS Dynamics) - Level 3**

<b>Name of Resource:</b> _____			
#	Mandatory Technical Criteria	Contractor's Response	
		Demonstrated Experience (Contractor to Insert Data)	Insert Page # of Resume
<b>M.1.6.1</b>	The Contractor must demonstrate that the proposed resource has a minimum of 5 years of experience, within the past 10 years, working as an MS Dynamics Programmer/Analyst performing at least 12 of the 17 tasks listed in the Statement of Work.		
<b>M.1.6.2</b>	The Contractor must demonstrate that the proposed resource has a minimum of 5 years of experience, within the past 10 years, designing, developing and integrating MS Dynamics applications with other enterprise technologies or applications.		
<b>M.1.6.3</b>	The Contractor must demonstrate that the proposed resource has a Microsoft Dynamics certification 2013 or higher.  Note: a copy of the certification must be provided at bid closing.		
<b>M.1.6.4</b>	The Contractor must demonstrate that the proposed resource has a minimum of 5 years of experience, within the past 10 years, with the analysis, design and development of web-based applications using C# and JavaScript.		
<b>M.1.6.5</b>	The Contractor must demonstrate that the proposed resource has a minimum of 2 years of experience, within the last 5 years, conducting the following: <ul style="list-style-type: none"> <li>• software analysis</li> <li>• code analysis</li> <li>• requirements analysis</li> <li>• performance analysis</li> <li>• software reviews</li> <li>• system risk analysis</li> <li>• software reliability analysis</li> </ul>		

**1.7 A.7 Programmer/Analyst (Prod Support) - Level 2**

Name of Resource: _____			
#	Mandatory Technical Criteria	Contractor's Response	
		Demonstrated Experience (Contractor to Insert Data)	Insert Page # of Resume
<b>M.1.7.1</b>	The Contractor must demonstrate that the proposed resource has a minimum of 5 years of experience, within the last 10 years, working as a Programmer Analyst performing at least 17 of the 25 tasks listed in the Statement of Work.		
<b>M.1.7.2</b>	The Contractor must demonstrate that the proposed resource has a minimum of 2 years of experience within the last 5 years, maintaining and supporting C++ and Java based applications running in a production environment.		
<b>M.1.7.3</b>	<p>The Contractor must demonstrate that the proposed resource has minimum of 2 years of experience, within the last 5 years, maintaining, supporting and administering the day-to-day operations of high availability* applications.</p> <p>*A high availability application is defined as a system which is expected to operate reliably for 24 hours per day, 365 days per year. With the exception of planned outages, the minimum acceptable availability ratio is 95% per year, whereas 99% is desirable.</p>		
<b>M.1.7.4</b>	<p>The Contractor must demonstrate that the proposed resource has a minimum of 2 years of experience providing production support on an EDI IT application that uses:</p> <ul style="list-style-type: none"> <li>• IBM MQSeries</li> <li>• EDI using message standards ANSI ASC X12 EDI or UN/EDIFACT</li> </ul>		
<b>M.1.7.5</b>	The Contractor must demonstrate that the proposed resource has a minimum of 2 years of experience utilizing a DB2 database.		

<b>M.1.7.6</b>	The Contractor must demonstrate that the proposed resource has a minimum of 2 years of experience deploying applications on IBM's WebSphere Application Server running Microsoft Windows and IBM Mainframe OS/390 environment.		
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**1.8 A.7 Programmer/Analyst (UI) - Level 3**

Name of Resource: _____			
#	Mandatory Technical Criteria	Contractor's Response	
		Demonstrated Experience (Contractor to Insert Data)	Insert Page # of Resume
<b>M.1.8.1</b>	The Contractor must demonstrate that the proposed resource has a minimum of 10 years of experience working as a JavaScript or ECMAScript Programmer/Analyst performing at least 8 of the 12 tasks listed in the Statement of Work.		
<b>M.1.8.2</b>	The Contractor must demonstrate that the proposed resource has a minimum of 3 years of experience, within the past 5 years, designing, developing and implementing applications based on the ECMAScript 5.1 or later scripting-language.		
<b>M.1.8.3</b>	The Contractor must demonstrate that the proposed resource has a minimum of 2 years of experience, within the past 5 years, designing, developing and implementing applications based on the HTML5 markup language.		
<b>M.1.8.4</b>	The Contractor must demonstrate that the proposed resource has a minimum of 2 years of experience, within the past 5 years, developing applications using React and Redux JavaScript libraries.		
<b>M.1.8.5</b>	<p>The Contractor must demonstrate that the proposed resource has a minimum of 2 years of experience, within the past 5 years, in developing code that meets and is in line with the internationally recognized Web Content Accessibility Guidelines (WCAG) 2.0 on accessibility and usability*.</p> <p>*A common definition of the WCAG 2.0 standards and guidelines is available at the following sites:  <a href="https://en.wikipedia.org/wiki/Web_Content_Accessibility_Guidelines">https://en.wikipedia.org/wiki/Web_Content_Accessibility_Guidelines</a>  <a href="https://en.wikipedia.org/wiki/Web_accessibility#Guidelines_on_accessible_web_design">https://en.wikipedia.org/wiki/Web_accessibility#Guidelines_on_accessible_web_design</a> </p>		

**1.9 A.8 System Analyst - Level 3**

<b>Name of Resource:</b> _____			
#	Mandatory Technical Criteria	Contractor's Response	
		Demonstrated Experience (Contractor to Insert Data)	Insert Page # of Resume
<b>M.1.9.1</b>	The Contractor must demonstrate that the proposed resource has a minimum of 10 years of experience, within the last 15 years, working as a System Analyst performing at least 10 of the 15 tasks listed in the Statement of Work.		
<b>M.1.9.2</b>	The Contractor must demonstrate that the proposed resource has a minimum of 5 years of experience, within the last 10 years, in evaluating business requirements and preparing detailed system specifications for the development of web-based applications serving 250 users or more.		
<b>M.1.9.3</b>	<p>The Contractor must demonstrate that the proposed resource has a minimum of 5 years of experience, within the last 10 years, undertaking and leading option analysis exercise including:</p> <ul style="list-style-type: none"> <li>researching viable solutions</li> <li>assessing and evaluating possible alternatives</li> <li>determining which option appears to be most effective at providing the best solution</li> <li>presenting the results of the option analysis and the recommendation to management</li> <li>preparing cost benefit analysis</li> </ul>		
<b>M.1.9.4</b>	The Contractor must demonstrate that the proposed resource has a minimum of 5 years of experience, within the last 10 years, undertaking, leading and documenting User Stories and/or System Use Cases to describe the interaction between the software and users.		
<b>M.1.9.5</b>	The Contractor must demonstrate that the proposed resource has a minimum of 5 years of project experience in using a recognized system development lifecycle methodology (SDLC) such as Waterfall, Agile, Iterative, Incremental, Lean, Spiral, etc.		

Name of Resource: _____			
#	Mandatory Technical Criteria	Contractor's Response	
		Demonstrated Experience (Contractor to Insert Data)	Insert Page # of Resume
M.1.9.6	The Contractor must demonstrate that the proposed resource has a minimum of 5 years of experience designing interfaces and end-to-end business processes for integrated applications using enterprise technology and/or commercial off-the-shelf software products.		



**1.10 B.14 Technical Writer - Level 2**

<b>Name of Resource:</b> _____			
#	Mandatory Technical Criteria	Contractor's Response	
		Demonstrated Experience (Contractor to Insert Data)	Insert Page # of Resume
<b>M.1.10.1</b>	The Contractor must demonstrate that the proposed resource has a minimum of 5 years of experience, within the past 10 years, working as a Technical Writer in an IM/IT environment performing at least 6 of the 9 tasks listed in the Statement of Work.		
<b>M.1.10.2</b>	The Contractor must demonstrate that the proposed resource has a minimum of 5 years of experience, within the past 10 years, in the development and maintenance of instructional documentation such as User's Guide, step-by-step installation instructions, training manuals and Standard Operating Procedures (SOPs).		
<b>M.1.10.3</b>	The Contractor must demonstrate that the proposed resource has a minimum of 5 years of experience, within the past 10 years, working with technical resources to document the processes and procedures of IT applications and systems.		
<b>M.1.10.4</b>	<p>The Contractor must demonstrate that the proposed resource has a minimum of 5 years of experience, within the last 10 years, using Microsoft office products including:</p> <ul style="list-style-type: none"> <li>• Word</li> <li>• PowerPoint</li> <li>• Excel</li> <li>• MS Visio</li> </ul>		

**1.11 I.7 Platform Analyst (B2B) - Level 2**

<b>Name of Resource:</b> _____			
#	Mandatory Technical Criteria	Contractor's Response	
		Demonstrated experience (Contractor to insert data)	Insert page # of resume
<b>M.1.11.1</b>	The Contractor must demonstrate that the proposed resource has a minimum of 5 years of experience, within the last 10 years, working as a Platform Analyst performing at least 16 of the 23 tasks listed in the Statement of Work.		
<b>M.1.11.2</b>	The Contractor must demonstrate that the proposed resource has a minimum of 5 years of experience designing, developing and implementing Business to Business (B2B) solutions* within the last 10 years.  *A B2B solution is defined as facilitating the capture and sharing of electronic information exchanged between one business and another.		
<b>M.1.11.3</b>	The Contractor must demonstrate that the proposed resource has a minimum of 3 years of experience developing B2B solutions using each of the following: <ul style="list-style-type: none"> <li>• XML (Extensible Markup Language)</li> <li>• Java (J2EE)</li> <li>• Web Services (REST or SOAP)</li> </ul>		
<b>M.1.11.4</b>	The Contractor must demonstrate that the proposed resource has a minimum of 3 years of experience with each of the following: <ul style="list-style-type: none"> <li>• MQ messaging</li> <li>• DB2</li> <li>• Data Modeling</li> </ul>		

**1.12 I.7 Platform Analyst (Data Power) - Level 2**

Name of Resource: _____			
#	Mandatory Technical Criteria	Contractor's Response	
		Demonstrated Experience (Contractor to Insert Data)	Insert Page # of Resume
<b>M.1.12.1</b>	The Contractor must demonstrate that the proposed resource has a minimum of 5 years of experience, within the last 10 years, working as a Platform Analyst performing at least 15 of the 22 tasks listed in the Statement of Work.		
<b>M.1.12.2</b>	The Contractor must demonstrate that the proposed resource has a minimum of 5 years of experience, within the last 10 years, designing, developing and implementing Business to Business (B2B) solutions*.  *A B2B solution is defined as to facilitate the capture and sharing of electronic information exchanged between one business and another.		
<b>M.1.12.3</b>	The Contractor must demonstrate that the proposed resource has a minimum of 3 years of experience in developing B2B solutions using each of the following: <ul style="list-style-type: none"> <li>• XML (Extensible Markup Language)</li> <li>• Java (J2EE)</li> <li>• Web Services (REST or SOAP)</li> <li>• IBM DataPower (GatewayScript)</li> </ul>		
<b>M.1.12.4</b>	The Contractor must demonstrate that the proposed resource has a minimum of 3 years of experience, with each of the following: <ul style="list-style-type: none"> <li>• MQ messaging</li> <li>• JMS messaging</li> <li>• DB2</li> <li>• Data Modeling</li> </ul>		

