



**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

Quebec

K1A0S5

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

| | |
|---|--|
| Title - Sujet three IM/IT TBIPS | |
| Solicitation No. - N° de l'invitation W6369-18P5MD/A | Date 2018-09-05 |
| Client Reference No. - N° de référence du client W6369-18P5MD | |
| GETS Reference No. - N° de référence de SEAG PW-\$IPS-006-33789 | |
| File No. - N° de dossier 006ips.W6369-18P5MD | CCC No./N° CCC - FMS No./N° VME |
| Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2018-09-28 | Time Zone Fuseau horaire Eastern Daylight Saving Time EDT |
| F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input type="checkbox"/> Other-Autre: <input type="checkbox"/> | |
| Address Enquiries to: - Adresser toutes questions à: Aresta, Arden | Buyer Id - Id de l'acheteur 006ips |
| Telephone No. - N° de téléphone (613) 858-9160 () | FAX No. - N° de FAX () - |
| Destination - of Goods, Services, and Construction: Destination - des biens, services et construction: DEPARTMENT OF NATIONAL DEFENCE 101 COLONEL BY DR. ATT: DKIM OTTAWA Ontario K1A0K2 Canada | |

Instructions: See Herein

Instructions: Voir aux présentes

Vendor/Firm Name and Address

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

Issuing Office - Bureau de distribution

Informatics Professional Services Division/Division des
services professionnels en informatique

Terrasses de la Chaudière 4th Floo

10 Wellington Street

Gatineau

Quebec

K1A0S5

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

| | | |
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**BID SOLICITATION
FOR CONTRACTS AGAINST A SUPPLY ARRANGEMENT FOR TASK- BASED INFORMATICS
PROFESSIONAL SERVICES (TBIPS)
RESOURCE CATEGORIES - LEVELS 2 & 3
FOR
THE DEPARTMENT OF NATIONAL DEFENCE**

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- Annex A - Statement of Work
 - Appendix A to Annex A – Tasking Assessment Procedure
 - Appendix B to Annex A – Task Authorization Form
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- Annex C - Security Requirements Check List
 - Appendix A to Annex C – Supplemental Security Guide

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

-Attachment 3.1: Bid Submission Form

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

-Attachment 4.1: Evaluation Criteria

-Attachment 4.2: Pricing Schedule

List of Attachment to Part 5 (Certifications):

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

Forms:

-Form 1 – Electronic Payment Instruments

-Form 2- Customer Reference Information Contact Form

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BID SOLICITATION

FOR CONTRACTS AGAINST A SUPPLY ARRANGEMENT FOR TASK- BASED INFORMATICS PROFESSIONAL SERVICES (TBIPS) RESOURCE CATEGORIES - LEVELS 2 & 3 FOR THE DEPARTMENT OF NATIONAL DEFENCE

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: includes the certifications to be provided;
- Part 6 Security, Financial and Other Requirements: includes specific requirements that must be addressed by Bidders; and
- Part 7 Resulting Contract Clauses: includes the clauses and conditions that will apply to any resulting contract.

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

1.2 Summary

- (a) This bid solicitation is being issued to satisfy the requirement of the Department of National Defence (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 3 contracts, each for 2 years plus 3 one-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 (CCoIFTA), 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.

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- (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 Workstreams and Resource Categories and in the National Capital Region (NCR) 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":

| RESOURCE CATEGORY | LEVEL OF EXPERTISE | ESTIMATED NUMBER OF RESOURCES REQUIRED |
|--|--------------------|--|
| A.6 Programmer/Software Developer (SharePoint) | LEVEL 3 | 1 |
| A.8 System Analyst | LEVEL 2 | 2 |
| I.9 System Administrator | LEVEL 3 | 1 |
| I.11 Technology Architect (SharePoint) | LEVEL 3 | 10 |
| I.11 Technology Architect (eDocs/GCDOCS) | LEVEL 3 | 1 |
| B.1. Business Analyst (General) | LEVEL 3 | 1 |
| B.1. Business Analyst (eDocs/GCDOCS) | LEVEL 3 | 40 |
| B.1. Business Analyst (eDocs/GCDOCS) | LEVEL 2 | 2 |
| B.11. IM/IT Instructor (eDocs/GCDOCS/SharePoint) | LEVEL 3 | 8 |
| P.1. Change Management Consultant | LEVEL 3 | 2 |
| P.9. Project Manager | LEVEL 3 | 1 |

1.3 Debriefings

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

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PART 2 - BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

- (a) All instructions, clauses and conditions identified in the bid solicitation by number, date and title are set out in the [Standard Acquisition Clauses and Conditions Manual](https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) (<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:
 - a. at the time of submitting an arrangement under the Request for Supply Arrangement (RFSA), the Bidder has already provided a list of names, as requested under the *Ineligibility and Suspension Policy*. During this procurement process, the Bidder must immediately inform Canada in writing of any changes affecting the list of names.
- (e) 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 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 10 calendar days before the bid closing date. Enquiries received after that time may not be answered.
- (b) Bidders should reference as accurately as possible the numbered item of the bid solicitation to which the enquiry relates. Care should be taken by Bidders to explain each question in sufficient detail in order to enable Canada to provide an accurate answer. Technical enquiries that are of a proprietary nature must be clearly marked "proprietary" at each relevant item. Items identified as "proprietary" will be treated as such except where Canada determines that the enquiry is not of a proprietary nature. Canada may edit the question(s) or may request that the Bidder do so, so that the proprietary nature of the question(s) is eliminated, and the enquiry can be answered with copies to all Bidders. Enquiries not submitted in a form that can be distributed to all Bidders may not be answered by Canada.

2.4 Former Public Servant

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

(b) Definitions

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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.

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

2.6 Volumetric Data

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

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PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

(a) Epost Connect Bid Submission

- (i) If the Bidder chooses to submit its bid electronically, Canada requests that the Bidder submits its bid in accordance with section 08 of the 2003 standard instructions. 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:
 - A. Section I: Technical Bid – Five (5) soft copies on a CD or USB key
 - B. Section II: Financial Bid – One soft copy on a SEPARATE CD or USB key
 - C. Section III: Certifications – One soft copy on a CD or USB key
- (c) If the Bidder is simultaneously providing an epost Connect copy and soft copy of the bid and if there is a discrepancy between the wording of the epost Connect copy and soft copy, the wording of the epost Connect copy will have priority over the wording of the soft copy.
- (d) Canada is not requesting a hard copy of the bid. However, if the Bidder submits a hard copy of its bid, and if there is a discrepancy between the wording of the soft or epost Connect copy and the hard copy, the wording of the soft or epost Connect copy will have priority over the wording of the hard copy.
- (e) Prices must appear in the financial bid only. No prices must be indicated in any other section of the bid.
- (f) **Format for Bid:** Canada requests that Bidders follow the format instructions described below in the preparation of their bid:
 - (i) use 8.5 x 11 inch (216 mm x 279 mm) paper 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.);

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- (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:

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

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

- (iii) **Substantiation of Technical Compliance:** The technical bid must substantiate the compliance with the specific articles of Attachment 4.1, which is the requested format for providing the substantiation. The substantiation must not simply be a repetition of the requirement(s), but must explain and demonstrate how the Bidder will meet the requirements and carry out the required Work. Simply stating that the Bidder or its proposed solution or resources comply is not sufficient. Where Canada determines that the substantiation is not complete, the Bidder will be considered non-responsive and disqualified. The substantiation may refer to additional documentation submitted with the bid - this information can be referenced in the "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) **For Proposed Resources:** The technical bid must include résumés for the resources 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.

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- (F) For work experience to be considered by Canada, the technical bid must not simply indicate the title of the individual's position, but must demonstrate that the resource has the required work experience by explaining the responsibilities and work performed by the individual while in that position. Only listing experience without providing any supporting data to describe responsibilities, duties and relevance to the requirement, or reusing the same wording as the qualification requirements, will not be considered "demonstrated" for the purposes of the assessment. The Contractor should provide complete details as to where, when, month and year, and how, through which activities/responsibilities, the stated qualifications / experience were obtained. In situations in which a proposed resource worked at the same time on more than one project, the duration of any overlapping time period will be counted only once toward any requirements that relate to the individual's length of experience.
- (v) **Customer Reference Contact Information:**
- (A) The Bidder must provide customer references. The customer reference must each confirm, if requested by PWGSC, the information required in CMC1 of Attachment 4.1.
- (B) The form of question to be used to request confirmation from customer references is as follows:
Has the Bidder provided your organization with the services described below? :
- The Bidder must have been awarded at least three (3) Information Management, Information Technology (IM/IT) contracts, of which at least one (1) was for a Government (Federal, Provincial, Municipal, Crown Corporation) Client environment.
- Each single contract identified must:
- have an initial contract value of at least \$5,000,000.00 excluding applicable taxes and not including amendments;
 - have been awarded at least two (2) years prior to the closing date of this solicitation and no later than ten (10) years from the closing date of this solicitation; and
 - have a duration of at least two (2) years within the last ten (10) years. (Note: duration does not include option periods that have not been exercised).
- 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:
- the rate bid must not increase by more than 5% from one time period to the next, and
 - 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:
- the rate bid for level three must be the same or higher than that bid for level two, and
 - the rate bid for level two must be the same or higher than the rate bid for level one.

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- (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 Form 1 - Electronic Payment Instruments, to identify which ones are accepted. If Form 1 - 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.

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PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

- (a) Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria. There are several steps in the evaluation process, which are described below. Even though the evaluation and selection will be conducted in steps, the fact that Canada has proceeded to a later step does not mean that Canada has conclusively determined that the Bidder has successfully passed all the previous steps. Canada may conduct steps of the evaluation in parallel.
- (b) An evaluation team composed of representatives of the Client and PWGSC will evaluate the bids on behalf of Canada. Canada may hire any independent consultant, or use any Government resources, to evaluate any bid. Not all members of the evaluation team will necessarily participate in all aspects of the evaluation.
- (c) In addition to any other time periods established in the bid solicitation:
 - (i) **Requests for Clarifications:** If Canada seeks clarification or verification from the Bidder about its bid, the Bidder will have 2 working days (or a longer period if specified in writing by the Contracting Authority) to provide the necessary information to Canada. Failure to meet this deadline will result in the bid being declared non-responsive.
 - (ii) **Extension of Time:** If additional time is required by the Bidder, the Contracting Authority may grant an extension in his or her sole discretion.

4.2 Technical Evaluation

(a) Mandatory Technical Criteria:

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

(b) Point-Rated Technical Criteria:

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

(c) Number of Resources Evaluated:

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

(d) Reference Checks:

- (i) Whether or not to conduct reference checks is discretionary. However, if PWGSC chooses to conduct reference checks for any given rated or mandatory requirement, it will check the references for that requirement for all bidders to be recommended for contract award.
- (ii) For reference checks, Canada will conduct the reference check in writing by email. Canada will send all email reference check requests to contacts supplied by all the Bidders within a 48-hour period using the email address provided in the bid. Canada will not award any points and/or a bidder will not meet the mandatory experience requirement (as applicable) unless the response is received within 5 working days of the date that Canada's email was sent.
- (iii) On the third working day after sending out the reference check request, if Canada has not received a response, Canada will notify the Bidder by email, to allow the Bidder to contact its reference directly to ensure that it responds to Canada within 5 working days. If the individual named by a Bidder is unavailable when required during the evaluation period, the Bidder may provide the name and email address of an alternate contact person from the same customer. Bidders will only be provided with this opportunity once for each customer, and only if the originally named individual is unavailable to respond (i.e., the Bidder will not be provided with an opportunity to submit the name of an alternate contact person if the original contact person indicates that he or she is unwilling or unable to respond). The 5 working days will not be extended to provide additional time for the new contact to respond.

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

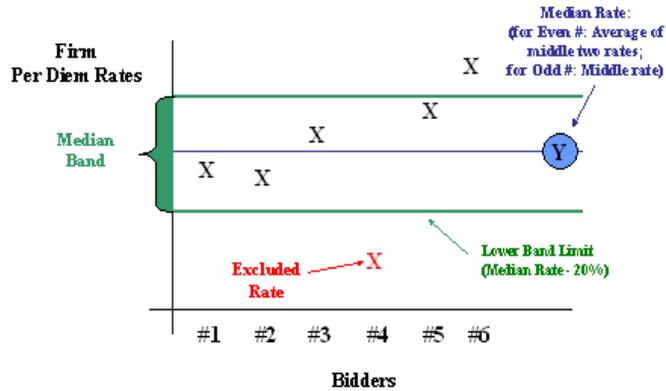
4.3 Financial Evaluation

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

For example, if the Median Rate (Y) is determined to be \$500 for a Resource Category, the Lower Band Limit would be minus (-) 20% of \$500, or \$400. If a Bidder proposes a firm per diem rate that is lower than \$400, the Median Rate of \$500 will be used in the Bidder's financial evaluation for that Resource Category.

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**Resource Category Median Band Determination
(Even Number of Bidders)**



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

(i) **Calculation of Total Bid Price:** The financial evaluation will be conducted using the pricing tables completed by the Bidders. A financial calculation will occur for each Bidder by multiplying its firm per diem rates for the Initial Contract Period and the option period(s) with the estimated number of days of work for each period, for all the Resource Categories stated in Attachment 4.2 - Pricing Schedule. The sum of such rates will constitute the Total Bid Price for that Bidder.

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

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

- (i) an invoice (referencing a contract serial number or other unique contract identifier) that shows that the Bidder has provided and invoiced a customer (with whom the Bidder deals at arm's length) for services performed for that customer similar to the services that would be provided in the relevant resource category, where those services were provided for at least three months within the eighteen months before the 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.

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(e) Formulae in Pricing Tables

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

4.4 Basis of Selection

- (a) A bid must comply with the requirements of the bid solicitation, meet all mandatory evaluation criteria and obtain the required pass marks for the point rated criteria identified in this bid solicitation to be declared responsive.
- (b) The responsive bid that obtains the highest Total Bidder Score will be recommended for award of a contract. For any given Bidder, the greatest possible Total Technical Score is 60 while the greatest possible Total Financial Score is 40.
 - (i) Calculation of Total Technical Score: The Total Technical Score will be computed for each responsive bid by converting the Technical Score obtained for the point-rated technical criteria using the following formula, rounded to two decimal places:

$$\frac{\text{Technical Score}}{\text{Maximum Technical Points (Bidders, please refer to the maximum technical points in Attachment 4.1)}} \times 60 = \text{Total Technical Score}$$
 - (ii) Calculation of Total Financial Score: The Total Financial Score will be computed for each responsive bid by converting the Financial Score obtained for the financial evaluation using the following formula rounded to two decimal places:

$$\frac{\text{Lowest Financial Evaluated Price}}{\text{The Bidder's Financial Evaluated Price}} \times 40 = \text{Total Financial Score}$$
 - (iii) Calculation of the Total Bidder Score: The Total Bidder Score will be computed for each responsive bid in accordance with the following formula:

$$\text{Total Technical Score} + \text{Total Financial Score} = \text{Total Bidder Score}$$
- (c) In the event of identical Total Bidder Scores occurring, then the bid with the highest Total Technical Score will become the top-ranked bidder.
- (d) A maximum of three contracts may be awarded in total as a result of this solicitation.
- (e) **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) 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 36% of the funding initially allocated;
 - (B) the Bidder with the next highest Total Bidder Score will receive 33% of the funding initially allocated; and
 - (C) the Bidder with the next highest Total Bidder Score will receive 31% of the funding initially allocated.
- (f) Bidders should note that all contract awards are subject to Canada's internal approvals process, which includes a requirement to approve funding in the amount of any proposed contract. Despite the fact that the Bidder may have been recommended for contract award, a contract will only be awarded if internal approval is granted according to Canada's internal policies. If approval is not granted, no contract will be awarded.

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PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

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

The certifications provided by Bidders to Canada are subject to verification by Canada at all times. 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](https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html)" list available at the bottom of the page of the Employment and Social Development Canada (ESDC) - Labour's website. (<https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html>).

Canada will have the right to declare a bid non-responsive if the Bidder, or any member of the Bidder if the Bidder is a Joint Venture, appears on the "[FCP Limited Eligibility to Bid](https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html)" list at the time of contract award.

Canada will also have the right to terminate the Contract for default if a Contractor, or any member of the Contractor if the Contractor is a Joint Venture, appears on the "[FCP Limited Eligibility to Bid](https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html)" list during the period of the Contract.

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

(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) Submission of Only One Bid

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

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PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS

6.1 Security Requirement

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

6.2 Financial Capability

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

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PART 7 - RESULTING CONTRACT CLAUSES

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

7.1 Requirement

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

7.2 Task Authorization

- (a) **As-and-when-requested Task Authorizations:** The Work or a portion of the Work to be performed under the Contract will be on an "as-and-when-requested basis" using a Task Authorization (TA). The Work described in the TA must be in accordance with the scope of the Contract. The Contractor must not commence work until a validly issued TA has been issued by Canada and received by the Contractor. The Contractor acknowledges that any work performed before such issuance and receipt will be done at the Contractor's own risk.
- (b) **Allocation of Task Authorizations:** More than one contract has been awarded for this requirement. As a result, the Task Authorizations issued under this series of contracts will be allocated in accordance with the following:
- (i) At the time this series of contracts was awarded, each contractor was allocated an amount of funding as specified in the Limitation of Expenditure in respect of Task Authorizations based on the evaluation process described in the bid solicitation that resulted in the award of this series of contracts.
- (ii) Canada will make a reasonable effort to ensure that the dollar value of the TAs issued to the Contractors are proportionally balanced throughout the Contract Period based on the percentage values in the Fund Allocation Formula. A review of TAs issued to the Contractors will be conducted at six-month intervals and at the beginning of each fiscal year to confirm proportional utilization and distribution of the TAs. Should a Contractor refuse a TA under the contract, the next Contractor, under the same allocation process, will be offered the draft TA. The dollar value of the refused TA will be subtracted from the dollar value of the Contractor's Contract and may be re-allocated, at the Contracting Authority's sole discretion, in whole or in part, to the other Contractors of the same Stream. Should all Contractors refuse a TA under the Contract, Canada reserves the right to use other methods of supply.
- (iii) In the event that Canada determines the proposed resource(s) does not meet the minimum experience or other requirements of the categories identified in the draft TA, Canada may, at its entire discretion, request that the Contractor propose another resource and the Contractor will have the time set out in the subparagraph "Contractor's Response to Draft Task Authorization" to respond. If the Contractor fails to respond on time or Canada determines that the proposed resource(s) does not meet the minimum experience or other requirements of the categories identified in the draft TA, the draft TA will be forwarded to the next Contractor, under the same allocation process.
- (c) **Assessment of Resources Proposed at TA Stage:** Processes for issuing, responding to and assessing Task Authorizations are further detailed in Appendices A, B, C and D of Annex A.
- (d) **Form and Content of draft Task Authorization:**
- (i) The Technical Authority will provide the Contractor with a description of the task in a draft Task Authorization using the form specified in Appendix B to Annex A.
- (ii) The draft Task Authorization will contain the details of the activities to be performed, and must also contain the following information:

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- (A) the contract number;
 - (B) the task number;
 - (C) 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);
 - (D) the categories of resources and the number required;
 - (E) a description of the work for the task outlining the activities to be performed and identifying any deliverables (such as reports);
 - (F) the start and completion dates;
 - (G) milestone dates for deliverables and payments (if applicable);
 - (H) the number of person-days of effort required;
 - (I) whether the work requires on-site activities and the location;
 - (J) the language profile of the resources required;
 - (K) the level of security clearance required of resources;
 - (L) the price payable to the Contractor for performing the task, with an indication of whether it is a firm price or a maximum TA price (and, for maximum price task authorizations, the TA must indicate how the final amount payable will be determined; where the TA does not indicate how the final amount payable will be determined, the amount payable is the amount, up to the maximum, that the Contractor demonstrates was actually worked on the project, by submitting time sheets filled in at the time of the work by the individual resources to support the charges); and
 - (M) any other constraints that might affect the completion of the task.
- (e) **Contractor's Response to Draft Task Authorization:** The Contractor must provide to the Technical Authority, within 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 its corresponding proposed resource(s) in accordance with Appendix A to Annex A of the Contract. The Contractor's quotation must be based on the rates set out in the Contract. The Contractor will not be paid for preparing or providing its response or for providing other information required to prepare and validly issue the TA.
- (f) **Task Authorization Limit and Authorities for Validly Issuing Task Authorizations:**
To be validly issued, a TA must include the following signatures:
- (i) To be validly issued, a TA must be signed by the Contracting Authority.
 - (ii) 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.
- (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) 1st quarter: April 1 to June 30;
 - (B) 2nd quarter: July 1 to September 30;
 - (C) 3rd quarter: October 1 to December 31; and
 - (D) 4th quarter: January 1 to March 31.

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

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

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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) 4006 (2016-08-16), Supplemental General Conditions - Contractor to Own Intellectual Property Rights in Foreground Information applies to and form part of the Contract.

7.5 Security Requirement

The following security requirements, apply to and form part of the Contract:

1. The Contractor/Offeror must, at all times during the performance of the Contract/Standing Offer, 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 NON RESTRICTED** information, assets or sensitive work site(s) **must EACH hold a valid personnel security screening at the level of RELIABILITY STATUS or SECRET, as required**, issued by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC).
3. The Contractor/Offeror personnel requiring access to **PROTECTED/CLASSIFIED RESTRICTED** information, assets or sensitive work site(s) **must be citizens of Canada or the United States and must EACH hold a valid personnel security screening at the level of RELIABILITY STATUS or SECRET, as required**, issued by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC).
4. The Contractor/Offeror **MUST NOT** remove any **CLASSIFIED** information or assets from the identified work site(s), and the Contractor/Offeror must ensure that its personnel are made aware of and comply with this restriction.
5. Subcontracts which contain security requirements are **NOT** to be awarded without the prior written permission of CISD/PWGSC.
6. The Contractor/Offeror must also comply with the provisions of the:
 - (a) Security Requirements Check List, attached at Annex C;
 - (b) Industrial Security Manual (latest edition).

7.6 Contract Period

(a) **Contract Period:** The "**Contract Period**" is the entire period of time during which the Contractor is obliged to perform the Work, which includes:

- (i) The "**Initial Contract Period**", which begins on the date the Contract is awarded and ends 2 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 3 additional one-year period(s) 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.

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7.7 Authorities

(a) Contracting Authority

The Contracting Authority for the Contract is:

Arden Aresta
Supply Officer
Public Works and Government Services Canada
Acquisitions Branch
Professional Services Procurement Directorate
Les Terrasses de la Chaudière,
10 Wellington Street, 4th floor,
Gatineau (QC) K1A 0S5
Telephone: 613-858-9160
Facsimile: 819-956-2675
E-mail address: arden.aresta@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:

TO BE INSERTED UPON CONTRACT AWARD

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

(c) DND Procurement Representative

The DND Procurement Representative for the Contract is:

TO BE INSERTED UPON CONTRACT AWARD

The DND Procurement Representative 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 administration aspects of the Work under the Contract, communication with PWGSC Contracting Authority on all matters concerning the Contract, procurement initiation authority, and providing PWGSC reports on Contract utilization. Technical matters may be discussed with the DND Procurement Representative; however, the DND Procurement Representative 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.

(d) Contractor's Representative

TO BE INSERTED UPON CONTRACT AWARD

7.8 Proactive Disclosure of Contracts with Former Public Servants

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

7.9 Payment

(a) Basis of Payment

- (i) **Professional Services provided under a Task Authorization with a Maximum Price:** For professional services requested by Canada, in accordance with a validly issued Task Authorization, Canada will pay the Contractor, in arrears, up to the Maximum Price for the TA, for actual time worked and any resulting deliverables in accordance with the firm all-inclusive per diem rates set out in Annex B, Basis of Payment, Applicable Taxes extra. Partial days will be prorated based on actual hours worked based on a 7.5-hour workday.
- (ii) **Travel and Living Expenses – National Joint Council Travel Directive:** The Contractor will be reimbursed its authorized travel and living expenses reasonably and properly incurred in the performance of the Work, at cost, without any allowance for profit and/or administrative overhead, in accordance with the meal and private vehicle expenses provided in Appendices B, C and D of

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the National Joint Council Travel Directive and with the other provisions of the directive referring to “travellers”, rather than those referring to “employees”. All travel must have the prior authorization of the Technical Authority. Travel requests will only be considered for a work location which is located more than 100 kilometers from the National Capital Region. The Contractor will be paid for actual time spent travelling at half the hourly rate. The hourly rate will be determined by dividing the firm per diem rate set out in Annex B by 7.5 hours. All payments are subject to government audit.

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

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

Note to Bidders: If applicable the Electronic Payment Instrument indicated by the Bidder in Form 1 will be included in any resulting contract.

(e) **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.

(f) **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.

(g) **No Responsibility to Pay for Work not performed due to Closure of Government Offices**

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- (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, via electronic email, a copy of each invoice to the DND Procurement Authority, and to the Contracting Authority.

7.11 Certifications and Additional Information

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

7.12 Federal Contractors Program for Employment Equity - Default by Contractor

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

7.13 Applicable Laws

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

7.14 Priority of Documents

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

- (a) these Articles of Agreement, including any individual SACC clauses incorporated by reference in these Articles of Agreement;
- (b) Supplemental General Conditions, in the following order:
 - (i) 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 - 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
 - (i) Appendix A to Annex C – Supplemental Security Guide
- (g) the validly issued Task Authorizations and any required certifications; and
- (h) the Contractor's bid dated **TO BE INSERTED UPON AWARD**, as clarified on "or" as amended **TO BE INSERTED UPON AWARD**.

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7.15 Defence Contract

- (a) SACC Manual clause A9006C (2012-07-16) Defence Contract

7.16 Foreign Nationals (Canadian Contractor)

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

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

7.17 Foreign Nationals (Foreign Contractor)

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

7.18 Insurance Requirements

(a) **Compliance with Insurance Requirements**

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

(b) **Commercial General Liability Insurance**

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

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- (I) Broad Form Property Damage including Completed Operations: Expands the Property Damage coverage to include certain losses that would otherwise be excluded by the standard care, custody or control exclusion found in a standard policy.
- (J) Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of policy cancellation.
- (K) If the policy is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.
- (L) Owners' or Contractors' Protective Liability: Covers the damages that the Contractor becomes legally obligated to pay arising out of the operations of a subcontractor.
- (M) Advertising Injury: While not limited to, the endorsement must include coverage for piracy or misappropriation of ideas, or infringement of copyright, trademark, title or slogan.

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

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

7.19 Limitation of Liability - Information Management/Information Technology

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

(b) **First Party Liability:**

- (i) The Contractor is fully liable for all damages to Canada, including indirect, special or consequential damages, caused by the Contractor's performance or failure to perform the Contract that relate to:
 - (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

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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).

7.20 Joint Venture Contractor

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

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

7.21 Professional Services - General

- (a) The Contractor must provide professional services on request as specified in this Contract. All resources provided by the Contractor must meet the qualifications described in the Contract (including those relating to previous experience, professional designation, education, language proficiency and security clearance) and must be competent to provide the required services by any delivery dates described in the Contract.

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- (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.

7.22 Safeguarding Electronic Media

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

7.23 Representations and Warranties

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

7.24 Access to Canada's Property and Facilities

Canada's property, facilities, equipment, documentation, and personnel are not automatically available to the Contractor. If the Contractor would like access to any of these, it is responsible for making a request to the Technical Authority. Unless expressly stated in the Contract, Canada has no obligation to provide any of these to the Contractor. If Canada chooses, in its discretion, to make its property, facilities, equipment,

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documentation or personnel available to the Contractor to perform the Work, Canada may require an adjustment to the Basis of Payment and additional security requirements may apply.

7.25 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.

7.26 Transition Period

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

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

7.27 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

1.0 BACKGROUND

- 1.1 The Assistant Deputy Minister – (Information Management) (ADM (IM)) group in the Department of National Defence/Canadian Armed Forces (DND/CAF) is responsible for ensuring that information is managed effectively and efficiently in accordance to Government of Canada (GC) Information Management (IM) policies and legislation. In order to accomplish this, ADM (IM) requires IM/IT professional service resources to support implementation and sustainment (in-service) activities related to Information Management, Record and Document Management (RDM), Collaboration and Business Transformation activities across DND/CAF.
- 1.2 Currently these activities are based on a suite of applications. These include OpenText Document Management/Records Management (DM/RM) which is also referred to as GCDOCS (Content Server), eDocs, Microsoft SharePoint, and a few to be defined knowledge management (KM) tools.
- 1.3 IM/IT professional service resources are required to execute activities including, but not limited to, implementation and change management, coordination of functional capability rollout, client relationship management, system maintenance, communications and business transformation.

2.0 OBJECTIVE

The objectives of this requirement are to:

- 2.1. Deploy new and/or additional RDM, Collaboration and KM capabilities;
- 2.2 Provide in-service support, including surge activities, to DND/CAF's existing and new RDM, Collaboration, KM environments; and
- 2.3. Migrate, if required, the existing RDM and Collaboration deployments into the RDM and Collaboration solutions.

3.0 TECHNICAL ENVIRONMENT

The technical environment for RDM, Collaboration within DND/CAF is in transition, with a goal of achieving a standard environment deployed to all users. The existing environment consists of:

3.1 Record and Document Management Solutions:

There are currently several RDM solutions deployed within DND/CAF, each addressing a variety of requirements. The primary RDM solutions within DND/CAF are:

- 3.1.1. Open Text eDocs 10;
- 3.1.2. Open Text Content Server 10.5;
- 3.1.3. Open Text Enterprise Connect 10.5;

3.2 Collaboration Solution:

DND/CAF currently have many Microsoft SharePoint sites deployed. The primary versions are Microsoft SharePoint 2010/2013.

3.3 Knowledge Management Solution:

DND/CAF are currently seeking to select and put in place a standardized Knowledge Management solution by the end of 2019.

3.4 Desktop:

The current deployment to the desktop is Windows 7. A project to migrate all desktops to Windows 10 has been initiated with a pilot project in 2017/2018. It is expected that the migration will start in 2019/2020. The desktop form factor is a mix of both physical and virtual workstations.

3.5 Server Operating System:

The current standard for departmental servers is Windows Server 2008/2012.

3.6 Database

The current database standard is Oracle 11/12c and SQL Server 2016.

4.0 APPLICABLE DOCUMENTS

4.1 Below is a partial list of applicable documents:

- 4.1.1. Policy on Information Management;

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- 4.1.2. Record Document and Information Management System (RDIMS) Information Management Rules;
- 4.1.3. RDIMS Business Rules (User & Information Administrator);
- 4.1.4. RDIMS Implementation Tool Kit;
- 4.1.5. GCDOCS Information Management rules;
- 4.1.6. Shared Workspaces Services (SharePoint) Governance Directives;
- 4.1.7. Recommendations for using SharePoint Designer at DND; and
- 4.1.8. Shared Workspace Services custom development constraints listings.