**1.13 P.9 Project Manager (BPA & B2B) - Level 2**

<b>Name of Resource:</b>			
#	Mandatory Technical (MT) Criteria	Contractor's Response	
		Demonstrated Experience (Contractor to Insert Data)	Insert Page # of Resume
<b>M.1.13.1</b>	The Contractor must demonstrate that the proposed resource has a minimum of 5 years of experience, within the last 10 years, working as a Project Manager performing at least 14 of the 21 tasks listed in the Statement of Work.		
<b>M.1.13.2</b>	<p>The Contractor must demonstrate that the proposed resource has a minimum of 5 years of experience, within the last 10 years, in managing IT projects* and providing IT project management support including performing the following functions:</p> <ul style="list-style-type: none"> <li>• Conduct and organize project start-up activities</li> <li>• Participate in options and cost benefit analysis</li> <li>• Determine and identify tasks and deliverables</li> <li>• Develop and maintain project schedules</li> <li>• Prepare budgetary estimates</li> <li>• Oversee and coordinate project activities</li> <li>• Monitor and track project activities and deliverables</li> <li>• Prepare progress reports including identifying risks and issues</li> <li>• Organize and facilitate meetings, walkthroughs, presentations, training sessions to different type of audience, for example, technical, non-technical and senior management</li> <li>• Develop, review and maintain project documentation including periodic status/progress reports.</li> </ul> <p>*IT project is defined as:</p>		

Name of Resource:			
#	Mandatory Technical (MT) Criteria	Contractor's Response	
		Demonstrated Experience (Contractor to Insert Data)	Insert Page # of Resume
	<ul style="list-style-type: none"> <li>Scope spans multiple programs and services</li> <li>User base of 500 users or more</li> </ul>		
<b>M.1.13.3</b>	The Contractor must demonstrate that the proposed resource has a minimum of 3 years of experience, within the last 5 years, using a change management process to track, coordinate and implement system enhancements.		
<b>M.1.13.4</b>	The Contractor must demonstrate that the proposed resource has experience managing multiple IT projects with similar timelines and competing priorities and working collaboratively with other project management personnel from other areas of the organization.		
<b>M.1.13.5</b>	The Contractor must demonstrate that the proposed resource has a minimum of 3 years of experience, within the last 5 years, developing and providing presentations to project personnel including senior management and end-users.		

## 2.0 Point Rated Resource Assessment Criteria:

### 2.1 A.1 Application/Software Architect – Level 3

Name of Resource: _____				
#	Rated Technical Criteria	Scoring Methodology	Points Max	Cross Reference to proposal (Page #)
R.2.1.1	The Contractor should demonstrate that the proposed resource has over and above the minimum 10 years of experience required in M.1.1.1 working as an Application/Software Architect.	10+ to 12 years = 2 points 12+ to 14 years = 4 points 14+ years = 6 points	6	
R.2.1.2	The Contractor should demonstrate that the proposed resource has experience as an Application/Software Architect working on at least three (3) large scale IT projects*.  *Large scale IT project is defined as: <ul style="list-style-type: none"> <li>• Scope spans multiple programs and services</li> <li>• User base of 500 users or more</li> </ul>	1 project = 2 points 2 projects = 4 points 3 projects = 6 points	6	
R.2.1.3	The Contractor should demonstrate that the proposed resource has over and above the minimum of 5 years of experience required in M.1.1.3 analyzing, designing, integrating and documenting technical architectures, frameworks, strategies and interfaces for enterprise-wide solutions/systems.	5+ to 7 years = 2 points 7+ to 9 years = 4 points 9+ years = 6 points	6	
R.2.1.4	The Contractor should demonstrate that the proposed resource has experience preparing and presenting technical material to senior	1+ to 3 years = 2 points 3+ to 5 years = 4 points 5+ years = 6 points	6	

Name of Resource: _____				
#	Rated Technical Criteria	Scoring Methodology	Points Max	Cross Reference to proposal (Page #)
	management.			
R.2.1.5	The Contractor should demonstrate that the proposed resource has experience in facilitating group discussions with technical team members and client representatives on application design considerations.	1+ to 3 years = 2 points 3+ to 5 years = 4 points 5+ years = 6 points	6	
R.2.1.6	The Contractor should demonstrate that the proposed resource has experience preparing and designing architectural artifacts using tools such as Rational Rose, Magic Draw, TogetherJ, Balsamiq, Visio or Enterprise Architect.	1+ to 3 years = 2 points 3+ to 5 years = 4 points 5+ years = 6 points	6	
R.2.1.7	The Contractor should demonstrate that the proposed resource has experience working on IT related projects using the Rational Unified Process (RUP) for the design of enterprise-wide applications.  *An enterprise-wide application is a system that operates in a corporate environment such as a business or government, designed to satisfy the needs of a large organization of 1,000 employees or more rather than individual users.	1+ to 3 years = 2 points 3+ to 5 years = 4 points 5+ years = 6 points	6	
Total Available points:			42	
Minimum Total Overall Points Required to be declared responsive:			25	
Total achieved:				

## 2.2 A.11 Tester – Level 2

Name of Resource: _____				
#	Rated Technical Criteria	Scoring Methodology	Points Max	Cross Reference to proposal (Page #)
R.2.2.1	The Contractor should demonstrate that the proposed resource has over and above the minimum 5 years of experience required in M.1.2.1 working as Web Application Software Tester in an IM/IT technical environment.	5+ to 7 years = 2 points 7+ to 9 years = 4 points 9+ years = 6 points	6	
R.2.2.2	The Contractor should demonstrate that the proposed resource has experience over and above the minimum 3 years required in M.1.2.2 in creating test deliverables, test cases, anticipated results and test plans.	3+ to 5 years = 2 points 5+ to 7 years = 4 points 7+ years = 6 points	6	
R.2.2.3	The Contractor should demonstrate that the proposed resource has experience over and above the minimum 3 years required in M.1.2.3 using automated testing tools.	3+ to 5 years = 2 points 5+ to 7 years = 4 points 7+ years = 6 points	6	
R.2.2.4	The Contractor should demonstrate that the proposed resource has experience working with: <ul style="list-style-type: none"> <li>HP Quality Center</li> <li>Selenium automated testing tool</li> </ul>	5 points for each test automated tool/product	10	
Total Available points:			28	
Minimum Total Overall Points Required to be declared responsive:			16	
Total achieved:				



### 2.3 A.14 Web Developer (Usability Expert) – Level 3

Name of Resource: _____				
#	Rated Technical Criteria	Scoring Methodology	Points Max	Cross Reference to proposal (Page #)
<b>R.2.3.1</b>	The Contractor should demonstrate that the proposed resource has experience over and above the minimum 10 years required in M.1.3.1 as a Web Developer (Usability Expert).	10+ to 12 years = 2 points 12+ to 14 years = 4 points 14+ years = 6 points	6	
<b>R.2.3.2</b>	The Contractor should demonstrate that the proposed resource has experience over and above the minimum 5 years required in M.1.3.2 designing web application interfaces for an IM/IT project with 500 users or more.	5+ to 6 years = 2 points 6+ to 7 years = 4 points 7+ years = 6 points	6	
<b>R.2.3.3</b>	The Contractor should demonstrate that the proposed resource has experience over and above the minimum 5 years required in M.1.3.3 developing usability tests, organizing, leading and participating in usability testing, documenting, analyzing results and modifying design accordingly.	5+ to 6 years = 2 points 6+ to 7 years = 4 points 7+ years = 6 points	6	
<b>R.2.3.4</b>	The Contractor should demonstrate that the proposed resource has experience over and above the minimum 5 years required in M.1.3.4 documenting workflow maps and user interfaces.	5+ to 6 years = 2 points 6+ to 7 years = 4 points 7+ years = 6 points	6	

<b>R.2.3.5</b>	The Contractor should demonstrate that the proposed resource has experience over and above the minimum 2 years required in M.1.3.5 designing web application interfaces that meet and are in line with the internationally recognized Web Content Accessibility Guidelines (WCAG) 2.0 on accessibility and usability.	2+ to 4 years = 2 points 4+ to 6 years = 4 points 6+ years = 6 points	6	
<b>R.2.3.6</b>	The Contractor should demonstrate that the proposed resource has a minimum of 2 years of experience, within the past 5 years, developing applications using React and Redux libraries.	2+ to 4 years = 2 points 4+ to 6 years = 4 points 6+ years = 6 points	6	
Total Available points:			36	
Minimum Total Overall Points Required to be declared responsive:			22	
Total achieved:				

## 2.4 A.7 Programmer/Analyst (CECP) – Level 3

Name of Resource: _____				
#	Rated Technical Criteria	Scoring Methodology	Points Max	Cross Reference to proposal (Page #)
R.2.4.1	The Contractor should demonstrate that the proposed resource has over and above the minimum 7 years of experience required in M.1.4.2 working as a Programmer/Analyst.	7+ to 10 years = 2 points 10+ to 13 years = 4 points 13+ years = 6 points	6	
R.2.4.2	The Contractor should demonstrate that the proposed resource has over and above the minimum 5 years of experience required in M.1.4.3 designing and building applications using IBM WebSphere Application Server running on Mainframe z/OS or OS/390.	5+ to 7 years = 2 points 7+ to 9 years = 4 points 9+ years = 6 points	6	
R.2.4.3	The Contractor should demonstrate that the proposed resource has experience in designing, developing and implementing Object-Oriented systems and Object Oriented (OO) n-tier applications using OO tools such as Unified Modeling Language (UML) and Rational Unified Process (RUP).	2+ to 4 years = 2 points 4+ to 6 years = 4 points 6+ years = 6 points	6	
R.2.4.4	The Contractor should demonstrate that the proposed resource has experience in using and supporting web frameworks in Java.	2+ to 4 years = 2 points 4+ to 6 years = 4 points 6+ years = 6 points	6	

<b>R.2.4.5</b>	The Contractor should demonstrate that the proposed resource has experience designing and developing applets using HyperText Markup Language (HTML), Servlets and JavaServer Pages / JavaServer Faces (JSP/JSF).	2+ to 4 years = 2 points 4+ to 6 years = 4 points 6+ years = 6 points	6	
<b>R.2.4.6</b>	The Contractor should demonstrate that the proposed resource has experience designing, building and supporting Java 2 Platform, Enterprise Edition (J2EE) applications.  Technologies used must include <b>ALL</b> of the following: <ul style="list-style-type: none"> <li>• JavaServer Pages (JSP)</li> <li>• Servlets</li> <li>• Enterprise Java Beans (EJB)</li> <li>• Extensible Markup Language (XML)</li> <li>• Web services</li> </ul>	2+ to 4 years = 2 points 4+ to 6 years = 4 points 6+ years = 6 points	6	
Total Available points:			36	
Minimum Total Overall Points Required to be declared responsive:			22	
Total achieved:				

## 2.5 A.7 Programmer/Analyst (Java) – Level 3

Name of Resource: _____				
#	Rated Technical Criteria	Scoring Methodology	Points Max	Cross Reference to proposal (Page #)
R.2.5.1	The Contractor should demonstrate that the proposed resource has experience over and above the minimum 10 years of experience required in M.1.5.1 as a Java Programmer/Analyst.	10+ to 12 years = 2 points 12+ to 14 years = 4 points 14+ years = 6 points	6	
R.2.5.2	The Contractor should demonstrate that the proposed resource has experience over and above the minimum 5 years required in M1.5.2 designing, developing and implementing RESTful Java Web Services.	5+ to 6 years = 2 points 6+ to 7 years = 4 points 7+ years = 6 points	6	
R.2.5.3	The Contractor should demonstrate that the proposed resource has experience over and above the minimum 3 years required in M.1.5.3 developing applications using Java EE 6 or later.	3+ to 4 years = 2 point 4+ to 5 years = 4 points 5+ years = 6 points	6	
R.2.5.4	The Contractor should demonstrate that the proposed resource has experience over and above the minimum 2 years required in M.1.5.4 developing applications using Java Persistence API.	2+ to 3 years = 2 points 3+ to 4 years = 4 points 4+ years = 6 points	6	
R.2.5.5	The Contractor should demonstrate that the proposed resource has experience over and above the minimum 2 years required in M.1.5.5 creating and normalizing relational databases.	2+ to 3 years = 2 points 3+ to 4 years = 4 points 4+ years = 6 points	6	

Name of Resource: _____				
#	Rated Technical Criteria	Scoring Methodology	Points Max	Cross Reference to proposal (Page #)
R.2.5.6	The Contractor should demonstrate that the proposed resource has experience over and above the minimum 2 years required in M.1.5.6, in developing code that meets and is in line with the internationally recognized Web Content Accessibility Guidelines (WCAG) 2.0 on accessibility and usability.	2+ to 3 years = 2 points 3+ to 4 years = 4 points 4+ years = 6 points	6	
R.2.5.7	The Contractor should demonstrate that the proposed resource has experience in testing, designing, and developing automated tests using Java (JUnit).	2+ to 3 years = 2 points 3+ to 4 years = 4 points 4+ years = 6 points	6	
Total Available points:			42	
Minimum Total Overall Points Required to be declared responsive:			25	
Total achieved:				

**2.6 A.7 Programmer/Analyst (MS Dynamics) – Level 3**

Name of Resource: _____				
#	Rated Technical Criteria	Scoring Methodology	Points Max	Cross Reference to proposal (Page #)
<b>R.2.6.1</b>	The Contractor should demonstrate that the proposed resource has experience over and above the minimum 5 years required in M.1.6.1 working as an MS Dynamics Programmer/Analyst.	5+ to 6 years = 2 points 6+ to 7 years = 4 points 7+ years = 6 points	6	
<b>R.2.6.2</b>	The Contractor should demonstrate that the proposed resource has worked as an MS Dynamics Programmer/Analyst on two (2) projects serving a user base of more than 250 users.  Note: individual points will be awarded for each of the two (2) projects	<u>Project #1</u> 250+ to 500 users = 2 points 500+ to 1,000 users = 4 points 1,000+ users = 6 points  <u>Project #2</u> 250+ to 500 users = 2 points 500+ to 1,000 users = 4 points 1,000+ users = 6 points	12	
<b>R.2.6.3</b>	The Contractor should demonstrate that the proposed resource has obtained MS Dynamics 2015 certification.  Note: a copy of the certification should be provided.	MS Dynamics 2015 certification = 3 points	3	

<b>R.2.6.4</b>	The Contractor should demonstrate that the proposed resource has at least 5 years of programming experience with the following languages: <ul style="list-style-type: none"><li>• C#</li><li>• JavaScript</li><li>• SQL</li></ul>	2 points per language up to a maximum of 6 points	6	
<b>R.2.6.5</b>	The Contractor should demonstrate that the proposed resource has experience conducting and executing regression and user acceptance tests.	1+ to 2 years = 2 points 2+ to 3 years = 4 points 3+ years = 6 points	6	
Total Available points:			33	
Minimum Total Overall Points Required to be declared responsive:			20	
Total achieved:				



## 2.7 A.7 Programmer/Analyst (Prod Support) – Level 2

Name of Resource: _____				
#	Rated Technical Criteria	Scoring Methodology	Points Max	Cross Reference to proposal (Page #)
R.2.7.1	The Contractor should demonstrate that the proposed resource has experience over and above the minimum 2 years required in M.1.7.3 maintaining, supporting and administering the day-to-day operations of high availability* applications.	2+ to 4 years = 2 points 4+ to 6 years = 4 points 6+ years = 6 points	6	
R.2.7.2	The Contractor should demonstrate that the proposed resource has experience in C++ version 6.	2+ to 3 years = 2 points 3+ to 4 years = 4 points 4+ years = 6 points	6	
R.2.7.3	The Contractor should demonstrate that the proposed resource has a minimum of 2 years of experience in liaising and communicating both verbally and in writing with clients and other technical resources in the context of providing operational support as outlined below: <ul style="list-style-type: none"> <li>addressing system malfunctions</li> <li>providing status and progress reports</li> <li>obtaining clarification and additional details on the behavior of the system</li> <li>communicating unplanned and scheduled outages</li> <li>installation of fixes and patches</li> <li>handling ad-hoc requests</li> </ul>	2+ to 4 years = 4 points 4+ to 6 years = 8 points 6+ years = 12 points	12	

Name of Resource: _____				
#	Rated Technical Criteria	Scoring Methodology	Points Max	Cross Reference to proposal (Page #)
	<ul style="list-style-type: none"> <li>coaching/training</li> <li>knowledge transfer</li> <li>producing technical documents such as release notes, FAQs, installation instructions.</li> </ul>			
<b>R.2.7.4</b>	The Contractor should demonstrate that the proposed resource has experience utilizing SMART Ticket Process in a production support role.	2+ to 4 years = 2 points 4+ to 6 years = 4 points 6+ years = 6 points	6	
<b>R.2.7.5</b>	The Contractor should demonstrate that the proposed resource has experience performing metric analysis or statistical analysis based on incident management in a production support environment.	2+ to 4 years = 2 points 4+ to 6 years = 4 points 6+ years = 6 points	6	
Total Available points:			36	
Minimum Total Overall Points Required to be declared responsive:			22	
Total achieved:				

**2.8 A.7 Programmer/Analyst (UI) – Level 3**

Name of Resource: _____				
#	Rated Technical Criteria	Scoring Methodology	Points Max	Cross Reference to proposal (Page #)
<b>R.2.8.1</b>	The Contractor should demonstrate that the proposed resource has experience over and above the minimum 10 years required in M.1.8.1 as a JavaScript or ECMAScript Programmer/Analyst.	10+ to 12 years = 2 points 12+ to 14 years = 4 points 14+ years = 6 points	6	
<b>R.2.8.2</b>	The Contractor should demonstrate that the proposed resource has experience over and above the minimum 3 years required in M.1.8.2 designing, developing and implementing applications based on the ECMAScript 5.1 or later scripting-language.	3+ to 4 years = 2 points 4+ to 5 years = 4 points 5+ years = 6 points	6	
<b>R.2.8.3</b>	The Contractor should demonstrate that the proposed resource has experience over and above the minimum 2 years required in M.1.8.3 designing, developing and implementing applications based on the HTML5 markup language.	2+ to 3 years = 2 points 3+ to 4 years = 4 points 4+ years = 6 points	6	
<b>R.2.8.4</b>	The Contractor should demonstrate that the proposed resource has experience over and above the minimum 2 years required in M.1.8.4 developing applications using React and Redux JavaScript libraries.	2+ to 3 years = 2 points 3+ to 4 years = 4 points 4+ years = 6 points	6	

<b>R.2.8.5</b>	The Contractor should demonstrate that the proposed resource has experience over and above the minimum 2 years required in M.1.8.5, in developing code that meets and is in line with the internationally recognized Web Content Accessibility Guidelines (WCAG) 2.0 on accessibility and usability.	2+ to 3 years = 2 points 3+ to 4 years = 4 points 4+ years = 6 points	6	
Total Available points:			30	
Minimum Total Overall Points Required to be declared responsive:			18	
Total achieved:				

## 2.9 A.8 System Analyst – Level 3

Name of Resource: _____				
#	Rated Technical Criteria	Scoring Methodology	Points Max	Cross Reference to proposal (Page #)
R.2.9.1	The Contractor should demonstrate that the proposed resource has over and above the minimum 10 years required in M.1.9.1 working as a System Analyst.	10+ to 12 years = 2 points 12+ to 14 years = 4 points 14+ years = 6 points	6	
R.2.9.2	The Contractor should demonstrate that the proposed resource has worked as a System Analyst on three (3) IT projects with the purpose of delivering web-based applications to more than 250 users.  Note: individual points will be awarded for each of the three (3) projects	<b><u>Project #1</u></b> 250+ to 500 users = 2 points 500+ to 1,000 users = 4 points 1,000+ users = 6 points <b><u>Project #2</u></b> 250+ to 500 users = 2 points 500+ to 1,000 users = 4 points 1,000+ users = 6 points <b><u>Project #3</u></b> 250+ to 500 users = 2 points 500+ to 1,000 users = 4 points 1,000+ users = 6 points	18	
R.2.9.3	The Contractor should demonstrate that the proposed resource has experience with the ITIL (Information Technology Infrastructure Library) framework including ITIL processes and best practices.	3+ to 4 years = 2 points 4+ to 5 years = 4 points 5+ years = 6 points	6	

Name of Resource: _____				
#	Rated Technical Criteria	Scoring Methodology	Points Max	Cross Reference to proposal (Page #)
<b>R.2.9.4</b>	The Contractor should demonstrate that the proposed resource has experience working on horizontal initiatives or IT projects that span across more than one Government department.	3+ to 4 years = 2 points 4+ to 5 years = 4 points 5+ years = 6 points	6	
<b>R.2.9.5</b>	The Contractor should demonstrate that the proposed resource has a working knowledge of the following applications: <ul style="list-style-type: none"> <li>• MS Excel</li> <li>• MS PowerPoint</li> <li>• MS Project</li> <li>• MS Word</li> <li>• MS Visio</li> </ul>	2 points per application up to a maximum of 10 points	10	
<b>R.2.9.6</b>	The Contractor should demonstrate that the proposed resource has over and above the minimum of 5 years required in M.1.9.6 designing interfaces and end-to-end business processes for integrated applications using enterprise technology and/or commercial off-the-shelf software products.	5+ to 6 years = 2 points 6+ to 7 years = 4 points 7+ years = 6 points	6	
Total Available points:			52	
Minimum Total Overall Points Required to be declared responsive:			31	
Total achieved:				

## 2.10 B.14 Technical Writer – Level 2

Name of Resource: _____				
#	Rated Technical Criteria	Scoring Methodology	Points Max	Cross Reference to proposal (Page #)
R.2.10.1	The Contractor should demonstrate that the proposed resource has experience over and above the minimum 5 years required in M.1.10.1 working as a Technical Writer in an IM/IT environment.	5+ to 7 years = 2 points 7+ to 9 years = 4 points 9+ years = 6 points	6	
R.2.10.2	The Contractor should demonstrate that the proposed resource has experience over and above the minimum 5 years required in M.1.10.2 developing and maintaining instructional documentation such as User's Guide, step-by-step installation instructions, training manuals and Standard Operating Procedures (SOPs).	5+ to 7 years = 2 points 7+ to 9 years = 4 points 9+ years = 6 points	6	
R.2.10.3	The Contractor should demonstrate that the proposed resource has experience over and above the minimum 5 years required in M.1.10.3 working with technical resources to document the processes and procedures of IT applications and systems.	5+ to 7 years = 2 points 8+ to 9 years = 4 points 9+ years = 6 points	6	
R.2.10.4	The Contractor should demonstrate that the proposed resource has experience working as Technical Writer with a development team that is leveraging and using the	1 point for each programming language or software product up to a maximum of 10 points	10	