5.0 TASKS AND DELIVERABLES

5.1 A.6 Programmer/Software Developer (SharePoint) - Level 3

The Programmer/Software Developer (SharePoint) must:

- 5.1.1. Work with the Technology Architect to create solution design alternatives and apply departmental best practices;
- 5.1.2. Prepare an assessment of the current state of the technical system architecture and detail technical requirements;
- 5.1.3. Advise and assist with software build issues;
- 5.1.4. Develop software application based on user requirements, configure and implement the solution;
- 5.1.5. Create/perform unit testing and debugging of solution modules during the development phase;
- 5.1.6. Document all aspects of the design/development solution, testing, implementation and detailed deployment instructions;
- 5.1.7. Prepare software development best practices documents;
- 5.1.8. Troubleshoot technical issues and provide problem diagnostic in conjunction with DND/CAF internal support teams;
- 5.1.9. Work closely with key stakeholders to ensure that the data entry, retrieval, change and delete functions meet business requirements for project completion;
- 5.1.10. Respond to bug reports and fix issues based on the prioritizing model;
- 5.1.11. Create and provide detailed installation/configuration/test plan documentation;
- 5.1.12. Provide expert technical SharePoint advice and guidance to IM/IT technical resources;
- 5.1.13. Track work status against the project schedule and ensure deliverables are completed on time;
- 5.1.14. Design, test and implement user interfaces to SharePoint 2010/2013 (or later versions) platforms and customize interfaces if required using HTML/XML and/or editing/updating/customizing install files;
- 5.1.15. Develop .NET and Active Server Pages (ASP) custom application interfaces using Application Programming Interfaces (API); and
- 5.1.16. Perform other similar tasks related to this category.

5.2 A.8 System Analyst (General) – Level 2

The System Analyst must:

- 5.2.1. Provide a report on user requirements by gathering and collecting information as requested by the Technical Authority;
- 5.2.2. Develop prototypes, models, standards and other DND internal requirements for RDM and Collaboration products in the technical context of systems, applications and security;
- 5.2.3. Provide advice, guidance and knowledge transfer of new prototypes, models, standards to other DND/CAF members;
- 5.2.4. Participate in implementation and in-service installations by troubleshooting, testing, maintaining and providing support through new deployments, upgrades and patches of MS Windows Operating Systems, MS Networking, other desktop and server applications, Relational Databases (Oracle and MS SQL) and the infrastructure that supports other Intranet/Internet server software and hardware;
- 5.2.5. Develop application/system specifications and designs;
- 5.2.6. Participate in and conduct application integration and system testing, scheduling and coordination while adhering to change management methodology in the context of a testing environment;
- 5.2.7. Perform analysis of test result data, provide associated reports and technical research;
- 5.2.8. Manage, schedule and perform, as requested, the migration of all other related data;
- 5.2.9. Conduct client service support both face-to-face and on the telephone, to analyze trouble call data and produce associated reports;
- 5.2.10. Perform installation, configuration and testing of development environment and related applications on servers and workstations for proposed solutions;

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- 5.2.11. Provide support to keep the project on schedule, i.e., provide tasks required for the Work Breakdown Structure (WBS);
- 5.2.12. Assist team leaders in planning, organizing, leading and monitoring the technical activities of the implementation and in-service support team;
- 5.2.13. Notify the Technical Authority of discrepancies in planning and submit recommendations to resolve these issues;
- 5.2.14. Maintain communications with the deployment team leaders and keep them notified of any related developments;
- 5.2.15. Track any decisions made regarding requests for changes and outstanding items with assigned tasks;
- 5.2.16. Develop .NET and Active Server Pages (ASP) custom application interface using Application Programming Interfaces (API);
- 5.2.17. Provide technical instructions, explanations and advice on RDM & Collaboration hybrid solutions, features, limitations, configurations and risks;
- 5.2.18. Debug and resolve any issues or errors during development;
- 5.2.19. Maintain knowledge of vendor products, features, bugs and enhancement requests to assist all members in client delivery;
- 5.2.20. Prepare technical briefings and make presentations, as requested by the Technical Authority; and
- 5.2.21. Perform other similar tasks related to this category.

5.3 B.1 - Business Analyst (General) - Level 3

The Business Analyst (General) must:

- 5.3.1. Develop and document statements of requirement for considered alternatives;
- 5.3.2. Analyze and document business requirements and delivering work products through the life cycle;
- 5.3.3. Translate business requirements into System/Functional requirements;
- 5.3.4. Perform business analysis of functional requirements to identify information, procedures, and decision flows;
- 5.3.5. Advise DND Senior Management and provide recommendations on a range of issues affecting the organization's ability to achieve the project's business objectives;
- 5.3.6. Perform research and information gathering in conjunction with the Technical Authority to prepare for development of short term, medium term and long term RDM/Collaboration/KM implementation plans;
- 5.3.7. Consult with DND/CAF stakeholders (individually or by means of facilitating group sessions) to produce comprehensive business requirements;
- 5.3.8. Facilitate Joint Application Development (JAD) session and act as the facilitator during workshops;
- 5.3.9. Develop workflow templates based on work process mapping;
- 5.3.10. Produce collaboration strategies and business user procedures for the RDM/Collaboration/KM systems;
- 5.3.11. Present business plans and strategies to various management committees, approval groups, and senior management;
- 5.3.12. Provide recommendations in analyzing, evaluating and controlling risks, related to RDM/Collaboration/KM requirements;
- 5.3.13. Provide written advice and documentation for delivery of an IM governance model and governance programs;
- 5.3.14. Make recommendations on which solutions can be implemented, develop the system level requirements and develop business scenarios to document the "to-be" system functionality;
- 5.3.15. Assess and document the organization's capacity/capability to undertake and successfully deliver an initiative or a change;
- 5.3.16. Provide a detailed business process analysis report for each DND/CAF organization preparing for RDM/Collaboration/KM roll-outs;
- 5.3.17. Communicate with deployment team leaders through either regular meetings or status reports on the status of assigned work activities as well as report potential issues or risks;
- 5.3.18. Develop business process renewal and migration Standard Operating Procedures (SOPs) to aid in the smooth transition from a manual system to an automated system;
- 5.3.19. Advise and provide input to team leaders in planning, organizing, leading and monitoring the functional activities of the implementation and in-service support team;
- 5.3.20. Provide bi-weekly status reports outlining work in progress, work completed, and work planned using the template/format provided by the Technical Authority; and
- 5.3.21. Perform other similar tasks related to this category.

5.4 B.1 Business Analyst (eDocs/GCDOCS) – Level 2 & 3

Level 2 and 3 resources will be performing the same tasks, however the level 3 resource tasks will contain a higher level of detail and complexity which will be described at the time of issuance of the task authorization.

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The Business Analyst (eDocs/GCDOCS) must perform the following:

- 5.4.1. Provide input in the development of GCDOCS configuration analysis and design;
- 5.4.2. Create metadata standards for the GCDOCS solution that meet business requirements and are compliant with the DND and GC metadata standards;
- 5.4.3. Troubleshoot problems, perform analysis and identify IM functionalities to meet clients' requirements
- 5.4.4. Provide advice on creation of best practices and training material for the GCDOCS solution;
- 5.4.5. Provide advice to the deployment plan for the GCDOCS solution;
- 5.4.6. Provide insights and collaborate with the training team, to enhance the training activities;
- 5.4.7. Attend meetings and provide input in the creation of a standard folder structure model, standard group and permissions model for the DND GCDOCS solution;
- 5.4.8. Ensure the GCDOCS folder structure meets the approved Enterprise Information Architecture (EIA), records management requirements and end users' needs;
- 5.4.9. Create custom metadata for the GCDOCS solution in order to meet specific business units' requirements;
- 5.4.10. Provide insights for the implementation of the GC IM Common Core requirements and in applying IM Common Core requirements in the GCDOCS solution;
- 5.4.11. Provide assistance in implementing the Government of Canada information management standards, policies and guidelines using the information management tools;
- 5.4.12. Provide assistance in the creation of test scenarios and testing;
- 5.4.13. Provide Subject Matter Expert (SME) guidance on applying compliance management and information management principles; and
- 5.4.14. Perform other similar tasks related to this category.

5.5 B.11 IM/IT Instructor (eDocs/GCDOCS and SharePoint) - Level 3

The IM/IT Instructor must:

- 5.5.1. Review and update existing eDocs/GCDOCS or SharePoint software training materials to enhance current training or create new Training Materials for IM/IT software applications;
- 5.5.2. Create new eDocs/GCDOCS or SharePoint software training material to include new functionalities;
- 5.5.3. Deliver eDocs/GCDOCS or SharePoint training to DND/CAF users and where applicable, provide one-on-one coaching.
- 5.5.4. Create and disseminate a Training Schedule;
- 5.5.5. Coordinate and confirm registration of students,;
- 5.5.6. Coordinate and provide training material (including Student Feedback Questionnaire) to each student attending training sessions – Material and Templates will be provided by DND/CAF;
- 5.5.7. Report training equipment problems to the GCDOCS administrator for resolution;
- 5.5.8. Maintain training environment by ensuring that the training environment/folders has all of the learners registered, the training environment is re-baselined and setup prior to the course starting and co-ordinate IT service requests if required;
- 5.5.9. Provide feedback to the Training Manager on updates to training packages, business processes and instructions;
- 5.5.10. Produce a monthly status report of issues, tasks and training delivered using the template/format provided by the Technical Authority;
- 5.5.11. Attend monthly status meetings;
- 5.5.12. Update training material and manuals, Computer Based Training (CBT) content and Student Handouts to reflect changes resulting from version upgrades and new business rules;
- 5.5.13. Support the development of Computer Based Training (CBT) course by providing content and recommendations and
- 5.5.14. Perform other similar tasks related to this category.

5.6 I.9 System Administrator – Level 2

The System Administrator must:

- 5.6.1. Report on requirements by gathering and collecting information as instructed by the Technical Authority;
- 5.6.2. Install, monitor, upgrade and maintain operating systems;
- 5.6.3. Install, monitor, upgrade and maintain hardware and software;
- 5.6.4. Work with the Technical Authority, Business Analysts, Project Managers, Developers, and clients/stakeholders to maintain and improve software performance;

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- 5.6.5. Apply problem solving skills to troubleshoot and resolve technical problems;
- 5.6.6. Ensure reliable system administration procedures are documented, such as backup and/or recovery;
- 5.6.7. Analyze system performance and recommend improvements;
- 5.6.8. Provide IM/IT expert advice, guidance and mentoring to the team members;
- 5.6.9. Participate in the implementation and in-service installations by troubleshooting, testing, maintaining and supporting the team through new deployments, upgrades, and patches of MS Windows Operating Systems, MS Networking, other desktop and server applications, Relational Databases (Oracle and MS SQL) and the infrastructure that supports other Intranet/Internet server side software and hardware;
- 5.6.10. Perform analysis of test result data, provide associated reports and technical research;
- 5.6.11. Manage, schedule and perform, as requested, the migration of all related data;
- 5.6.12. Conduct client service support both face-to-face and on telephone, to analyze trouble call data and produce associated reports;
- 5.6.13. Perform installation, configuration and testing of development environment, and related applications on servers and workstations for proposed solutions;
- 5.6.14. Track major milestones and ensure deliverables are completed on schedule;
- 5.6.15. Notify the Technical Authority of discrepancies in planning and submit recommendations to resolve these issues;
- 5.6.16. Maintain communications with the deployment team leaders and keep them notified of any related developments;
- 5.6.17. Track any decisions made regarding requests for changes and outstanding items with regarded tasks;
- 5.6.18. Maintain knowledge of all vendor products, features, bugs and enhancement requests to assist all members in client delivery;
- 5.6.19. Prepare technical briefings and make presentations, as requested by the Technical Authority;
- 5.6.20. Resolve any issues or errors during development and implementation;
- 5.6.21. Document all solutions; and
- 5.6.22. Perform other similar tasks related to this category.

5.7 I.11 Technology Architect (eDocs/GCDOCS and SharePoint) - Level 3

The Technology Architect must:

- 5.7.1. Review and assess the current system architecture to develop/update technical requirements;
- 5.7.2. Review and assess the overall response time for end-users of the RDM/Collaboration/KM systems (eDocs DM 10 / SharePoint / Open Text Content Server 10 or higher);
- 5.7.3. Analyze the existing capabilities within the RDM/Collaboration/KM systems (eDocs DM 10 / SharePoint / Open Text Content Server 10 or higher) and recommend areas for improved capability and integration;
- 5.7.4. Develop technical architecture, frameworks strategies and associated or integrated applications in order to meet business, functional and application requirements;
- 5.7.5. Gather, collect and document information on RDM/Collaboration/KM systems (eDocs DM 10 / SharePoint / Open Text Content Server 10 or higher) architectural requirements. Identify and document system-specific technical standards including data dictionaries, naming conventions and custom components;
- 5.7.6. Develop necessary integrations between new and/or existing systems;
- 5.7.7. Analyze and evaluate upgrades and new releases, and make recommendations on the viability of proceeding with such upgrades;
- 5.7.8. Analyze and evaluate alternative technology solutions to meet DND/CAF business requirements and provide a report with the findings;
- 5.7.9. Perform impact analysis of proposed technology changes;
- 5.7.10. Perform cost-benefit analysis of implementing new processes and solutions;
- 5.7.11. Develop prototypes of potential solutions and suggest recommended courses of action;
- 5.7.12. Review technical infrastructure designs to ensure adherence to standards and to recommend performance improvements;
- 5.7.13. Evaluate hardware relative to their ability to support the Department's RDM & Collaboration systems and associated applications (eDocs DM 10 / SharePoint / Open Text Content Server 10 or higher);
- 5.7.14. Determine potential and actual bottlenecks of hardware and improve system performance through recommended hardware changes;
- 5.7.15. Create/perform unit testing of solution modules during the development phase;
- 5.7.16. Respond to bug reports and fix issues based on the prioritization model;
- 5.7.17. Prepare software development best practices documents;
- 5.7.18. Provide detailed Installation/Configuration/Test Plan documentations;

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- 5.7.19. Provide expert technical advice and guidance to IM/IT technical resources;
- 5.7.20. Perform testing, installation and configuration of the RDM development environment;
- 5.7.21. Document all aspects of the solution design/development, testing, implementation and detailed deployment instructions;
- 5.7.22. Troubleshoot technical issues in conjunction with DND/CAF internal support teams;
- 5.7.23. Advise and assist with software build issues;
- 5.7.24. Monitor industry trends to ensure that solutions are aligned with the government directions for Information Technology (IT); and
- 5.7.25. Perform other similar tasks related to this category.

5.8 P.1 Change Management Consultant– Level 3

The Change Management Consultant must:

- 5.8.1. Analyze and develop business "critical success factors";
- 5.8.2. Define business strategies and processes in support of Information Management (IM) transformation and change management activities;
- 5.8.3. Provide advice and recommendation on change impact analysis and change management activities;
- 5.8.4. Create presentations to be presented to various stakeholders, facilitate meetings and discussions;
- 5.8.5. Support the design, development, delivery and management of communications by creating, assessing and analyzing the change to be implemented;
- 5.8.6. Conduct impact analyses and assess change readiness and uptake; and
- 5.8.7. Perform other similar tasks related to this category.