Name of Resource: _____				
#	Rated Technical Criteria	Scoring Methodology	Points Max	Cross Reference to proposal (Page #)
	<p>following programming languages and software products:</p> <ul style="list-style-type: none"> <li>• HTML</li> <li>• CSS</li> <li>• JavaScript</li> <li>• JSP</li> <li>• Adobe LifeCycle</li> <li>• ASP</li> <li>• PowerScript</li> <li>• OpentText GCDocs</li> <li>• SAP Enterprise Resource Planning</li> <li>• XML</li> <li>• JIRA</li> <li>• Java</li> <li>• Moodle</li> <li>• MS Dynamics</li> <li>• Questionmark</li> <li>• IBM IIB</li> <li>• IBM DataPower</li> <li>• IBM MQ</li> </ul>			
<b>R.2.10.5</b>	The Contractor should demonstrate that the proposed resource has experience editing technical documentation for web-based applications designed in Java.	<p>2+ to 4 years = 2 points</p> <p>4+ to 6 years = 4 points</p> <p>6+ years = 6 points</p>	6	
<b>R.2.10.6</b>	The Contractor should demonstrate that the proposed resource has	<p>2+ to 4 years = 2 points</p> <p>4+ to 6 years = 4 points</p>	6	



Name of Resource: _____				
#	Rated Technical Criteria	Scoring Methodology	Points Max	Cross Reference to proposal (Page #)
	experience with the ITIL (Information Technology Infrastructure Library) framework including ITIL processes and best practices.	6+ years = 6 points		
<b>R.2.10.7</b>	The Contractor should demonstrate that the proposed resource has a specialized certification or diploma in Technical Writing and/or Communication.  Note: a copy of the certification or diploma should be provided.	Certification or Diploma = 5 points	5	
Total Available points:			45	
Minimum Total Overall Points Required to be declared responsive:			27	
Total achieved:				

## 2.11 I.7 Platform Analyst (B2B) – Level 2

Name of Resource: _____				
#	Rated Technical Criteria	Scoring Methodology	Points Max	Cross Reference to proposal (Page #)
R.2.11.1	The Contractor should demonstrate that the proposed resource has experience implementing B2B solutions using the IBM Sterling B2B Integrator (SBI) COTS product.	1+ to 3 years = 2 points 3+ to 5 years = 4 points 5+ years = 6 points	6	
R.2.11.2	The Contractor should demonstrate that the proposed resource has experience with IBM WebSphere (J2EE) application server.	1+ to 3 years = 2 points 3+ to 5 years = 4 points 5+ years = 6 points	6	
R.2.11.3	The Contractor should demonstrate that the proposed resource has experience integrating IBM Sterling B2B Integrator (SBI) Business Processes using Web Service.	1+ to 3 years = 2 points 3+ to 5 years = 4 points 5+ years = 6 points	6	
R.2.11.4	The Contractor should demonstrate that the proposed resource has experience with Java programming using REST (Representational State Transfer) or SOAP (Simple Object Access Protocol) technologies.	1+ to 3 years = 2 points 3+ to 5 years = 4 points 5+ years = 6 points	6	
R.2.11.5	The Contractor should demonstrate that the proposed resource has experience analyzing, developing or enhancing an EDI IT application using MQ Series.	1+ to 3 years = 2 points 3+ to 5 years = 4 points 5+ years = 6 points	6	

Name of Resource: _____				
#	Rated Technical Criteria	Scoring Methodology	Points Max	Cross Reference to proposal (Page #)
<b>R.2.11.6</b>	<p>The Contractor should demonstrate that the proposed resource has experience within the last 10 years working on large scale IT projects*</p> <p>*Large scale IT project is defined as:</p> <ul style="list-style-type: none"> <li>• Scope spans multiple programs and services</li> <li>• User base of 500 users or more</li> </ul>	<p>1+ to 3 years = 2 points</p> <p>3+ to 5 years = 4 points</p> <p>5+ years = 6 points</p>	6	
Total Available points:			36	
Minimum Total Overall Points Required to be declared responsive:			22	
Total achieved:				

## 2.12 I.7 Platform Analyst (Data Power) – Level 2

Name of Resource: _____				
#	Rated Technical Criteria	Scoring Methodology	Points Max	Cross Reference to proposal (Page #)
<b>R.2.12.1</b>	The Contractor should demonstrate that the proposed resource has experience implementing B2B solutions using the IBM Data Power product.	1+ to 3 years = 2 points 3+ to 5 years = 4 points 5+ years = 6 points	6	
<b>R.2.12.2</b>	The Contractor should demonstrate that the proposed resource has experience implementing B2B solutions using the IBM Integration Bus (IIB) COTS product.	1+ to 3 years = 2 points 3+ to 5 years = 4 points 5+ years = 6 points	6	
<b>R.2.12.3</b>	The Contractor should demonstrate that the proposed resource has experience with IBM WebSphere (J2EE) application server.	1+ to 3 years = 2 points 3+ to 5 years = 4 points 5+ years = 6 points	6	
<b>R.2.12.4</b>	The Contractor should demonstrate that the proposed resource has experience integrating IBM Data Power Business Processes using Multi-protocol Adapters and IBM Transformation Extender.	1+ to 3 years = 2 points 3+ to 5 years = 4 points 5+ years = 6 points	6	
<b>R.2.12.5</b>	The Contractor should demonstrate that the proposed resource has experience with Gateway Script (ECMAScript and CommonJS) programming within IBM Data Power.	1+ to 3 years = 2 points 3+ to 5 years = 4 points 5+ years = 6 points	6	

<b>R.2.12.6</b>	The Contractor should demonstrate that the proposed resource has experience with Java programming using REST (Representational State Transfer) or SOAP (Simple Object Access Protocol) technologies.	1+ to 3 years = 2 points 3+ to 5 years = 4 points 5+ years = 6 points	6	
<b>R.2.12.7</b>	The Contractor should demonstrate that the proposed resource has experience analyzing, developing or enhancing an EDI IT application using MQ Series and/or JMS.	1+ to 3 years = 2 points 3+ to 5 years = 4 points 5+ years = 6 points	6	
<b>R.2.12.8</b>	The Contractor should demonstrate that the proposed resource has experience within the last 10 years working on large scale IT projects*  *Large scale IT project is defined as: <ul style="list-style-type: none"> <li>• Scope spans multiple programs and services</li> <li>• User base of 500 users or more</li> </ul>	1+ to 3 years = 2 points 3+ to 5 years = 4 points 5+ years = 6 points	6	
Total Available points:			48	
Minimum Total Overall Points Required to be declared responsive:			29	
Total achieved:				

## 2.13 P.9 Project Manager (BPA & B2B) – Level 2

Name of Resource: _____				
#	Rated Technical Criteria	Scoring Methodology	Points Max	Cross Reference to proposal (Page #)
R.2.13.1	The Contractor should demonstrate that the proposed resource has experience in leading Information Technology (IT) projects.	3 projects = 2 points 4 projects = 4 points 5 projects = 6 points	6	
R.2.13.2	The Contractor should demonstrate that the proposed resource has experience working on horizontal initiatives or IT projects that span across more than one Government department.	1 project = 2 points 2 projects = 4 points 3 projects = 6 points	6	
R.2.13.3	The Contractor should demonstrate that the proposed resource has obtained a university degree or college diploma in project management, business administration, or computer science.  A copy of the degree or diploma should be provided.	no degree or diploma = 0 points degree or diploma = 6 points	6	
R.2.13.4	The Contractor should demonstrate that the proposed resource has experience with both the Agile and Waterfall project management methodologies.	Agile = 3 points Waterfall = 3 points	6	

<b>R.2.13.5</b>	<p>The Contractor should demonstrate that the proposed resource has at least 5 years of experience working with:</p> <ul style="list-style-type: none"> <li>• MS Excel</li> <li>• MS PowerPoint</li> <li>• MS Project</li> <li>• MS Word</li> <li>• MS Visio</li> </ul>	2 points per application up to a maximum of 10 points	10	
<b>R.2.13.6</b>	<p>The Contractor should demonstrate that the proposed resource has experience with the ITIL (Information Technology Infrastructure Library) including best practices and guidelines.</p>	<p>2+ to 4 years = 3 points 4+ years = 6 points</p>	6	
<b>R.2.13.7</b>	<p>The Contractor should demonstrate that the proposed resource has completed a Project Management Professional certification.</p> <p>A copy of the certification should be provided.</p>	<p>PMP certification or PRINCE2 Practitioner certification = 6 points</p>	6	
Total Available points:			46	
Minimum Total Overall Points Required to be declared responsive:			27	
Total achieved:				

## **APPENDIX D TO ANNEX A**

### **CERTIFICATIONS AT THE TA STAGE**

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

#### **1. CERTIFICATION OF EDUCATION AND EXPERIENCE**

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

\_\_\_\_\_  
Print name of authorized individual & sign above

\_\_\_\_\_  
Date

#### **2. CERTIFICATION OF AVAILABILITY OF PERSONNEL**

The Contractor certifies that, should it be authorized to provide services under this Task Authorization, the persons proposed in the quotation will be available to commence performance of the work within a reasonable time from the date of issuance of the valid Task Authorization, or within the time specified in the TA Form, and will remain available to perform the work in relation to the fulfillment of the requirement.

\_\_\_\_\_  
Print name of authorized individual & sign above

\_\_\_\_\_  
Date

#### **3. CERTIFICATION OF STATUS OF PERSONNEL**

If the Contractor has proposed any individual who is not an employee of the Contractor, the Contractor certifies that it has permission from that individual to propose his/her services in relation to the Work to be performed under this TA and to submit his/her résumé to Canada. At any time during the Contract Period the Contractor must, upon request from the Contracting Authority, provide the written confirmation, signed by the individual, of the permission that was given to the Contractor of his/her availability. Failure to comply with the request may result in a default under the Contract in accordance with the General Conditions.

\_\_\_\_\_

\_\_\_\_\_



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Print name of authorized individual & sign above

Date

4. CERTIFICATION OF LANGUAGE - [English or Bilingual or French]

The Contractor certifies that the proposed resource(s) in response to this draft Task Authorization is/are [Option 1 - Unilingual English] fluent in English. The individual(s) proposed must be able to communicate orally and in writing in English without any assistance and with minimal errors.

[Option 2 - Bilingual] fluent in both official languages of Canada (French and English). The individual(s) proposed must be able to communicate orally and in writing in French and English without any assistance and with minimal errors.

[Option 3 - Unilingual French] fluent in French. The individual(s) proposed must be able to communicate orally and in writing in French 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 two years later 2020)			
Resource Category	Level of Expertise	Firm Per Diem Rate	
		Year 1	Year 2
Application/Software Architect	Level 3		
Tester	Level 2		
Web Developer (Usability Expert)	Level 3		
Programmer/Analyst (CECP)	Level 3		
Programmer/Analyst (JAVA)	Level 3		
Programmer/Analyst (MS Dynamics)	Level 3		
Programmer/Analyst (Prod Support)	Level 2		
Programmer/Analyst (UI)	Level 3		
System Analyst	Level 3		
Technical Writer	Level 2		
Platform Analyst (B2B)	Level 2		
Platform Analyst (Data Power)	Level 2		
Project Manager	Level 2		

### OPTION PERIODS:

Option Period 1 (2020 to 2022)			
Resource Category	Level of Expertise	Firm Per Diem Rate	
		Year 1	Year 2
Application/Software Architect	Level 3		
Tester	Level 2		
Web Developer (Usability Expert)	Level 3		
Programmer/Analyst (CECP)	Level 3		

Solicitation Number:  
47419-251689/A

Amendment Number:

Buyer ID:  
606EL

Programmer/Analyst (JAVA)	Level 3		
Programmer/Analyst (MS Dynamics)	Level 3		
Programmer/Analyst (Prod Support)	Level 2		
Programmer/Analyst (UI)	Level 3		
System Analyst	Level 3		
Technical Writer	Level 2		
Platform Analyst (B2B)	Level 2		
Platform Analyst (Data Power)	Level 2		
Project Manager	Level 2		

<b>Option Period 2</b> <b>(2022 to 2024)</b>			
Resource Category	Level of Expertise	Firm Per Diem Rate	
		Year 1	Year 2
Application/Software Architect	Level 3		
Tester	Level 2		
Web Developer (Usability Expert)	Level 3		
Programmer/Analyst (CECP)	Level 3		
Programmer/Analyst (JAVA)	Level 3		
Programmer/Analyst (MS Dynamics)	Level 3		
Programmer/Analyst (Prod Support)	Level 2		
Programmer/Analyst (UI)	Level 3		
System Analyst	Level 3		
Technical Writer	Level 2		
Platform Analyst (B2B)	Level 2		
Platform Analyst (Data Power)	Level 2		
Project Manager	Level 2		

**ANNEX C**  
**SECURITY REQUIREMENTS CHECK LIST**  
*(Provided under separate cover)*

## ATTACHMENT 3.1 BID SUBMISSION FORM

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

	Article in Part 2 entitled "Former Public Servant"	
<b>Security Clearance Level of Bidder</b> [include both the level and the date it was granted] <b>[Note to Bidders: Please ensure that the security clearance matches the legal name of the Bidder. 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 3.2**  
**ELECTRONIC PAYMENT INSTRUMENTS**

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

- ☐ VISA Acquisition Card;
- ☐ MasterCard Acquisition Card;
- ☐ Direct Deposit (Domestic and International);
- ☐ Electronic Data Interchange (EDI);
- ☐ Wire Transfer (International Only);
- ☐ Large Value Transfer System (LVTS) (Over \$25M)

## ATTACHMENT 4.1 BID EVALUATION CRITERIA

### 1. MANDATORY CORPORATE REQUIREMENTS

	Mandatory Corporate Requirement
M.1.1	<p><b>Corporate Experience:</b></p> <p>The bidder must provide two customer reference contracts with a cumulative billed value of \$7,000,000.00 (Canadian including taxes) that were awarded within the last 5 years of the issuance date of this RFP, where the bidder was contracted to provide Information Technology resources* responsible for the analysis and design, development, implementation and ongoing operational support of large-scale** web-based applications. A summary of the scope and key responsibilities under each contract must be provided.</p> <p>At least one of the two reference contracts must demonstrate having delivered the services to a Government organization***.</p> <p>The above requirement must be demonstrated in a signed letter not by the bidder but by the other party of each of the two contracts. The name of the other party and the name of a contact person for that party must be provided in the letter. It is requested that an email address and phone number also be provided. It is also requested that the description of the information technology services be limited to one page and the contract title or serial number be included.</p> <p>* Include a list of the resource categories provided under the contract</p> <p>**Large scale is defined as:</p> <ul style="list-style-type: none"><li>• Scope spans multiple functional areas and locations (Headquarters, regions, points of entry, program areas, branches/directorates/divisions, etc.)</li><li>• Serving 250 concurrent users or more at any given time</li></ul> <p>*** Government means any Federal, Provincial or Municipal Government. Federal Government means any department, agency, board of a Government or a Crown corporation.</p>



<b>Bidder Response Table</b> <b>M1.1 Mandatory Corporate Experience</b> <i>Bidder to replicate table for each of the two (2) Corporate Reference Contracts</i>		
Corporate Reference Contract Description		(Bidder to Insert Data)
<b>Client Particulars</b>	Client Organization Name	
	Address	
	Contract or Purchase Order Number	
	Project Title	
	Client Name and Title	
	Client Telephone Number	
	Client eMail Address	
<p>1. Provide a brief description of the Bidder's contract to provide Information Technology resources responsible for the analysis and design, development, implementation and ongoing operational support of large-scale* web-based applications.</p> <p>*Large-scale is defined as:</p> <ul style="list-style-type: none"> <li>• Scope spans multiple functional areas and locations (Headquarters, regions, points of entry, program areas, branches/directorates/divisions, etc.)</li> <li>• Serving 250 concurrent users or more at any given time</li> </ul> <p>Note: the description of the information technology services be limited to one page.</p>		
2. Specify contract start and end date (mm/yyyy to mm/yyyy)		
3. Specify total amount billed value (Canadian, including taxes) within the last five (5) years of the issuance date of this RFP.		
4. Include a list of Resource Categories provided under the Contract.		

	<b>Mandatory Corporate Requirement</b>	<b>Demonstrated Experience</b> (Bidder to insert response)
<b>M.1.2</b>	<p><b>Corporate Capability:</b></p> <p>The bidder must demonstrate its experience and capability to supply all of the following resource categories. The bidder may use up to 3 different client engagements to demonstrate their experience, capacity and capability of providing qualified resources on an as requested basis. Each of the identified resources must have been contracted by the bidder for a minimum period of six months within the three years preceding the issuance date of this RFP. Note: the resources identified in response to this requirement will be used to assess Corporate Capability only.</p>	

<b>Mandatory Corporate Capability</b> <b>Bidder Response Table</b>					
#	Resource Category	Resource Name	Contract #	Start Date	End Date
1	Application/Software Architect – Level 3				
2	Tester – Level 2				
3	Web Developer (Usability Expert) – Level 3				
4	Programmer/Analyst (JAVA) – Level 3				
5	Programmer/Analyst (MS Dynamics) – Level 3				
6	System Analyst – Level 3				
7	Technical Writer – Level 2				
8	Platform Analyst (Data Power) – Level 2				
9	Project Manager – Level 2				

## 2. Mandatory Resource Technical Evaluation Criteria

The resource categories outlined in the table below will be evaluated at bid closing. The Bidder must propose the number of resources requested in each category. The additional resources will only be assessed after contract award once specific tasks are requested of the Contractor.

TBIPS Reference	Resource Category	Experience Level 1, 2 or 3	Number of Resources to be Evaluated
A.11	Tester	2	1
A.7	Programmer/Analyst (JAVA)	3	2
A.7	Programmer/Analyst (UI)	3	1
B.14	Technical Writer	2	1
I.7	Platform Analyst (Data Power)	2	2
P.9	Project Manager	2	1

### 2.1 A.11 Tester – Level 2

Name of Proposed Resource: _____			
#	Mandatory Technical Criteria	Bidder's Response	
		Demonstrated Experience (Bidders to Insert Data)	Insert Page # of Resume
M.2.1.1	The bidder must demonstrate that the proposed resource has a minimum of 5 years of experience, within the last 10 years, working as Web Application Software Tester in an IM/IT technical environment performing at least 10 of the 14 tasks listed in the Statement of Work, Article 5. Resource Tasks and Deliverables, A.11 Tester level 2.		
M.2.1.2	The bidder must demonstrate that the proposed resource has a minimum of 3 years of experience, within the past 5 years, in the creation of test deliverables, test cases, anticipated results and test plans.		
M.2.1.3	The bidder must demonstrate that the proposed resource has a minimum of 3 years of experience in establishing testing procedures and the use of automated testing tools for: <ul style="list-style-type: none"><li>unit testing</li></ul>		

Name of Proposed Resource: _____			
#	Mandatory Technical Criteria	Bidder's Response	
		Demonstrated Experience (Bidders to Insert Data)	Insert Page # of Resume
	<ul style="list-style-type: none"> <li>integration testing</li> <li>regression testing</li> </ul>		
<b>M.2.1.4</b>	<p>The bidder must demonstrate that the proposed resource has a minimum of 3 years of experience developing automated unit and integration tests for:</p> <ul style="list-style-type: none"> <li>Java built web applications</li> <li>HTML web applications</li> <li>Web services (SOAP, REST, WEB API)</li> </ul>		
<b>M.2.1.5</b>	<p>The bidder must demonstrate that the proposed resource has experience within the last 10 years working on large scale IT projects*</p> <p>*Large scale IT project is defined as:</p> <ul style="list-style-type: none"> <li>Scope spans multiple programs and services</li> <li>User base of 500 users or more</li> </ul>		

## 2.2 A.7 Programmer/Analyst (Java) – Level 3

Name of Proposed Resource: _____			
#	Mandatory Technical Criteria	Bidder's Response	
		Demonstrated Experience (Bidders to Insert Data)	Insert Page # of Resume
<b>M.2.2.1</b>	<p>The bidder must demonstrate that the proposed resource has a minimum of 10 years of experience working as a Java Programmer/Analyst performing at least 8 of the 11 tasks listed in the Statement of Work, Article 5. Resource Tasks and Deliverables, A.7 Programmer/Analyst (Java) level 3.</p>		

Name of Proposed Resource: _____			
#	Mandatory Technical Criteria	Bidder's Response	
		Demonstrated Experience (Bidders to Insert Data)	Insert Page # of Resume
<b>M.2.2.2</b>	The bidder must demonstrate that the proposed resource has a minimum of 5 years of experience, within the past 10 years, designing, developing and implementing RESTful Java Web Services.		
<b>M.2.2.3</b>	The bidder must demonstrate that the proposed resource has a minimum of 3 years of experience, within the past 5 years, developing applications using Java EE 6 or later.		
<b>M.2.2.4</b>	The bidder must demonstrate that the proposed resource has a minimum of 2 years of experience, within the past 5 years, developing applications using Java Persistence API.		
<b>M.2.2.5</b>	The bidder must demonstrate that the proposed resource has a minimum of 2 years of experience, within the last 5 years, creating and normalizing relational databases.		
<b>M.2.2.6</b>	<p>The bidder must demonstrate that the proposed resource has a minimum of 2 years of experience, within the last 5 years, in developing code that meets and is in line with the internationally recognized Web Content Accessibility Guidelines (WCAG) 2.0 on accessibility and usability*.</p> <p>*A common definition of the WCAG 2.0 standards and guidelines is available at the following sites:</p> <p><a href="https://en.wikipedia.org/wiki/Web_Content_Accessibility_Guidelines">https://en.wikipedia.org/wiki/Web_Content_Accessibility_Guidelines</a></p> <p><a href="https://en.wikipedia.org/wiki/Web_accessibility#Guidelines_on_accessible_web_design">https://en.wikipedia.org/wiki/Web_accessibility#Guidelines_on_accessible_web_design</a></p>		