5.9 P.9 IM/IT Project Manager - Level 3

The IM/IT Project Manager must:

- 5.9.1. Prepare and maintain a plan of activities using Microsoft Project 2010, showing a detailed schedule of all activities, for review and approval by the Technical Authority. The schedule will provide, as a minimum, a detailed breakdown of all proposed activities associated with the task, including schedules for deliverables;
- 5.9.2. Establish a process to identify what the project will be responsible to achieve and define a baseline for performance measurement;
- 5.9.3. Identify the project scope and goals in terms of objectives and thresholds;
- 5.9.4. Identify how the project will be evaluated against what was intended (i.e. test and evaluation) and the performance measurements to be used;
- 5.9.5. Develop and update the status of the tasks, milestones and deliverables of the project based on information collected from relevant members of the project team and other direct and indirect contributors to the success of the project;
- 5.9.6. Develop and maintain the Work Breakdown Structure (WBS) and document project plans;
- 5.9.7. Manage and control the time, resources and scope according to the priorities of the project;
- 5.9.8. Monitor the progress of various project activities, identify risks and opportunities, and manage communication by ensuring that proper messaging has been forwarded to the user community;
- 5.9.9. Develop and deliver IM/IT project presentations to various stakeholders;
- 5.9.10. Facilitate meetings and discussions among stakeholders of the project team;
- 5.9.11. Prepare implementation strategy documents and framework for submission to DND/CAF Senior Management;
- 5.9.12. Prepare and confirm project plans, schedules and resource plans on a regular basis to the Technical Authority;
- 5.9.13. Communicate and manage program/project scope;
- 5.9.14. Define project team structures, request resource assignments and allocate team members to client-mandate;
- 5.9.15. Maintain management of the project by mitigating risks and defining resolution plans for addressing issues;
- 5.9.16. Apply proper change management processes and ensure that no work is performed on a requested change without appropriate approvals;
- 5.9.17. Liaise directly with DND/CAF Technical Team to coordinate implementations;
- 5.9.18. Provide process guidance to the Project Team members
- 5.9.19. Establish project communication plans and deliver regular status updates, including weekly project dashboard updates;
- 5.9.20. Prepare project documentation, including options analysis, business cases, communication plans, risk assessment documents and status reports;
- 5.9.21. Prepare other documents including presentations and communications;
- 5.9.22. Assess risks that could jeopardize the project implementation and bring them to the attention of the Technical Authority;

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- 5.9.23. Provide Subject Matter Expert (SME) guidance to DND/CAF team members
- 5.9.24. Provide input, feedback and requirements to the Technical Authority and DND/CAF Project Team members on Management of Recorded Information (MoRI) policies, standards and guidelines, to sustain deployment; and
- 5.9.25. Perform other similar tasks related to this category.

6.0 REPORTING REQUIREMENTS

- 6.1 The Contractor must provide a financial status report, to be included with the monthly invoice, which must contain, at a minimum, the following information:
 - 6.1.1. Task Number;
 - 6.1.2. Start Date;
 - 6.1.3. End Date;
 - 6.1.4. Amount Spent on Services;
 - 6.1.5. Amount on Travel and Living;
 - 6.1.6. GST/HST;
 - 6.1.7. Total Spent;
 - 6.1.8. Task Value;
 - 6.1.9. Funds Remaining in the Task;
 - 6.1.10. % Complete; and
 - 6.1.11. Task Status (Active/Closed).

- 6.2 The Contractor will prepare written bi-weekly progress reports of the work performed. One copy will be provided to the Technical Authority at the beginning of the month following the work; a second copy will accompany the monthly invoice. At a minimum, each progress report will document the following information:
 - 6.2.1. All significant activities performed under each task during the period covered by the report;
 - 6.2.2. Status of all action and decision items originating from each task, as well as a list of outstanding activities;
 - 6.2.3. A description of any problems encountered which are likely to require attention by the Technical Authority; and
 - 6.2.4. Any recommendations relating to the conduct of the work.

7.0 LANGUAGE REQUIREMENTS

- 7.1 The language of work will be indicated in each task authorization and will be either of the following options:
 - 7.1.1. Proposed resources must be fluent in both Official Languages of Canada (English and French). Fluent means that the individual must be able to communicate orally and in writing without any assistance and with minimal errors.
 - Or
 - 7.1.2. Proposed resources must be fluent in English. Fluent means that the individual must be able to communicate orally and in writing without any assistance and with minimal errors.

8.0 LOCATION OF WORK

- 8.1 The work will be performed primarily on DND premises in the National Capital Region (NCR) between the hours of 07:00 to 17:00, Monday to Friday. The Technical Authority will provide on-site facilities as required, with the remainder of the unclassified work to be carried out at the contractor's facility. Travel costs within the NCR will not be reimbursed.

9.0 TRAVEL

- 9.1 The majority of the work is expected to be performed within the NCR. However, if travel is deemed necessary, Travel and Living expenses only apply when the Contractor is requested to work outside the NCR. If travel is required, the Technical Authority must authorize travel in advance, in writing.
- 9.2 Invoices for Travel and Living costs are to be supported by documentation (receipts) and will be reimbursed in accordance with the Treasury Board Policy and Guidelines on Travel in effect at the time of travel at actual cost with no allowance for mark-up or profit. Charges for air travel must not exceed that for economy travel.

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APPENDIX A TO ANNEX A TASKING ASSESSMENT PROCEDURE

1. Where a requirement for a specific task is identified, a draft Task Authorization Form (TA Form) as attached at Appendix B to Annex A will be provided to the Contractor in accordance with the allocation methodology stated in the Contract Article titled "Allocation of Task Authorizations". Once a draft TA Form is received, the Contractor must submit to the DND Procurement Representative 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 resourced(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 (unless the contact at the reference is only available by telephone). Canada will not assess any points or consider a mandatory criterion met unless the response is received within 5 working days. On the third working day after sending out the e-mails, if Canada has not received a response, Canada will notify the Contractor by e-mail, to allow the Contractor to contact its reference directly to ensure that it responds to Canada within 5 working days. Wherever information provided by a reference differs from the information supplied by the Contractor, the information supplied by the reference will be the information assessed. Points will not be allocated or a mandatory criteria considered as met if the reference customer is not a customer of the Contractor itself (for example, the customer cannot be the customer of an affiliate of the Contractor). Nor will points be allocated or a mandatory criteria considered as met if the customer is itself an affiliate or other entity that does not deal at arm's length with the Contractor. Crown references will be accepted.

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4. During the assessment of the resources proposed, should the references for two or more resources required under that TA either be unavailable or fail to substantiate the required qualifications of the proposed resources to perform the required services, the Contracting Authority may find the quotation to be non-responsive.
5. Only quotations that meet all of the mandatory criteria will be considered for assessment of the point rated criteria. Each resource proposed must attain the required minimum score for the point rated criteria for the applicable Resource Category. If the minimum score for any proposed resource is less than what is required, the Contractor's quotation will be found to be non-responsive.
6. Once the quotation has been accepted by the Technical Authority, the TA Form will be signed by Canada and provided to the Contractor for signature. The TA Form must be appropriately signed by Canada prior to commencement of any work. The Contractor must not commence work until a validly issued TA Form (the Task Authorization) has been received, and any work performed in its absence is done at the Contractor's own risk.

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**APPENDIX B TO ANNEX A
TASK AUTHORIZATION FORM**

| | | | | | | | | | | |
|--|---|------------------------------------|-------|-------|----------------------|-----------------------|-------|-------|-----------|------|
| All invoices/progress claims must show the referenced Contract and Task numbers. Toutes les factures doivent indiquer les numéros du contrat et de la tâche. | | Contract no. - No du contrat | | | | | | | | |
| | | Task no. - No de la tâche | | | | | | | | |
| Amendment no. - No de la modification | Increase/Decrease - Augmentation/Réduction | Previous value - Valeur précédente | | | | | | | | |
| To - A | TO THE CONTRACTOR You are requested to supply the following services in accordance with the terms of the above referenced Contract. Only services included in the Contract can be supplied against this task. Please advise the undersigned if the completion date cannot be met. Invoices/progress claims shall be prepared in accordance with the instructions set out in the contract. A L'ENTREPRENEUR Vous êtes prié de fournir les services suivants en conformité des termes du contrat mentionné ci-dessus. Seules les services mentionnés dans le contrat doivent être fournis à l'appui de cette demande. Prière d'aviser le signataire si la livraison ne peut se faire dans les délais prescrits. Les factures doivent être établies selon les instructions énoncées dans le contrat. | | | | | | | | | |
| Delivery location - Expédiez à | _____ Date for the Department of National Defence pour le ministère de la Défense nationale | | | | | | | | | |
| Delivery/Completion date - Date de livraison/d'achèvement From - De : To - À : | | | | | | | | | | |
| Contract item no. No d'article du contrat | Services | Cost Prix | | | | | | | | |
| | | | | | | | | | | |
| | Applicable Taxes Taxes applicables | | | | | | | | | |
| | Total | | | | | | | | | |
| | THE CONTRACTOR HEREBY ACCEPTS THE TASK AUTHORIZATION IDENTIFIED ABOVE : <table border="0"> <tr> <td>_____</td> <td>_____</td> </tr> <tr> <td>Name (type or print)</td> <td>Title (type or print)</td> </tr> <tr> <td>_____</td> <td>_____</td> </tr> <tr> <td>Signature</td> <td>Date</td> </tr> </table> | | _____ | _____ | Name (type or print) | Title (type or print) | _____ | _____ | Signature | Date |
| _____ | _____ | | | | | | | | | |
| Name (type or print) | Title (type or print) | | | | | | | | | |
| _____ | _____ | | | | | | | | | |
| Signature | Date | | | | | | | | | |
| APPLICABLE ONLY TO PWGSC CONTRACTS: The Contracting Authority signature is required when the total value of the DND 626 exceeds the threshold specified in the Contract. NE S'APPLIQUE QU'AUX CONTRATS DE TPSGC : La signature de l'autorité contractante est requise lorsque la valeur totale du formulaire DND 626 est supérieure au seuil précisé dans le contrat. | | | | | | | | | | |
| _____ for the Department of Public Works and Government Services pour le ministère des Travaux publics et services gouvernementaux | | DND 626 (01-05) | | | | | | | | |

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**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 and Rated Resource Assessment Criteria:

1.1. A.6 Programmer/Software Developer (SharePoint) – Level 3 – Mandatory Criteria

| Mandatory Criteria for A.6 Programmer/Software Developer Level 3 (SharePoint) | | | |
|--|---|--------------------|--------------------------------|
| | Mandatory Evaluation Criteria | Met/Not Met | Demonstrated Experience |
| M1 | The Bidder must demonstrate that the proposed resource has a minimum of ten (10) years of experience in deploying and maintaining SharePoint (version 2007 or higher) in a Government environment. | | |
| M2 | The Bidder must demonstrate that the proposed resource has a minimum of five (5) years of experience implementing SharePoint (version 2007 or higher) customizations, when needed, to fill in requirement gaps that cannot be met using out-of-the-box configuration (e.g., web parts, event receivers, etc.) within the last ten (10) years. | | |
| M3 | The Bidder must demonstrate that the proposed resource has a minimum of five (5) years of experience with developing Web-based applications using Microsoft technologies, including ASP.NET Framework and C# within the last ten (10) years. | | |
| Compliant: (Met or Not Met): | | | |

1.2. A.6 Programmer/Software Developer (SharePoint) – Level 3 – Rated Criteria

| Point Rated Technical Criteria for A.6 Programmer/Software Developer Level 3 (SharePoint) | | | | |
|--|---|--|-------------------|--------------------------------|
| | Point-Rated Evaluation Criteria | Point Allocation | Max Points | Demonstrated Experience |
| R1 | The Bidder should demonstrate that the proposed resource has more than ten (10) years of experience as a Programmer/Software Developer. | Point Allocation: <ul style="list-style-type: none"> • 1 point – 10+ to 12 years • 2 points – 12+ to 15 years • 3 points – 15+ years | 3 | |
| R2 | The Bidder should demonstrate that the proposed resource has a minimum of two (2) years of experience integrating SharePoint with Open Text Content Server 10 | Point Allocation: <ul style="list-style-type: none"> • 1 point – 2 to 3 years • 2 points – 3+ years | 2 | |

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| | (or higher) in a Government of Canada environment. | | | | |
| R3 | The Bidder should demonstrate that the proposed resource has experience with SharePoint Designer, Nintex Workflow, Web Parts and workflow creation. | Point Allocation: <ul style="list-style-type: none"> • 1 point – 1+ to 2 year • 2 points – 2+ years | 2 | | |
| R4 | The Bidder should demonstrate that the proposed resource has experience developing and maintaining SharePoint Solutions Packages (WSP). | Point Allocation: <ul style="list-style-type: none"> • 1 point – 1+ to 2 year • 2 points – 2+ years | 2 | | |
| R5 | The Bidder should demonstrate that the proposed resource has experience working on IM/IT projects within the Public Safety and Defense business domains, which includes one (1) or more of the following: 1. Defence 2. Intelligence 3. National Security 4. Enforcement | Point Allocation: <ul style="list-style-type: none"> • 1 point – 1+ to 3 years • 2 points – 3+ years | 2 | | |
| R6 | The Bidder should demonstrate that the proposed resource has successfully completed one (1) or more of the following certifications: <ul style="list-style-type: none"> • Microsoft Certified Professional (MCP) • SharePoint 2010 Certification • SharePoint 2013 Certification <u>Note:</u> copies of the certifications must be provided with the Bidder's response. | Point Allocation: <ul style="list-style-type: none"> • 1 point = MCP • 1 point = SharePoint 2010 • 1 point = SharePoint 2013 | 3 | | |
| Total Points | | | 14 | | |
| Minimum Points Required | | | 7 | | |

1.3. A.8 System Analyst - Level 2 – Mandatory Criteria

| Mandatory Criteria for A.8 System Analyst - Level 2 | | | |
|--|--|--------------------|--------------------------------|
| | Mandatory Evaluation Criteria | Met/Not Met | Demonstrated Experience |
| M1 | The Bidder must demonstrate that the proposed resource has a minimum of five (5) years of experience as a System Analyst within the last ten (10) years in an IM/IT environment. | | |

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| M2 | The Bidder must demonstrate that the proposed resource has a minimum of five (5) years of experience, within the last ten (10) years in developing application/system specifications and designs. | | |
| M3 | The Bidder must demonstrate that the proposed resource has a minimum of five (5) years of experience within the last ten (10) years in application design or systems integration. | | |
| Compliant: (Met or Not Met): | | | |

1.4. A.8 System Analyst - Level 2 – Rated Criteria

| Point Rated Criteria for A.8 System Analyst - Level 2 | | | | | |
|---|--|--|------------|-------|-------------------------|
| | Point-Rated Evaluation Criteria | Point Allocation | Max Points | Score | Demonstrated Experience |
| R1 | The Bidder should demonstrate that the proposed resource has experience working as a System Analyst in SharePoint (version 2007 or higher) or eDocs DM 10 (or higher) / Open Text Content Server 10 (or higher) in a government setting. | Point Allocation: <ul style="list-style-type: none"> • 1 point – 1 to 3 years • 2 points – 3+ to 5 years • 3 points – 5+ to 7 years • 4 points – 7+ years | 4 | | |
| R2 | The Bidder should demonstrate that the proposed resource has experience as a System Analyst in an eDocs or GCDOCS or SharePoint integration project. | Point Allocation: <ul style="list-style-type: none"> • 1 point - 6 months to 1 year • 2 points – 1+ to 3 years • 3 points – 3+ to 6 years • 4 points – 6+ to 9 years • 5 points – 9+ years | 5 | | |
| R3 | The Bidder should demonstrate that the proposed resource has experience creating and maintaining technical documentation. | Point Allocation: <ul style="list-style-type: none"> • 1 point – 1 to 3 years • 2 points – 3+ years | 2 | | |
| R4 | The Bidder should demonstrate that the proposed resource has experience working on IM/IT projects within the Public Safety and Defense business domains, which includes one (1) or more of the following: <ol style="list-style-type: none"> 1. Defence 2. Intelligence 3. National Security 4. Enforcement | Point Allocation: <ul style="list-style-type: none"> • 1 point – 1 to 3 years • 2 points – 3+ years | 2 | | |

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|--------------------------------|--|--|-----------|--|--|
| R5 | The Bidder should demonstrate that the proposed resource has relational database experience working with either Oracle 12c (or higher), or SQL Server 2003 (or higher) databases in creating/modifying tables, attributes, primary keys and backup/restore procedures. | Point Allocation: <ul style="list-style-type: none"> • 1 point – 1 to 2 years • 2 points – 2+ to 5 years • 3 points – 5+ years | 3 | | |
| Total Points | | | 16 | | |
| Minimum Points Required | | | 10 | | |

1.5. I.9 System Administrator – Level 2 - Mandatory Criteria

| Mandatory Criteria for I.9 System Administrator – Level 2 | | | |
|---|---|-------------|-------------------------|
| | Mandatory Evaluation Criteria | Met/Not Met | Demonstrated Experience |
| M1 | The Bidder must demonstrate that the proposed resource has a minimum of five (5) years of experience as a System Administrator within the last ten (10) years in an IM/IT environment. | | |
| M2 | The Bidder must demonstrate that the proposed resource has a minimum of (5) years of experience, within the last ten (10) years, working as a System Administrator on a Records and Document Management environment or Collaboration environment. | | |
| M3 | The Bidder must demonstrate that the proposed resource has a minimum of five (5) years of experience within the last ten (10) years performing installations, configurations and testing on servers and workstations. | | |
| M4 | The Bidder must demonstrate that the proposed resource has a minimum of five (5) years of experience within the last ten (10) years conducting client service support (both Face to Face and on the telephone.) | | |
| Compliant: (Met or Not Met): | | | |

1.6. I.9 System Administrator – Level 2 - Rated Criteria

| Point Rated Criteria for I.9 System Administrator – Level 2 | | | | | |
|---|--|---|------------|-------|-------------------------|
| | Point-Rated Evaluation Criteria | Point Allocation | Max Points | Score | Demonstrated Experience |
| R1 | The Bidder should demonstrate that the proposed resource has more than five (5) years of experience as a System Administrator working on a | Point Allocation: <ul style="list-style-type: none"> • 1 point – 5+ to 7 years • 2 points – 7+ to 8 years • 3 points – 8+ years | 3 | | |

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|--------------------------------|---|---|-----------|--|--|
| | Records and Document Management system or Collaboration system. | | | | |
| R2 | The Bidder should demonstrate that the proposed resource has experience working in an implementation project using either*: <ul style="list-style-type: none"> SharePoint (version 2007 or higher); or on an Open Text Content Server 10 (or higher) (GCDOCS); and/or eDocs DM 10 (or higher) within a Government department setting. <p>* To be specified at the time of Task Authorization</p> | Point Allocation: <ul style="list-style-type: none"> 1 point – 1 to 3 years 2 points – 3+ years | 2 | | |
| R3 | The Bidder should demonstrate that the proposed resource has experience creating and maintaining technical documentation. | Point Allocation: <ul style="list-style-type: none"> 1 point – 1 to 3 years 2 points – 3+ years | 2 | | |
| R4 | The Bidder should demonstrate that the proposed resource has experience working with either Oracle 12c (or higher), or SQL Server 2003 (or higher) databases. | Point Allocation: <ul style="list-style-type: none"> 1 point – 1 to 2 years 2 points – 2+ to 5 years 3 points – 5+ years | 3 | | |
| Total Points | | | 10 | | |
| Minimum Points Required | | | 6 | | |

1.7. I.11 Technology Architect (eDocs/GCDOCS) - Level 3 – Mandatory Criteria

| Mandatory Criteria for I.11 Technology Architect (eDocs/GCDOCS) – Level 3 | | | |
|--|---|--------------------|--------------------------------|
| | Mandatory Evaluation Criteria | Met/Not Met | Demonstrated Experience |
| M1 | The Bidder must demonstrate that the proposed resource has a minimum of ten (10) years of experience as a Technology Architect in an IM/IT environment. | | |
| M2 | The Bidder must demonstrate that the proposed resource has over five (5) years of experience, within the last ten (10) years, customizing, programming and configuring (eDocs DM 10 (or higher) or Open Text Content Server 10 (or higher) solutions. | | |
| M3 | The Bidder must demonstrate that the proposed resource has over five (5) years of experience, working with metadata and taxonomies within an IM/IT environment. | | |
| Compliant: (Met or Not Met): | | | |

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1.8. I.11 Technology Architect (eDocs/GCDOCS) - Level 3 – Rated Criteria

| Point Rated Criteria for I.11 Technology Architect (eDocs/GCDOCS) - Level 3 | | | | | |
|---|---|--|------------|-------|-------------------------|
| | Point-Rated Evaluation Criteria | Point Allocation | Max Points | Score | Demonstrated Experience |
| R1 | The Bidder should demonstrate that the proposed resource has experience has a minimum of ten (10) years of experience as a Technology Architect. | Point Allocation: <ul style="list-style-type: none"> 1 points – 10+ to 12 years 2 points – 12+ to 15 years | 2 | | |
| R2 | The Bidder should demonstrate that the proposed resource has experience in the design and application of metadata for managing electronic information resources, including required corporate vocabularies and taxonomies. | Point Allocation: <ul style="list-style-type: none"> 1 point – 1 to 3 years 2 points – 3+ years | 2 | | |
| R3 | The Bidder should demonstrate that the proposed resource has a minimum five (5) years of experience in providing technical guidance and proposing enhancements to Government of Canada (GC) implementations using the following programs in GC Gold Build: <ul style="list-style-type: none"> Workflow Communities Project Workspace | Point Allocation: <ul style="list-style-type: none"> 1 point – Workflow 1 point – Communities 1 point – Project Workspace | 3 | | |
| R4 | The Bidder should demonstrate that the proposed resource has a minimum of three (3) years of experience in evaluating and implementing new products and/or integrations with Open Text Content Server. | Point Allocation: <ul style="list-style-type: none"> 1 point – 3 to 5 years 2 points – 5+ years | 2 | | |
| Total Points | | | 9 | | |
| Minimum Points Required | | | 4 | | |

1.9. B.1 Business Analyst (General) – Level 3 – Mandatory Criteria

| Mandatory Criteria for B.1 Business Analyst (General) – Level 3 | | | |
|---|--|-------------|-------------------------|
| | Mandatory Evaluation Criteria | Met/Not Met | Demonstrated Experience |
| M1 | The Bidder must demonstrate that the proposed resource has a minimum of ten (10) years of experience as a Business Analyst within the last fifteen (15) years. | | |
| M2 | The Bidder must demonstrate that the proposed resource has a minimum of ten (10) years of experience as a Business Analyst working on IM/IT projects. | | |

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|-------------------------------------|--|--|--|
| M3 | The Bidder must demonstrate that the proposed resource has a minimum of ten (10) years of experience converting business requirements into functional specifications. | | |
| M4 | The Bidder must demonstrate that the proposed resource has a minimum of seven (7) years of experience conducting focus groups and JAD sessions to gather and validate business requirements for a business solution. | | |
| M5 | The Bidder must demonstrate that the proposed resource has a minimum of seven (7) years of experience presenting IM/IT related issues to project stakeholders. | | |
| Compliant: (Met or Not Met): | | | |

1.10. B.1 Business Analyst (General) – Level 3 – Rated Criteria

Point Rated Criteria for B.1 Business Analyst (General) – Level 3

| | Point-Rated Evaluation Criteria | Point Allocation | Max Points | Score | Demonstrated Experience |
|-----------|---|---|------------|-------|-------------------------|
| R1 | The Bidder should demonstrate that the proposed resource has more than ten (10) years of experience as a Business Analyst. | Point Allocation: <ul style="list-style-type: none"> • 1 point – 10+ to 12 years • 2 points – 12+ to 15 years • 3 points – 15+ years | 3 | | |
| R2 | The Bidder should demonstrate that the proposed resource has more than ten (10) years of experience as a Business Analyst working on IM/IT projects. | Point Allocation: <ul style="list-style-type: none"> • 1 points – 10+ to 12 years • 2 points – 12+ to 15 years • 3 points – 15+ years | 3 | | |
| R3 | The Bidder should demonstrate that the proposed resource has more than ten (10) years of experience converting business requirements into functional specifications. | Point Allocation: <ul style="list-style-type: none"> • 1 points – 10+ to 12 years • 2 points – 12+ to 15 years • 3 points – 15+ years | 3 | | |
| R4 | The Bidder should demonstrate that the proposed resource has more than seven (7) years of experience conducting focus groups and Joint Application Development (JAD) sessions to gather and validate business requirements for a business solution. | Point Allocation: <ul style="list-style-type: none"> • 1 points – 7+ to 9 years • 2 points – 9+ to 12 years • 3 points – 12+ years | 3 | | |

| | | |
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|--------------------------------|--|---|-----------|--|--|
| R5 | The Bidder should demonstrate that the proposed resource has experience working on IM/IT projects within the Public Safety and Defense business domains, which includes one (1) or more of the following: 1. Defence 2. Intelligence 3. National Security 4. Enforcement | Point Allocation: • 1 point – 1 to 3 years • 2 points – 3+ years | 2 | | |
| R6 | The Bidder should demonstrate that the proposed resource has experience as a Business Analyst working on the implementation of a Collaboration and/or a Record and Document Management (RDM) system. | Point Allocation: • 1 points – 1 to 2 years • 2 points – 2+ years | 2 | | |
| Total Points | | | 16 | | |
| Minimum Points Required | | | 10 | | |

1.11. B.11 IM / IT Instructor (eDocs / GCDOCS) – Level 3 – Mandatory Criteria

| Mandatory Criteria for IM / IT Trainer – Level 3 (eDocs/GCDOCS) | | | |
|--|---|--------------------|--------------------------------|
| | Mandatory Evaluation Criteria | Met/Not Met | Demonstrated Experience |
| M1 | The Bidder must demonstrate that the proposed resource has a minimum of ten (10) years of experience as an IM/IT instructor within the last fifteen (15) years. | | |
| M2 | The Bidder must demonstrate that the proposed resource has a minimum of one (1) year experience, working with Open Text Content Server 10 (or higher) (GCDOCS) and/or eDocs DM 10 (or higher) project within a Government environment. | | |
| M3 | The Bidder must demonstrate that the proposed resource has a minimum of two (2) years of experience, within the last five (5) years, developing and reviewing training content for Electronic Document and Records Management System (EDRMS) within a Government environment. | | |
| Compliant: (Met or Not Met): | | | |

1.12. B.11 IM / IT Instructor (eDocs / GCDOCS) – Level 3 – Rated Criteria

| | | |
|--|--|--|
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Point Rated Criteria for IM / IT Trainer – Level 3 (eDocs/GCDOCS)

| | Point-Rated Evaluation Criteria | Point Allocation | Max Points | Score | Demonstrated Experience |
|--------------------------------|--|---|------------|-------|-------------------------|
| R1 | The Bidder should demonstrate that the proposed resource has more than ten (10) years of experience as an IM/IT Trainer. | Point Allocation: <ul style="list-style-type: none"> 1 points – 10+ to 12 years 2 points – 12+ to 15 years 3 points – 15+ years | 3 | | |
| R2 | The Bidder should demonstrate that the proposed resource has experience working with business clients to plan and administer the delivery of training, within a Government of Canada environment. | Point Allocation: <ul style="list-style-type: none"> 1 point – 1 to 2 years 2 points – 2+ years | 2 | | |
| R3 | The Bidder should demonstrate that the proposed resource has a minimum of one (1) year experience delivering Open Text Content Server 10 (or higher) (GCDOCS) project and/or eDocs DM 10 (or higher) training. | Point Allocation: <ul style="list-style-type: none"> 1 point – 1 to 2 years 2 points – 2+ years | 2 | | |
| R4 | The Bidder should demonstrate that the proposed resource has experience developing Open Text Content Server 10 (or higher) (GCDOCS) and/or eDocs DM 10 (or higher) training material for training or coaching clients. | Point Allocation: <ul style="list-style-type: none"> 1 point – 2 to 3 years 2 points – 3+ years | 2 | | |
| Total Points | | | 9 | | |
| Minimum Points Required | | | 6 | | |

1.13. P.9 IM/IT Project Manager – Level 3 – Mandatory Criteria

Mandatory Criteria for P.9 IM/IT Project Manager – Level 3

| | Mandatory Evaluation Criteria | Met/Not Met | Demonstrated Experience |
|-----------|---|-------------|-------------------------|
| M1 | The Bidder must demonstrate that the proposed resource has a minimum of ten (10) years of experience within the past fifteen (15) years as a Project Manager working on IM/IT projects. | | |
| M2 | The Bidder must demonstrate that the proposed resource has a minimum of five (5) years of experience managing projects in SharePoint (version 2007 or higher) or eDocs DM 10 (or higher) / Open Text Content Server 10 (or higher) (GCDOCS), during the definition and implementation phases. | | |
| M3 | The Bidder must demonstrate that the proposed resource has a minimum of seven (7) years of experience implementing Risk Management plans in an IM/IT project | | |

| | | |
|---|--|---|
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| M4 | The Bidder must demonstrate that the proposed resource has a minimum of seven (7) years of experience presenting IM/IT related issues to project stakeholders. | |
| Compliant: (Met or Not Met) | | |

1.14. P.9 IM/IT Project Manager – Level 3 – Rated Criteria

Point Rated Criteria for P.9 IM/IT Project Manager – Level 3

| | Point-Rated Evaluation Criteria | Point Allocation | Max Points | Score | Demonstrated Experience |
|--------------------------------|--|---|------------|-------|-------------------------|
| R1 | The Bidder should demonstrate that the proposed resource has more than ten (10) years of experience as an IM/IT Project Manager. | Point Allocation: <ul style="list-style-type: none"> • 1 points – 10+ to 12 years • 2 points – 12+ to 15 years • 3 points – 15+ years | 3 | | |
| R2 | The Bidder should demonstrate that the proposed resource has more than ten (10) years of experience managing projects during the definition and implementation phases of an IM/IT project. | Point Allocation: <ul style="list-style-type: none"> • 1 points – 10+ to 12 years • 2 points – 12+ to 15 years • 3 points – 15+ years | 3 | | |
| R3 | The Bidder should demonstrate that the proposed resource has experience managing the implementation of eDocs DM 10 (or higher) or Open Text Content Server 10 (or higher) (GCDOCS). | Point Allocation: <ul style="list-style-type: none"> • 1 points – 1 to 2 years • 2 points – 2+ to 5 years • 3 points – 5+ years | 3 | | |
| R4 | The Bidder should demonstrate that the proposed resource has experience managing IM/IT projects in a governmental organization. | Point Allocation: <ul style="list-style-type: none"> • 1 points – 1 to 2 years • 2 points – 2+ to 5 years • 3 points – 5+ years | 3 | | |
| R5 | The Bidder should demonstrate that the proposed resource has experience working on IM/IT projects within the Public Safety and Defense business domains, which includes one or more of the following: 1. Defence 2. Intelligence 3. National Security 4. Enforcement | Point Allocation: <ul style="list-style-type: none"> • 1 point – 1+ to 3 years • 2 points – 3+ years | 2 | | |
| Total Points | | | 14 | | |
| Minimum Points Required | | | 8 | | |

Note to Bidders: With the exception of CMC1, Attachment 4.1 – Bid Evaluation Criteria will be inserted and will form part of the resulting contract.

| | | |
|--|--|--|
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**ANNEX B
BASIS OF PAYMENT**