### 2.3 A.7 Programmer/Analyst (UI) – Level 3

Name of Proposed Resource: _____			
#	Mandatory Technical Criteria	Bidder's Response	
		Demonstrated Experience (Bidders to Insert Data)	Insert Page # of Resume
<b>M.2.3.1</b>	The bidder must demonstrate that the proposed resource has a minimum of 10 years of experience working as a JavaScript or ECMAScript Programmer/Analyst performing at least 8 of the 12 tasks listed in the Statement of Work, Article 5. Resource Tasks and Deliverables, A.7 Programmer/Analyst (UI) level 3.		
<b>M.2.3.2</b>	The bidder must demonstrate that the proposed resource has a minimum of 3 years of experience, within the past 5 years, designing, developing and implementing applications based on the ECMAScript 5.1 or later scripting-language.		
<b>M.2.3.3</b>	The bidder must demonstrate that the proposed resource has a minimum of 2 years of experience, within the past 5 years, designing, developing and implementing applications based on the HTML5 markup language.		
<b>M.2.3.4</b>	The bidder must demonstrate that the proposed resource has a minimum of 2 years of experience, within the past 5 years, developing applications using React and Redux JavaScript libraries.		
<b>M.2.3.5</b>	<p>The bidder must demonstrate that the proposed resource has a minimum of 2 years of experience, within the past 5 years, in developing code that meets and is in line with the internationally recognized Web Content Accessibility Guidelines (WCAG) 2.0 on accessibility and usability*.</p> <p>*A common definition of the WCAG 2.0 standards and guidelines is available at the following sites:</p> <p><a href="https://en.wikipedia.org/wiki/Web_Content_Accessibility_Guidelines">https://en.wikipedia.org/wiki/Web_Content_Accessibility_Guidelines</a></p> <p><a href="https://en.wikipedia.org/wiki/Web_accessibility#Guidelines_on_accessible_web_design">https://en.wikipedia.org/wiki/Web_accessibility#Guidelines on accessible web design</a></p>		

## 2.4 B.14 Technical Writer – Level 2

Name of Proposed Resource: _____			
#	Mandatory Technical Criteria	Bidder's Response	
		Demonstrated Experience (Bidders to Insert Data)	Insert Page # of Resume
<b>M.2.4.1</b>	The bidder must demonstrate that the proposed resource has a minimum of 5 years of experience, within the past 10 years, working as a Technical Writer in an IM/IT environment performing at least 6 of the 9 tasks listed in the Statement of Work, Article 5. Resource Tasks and Deliverables, B.14 Technical Writer level 2.		
<b>M.2.4.2</b>	The bidder must demonstrate that the proposed resource has a minimum of 5 years of experience, within the past 10 years, in the development and maintenance of instructional documentation such as User's Guide, step-by-step installation instructions, training manuals and Standard Operating Procedures (SOPs).		
<b>M.2.4.3</b>	The bidder must demonstrate that the proposed resource has a minimum of 5 years of experience, within the past 10 years, working with technical resources to document the processes and procedures of IT applications and systems.		
<b>M.2.4.4</b>	The bidder must demonstrate that the proposed resource has a minimum of 5 years of experience, within the last 10 years, using Microsoft office products including: <ul style="list-style-type: none"> <li>• Word</li> <li>• PowerPoint</li> <li>• Excel</li> <li>• MS Visio</li> </ul>		

## 2.5 I.7 Platform Analyst (Data Power) – Level 2

Name of Proposed Resource: _____			
#	Mandatory Technical Criteria	Bidder's Response	
		Demonstrated Experience (Bidders to Insert Data)	Insert Page # of Resume
<b>M.2.5.1</b>	The bidder must demonstrate that the proposed resource has a minimum of 5 years of experience, within the last 10 years, working as a Platform Analyst performing at least 15 of the 22 tasks listed in the Statement of Work, Article 5. Resource Tasks and Deliverables, I.7 Platform Analyst (Data Power) level 2.		
<b>M.2.5.2</b>	The bidder must demonstrate that the proposed resource has a minimum of 5 years of experience, within the last 10 years, designing, developing and implementing Business to Business (B2B) solutions*.  *A B2B solution is defined as to facilitate the capture and sharing of electronic information exchanged between one business and another.		
<b>M.2.5.3</b>	The bidder must demonstrate that the proposed resource has a minimum of 3 years of experience in developing B2B solutions using each of the following: <ul style="list-style-type: none"> <li>• XML (Extensible Markup Language)</li> <li>• Java (J2EE)</li> <li>• Web Services (REST or SOAP)</li> <li>• IBM DataPower (GatewayScript)</li> </ul>		
<b>M.2.5.4</b>	The bidder must demonstrate that the proposed resource has a minimum of 3 years of experience, with each of the following: <ul style="list-style-type: none"> <li>• MQ messaging</li> <li>• JMS messaging</li> <li>• DB2</li> <li>• Data Modeling</li> </ul>		



**2.6 P.9 Project Manager (BPA & B2B) – Level 2**

<b>Name of Proposed Resource:</b> _____			
#	Mandatory Technical Criteria	Bidder's Response	
		Demonstrated Experience (Bidders to Insert Data)	Insert Page # of Resume
<b>M.2.6.1</b>	The bidder must demonstrate that the proposed resource has a minimum of 5 years of experience, within the last 10 years, working as a Project Manager performing at least 14 of the 21 tasks listed in the Statement of Work, Article 5. Resource Tasks and Deliverables, P.9 Project Manager level 2.		
<b>M.2.6.2</b>	<p>The bidder must demonstrate that the proposed resource has a minimum of 5 years of experience, within the last 10 years, in managing IT projects* and providing IT project management support including performing the following functions:</p> <ul style="list-style-type: none"> <li>• Conduct and organize project start-up activities</li> <li>• Participate in options and cost benefit analysis</li> <li>• Determine and identify tasks and deliverables</li> <li>• Develop and maintain project schedules</li> <li>• Prepare budgetary estimates</li> <li>• Oversee and coordinate project activities</li> <li>• Monitor and track project activities and deliverables</li> <li>• Prepare progress reports including identifying risks and issues</li> <li>• Organize and facilitate meetings, walkthroughs, presentations, training sessions to different type of audience, for example, technical, non-technical and senior management</li> <li>• Develop, review and maintain project documentation including periodic status/progress reports.</li> </ul> <p>*IT project is defined as:</p>		

Name of Proposed Resource: _____			
#	Mandatory Technical Criteria	Bidder's Response	
		Demonstrated Experience (Bidders to Insert Data)	Insert Page # of Resume
	<ul style="list-style-type: none"> <li>Scope spans multiple programs and services</li> <li>User base of 500 users or more</li> </ul>		
<b>M.2.6.3</b>	The bidder must demonstrate that the proposed resource has a minimum of 3 years of experience, within the last 5 years, using a change management process to track, coordinate and implement system enhancements.		
<b>M.2.6.4</b>	The bidder must demonstrate that the proposed resource has experience managing multiple IT projects with similar timelines and competing priorities and working collaboratively with other project management personnel from other areas of the organization.		
<b>M.2.6.5</b>	The bidder must demonstrate that the proposed resource has a minimum of 3 years of experience, within the last 5 years, developing and providing presentations to project personnel including senior management and end-users.		

### 3. Point Rated Resource Technical Evaluation Criteria

#### 3.1 A.11 Tester – Level 2

Name of Proposed Resource: _____				
#	Rated Technical Criteria	Scoring Methodology	Points Max	Cross Reference to proposal (Page #)
R.3.1.1	The bidder should demonstrate that the proposed resource has over and above the minimum 5 years of experience required in M.2.1.1 working as Web Application Software Tester in an IM/IT technical environment.	5+ to 7 years = 2 points 7+ to 9 years = 4 points 9+ years = 6 points	6	
R.3.1.2	The bidder should demonstrate that the proposed resource has experience over and above the minimum 3 years required in M.2.1.2 in creating test deliverables, test cases, anticipated results and test plans.	3+ to 5 years = 2 points 5+ to 7 years = 4 points 7+ years = 6 points	6	
R.3.1.3	The bidder should demonstrate that the proposed resource has experience over and above the minimum 3 years required in M.2.1.3 using automated testing tools.	3+ to 5 years = 2 points 5+ to 7 years = 4 points 7+ years = 6 points	6	
R.3.1.4	The bidder should demonstrate that the proposed resource has experience working with: <ul style="list-style-type: none"> <li>HP Quality Center</li> <li>Selenium automated testing tool</li> </ul>	5 points for each test automated tool/product	10	
Total Available points:			28	
Minimum Total Overall Points Required to be declared responsive:			16	
Total achieved:				

### 3.2 A.7 Programmer/Analyst (Java) – Level 3

Name of Proposed Resource: _____				
#	Rated Technical Criteria	Scoring Methodology	Points Max	Cross Reference to proposal (Page #)
R.3.2.1	The bidder should demonstrate that the proposed resource has experience over and above the minimum 10 years of experience required in M.2.2.1 as a Java Programmer/Analyst.	10+ to 12 years = 2 points 12+ to 14 years = 4 points 14+ years = 6 points	6	
R.3.2.2	The bidder should demonstrate that the proposed resource has experience over and above the minimum 5 years required in M.2.2.2 designing, developing and implementing RESTful Java Web Services.	5+ to 6 years = 2 points 6+ to 7 years = 4 points 7+ years = 6 points	6	
R.3.2.3	The bidder should demonstrate that the proposed resource has experience over and above the minimum 3 years required in M.2.2.3 developing applications using Java EE 6 or later.	3+ to 4 years = 2 point 4+ to 5 years = 4 points 5+ years = 6 points	6	
R.3.2.4	The bidder should demonstrate that the proposed resource has experience over and above the minimum 2 years required in M.2.2.4 developing applications using Java Persistence API.	2+ to 3 years = 2 points 3+ to 4 years = 4 points 4+ years = 6 points	6	
R.3.2.5	The bidder should demonstrate that the proposed resource has experience over and above the minimum 2 years required in M.2.2.5 creating	2+ to 3 years = 2 points 3+ to 4 years = 4 points 4+ years = 6 points	6	

Name of Proposed Resource: _____				
#	Rated Technical Criteria	Scoring Methodology	Points Max	Cross Reference to proposal (Page #)
	and normalizing relational databases.			
<b>R.3.2.6</b>	The bidder should demonstrate that the proposed resource has experience over and above the minimum 2 years required in M.2.2.6, in developing code that meets and is in line with the internationally recognized Web Content Accessibility Guidelines (WCAG) 2.0 on accessibility and usability.	2+ to 3 years = 2 points 3+ to 4 years = 4 points 4+ years = 6 points	6	
<b>R.3.2.7</b>	The bidder should demonstrate that the proposed resource has experience in testing, designing, and developing automated tests using Java (JUnit).	2+ to 3 years = 2 points 3+ to 4 years = 4 points 4+ years = 6 points	6	
Total Available points:			42	
Minimum Total Overall Points Required to be declared responsive:			25	
Total achieved:				

### 3.3 A.7 Programmer/Analyst (UI) – Level 3

Name of Resource: _____				
#	Rated Technical Criteria	Scoring Methodology	Points Max	Cross Reference to proposal (Page #)
R.3.3.1	The bidder should demonstrate that the proposed resource has experience over and above the minimum 10 years required in M.2.3.1 as a JavaScript or ECMAScript Programmer/Analyst.	10+ to 12 years = 2 points 12+ to 14 years = 4 points 14+ years = 6 points	6	
R.3.3.2	The bidder should demonstrate that the proposed resource has experience over and above the minimum 3 years required in M.2.3.2 designing, developing and implementing applications based on the ECMAScript 5.1 or later scripting-language.	3+ to 4 years = 2 points 4+ to 5 years = 4 points 5+ years = 6 points	6	
R.3.3.3	The bidder should demonstrate that the proposed resource has experience over and above the minimum 2 years required in M.2.3.3 designing, developing and implementing applications based on the HTML5 markup language.	2+ to 3 years = 2 points 3+ to 4 years = 4 points 4+ years = 6 points	6	
R.3.3.4	The bidder should demonstrate that the proposed resource has experience over and above the minimum 2 years required in M.2.3.4 developing applications using React and Redux JavaScript libraries.	2+ to 3 years = 2 points 3+ to 4 years = 4 points 4+ years = 6 points	6	
R.3.3.5	The bidder should demonstrate that the proposed resource has	2+ to 3 years = 2 points 3+ to 4 years = 4 points	6	