INITIAL CONTRACT PERIOD:

| Initial Contract Period – Year 1 | | |
|--|---------------------------|---|
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| A.6 Programmer/Software Developer | LEVEL 3 | <i>To be inserted upon contract award</i> |
| A.8 System Analyst | LEVEL 2 | <i>To be inserted upon contract award</i> |
| I.9 System Administrator | LEVEL 3 | <i>To be inserted upon contract award</i> |
| I.11 Technology Architect (SharePoint) | LEVEL 3 | <i>To be inserted upon contract award</i> |
| I.11 Technology Architect (eDocs/GCDOCS) | LEVEL 3 | <i>To be inserted upon contract award</i> |
| B.1. Business Analyst (General) | LEVEL 3 | <i>To be inserted upon contract award</i> |
| B.1. Business Analyst (eDocs/GCDOCS) | LEVEL 3 | <i>To be inserted upon contract award</i> |
| B.1. Business Analyst (eDocs/GCDOCS) | LEVEL 2 | <i>To be inserted upon contract award</i> |
| B.11. IM/IT Instructor (eDocs/GCDOCS/SharePoint) | LEVEL 3 | <i>To be inserted upon contract award</i> |
| P.1. Change Management Consultant | LEVEL 3 | <i>To be inserted upon contract award</i> |
| P.9. Project Manager | LEVEL 3 | <i>To be inserted upon contract award</i> |

| Initial Contract Period – Year 2 | | |
|--|---------------------------|---|
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| A.6 Programmer/Software Developer | LEVEL 3 | <i>To be inserted upon contract award</i> |
| A.8 System Analyst | LEVEL 2 | <i>To be inserted upon contract award</i> |
| I.9 System Administrator | LEVEL 3 | <i>To be inserted upon contract award</i> |
| I.11 Technology Architect (SharePoint) | LEVEL 3 | <i>To be inserted upon contract award</i> |
| I.11 Technology Architect (eDocs/GCDOCS) | LEVEL 3 | <i>To be inserted upon contract award</i> |
| B.1. Business Analyst (General) | LEVEL 3 | <i>To be inserted upon contract award</i> |
| B.1. Business Analyst (eDocs/GCDOCS) | LEVEL 3 | <i>To be inserted upon contract award</i> |
| B.1. Business Analyst (eDocs/GCDOCS) | LEVEL 2 | <i>To be inserted upon contract award</i> |
| B.11. IM/IT Instructor (eDocs/GCDOCS/SharePoint) | LEVEL 3 | <i>To be inserted upon contract award</i> |
| P.1. Change Management Consultant | LEVEL 3 | <i>To be inserted upon contract award</i> |
| P.9. Project Manager | LEVEL 3 | <i>To be inserted upon contract award</i> |

OPTION PERIODS:

| Option Period 1 – Year 3 | | |
|-----------------------------------|---------------------------|---|
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| A.6 Programmer/Software Developer | LEVEL 3 | <i>To be inserted upon contract award</i> |
| A.8 System Analyst | LEVEL 2 | <i>To be inserted upon contract award</i> |

| | | |
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| | | |
|---|---------|---|
| I.9 System Administrator | LEVEL 3 | <i>To be inserted upon contract award</i> |
| I.11 Technology Architect (SharePoint) | LEVEL 3 | <i>To be inserted upon contract award</i> |
| I.11 Technology Architect (eDocs/GCDOCS) | LEVEL 3 | <i>To be inserted upon contract award</i> |
| B.1. Business Analyst (General) | LEVEL 3 | <i>To be inserted upon contract award</i> |
| B.1. Business Analyst (eDocs/GCDOCS) | LEVEL 3 | <i>To be inserted upon contract award</i> |
| B.1. Business Analyst (eDocs/GCDOCS) | LEVEL 2 | <i>To be inserted upon contract award</i> |
| B.11. IM/IT Instructor (eDocs/GCDOCS/ SharePoint) | LEVEL 3 | <i>To be inserted upon contract award</i> |
| P.1. Change Management Consultant | LEVEL 3 | <i>To be inserted upon contract award</i> |
| P.9. Project Manager | LEVEL 3 | <i>To be inserted upon contract award</i> |

Option Period 2 – Year 4

| Resource Category | Level of Expertise | Firm Per Diem Rate |
|---|---------------------------|---|
| A.6 Programmer/Software Developer | LEVEL 3 | <i>To be inserted upon contract award</i> |
| A.8 System Analyst | LEVEL 2 | <i>To be inserted upon contract award</i> |
| I.9 System Administrator | LEVEL 3 | <i>To be inserted upon contract award</i> |
| I.11 Technology Architect (SharePoint) | LEVEL 3 | <i>To be inserted upon contract award</i> |
| I.11 Technology Architect (eDocs/GCDOCS) | LEVEL 3 | <i>To be inserted upon contract award</i> |
| B.1. Business Analyst (General) | LEVEL 3 | <i>To be inserted upon contract award</i> |
| B.1. Business Analyst (eDocs/GCDOCS) | LEVEL 3 | <i>To be inserted upon contract award</i> |
| B.1. Business Analyst (eDocs/GCDOCS) | LEVEL 2 | <i>To be inserted upon contract award</i> |
| B.11. IM/IT Instructor (eDocs/GCDOCS/ SharePoint) | LEVEL 3 | <i>To be inserted upon contract award</i> |
| P.1. Change Management Consultant | LEVEL 3 | <i>To be inserted upon contract award</i> |
| P.9. Project Manager | LEVEL 3 | <i>To be inserted upon contract award</i> |

Option Period 3 – Year 5

| Resource Category | Level of Expertise | Firm Per Diem Rate |
|--|---------------------------|---|
| A.6 Programmer/Software Developer | LEVEL 3 | <i>To be inserted upon contract award</i> |
| A.8 System Analyst | LEVEL 2 | <i>To be inserted upon contract award</i> |
| I.9 System Administrator | LEVEL 3 | <i>To be inserted upon contract award</i> |
| I.11 Technology Architect (SharePoint) | LEVEL 3 | <i>To be inserted upon contract award</i> |
| I.11 Technology Architect (eDocs/GCDOCS) | LEVEL 3 | <i>To be inserted upon contract award</i> |
| B.1. Business Analyst (General) | LEVEL 3 | <i>To be inserted upon contract award</i> |
| B.1. Business Analyst (eDocs/GCDOCS) | LEVEL 3 | <i>To be inserted upon contract award</i> |
| B.1. Business Analyst (eDocs/GCDOCS) | LEVEL 2 | <i>To be inserted upon contract award</i> |
| B.11. IM/IT Instructor (eDocs/GCDOCS/SharePoint) | LEVEL 3 | <i>To be inserted upon contract award</i> |
| P.1. Change Management Consultant | LEVEL 3 | <i>To be inserted upon contract award</i> |
| P.9. Project Manager | LEVEL 3 | <i>To be inserted upon contract award</i> |

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ANNEX C SECURITY REQUIREMENTS CHECK LIST

| | | |
|---|---|--|
|  Government of Canada / Gouvernement du Canada |  | Contract Number / Numéro du contrat W6369-18-P5MD |
| | | 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 | Department of National Defence | 2. Branch or Directorate / Direction générale ou Direction ADM IM / DGEAS / DKIM |
| 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 The intent of this contract, is to offer the DND/CAF Level 1 Organizations with the required expertise for the implementation and support of GCDOCS and of the collaboration environment (SharePoint), for both the DWAN and CSNI environment. This contract will require various security level, therefore, a supplemental security guide has been completed. | | |
| 5. a) Will the supplier require access to Controlled Goods? / Le fournisseur aura-t-il accès à des marchandises contrôlées? | | <input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui |
| 5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? / Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques? | | <input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui |
| 6. Indicate the type of access required / Indiquer le type d'accès requis | | |
| 6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? / Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? (Specify the level of access using the chart in Question 7. c.) / (Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c.) | | <input type="checkbox"/> No / Non <input checked="" type="checkbox"/> Yes / Oui |
| 6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. / Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé. | | <input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui |
| 6. c) Is this a commercial courier or delivery requirement with no overnight storage? / S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit? | | <input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui |
| 7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès | | |
| Canada <input checked="" type="checkbox"/> | NATO / OTAN <input type="checkbox"/> | Foreign / Étranger <input type="checkbox"/> |
| 7. b) Release restrictions / Restrictions relatives à la diffusion | | |
| No release restrictions / Aucune restriction relative à la diffusion <input checked="" type="checkbox"/> SM | All NATO countries / Tous les pays de l'OTAN <input type="checkbox"/> | No release restrictions / Aucune restriction relative à la diffusion <input type="checkbox"/> |
| Not releasable / À ne pas diffuser <input type="checkbox"/> | Restricted to: / Limité à: <input type="checkbox"/> | Restricted to: / Limité à: <input type="checkbox"/> |
| Specify country(ies): / Préciser le(s) pays: Canada and US | 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 CLASSIFIÉE <input type="checkbox"/> | PROTECTED A / PROTÉGÉ A <input type="checkbox"/> |
| PROTECTED B / PROTÉGÉ B <input checked="" type="checkbox"/> | NATO RESTRICTED / NATO DIFFUSION RESTREINTE <input type="checkbox"/> | PROTECTED B / PROTÉGÉ B <input type="checkbox"/> |
| PROTECTED C / PROTÉGÉ C <input checked="" type="checkbox"/> | NATO CONFIDENTIAL / NATO CONFIDENTIEL <input type="checkbox"/> | PROTECTED C / PROTÉGÉ C <input type="checkbox"/> |
| CONFIDENTIAL / CONFIDENTIEL <input checked="" type="checkbox"/> | NATO SECRET / NATO SECRET <input type="checkbox"/> | CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/> |
| SECRET / SECRET <input checked="" type="checkbox"/> | COSMIC TOP SECRET / COSMIC TRÈS SECRET <input type="checkbox"/> | SECRET / SECRET <input type="checkbox"/> |
| TOP SECRET <input type="checkbox"/> | | TOP SECRET / TRÈS SECRET <input type="checkbox"/> |
| TOP SECRET (SIGINT) <input type="checkbox"/> | | TOP SECRET (SIGINT) <input type="checkbox"/> |
| TRÈS SECRET (SIGINT) <input type="checkbox"/> | | TRÈS SECRET (SIGINT) <input type="checkbox"/> |

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Canada

| | | |
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PART A (continued) / PARTIE A (suite)

8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS?
If Yes, indicate the level of sensitivity:
Dans l'affirmative, indiquer le niveau de sensibilité: No Yes
Non Oui

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?
Short Title(s) of material / Titre(s) abrégé(s) du matériel:
Document Number / Numéro du document: No Yes
Non Oui

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

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

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

NOTE: If multiple levels of screening are identified, a Security Classification Guide must be provided.
REMARQUE: Si plusieurs niveaux de contrôle de sécurité sont requis, un guide de classification de la sécurité doit être fourni.

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

PART C - SAFEGUARDS (SUPPLIER) / PARTIE C - MESURES DE PROTECTION (FOURNISSEUR)

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

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

11. b) Will the supplier be required to safeguard COMSEC information or assets?
Le fournisseur sera-t-il tenu de protéger des renseignements ou des biens COMSEC? No Yes
Non Oui

PRODUCTION

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

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

11. d) Will the supplier be required to use its IT systems to electronically process, produce or store PROTECTED and/or CLASSIFIED information or data?
Le fournisseur sera-t-il tenu d'utiliser ses propres systèmes informatiques pour traiter, produire ou stocker électroniquement des renseignements ou des données PROTÉGÉS et/ou CLASSIFIÉS? No Yes
Non Oui

11. e) Will there be an electronic link between the supplier's IT systems and the government department or agency?
Disposera-t-on d'un lien électronique entre le système informatique du fournisseur et celui du ministère ou de l'agence gouvernementale? No Yes
Non Oui

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Government of Canada
Gouvernement du Canada

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

For users completing the form manually use the summary chart below to indicate the category, level, and level(s) of safeguarding required at the supplier's site(s) or premises.
Les utilisateurs qui remplissent le formulaire manuellement doivent utiliser le tableau récapitulatif ci-dessous pour indiquer, pour chaque catégorie, les niveaux de sauvegarde requis aux installations du fournisseur.

For users completing the form online (via the Internet), the summary chart is automatically populated by your responses to previous questions.
Dans le cas des utilisateurs qui remplissent le formulaire en ligne (par Internet), les réponses aux questions précédentes sont automatiquement saisies dans le tableau récapitulatif.

SUMMARY CHART / TABLEAU RÉCAPITULATIF

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

12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED?
La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE? No / Non Yes / Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification".
Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire.

12. b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED?
La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE? No / Non Yes / Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification" and indicate with attachments (e.g. SECRET with Attachments).
Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire et indiquez qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).

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**APPENDIX A TO ANNEX C
SUPPLEMENTAL SECURITY GUIDE**

Security Requirement Checklist (SRCL) Supplemental Security Guide

| Part A - Multiple Release Restrictions: Security Guide | | | | | | | |
|--|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------|------------|---------------------|
| To be completed in addition to SRCL question 7.b) when release restrictions are therein identified. Indicate to which levels of information release restrictions apply. Make note in the chart if a level of information bears multiple restrictions (e.g. a portion of the SECRET information bears the caveat Canadian Eyes Only while the remainder of the SECRET information has no release restrictions.) | | | | | | | |
| Canadian Information | | | | | | | |
| Citizenship Restriction | PROTECTED | | | CLASSIFIED | | | |
| | A | B | C | CONFIDENTIAL | SECRET | TOP SECRET | TOP SECRET (SIGINT) |
| No Release Restrictions | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | | | | |
| Not Releasable | | | | | | | |
| Restricted to: Canada and US | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | X | | |
| Permanent Residents Included* | | | | | | | |
| NATO Information | | | | | | | |
| Citizenship Restriction | NATO UNCLASSIFIED | NATO RESTRICTED | NATO CONFIDENTIAL | NATO SECRET | COSMIC TOP SECRET | | |
| All NATO Countries | | | | | | | |
| Restricted to: | | | | | | | |
| Permanent Residents Included* | | | | | | | |
| Foreign Information | | | | | | | |
| Citizenship Restriction | PROTECTED | | | CLASSIFIED | | | |
| | A | B | C | CONFIDENTIAL | SECRET | TOP SECRET | TOP SECRET (SIGINT) |
| No Release Restrictions | | | | | | | |
| Restricted to: | | | | | | | |
| Permanent Residents Included* | | | | | | | |
| COMSEC Information | | | | | | | |
| Citizenship Restriction | PROTECTED | | | CLASSIFIED | | | |
| | A | B | C | CONFIDENTIAL | SECRET | TOP SECRET | TOP SECRET (SIGINT) |
| Not Releasable | | | | | | | |
| Restricted to: | | | | | | | |
| DND ONLY Embedded Contractor (Access to Controlled Goods) | | | | | | | |
| Restriction | Yes | | | NO | | | |
| SECRET clearance with CEO applies | | | | | | | |

*When release restrictions are indicated, specify if permanent residents are allowed to be included.

| | | |
|--|--|--|
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Security Requirement Checklist (SRCL) Supplemental Security Guide

| Part B - Multiple Levels of Personnel Screening: Security Classification Guide | | | |
|---|---|--|----------------------------------|
| To be completed in addition to SRCL question 10.a) when multiple levels of personnel screening are therein identified. Indicate which personnel screening levels are required for which portions of the work/access involved in the contract. | | | |
| Level of Personnel Clearance (e.g. Reliability, Secret) | Position / Description/Task | Access to sites and/or information. Levels of Information to be accessed. | Citizenship Restriction (if any) |
| Reliability | All categories | PROTECTED A, PROTECTED B, | N/A |
| SECRET | All categories <i>Access to CSN/ network</i> | PROTECTED A, PROTECTED B, PROTECTED C, CONFIDENTIAL, SECRET | Canadian/US eyes |
| | | | |
| | | | |
| | | | |
| | | | |

SM
SM

| |
|---|
| Part C – Safeguards / Information Technology (IT) Media – 11d = yes |
| IT security requirements must be specified in a separate technical document and submitted with the SRCL |

OTHER SECURITY INTRUCTIONS

| | | |
|--|--|--|
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**ATTACHMENT 3.1
BID SUBMISSION FORM**

| BID SUBMISSION FORM | | |
|--|---|--|
| Bidder's full legal name | | |
| Authorized Representative of Bidder for evaluation purposes (e.g., clarifications) | Name | |
| | Title | |
| | Address | |
| | Telephone # | |
| | Fax # | |
| | Email | |
| Bidder's Procurement Business Number (PBN) [see the Standard Instructions 2003] [Note to Bidders: Please ensure that the PBN you provide matches the legal name under which you have submitted your bid. If it does not, the Bidder will be determined based on the legal name provided, not based on the PBN, and the Bidder will be required to submit the PBN that matches the legal name of the Bidder.] | | |
| Jurisdiction of Contract: Province or territory in Canada the Bidder wishes to be the legal jurisdiction applicable to any resulting contract (if other than as specified in solicitation) | | |
| Bidder's Proposed Site(s) or Premises Requiring Safeguard Measures. See Part 3 for instructions. (Note: Procurement Officers should delete if this requirement was not included in Part 6) | Address of proposed site or premise: _____ City: _____ Province: _____ Postal Code: _____ Country: _____ | |
| Former Public Servants See the Article in Part 2 of the bid solicitation entitled Former Public Servant for a definition of "Former Public Servant". | Is the Bidder a FPS in receipt of a pension as defined in the bid solicitation? Yes ____ No ____ If yes, provide the information required by the Article in Part 2 entitled "Former Public Servant" | |
| | Is the Bidder a FPS who received a lump sum payment under the terms of the Work Force Adjustment Directive? Yes ____ No ____ If yes, provide the information required by the Article in Part 2 entitled "Former Public Servant" | |
| Security Clearance Level of Bidder [include both the level and the date it was granted] | | |

| | | |
|---|---|---|
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[Note to Bidders: Please ensure that the security clearance matches the legal name of the Bidder. If it does not, the security clearance is not valid for the Bidder.]

On behalf of the Bidder, by signing below, I confirm that I have read the entire bid solicitation including the documents incorporated by reference into the bid solicitation and I certify that:

1. The Bidder considers itself and its proposed resources able to meet all the mandatory requirements described in the bid solicitation;
2. This bid is valid for the period requested in the bid solicitation;
3. All the information provided in the bid is complete, true and accurate; and
4. If the Bidder is awarded a contract, it will accept all the terms and conditions set out in the resulting contract clauses included in the bid solicitation.

Signature of Authorized Representative of Bidder

| | | |
|--|--|--|
| Solicitation No. N° de l'invitation W6369-18P5MD/A | Amd. No – N° de la modif. | Buyer ID – Id de l'acheteur 0006IPS |
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**ATTACHMENT 4.1
BID EVALUATION CRITERIA**

1.0 Corporate Criteria

| Corporate Mandatory Criteria | | | |
|-------------------------------------|--|--------------------|--------------------------------|
| | Mandatory Evaluation Criteria | Met/Not Met | Demonstrated Experience |
| CMC1 | <p>The Bidder must have been awarded at least three (3) Information Management, Information Technology (IM/IT) contracts, of which at least one (1) was for a Government (Federal, Provincial, Municipal, Crown Corporation) Client environment.</p> <p>For each single contract identified must:</p> <ol style="list-style-type: none"> a. have an initial contract value of at least \$5,000,000.00 excluding applicable taxes and not including amendments; b. have been awarded at least two (2) years prior to the closing date of this solicitation and no later than ten (10) years from the closing date of this solicitation; and c. have a duration of at least two (2) years within the last ten (10) years. (Note: duration does not include option periods that have not been exercised). <p>To demonstrate this experience the Bidder must submit: Customer references for three (3) individual IM/IT contracts (one (1) reference for each contract) managed within the last ten (10) years. The references must include:</p> <ul style="list-style-type: none"> • the name of the organization, • the contract number, • a short description of the services provided, • the name, and either the telephone number or e-mail address of the organization's c o n t a c t responsible for the contract, • as well as the award date, • expiry date; and • dollar value of each contract. <p>The information listed above should be submitted with the bid using Form 2– Customer Reference Contact Information Form. If any of the information is not submitted, the Contracting Authority will inform the Bidder of a time frame within which to provide the information. Failure to provide the information listed above within</p> | | |

| | | |
|---|---|---|
| Solicitation No. N° de l'invitation W6369-18P5MD/A | Amd. No – N° de la modif. | Buyer ID – Id de l'acheteur 0006IPS |
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| | | | |
|-------------------------------------|---|--|--|
| | <p>the time frame provided will render the bid non-responsive.</p> <p>It is the Bidder's responsibility to ensure that any information divulged is accurate.</p> <p>Note: The Bidder must have been the prime contractor, rather than a subcontractor. This means that the Bidder contracted directly with the customer of the work. If the Bidder's contract was to perform work which another entity had itself first contracted to perform, the Bidder will not be considered the prime contractor. For example, Z (customer) contracted with Y for services. Y, in turn, entered into a contract with X to provide all or part of these services to Z. In this example, Y is a prime contractor and X is a subcontractor.</p> <p>Bidders are reminded that acceptance on a Supply Arrangement or Standing Offer is not a contract and therefore any reference to this type of document will not be accepted for the purpose of evaluating contract experience. For example if the Bidder references it's TBIPS SA number such as EN578-055605/XXX/EL for the purpose of demonstrating experience under the evaluation criteria, Canada will disregard this experience because it does not relate to a specific contract</p> | | |
| Compliant: (Met or Not Met): | | | |

| | | |
|---|---|---|
| Solicitation No. N° de l'invitation W6369-18P5MD/A | Amd. No – N° de la modif. | Buyer ID – Id de l'acheteur 0006IPS |
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2.0 Resource Criteria

Definition:

- 1) A **Record and Document Management (RDM)** environment is defined as an environment containing eDocs, GCDOCS, or SharePoint, which are used to provide storage, indexing, classification, retention and disposition on electronic and paper documents within an organization.
- 2) **Senior Management** is defined as Director Level and above.

2.1. I.11 Technology Architect (SharePoint) – Level 3 – Mandatory Criteria

| Mandatory Criteria for I.11 Technology Architect (SharePoint) - Level 3 | | | |
|---|--|-------------|-------------------------|
| | Mandatory Evaluation Criteria | Met/Not Met | Demonstrated Experience |
| M1 | The Bidder must demonstrate that the proposed resource has a minimum of ten (10) years of experience within the last fifteen (15) years as a Technology Architect. | | |
| M2 | The Bidder must demonstrate that the proposed resource has a minimum of five (5) years of experience, within the last ten (10) years, customizing, programming and configuring Information Management solutions. | | |
| M3 | The Bidder must demonstrate that the proposed resource has a minimum of five (5) years of experience within the last ten (10) years in developing Web-based applications using Microsoft technologies, including ASP.NET Framework and C+. | | |
| M4 | The Bidder must demonstrate that the proposed resource has a minimum of five (5) years of experience within the last ten (10) years using SharePoint Designer (2007 or higher versions), InfoPath (2007 or higher versions) and Web Parts. | | |
| Compliant: (Met or Not Met) | | | |

2.2. I.11 Technology Architect (SharePoint) – Level 3 – Rated Criteria

| Point Rated Criteria for Technology Architect (SharePoint) - Level 3 | | | | | |
|--|--|--|------------|-------|-------------------------|
| | Point-Rated Evaluation Criteria | Point Allocation | Max Points | Score | Demonstrated Experience |
| R1 | The Bidder should demonstrate that the proposed resource has more than ten (10) years of experience as a Technology Architect. | Point Allocation: <ul style="list-style-type: none"> • 1 points – 10+ to 12 years • 2 points – 12+ to 15 years • 3 points - 15+ years | 3 | | |
| R2 | The Bidder should demonstrate that the proposed resource has | Point Allocation: | 2 | | |

| | | | | | |
|---|--|--|-----------|---|--|
| Solicitation No. N° de l'invitation W6369-18P5MD/A | | Amd. No – N° de la modif. | | Buyer ID – Id de l'acheteur 0006IPS | |
| Client Ref. No. – N° de réf. De client W6369-18P5MD | | File No. – N° du dossier 006IPS. W6369-18P5MD | | CCC No./ N° CCC – FMS No/ N° VME | |
| | experience working on IM/IT projects within the Public Safety and Defense business domains, which includes one or more the following: 1. Defence 2. Intelligence 3. National Security 4. Enforcement | <ul style="list-style-type: none"> • 1 points – 1 to 3 years • 2 points – 3+ years | | | |
| R3 | The Bidder should demonstrate that the proposed resource has experience configuring/developing SharePoint. | Point Allocation: <ul style="list-style-type: none"> • 1 points – 1 to 3 years • 2 points – 3+ to 10 years • 3 points – 10+ years | 3 | | |
| R4 | The Bidder should demonstrate that the proposed resource has experience as a SharePoint administrator performing Farm Administration, publishing Term Store, and integrating 3rd party authentication providers. | Point Allocation: <ul style="list-style-type: none"> • 1 points – 1 to 3 years • 2 points – 3+ to 5 years • 3 points – 5+ to 8 years • 4 points – 8+ years | 4 | | |
| R5 | The Bidder must demonstrate that the proposed resource has experience maintaining SharePoint (version 2007 or higher version) by applying patches, service packs and deploying new SharePoint capabilities such as web parts, features and web services. | Point Allocation: <ul style="list-style-type: none"> • 1 points – 1 to 3 years • 2 points – 3+ to 10 years • 3 points – 10+ years | 3 | | |
| R6 | The Bidder should demonstrate that the proposed resource has experience implementing Taxonomy and Metadata in SharePoint (version 2007 or higher). | Point Allocation: <ul style="list-style-type: none"> • 1 point – 1 to 2 years • 2 points – 2+ years | 2 | | |
| R7 | The Bidder must demonstrate that the proposed resource has experience working with either Oracle 12c (or higher) or SQL Server 2003 (or higher) relational database. | Point Allocation: <ul style="list-style-type: none"> • 1 points – 1 to 3 years • 2 points – 3+ to 5 years • 3 points – 5+ to 8 years • 4 points – 8+ years | 4 | | |
| Total Points | | | 21 | | |
| Minimum Points Required | | | 12 | | |

2.3. I.11 Technology Architect (SharePoint) – Level 3 – Mandatory Criteria

| Mandatory Criteria for I.11 Technology Architect (SharePoint) - Level 3 | | | |
|--|---|--------------------|--------------------------------|
| | Mandatory Evaluation Criteria | Met/Not Met | Demonstrated Experience |
| M1 | The Bidder must demonstrate that the proposed resource has a minimum of ten (10) years of | | |

| | | | | | |
|---|--|---|--|---|--|
| Solicitation No. N° de l'invitation W6369-18P5MD/A | | Amd. No – N° de la modif. | | Buyer ID – Id de l'acheteur 0006IPS | |
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| | experience within the last fifteen (15) years as a Technology Architect. | | | | |
| M2 | The Bidder must demonstrate that the proposed resource has a minimum of five (5) years of experience, within the last ten (10) years, customizing, programming and configuring Information Management solutions. | | | | |
| M3 | The Bidder must demonstrate that the proposed resource has a minimum of five (5) years of experience within the last ten (10) years in developing Web-based applications using Microsoft technologies, including ASP.NET Framework and C+. | | | | |
| M4 | The Bidder must demonstrate that the proposed resource has a minimum of five (5) years of experience within the last ten (10) years using SharePoint Designer (2007 or higher versions), InfoPath (2007 or higher versions) and Web Parts. | | | | |
| Compliant: (Met or Not Met) | | | | | |

2.4. I.11 Technology Architect (SharePoint) – Level 3 – Rated Criteria

| Point Rated Criteria for Technology Architect (SharePoint) - Level 3 | | | | | |
|---|---|---|-------------------|--------------|--------------------------------|
| | Point-Rated Evaluation Criteria | Point Allocation | Max Points | Score | Demonstrated Experience |
| R1 | The Bidder should demonstrate that the proposed resource has more than ten (10) years of experience as a Technology Architect. | Point Allocation: <ul style="list-style-type: none"> • 1 points – 10+ to 12 years • 2 points – 12+ to 15 years • 3 points - 15+ years | 3 | | |
| R2 | The Bidder should demonstrate that the proposed resource has experience working on IM/IT projects within the Public Safety and Defense business domains, which includes one or more the following: 5. Defence 6. Intelligence 7. National Security 8. Enforcement | Point Allocation: <ul style="list-style-type: none"> • 1 points – 1 to 3 years • 2 points – 3+ years | 2 | | |
| R3 | The Bidder should demonstrate that the proposed resource has experience configuring/developing SharePoint. | Point Allocation: <ul style="list-style-type: none"> • 1 points – 1 to 3 years • 2 points – 3+ to 10 years • 3 points – 10+ years | 3 | | |
| R4 | The Bidder should demonstrate that the proposed resource has experience as a SharePoint | Point Allocation: <ul style="list-style-type: none"> • 1 points – 1 to 3 years • 2 points – 3+ to 5 years | 4 | | |

| | | | | | |
|---|--|---|-----------|---|--|
| Solicitation No. N° de l'invitation W6369-18P5MD/A | | Amd. No – N° de la modif. | | Buyer ID – Id de l'acheteur 0006IPS | |
| Client Ref. No. – N° de réf. De client W6369-18P5MD | | File No. – N° du dossier 006IPS. W6369-18P5MD | | CCC No./ N° CCC – FMS No/ N° VME | |
| | administrator performing Farm Administration, publishing Term Store, and integrating 3rd party authentication providers. | <ul style="list-style-type: none"> • 3 points – 5+ to 8 years • 4 points – 8+ years | | | |
| R5 | The Bidder must demonstrate that the proposed resource has experience maintaining SharePoint (version 2007 or higher version) by applying patches, service packs and deploying new SharePoint capabilities such as web parts, features and web services. | Point Allocation: <ul style="list-style-type: none"> • 1 points – 1 to 3 years • 2 points – 3+ to 10 years • 3 points – 10+ years | 3 | | |
| R6 | The Bidder should demonstrate that the proposed resource has experience implementing Taxonomy and Metadata in SharePoint (version 2007 or higher). | Point Allocation: <ul style="list-style-type: none"> • 1 point – 1 to 2 years • 2 points – 2+ years | 2 | | |
| R7 | The Bidder must demonstrate that the proposed resource has experience working with either Oracle 12c (or higher) or SQL Server 2003 (or higher) relational database. | Point Allocation: <ul style="list-style-type: none"> • 1 points – 1 to 3 years • 2 points – 3+ to 5 years • 3 points – 5+ to 8 years • 4 points – 8+ years | 4 | | |
| Total Points | | | 21 | | |
| Minimum Points Required | | | 12 | | |

2.5. B.1 Business Analyst (eDocs/GCDOCS) – Level 3 – Mandatory Criteria

| Mandatory Criteria for B.1 Business Analyst (eDocs / GCDOCS)– Level 3 | | | |
|--|---|--------------------|--------------------------------|
| | Mandatory Evaluation Criteria | Met/Not Met | Demonstrated Experience |
| M1 | The Bidder must demonstrate that the proposed resource has a minimum of ten (10) years of experience as a Business Analyst within the last fifteen (15) years. | | |
| M2 | The Bidder must demonstrate that the proposed resource has a minimum of three (3) years of experience, within the last six (6) years, working as a Business Analyst on an Open Text Content Server 10 (or higher) (GCDOCS) project within a Government environment with a minimum of 500 users. | | |
| M3 | The Bidder must demonstrate that the proposed resource has a minimum of five (5) years of experience working as a Business Analyst within a Government environment. | | |
| M4 | The Bidder must demonstrate that the proposed resource has a minimum of three (3) years of experience consulting with users and senior | | |

| | | |
|---|---|---|
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| | | | |
|-------------------------------------|---|--|--|
| | management to develop client based solutions for an Electronic Document and Records Management System (EDRMS) (folder structure, user groups, permissions, metadata). | | |
| Compliant: (Met or Not Met): | | | |