Name of Resource: _____				
#	Rated Technical Criteria	Scoring Methodology	Points Max	Cross Reference to proposal (Page #)
	experience over and above the minimum 2 years required in M.2.3.5, in developing code that meets and is in line with the internationally recognized Web Content Accessibility Guidelines (WCAG) 2.0 on accessibility and usability.	4+ years = 6 points		
Total Available points:			30	
Minimum Total Overall Points Required to be declared responsive:			18	
Total achieved:				

### 3.4 B.14 Technical Writer – Level 2

Name of Resource: _____				
#	Rated Technical Criteria	Scoring Methodology	Points Max	Cross Reference to proposal (Page #)
R.3.4.1	The bidder should demonstrate that the proposed resource has experience over and above the minimum 5 years required in M.2.4.1 working as a Technical Writer in an IM/IT environment.	5+ to 7 years = 2 points 7+ to 9 years = 4 points 9+ years = 6 points	6	
R.3.4.2	The bidder should demonstrate that the proposed resource has experience over and above the minimum 5 years required in M.2.4.2 developing and maintaining instructional documentation such as User's Guide, step-by-step installation instructions, training manuals	5+ to 7 years = 2 points 7+ to 9 years = 4 points 9+ years = 6 points	6	

Name of Resource: _____				
#	Rated Technical Criteria	Scoring Methodology	Points Max	Cross Reference to proposal (Page #)
	and Standard Operating Procedures (SOPs).			
<b>R.3.4.3</b>	The bidder should demonstrate that the proposed resource has experience over and above the minimum 5 years required in M.2.4.3 working with technical resources to document the processes and procedures of IT applications and systems.	5+ to 7 years = 2 points 8+ to 9 years = 4 points 9+ years = 6 points	6	
<b>R.3.4.4</b>	The bidder should demonstrate that the proposed resource has experience working as Technical Writer with a development team that is leveraging and using the following programming languages and software products: <ul style="list-style-type: none"> <li>• HTML</li> <li>• CSS</li> <li>• JavaScript</li> <li>• JSP</li> <li>• Adobe LifeCycle</li> <li>• ASP</li> <li>• PowerScript</li> <li>• OpentText GCDocs</li> <li>• SAP Enterprise Resource Planning</li> <li>• XML</li> <li>• JIRA</li> <li>• Java</li> </ul>	1 point for each programming language or software product up to a maximum of 10 points	10	



Name of Resource: _____				
#	Rated Technical Criteria	Scoring Methodology	Points Max	Cross Reference to proposal (Page #)
	<ul style="list-style-type: none"> <li>Moodle</li> <li>MS Dynamics</li> <li>Questionmark</li> <li>IBM IIB</li> <li>IBM DataPower</li> <li>IBM MQ</li> </ul>			
<b>R.3.4.5</b>	The bidder should demonstrate that the proposed resource has experience editing technical documentation for web-based applications designed in Java.	2+ to 4 years = 2 points 4+ to 6 years = 4 points 6+ years = 6 points	6	
<b>R.3.4.6</b>	The bidder should demonstrate that the proposed resource has experience with the ITIL (Information Technology Infrastructure Library) framework including ITIL processes and best practices.	2+ to 4 years = 2 points 4+ to 6 years = 4 points 6+ years = 6 points	6	
<b>R.3.4.7</b>	The bidder should demonstrate that the proposed resource has a specialized certification or diploma in Technical Writing and/or Communication.  Note: a copy of the certification or diploma should be provided at bid closing.	Certification or Diploma = 5 points	5	
Total Available points:			45	
Minimum Total Overall Points Required to be declared responsive:			27	
Total achieved:				

### 3.5 I.7 Platform Analyst (Data Power) – Level 2

Name of Resource: _____				
#	Rated Technical Criteria	Scoring Methodology	Points Max	Cross Reference to proposal (Page #)
R.3.5.1	The bidder should demonstrate that the proposed resource has experience implementing B2B solutions using the IBM Data Power product.	Less than 1 year = 0 points 1+ to 3 years = 2 points 3+ to 5 years = 4 points 5+ years = 6 points	6	
R.3.5.2	The bidder should demonstrate that the proposed resource has experience implementing B2B solutions using the IBM Integration Bus (IIB) COTS product.	1+ to 3 years = 2 points 3+ to 5 years = 4 points 5+ years = 6 points	6	
R.3.5.3	The bidder should demonstrate that the proposed resource has experience with IBM WebSphere (J2EE) application server.	1+ to 3 years = 2 points 3+ to 5 years = 4 points 5+ years = 6 points	6	
R.3.5.4	The bidder should demonstrate that the proposed resource has experience integrating IBM Data Power Business Processes using Multi-protocol Adapters and IBM Transformation Extender.	1+ to 3 years = 2 points 3+ to 5 years = 4 points 5+ years = 6 points	6	
R.3.5.5	The bidder should demonstrate that the proposed resource has experience with Gateway Script (ECMAScript and CommonJS) programming within IBM Data Power.	1+ to 3 years = 2 points 3+ to 5 years = 4 points 5+ years = 6 points	6	
R.3.5.6	The bidder should demonstrate that the	1+ to 3 years = 2 points	6	

<b>Name of Resource:</b> _____				
<b>#</b>	<b>Rated Technical Criteria</b>	<b>Scoring Methodology</b>	<b>Points Max</b>	<b>Cross Reference to proposal (Page #)</b>
	proposed resource has experience with Java programming using REST (Representational State Transfer) or SOAP (Simple Object Access Protocol) technologies.	3+ to 5 years = 4 points 5+ years = 6 points		
<b>R.3.5.7</b>	The bidder should demonstrate that the proposed resource has experience analyzing, developing or enhancing an EDI IT application using MQ Series and/or JMS.	1+ to 3 years = 2 points 3+ to 5 years = 4 points 5+ years = 6 points	6	
<b>R.3.5.8</b>	The bidder should demonstrate that the proposed resource has experience within the last 10 years working on large scale IT projects*  *Large scale IT project is defined as: <ul style="list-style-type: none"> <li>• Scope spans multiple programs and services</li> <li>• User base of 500 users or more</li> </ul>	1+ to 3 years = 2 points 3+ to 5 years = 4 points 5+ years = 6 points	6	
Total Available points:			48	
Minimum Total Overall Points Required to be declared responsive:			29	
Total achieved:				

### 3.6 P.9 Project Manager (BPA & B2B) – Level 2

Name of Resource: _____				
#	Rated Technical Criteria	Scoring Methodology	Points Max	Cross Reference to proposal (Page #)
<b>R.3.6.1</b>	The bidder should demonstrate that the proposed resource has experience in leading Information Technology (IT) projects.	3 projects = 2 points 4 projects = 4 points 5 projects = 6 points	6	
<b>R.3.6.2</b>	The bidder should demonstrate that the proposed resource has experience working on horizontal initiatives or IT projects that span across more than one Government department.	1 project = 2 points 2 projects = 4 points 3 projects = 6 points	6	
<b>R.3.6.3</b>	The bidder should demonstrate that the proposed resource has obtained a university degree or college diploma in project management, business administration, or computer science.  A copy of the degree or diploma should be provided at bid closing.	no degree or diploma = 0 points  degree or diploma = 6 points	6	
<b>R.3.6.4</b>	The bidder should demonstrate that the proposed resource has experience with both the Agile and Waterfall project management methodologies.	Agile = 3 points Waterfall = 3 points	6	

<b>R.3.6.5</b>	<p>The bidder should demonstrate that the proposed resource has at least 5 years of experience working with:</p> <ul style="list-style-type: none"> <li>• MS Excel</li> <li>• MS PowerPoint</li> <li>• MS Project</li> <li>• MS Word</li> <li>• MS Visio</li> </ul>	2 points per application up to a maximum of 10 points	10	
<b>R.3.6.6</b>	<p>The bidder should demonstrate that the proposed resource has experience with the ITIL (Information Technology Infrastructure Library) including best practices and guidelines.</p>	<p>2+ to 4 years = 3 points 4+ years = 6 points</p>	6	
<b>R.3.6.7</b>	<p>The bidder should demonstrate that the proposed resource has completed a Project Management Professional certification.</p> <p>A copy of the certification should be provided at bid closing.</p>	<p>PMP certification or PRINCE2 Practitioner certification = 6 points</p>	6	
Total Available points:			46	
Minimum Total Overall Points Required to be declared responsive:			27	
Total achieved:				

## ATTACHMENT 4.2 PRICING SCHEDULE

**Initial Contract Period:**

Initial Contract Period			
Date of Contract award to two years later (2020)			
(A)	(B)	(C)	
Resource Category	Level of Expertise	Firm Per Diem Rate	
		Year 1	Year 2
Application/Software Architect	Level 3		
Tester	Level 2		
Web Developer (Usability Expert)	Level 3		
Programmer/Analyst (CECP)	Level 3		
Programmer/Analyst (JAVA)	Level 3		
Programmer/Analyst (MS Dynamics)	Level 3		
Programmer/Analyst (Prod Support)	Level 2		
Programmer/Analyst (UI)	Level 3		
System Analyst	Level 3		
Technical Writer	Level 2		
Platform Analyst (B2B)	Level 2		
Platform Analyst (Data Power)	Level 2		
Project Manager	Level 2		

**Option Periods:**

Option Period 1			
2020 to 2022			
(A)	(B)	(C)	
Resource Category	Level of Expertise	Firm Per Diem Rate	
		Year 1	Year 2
Application/Software Architect	Level 3		

Tester	Level 2		
Web Developer (Usability Expert)	Level 3		
Programmer/Analyst (CECP)	Level 3		
Programmer/Analyst (JAVA)	Level 3		
Programmer/Analyst (MS Dynamics)	Level 3		
Programmer/Analyst (Prod Support)	Level 2		
Programmer/Analyst (UI)	Level 3		
System Analyst	Level 3		
Technical Writer	Level 2		
Platform Analyst (B2B)	Level 2		
Platform Analyst (Data Power)	Level 2		
Project Manager	Level 2		

Option Period 2 2022 to 2024			
(A)	(B)	(C)	
Resource Category	Level of Expertise	Firm Per Diem Rate	
		Year 1	Year 2
Application/Software Architect	Level 3		
Tester	Level 2		
Web Developer (Usability Expert)	Level 3		
Programmer/Analyst (CECP)	Level 3		
Programmer/Analyst (JAVA)	Level 3		
Programmer/Analyst (MS Dynamics)	Level 3		
Programmer/Analyst (Prod Support)	Level 2		
Programmer/Analyst (UI)	Level 3		
System Analyst	Level 3		
Technical Writer	Level 2		
Platform Analyst (B2B)	Level 2		
Platform Analyst (Data Power)	Level 2		
Project Manager	Level 2		

## 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).





# TASK AUTHORIZATION FORM FORMULAIRE D'AUTORISATION DE TÂCHES

## PART 1 (completed by the Technical/Project Authority) / PARTIE 1 (complété par le Responsable technique / Chargé du projet)

### A. General Information / Informations générales

Contract Number / Numéro du contrat :

Contractor Name / Nom du Contracteur :

Task Authorization (TA) No. / N°  
de l'autorisation de tâches (AT) :

Commitment No. / N° de  
l'engagement :

Financial Coding / Code  
financier :

Date of Issuance / Date  
d'émission :

Response required by /  
Réponse requise par :

### B. For Amendments Only / Aux fins de modification seulement

Amendment No. / N° de la modification :

Reason for the Amendment / Raison pour la modification :

### C. TA Requirements / Exigences relatives à l'AT

Required Resource(s) / Ressource(s) requise(s)

Category / Catégorie	Level / Niveau	Estimated Level of Effort (days) / Niveau d'effort estimatif (jours)	Linguistic Profile / Profile linguistique	Required Level(s) of Security / Niveau(x) de sécurité requis	
					<input type="button" value="+"/> <input type="button" value="-"/>

Statement of Work (tasks, deliverables, reports, etc.) / Énoncé des travaux (tâches, livrables, rapports, etc.)

### Period of Services / Période de service:

Initial Start Date / Date de début initiale :

Initial End Date / Date de fin initiale :

Extended End Date (See Reason for the Amendment) / Date de fin prolongée (voir Raison pour la modification) :

☐ Option To Extend Initial End Date / Option pour prolonger la date de fin initiale

Travel Requirement(s) / Exigence(s) de voyage :

Work Location(s) / Lieu(x) de travail :

## PART 2 (completed by the Contractor and/or the Technical/Project Authority) / PARTIE 2 (complété par le Contracteur et/ou le Responsable technique / Chargé du projet)

### A. Contractor Resource(s) / Ressource(s) du Contracteur

Note: once approved, only the following resources may provide services under this TA. / Nota : une fois approuvée, seules les ressources suivantes peuvent fournir des services sous la présente AT.



# TASK AUTHORIZATION FORM

## FORMULAIRE D'AUTORISATION DE TÂCHES

Name / Nom	Category / Catégorie	Level / Niveau	Linguistic Profile / Profil linguistique	Level of Security / Niveau de sécurité	PWGSC Security File No. / N° du dossier de sécurité TPSGC	
						<div>+ -</div>

### B. Estimated Cost / Coût estimatif

Category / Catégorie	Level / Niveau	Per Diem Rate / Taux journalier	Estimated Level of Effort (days) / Niveau d'effort estimatif (jours)	Total Cost / Coût estimatif	
					<div><div>+</div><div>-</div></div>
Estimated Cost / Coût estimatif					
Total Estimated Travel and Living Cost / Estimé des frais de déplacement et de subsistance				\$0.00	
Taxe rate applied / Taux d'imposition appliqué (%)	15.000	Applicable Taxes / Taxes applicables		\$0.00	
Total Estimated Cost / Coût total estimatif				\$0.00	

### PART 3 - TA APPROVAL BY CANADA / PARTIE 3 - APPROBATION DE L'AT PAR LE CANADA

By signing this TA, the authorized client authority and/or the PWGSC Contracting Authority certify(ies) that the content of this TA is in accordance with the conditions of the Contract.

En apposant sa signature sur l'AT, le client autorisé et/ou l'autorité contractante de TPSGC atteste(nt) que le contenu de cette AT est conforme aux conditions du contrat.

The client's authorization limit is . When the value of a TA and its amendments (including GST/HST) is in excess of this limit, the TA must be signed by the authorized client and forwarded to the PWGSC Contracting Authority for authorization.

La limite d'autorisation du client est . Lorsque la valeur de l'AT et ses modifications (incluant la TPS/TVH) dépasse cette limite, l'AT doit être signée par le client autorisé et transmise à l'autorité contractante de TPSGC pour autorisation.

Name of Authorized Client / Nom du client autorisé \_\_\_\_\_ Date \_\_\_\_\_

Name of Contracting Authority / Nom de l'autorité contractante \_\_\_\_\_ Date \_\_\_\_\_

Signature \_\_\_\_\_

Signature \_\_\_\_\_

### PART 4 - CONTRACTOR SIGNATURE / PARTIE 4 - SIGNATURE DU CONTRACTEUR

Name and Title of individual authorized to sign on behalf of the Contractor / Nom et titre de la personne autorisée à signer au nom de l'entrepreneur \_\_\_\_\_

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

Government  
of CanadaGouvernement  
du Canada

Contract Number / Numéro du contrat

1000341689

Security Classification / Classification de sécurité  
UNCLASSIFIED

## SECURITY REQUIREMENTS CHECK LIST (SRCL)

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

PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE	
1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine	2. Branch or Directorate / Direction générale ou Direction
CB SA	ISTB / BASD
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	
Supplier supply arrangement for the role of the Business Process Automation Firm, Business to Business and Custom Platform section.	
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 <input type="checkbox"/> Yes	
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 <input type="checkbox"/> Yes	
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 <input checked="" type="checkbox"/> Yes	
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 <input type="checkbox"/> Yes	
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 <input type="checkbox"/> Yes	
7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès	
Canada <input checked="" type="checkbox"/>	NATO / OTAN <input type="checkbox"/>
Foreign / Étranger <input type="checkbox"/>	
7. b) Release restrictions / Restrictions relatives à la diffusion	
No release restrictions Aucune restriction relative à la diffusion <input checked="" type="checkbox"/>	All NATO countries Tous les pays de l'OTAN <input type="checkbox"/>
Not releasable À ne pas diffuser <input type="checkbox"/>	
Restricted to: / Limité à: <input type="checkbox"/>	Restricted to: / Limité à: <input type="checkbox"/>
Specify country(ies): / Préciser le(s) pays:	Specify country(ies): / Préciser le(s) pays:
7. c) Level of information / Niveau d'information	
PROTECTED A PROTÉGÉ A <input checked="" type="checkbox"/>	NATO UNCLASSIFIED NATO NON CLASSIFIÉ <input type="checkbox"/>
PROTECTED B PROTÉGÉ B <input checked="" type="checkbox"/>	NATO RESTRICTED NATO DIFFUSION RESTREINTE <input type="checkbox"/>
PROTECTED C PROTÉGÉ C <input checked="" type="checkbox"/>	NATO CONFIDENTIAL NATO CONFIDENTIEL <input type="checkbox"/>
CONFIDENTIAL CONFIDENTIEL <input checked="" type="checkbox"/>	NATO SECRET NATO SECRET <input type="checkbox"/>
SECRET SECRET <input checked="" type="checkbox"/>	COSMIC TOP SECRET COSMIC TRÈS SECRET <input type="checkbox"/>
TOP SECRET	
TRÈS SECRET	
TOP SECRET (SIGINT)	
TRÈS SECRET (SIGINT)	



**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



RELIABILITY STATUS  
COTE DE FIABILITÉ



CONFIDENTIAL  
CONFIDENTIEL



SECRET  
SECRET



TOP SECRET  
TRÈS SECRET



TOP SECRET - SIGINT  
TRÈS SECRET - SIGINT



NATO CONFIDENTIAL  
NATO CONFIDENTIEL



NATO SECRET  
NATO SECRET



COSMIC TOP SECRET  
COSMIC TRÈS SECRET



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



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

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

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

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

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

## SUMMARY CHART / TABLEAU RÉCAPITULATIF

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

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

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

☒ No ☐ Yes  
Non 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 ☐ Yes  
Non Oui

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

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



Government of Canada  
Gouvernement du Canada

Contract Number / Numéro du contrat

1000341689

Security Classification / Classification de sécurité  
UNCLASSIFIED

## PART D - AUTHORIZATION / PARTIE D - AUTORISATION

## 13. Organization Project Authority / Chargé de projet de l'organisme

Name (print) - Nom (en lettres moulées) <b>ERIC CARRIÈRE</b>	Title - Titre <b>MANAGER, ISTI3</b>	Signature 
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Telephone No. - N° de téléphone <b>(343) 291-5329</b>	Facsimile No. - N° de télécopieur <b>(866) 335-3237</b>	E-mail address - Adresse courriel <b>ERIC.CARRIERE@CBSA-ASPC.gc.ca</b>	Date <b>April 19, 2018</b>
--	--	---	-------------------------------

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

Name (print) - Nom (en lettres moulées) <b>Stephane Lefortune</b>	Title - Titre <b>Security Specialist</b>	Signature 
--	---	---------------

Telephone No. - N° de téléphone <b>343 891 7776</b>	Facsimile No. - N° de télécopieur <b>866 335 3237</b>	E-mail address - Adresse courriel <b>Stephane.Lefortune@CBSA-ASPC.gc.ca</b>	Date <b>19.4.2018</b>
--	--	--	--------------------------

## 15. Are there additional instructions (e.g. Security Guide, Security Classification Guide) attached?

Des instructions supplémentaires (p. ex. Guide de sécurité, Guide de classification de la sécurité) sont-elles jointes?

☐ No ☐ Yes  
Non Oui

## 16. Procurement Officer / Agent d'approvisionnement

Name (print) - Nom (en lettres moulées)	Title - Titre	Signature <b>Mansour, Silvana</b> <small>Digitally signed by Mansour, Silvana Date: 2018.08.21 15:37:25 -04'00'</small>
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Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date
---------------------------------	-----------------------------------	-----------------------------------	------

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

Name (print) - Nom (en lettres moulées)	Title - Titre	Signature <b>Saumur, Jacques O</b> <small>Digitally signed by Saumur, Jacques O DN: c=CA, o=GC, ou=PWGSC-TPSGC, cn=Saumur, Jacques O Date: 2017.02.02 13:38:31 -05'00'</small>
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Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date
---------------------------------	-----------------------------------	-----------------------------------	------

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



1. The Contractor/Offeror must, at all times during the performance of the Contract/Standing Offer/Supply Arrangement, 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/Offeror personnel requiring access to PROTECTED/CLASSIFIED information, assets or sensitive work site(s) must EACH hold a valid personnel security screening at the level of **RELIABILITY STATUS, CONFIDENTIAL or SECRET** as required, granted or approved by CISD/PWGSC.
3. The Contractor/Offeror MUST NOT remove any PROTECTED/CLASSIFIED information from the identified work site(s), and the Contractor/Offeror 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/Offeror must comply with the provisions of the:
  - a. Security Requirements Check List and security guide (if applicable), attached at Annex \_\_\_\_\_;
  - b. *Industrial Security Manual* (Latest Edition).

#### **ADDITIONAL SECURITY REQUIREMENT:**

The CBSA, will conduct its own personnel Reliability Status assessment of the Contractor (specifically the Contractor personnel), which is allowed under the Treasury Board Secretariat of Canada's (TBS) "Security and Contracting Management Standard" and the Policy on Government Security – Personnel Security Standard. Reliability Status assessment conducted by the CBSA will include a credit check.

If the Contractor (specifically the Contractor personnel), has already been screened under the TBS Policy on Government Security - Personnel Security Standard, the Contractor (specifically the Contractor personnel), will still undergo a security screening process to be conducted by the CBSA.

The credit check and fingerprinting\* will be performed by an authorized security official with the CBSA's "Personnel Security Screening Section" (PSSS), which is independent of the Public Services and Procurement Canada's (PSPC), "Canadian and International Industrial Security Directorate" (CIISD).

Until the credit check, fingerprinting\* (if required) and all other security screening processes required have been completed and the Contractor (specifically the Contractor personnel) is deemed suitable by the CBSA, the Contractor (specifically the Contractor personnel) will not be permitted access to Protected / Classified information or assets, and further, will not be permitted to enter sites where such information or assets are kept.

**\*Fees are applicable. Fingerprinting will be at the Contractor's cost.**

**\*\* Contractor and its personnel can include in some instances landlords, property management employees and principles of companies when the latter have access to the premises where the CBSA designated or classified information/assets are kept.**