2.6. B.1 Business Analyst (eDocs/GCDOCS) – Level 3 – Rated Criteria

| Point Rated Criteria for Business Analyst (eDocs / GCDOCS)– Level 3 | | | | | |
|--|--|---|-------------------|--------------|--------------------------------|
| | Point-Rated Evaluation Criteria | Point Allocation | Max Points | Score | Demonstrated Experience |
| R1 | The Bidder should demonstrate that the proposed resource has experience as a Business Analyst working on the implementation of an EDRMS. | Point Allocation: <ul style="list-style-type: none"> • 1 points – 3 to 5 years • 2 points – 5+ to 7 years • 3 points – 7+ years | 3 | | |
| R2 | The Bidder should demonstrate that the proposed resource has experience consulting with user groups and senior management to develop client based solutions for GCDOCS (folders, user groups, permissions, metadata) while respecting the Enterprise Information Architecture (EIA) and Records Management's requirements. | Point Allocation: <ul style="list-style-type: none"> • 1 point – 1 to 2 years • 2 points – 2+ to 5 years • 3 points – 5+ years | 3 | | |
| R3 | The Bidder should demonstrate that the resource has experience as a Business Analyst working on an Information Management project where an EDRMS application is being deployed nationally. | Point Allocation: <ul style="list-style-type: none"> • 1 point – 500+ to 1000 users • 2 points – 1000+ to 2000 users • 3 points – 2000+ users | 3 | | |
| R4 | The Bidder should demonstrate that the resource has experience working with the Government of Canada GCDOCS Gold Build, the Information Management Common Core (IMCC), Information Management policies and standards. | Point Allocation: <ul style="list-style-type: none"> • 1 point – 1 to 2 years • 2 points – 2+ to 3 years • 3 points – 3+ years | 3 | | |
| Total Points | | | 12 | | |
| Minimum Points Required | | | 9 | | |

2.7. B.1 Business Analyst (eDocs/GCDOCS) – Level 3 – Mandatory Criteria

| Mandatory Criteria for B.1 Business Analyst (eDocs / GCDOCS)– Level 3 | | | |
|--|--------------------------------------|--------------------|--------------------------------|
| | Mandatory Evaluation Criteria | Met/Not Met | Demonstrated Experience |
| | | | |

| | | | | | |
|---|--|---|--|---|--|
| Solicitation No. N° de l'invitation W6369-18P5MD/A | | Amd. No – N° de la modif. | | Buyer ID – Id de l'acheteur 0006IPS | |
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| M1 | The Bidder must demonstrate that the proposed resource has a minimum of ten (10) years of experience as a Business Analyst within the last fifteen (15) years. | | | | |
| M2 | The Bidder must demonstrate that the proposed resource has a minimum of three (3) years of experience, within the last six (6) years, working as a Business Analyst on an Open Text Content Server 10 (or higher) (GCDOCS) project within a Government environment with a minimum of 500 users. | | | | |
| M3 | The Bidder must demonstrate that the proposed resource has a minimum of five (5) years of experience working as a Business Analyst within a Government environment. | | | | |
| M4 | The Bidder must demonstrate that the proposed resource has a minimum of three (3) years of experience consulting with users and senior management to develop client based solutions for an Electronic Document and Records Management System (EDRMS) (folder structure, user groups, permissions, metadata). | | | | |
| Compliant: (Met or Not Met): | | | | | |

2.8. B.1 Business Analyst (eDocs/GCDOCS) – Level 3 – Rated Criteria

| Point Rated Criteria for Business Analyst (eDocs / GCDOCS)– Level 3 | | | | | |
|--|--|---|-------------------|--------------|--------------------------------|
| | Point-Rated Evaluation Criteria | Point Allocation | Max Points | Score | Demonstrated Experience |
| R1 | The Bidder should demonstrate that the proposed resource has experience as a Business Analyst working on the implementation of an EDRMS. | Point Allocation: <ul style="list-style-type: none"> • 1 points – 3 to 5 years • 2 points – 5+ to 7 years • 3 points – 7+ years | 3 | | |
| R2 | The Bidder should demonstrate that the proposed resource has experience consulting with user groups and senior management to develop client based solutions for GCDOCS (folders, user groups, permissions, metadata) while respecting the Enterprise Information Architecture (EIA) and Records Management's requirements. | Point Allocation: <ul style="list-style-type: none"> • 1 point – 1 to 2 years • 2 points – 2+ to 5 years • 3 points – 5+ years | 3 | | |
| R3 | The Bidder should demonstrate that the resource has experience as a Business Analyst working on an Information Management project where an EDRMS application is being deployed nationally. | Point Allocation: <ul style="list-style-type: none"> • 1 point – 500+ to 1000 users • 2 points – 1000+ to 2000 users • 3 points – 2000+ users | 3 | | |

| | | | | | |
|---|---|--|-----------|---|--|
| Solicitation No. N° de l'invitation W6369-18P5MD/A | | Amd. No – N° de la modif. | | Buyer ID – Id de l'acheteur 0006IPS | |
| Client Ref. No. – N° de réf. De client W6369-18P5MD | | File No. – N° du dossier 006IPS. W6369-18P5MD | | CCC No./ N° CCC – FMS No/ N° VME | |
| R4 | The Bidder should demonstrate that the resource has experience working with the Government of Canada GCDOCS Gold Build, the Information Management Common Core (IMCC), Information Management policies and standards. | Point Allocation: <ul style="list-style-type: none"> • 1 point – 1 to 2 years • 2 points – 2+ to 3 years • 3 points – 3+ years | 3 | | |
| Total Points | | | 12 | | |
| Minimum Points Required | | | 9 | | |

2.9. B.1 Business Analyst (eDocs/GCDOCS) – Level 3 – Mandatory Criteria

| Mandatory Criteria for B.1 Business Analyst (eDocs / GCDOCS)– Level 3 | | | |
|---|--|-------------|-------------------------|
| | Mandatory Evaluation Criteria | Met/Not Met | Demonstrated Experience |
| M1 | The Bidder must demonstrate that the proposed resource has a minimum of ten (10) years of experience as a Business Analyst within the last fifteen (15) years. | | |
| M2 | The Bidder must demonstrate that the proposed resource has a minimum of three (3) years of experience, within the last six (6) years, working as a Business Analyst on an Open Text Content Server 10 (or higher) (GCDOCS) project within a Government environment with a minimum of 500 users. | | |
| M3 | The Bidder must demonstrate that the proposed resource has a minimum of five (5) years of experience working as a Business Analyst within a Government environment. | | |
| M4 | The Bidder must demonstrate that the proposed resource has a minimum of three (3) years of experience consulting with users and senior management to develop client based solutions for an Electronic Document and Records Management System (EDRMS) (folder structure, user groups, permissions, metadata). | | |
| Compliant: (Met or Not Met): | | | |

2.10. B.1 Business Analyst (eDocs/GCDOCS) – Level 3 – Rated Criteria

| Point Rated Criteria for Business Analyst (eDocs / GCDOCS)– Level 3 | | | | | |
|---|--|---|------------|-------|-------------------------|
| | Point-Rated Evaluation Criteria | Point Allocation | Max Points | Score | Demonstrated Experience |
| R1 | The Bidder should demonstrate that the proposed resource has experience as a Business Analyst working on the implementation of an EDRMS. | Point Allocation: <ul style="list-style-type: none"> • 1 points – 3 to 5 years • 2 points – 5+ to 7 years • 3 points – 7+ years | 3 | | |

| | | | | | |
|---|--|---|-----------|---|--|
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| R2 | The Bidder should demonstrate that the proposed resource has experience consulting with user groups and senior management to develop client based solutions for GCDOCS (folders, user groups, permissions, metadata) while respecting the Enterprise Information Architecture (EIA) and Records Management's requirements. | Point Allocation: <ul style="list-style-type: none"> • 1 point – 1 to 2 years • 2 points – 2+ to 5 years • 3 points – 5+ years | 3 | | |
| R3 | The Bidder should demonstrate that the resource has experience as a Business Analyst working on an Information Management project where an EDRMS application is being deployed nationally. | Point Allocation: <ul style="list-style-type: none"> • 1 point – 500+ to 1000 users • 2 points – 1000+ to 2000 users • 3 points – 2000+ users | 3 | | |
| R4 | The Bidder should demonstrate that the resource has experience working with the Government of Canada GCDOCS Gold Build, the Information Management Common Core (IMCC), Information Management policies and standards. | Point Allocation: <ul style="list-style-type: none"> • 1 point – 1 to 2 years • 2 points – 2+ to 3 years • 3 points – 3+ years | 3 | | |
| Total Points | | | 12 | | |
| Minimum Points Required | | | 9 | | |

2.11. B.1 Business Analyst (eDocs/GCDOCS) – Level 2 – Mandatory Criteria

| Mandatory Criteria for B.1 Business Analyst (eDocs / GCDOCS)– Level 2 | | | |
|--|---|--------------------|--------------------------------|
| | Mandatory Evaluation Criteria | Met/Not Met | Demonstrated Experience |
| M1 | The Bidder must demonstrate that the proposed resource has a minimum of five (5) years of experience as a Business Analyst within the last ten (10) years. | | |
| M2 | The Bidder must demonstrate that the proposed resource has a minimum of one (1) year experience, within the last five (5) years, working as a Business Analyst on an OpenText Content Server 10 (or higher) (GCDOCS) project within a Government environment with a minimum of 500 users. | | |
| M3 | The Bidder must demonstrate that the proposed resource has a minimum of five (5) years of experience working with IM policy and guidelines, within a government environment. | | |
| M4 | The Bidder must demonstrate that the proposed resource has a minimum of one (1) year of experience consulting with users and senior management to develop client based solutions for an EDRMS system (folder structure, user groups, permissions, metadata). | | |

| | | |
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| Compliant: (Met or Not Met): | | |

2.12. B.1 Business Analyst (eDocs/GCDOCS) – Level 2 – Rated Criteria

| Point Rated Criteria for Business Analyst (eDocs / GCDOCS)– Level 2 | | | | | |
|--|--|---|-------------------|--------------|--------------------------------|
| | Point-Rated Evaluation Criteria | Point Allocation | Max Points | Score | Demonstrated Experience |
| R1 | The Bidder should demonstrate that the proposed resource has experience as a Business Analyst working on the implementation of an EDRMS. | Point Allocation: <ul style="list-style-type: none"> • 1 points – 1 to 3 years • 2 points – 3+ to 5 years • 3 points – 5+ to 7 years • 4 points – 7+ years | 4 | | |
| R2 | The Bidder should demonstrate that the proposed resource has experience consulting with user groups and senior management to develop client based solutions for GCDOCS (folders, user groups, permissions, metadata) while respecting the Enterprise Information Architecture (EIA) and Records Management's requirements. | Point Allocation: <ul style="list-style-type: none"> • 1 point – 6 months to 1 year • 2 points – 1+ to 2 years • 3 points – 2+ years | 3 | | |
| R3 | The Bidder should demonstrate that the resource has experience as a Business Analyst working on a large Information Management project where an Electronic Document and Records Management System (EDRMS) application is being deployed nationally. | Point Allocation: <ul style="list-style-type: none"> • 1 point – 500 to 1,000 users • 2 points – 1000+ to 2,000 users • 3 points – 2,000+ users | 3 | | |
| R4 | The Bidder should demonstrate that the resource has experience working with the Canadian solution of the GCDOCS and in-depth knowledge of the GCDOCS Gold Build and the Treasury Board Secretariat (TBS) IM Common Core (IMCC). | Point Allocation: <ul style="list-style-type: none"> • 1 point – 1 to 2 years • 2 points – 2+ to 3 years • 3 points – 3+ years | 3 | | |
| Total Points | | | 13 | | |
| Minimum Points Required | | | 8 | | |

2.13. B.11 IM / IT Instructor (SharePoint) – Level 3 – Mandatory Criteria

| Mandatory Criteria for IM / IT Trainer – Level 3 (SharePoint) | | | |
|--|---|--------------------|--------------------------------|
| | Mandatory Evaluation Criteria | Met/Not Met | Demonstrated Experience |
| M1 | The Bidder must demonstrate that the proposed resource has a minimum of ten (10) years of experience as an IM/IT instructor within the last fifteen (15) years. | | |

| | | |
|---|---|---|
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| | | | |
|-------------------------------------|--|--|--|
| M2 | The Bidder must demonstrate that the proposed resource has a minimum of three (3) years of experience, within the last ten (10) years, working as an IM/IT Trainer on a SharePoint project within a Government environment. | | |
| M3 | The Bidder must demonstrate that the proposed resource has a minimum of three (3) years of experience, within the last ten (10) years, developing and reviewing training content for SharePoint within a Government environment. | | |
| M4 | The Bidder must demonstrate that the proposed resource has a minimum of ten (10) years of experience in providing an operational training environment for the delivery of IM/IT training courses. | | |
| Compliant: (Met or Not Met): | | | |

2.14. B.11 IM / IT Instructor (SharePoint) – Level 3 – Rated Criteria

Point Rated Criteria for IM / IT Trainer – Level 3 (SharePoint)

| | Point-Rated Evaluation Criteria | Point Allocation | Max Points | Score | Demonstrated Experience |
|--------------------------------|---|---|------------|-------|-------------------------|
| R1 | The Bidder should demonstrate that the proposed resource has more than ten (10) years of experience as an IM/IT Trainer. | Point Allocation: <ul style="list-style-type: none"> • 1 points – 10+ to 12 years • 2 points – 12+ to 15 years • 3 points – 15+ years | 3 | | |
| R2 | The Bidder should demonstrate that the proposed resource has experience working with business clients to plan and administer the delivery of training, within a Government of Canada environment. | Point Allocation: <ul style="list-style-type: none"> • 1 point – 6 months to 1 year • 2 points – 1+ years | 2 | | |
| R3 | The Bidder should demonstrate that the proposed resource has experience delivering SharePoint training courses. | Point Allocation: <ul style="list-style-type: none"> • 1 points – 3 to 5 years • 2 points – 5+ to 7 years • 3 points – 7+ years | 3 | | |
| R4 | The Bidder should demonstrate that the proposed resource has experience developing SharePoint (version 2007 or higher) training material for training or coaching clients. | Point Allocation: <ul style="list-style-type: none"> • 1 points – 6 months to 1 year • 2 points – 1+ to 5 years • 3 points – 5+ years | 3 | | |
| Total Points | | | 11 | | |
| Minimum Points Required | | | 6 | | |

| | | |
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2.15. B.11 IM / IT Instructor (SharePoint) – Level 3 – Mandatory Criteria

| Mandatory Criteria for IM / IT Trainer – Level 3 (SharePoint) | | | |
|---|--|-------------|-------------------------|
| | Mandatory Evaluation Criteria | Met/Not Met | Demonstrated Experience |
| M1 | The Bidder must demonstrate that the proposed resource has a minimum of ten (10) years of experience as an IM/IT instructor within the last fifteen (15) years. | | |
| M2 | The Bidder must demonstrate that the proposed resource has a minimum of three (3) years of experience, within the last ten (10) years, working as an IM/IT Trainer on a SharePoint project within a Government environment. | | |
| M3 | The Bidder must demonstrate that the proposed resource has a minimum of three (3) years of experience, within the last ten (10) years, developing and reviewing training content for SharePoint within a Government environment. | | |
| M4 | The Bidder must demonstrate that the proposed resource has a minimum of ten (10) years of experience in providing an operational training environment for the delivery of IM/IT training courses. | | |
| Compliant: (Met or Not Met): | | | |

2.16. B.11 IM / IT Instructor (SharePoint) – Level 3 – Rated Criteria

| Point Rated Criteria for IM / IT Trainer – Level 3 (SharePoint) | | | | | |
|---|---|---|------------|-------|-------------------------|
| | Point-Rated Evaluation Criteria | Point Allocation | Max Points | Score | Demonstrated Experience |
| R1 | The Bidder should demonstrate that the proposed resource has more than ten (10) years of experience as an IM/IT Trainer. | Point Allocation: • 1 points – 10+ to 12 years • 2 points – 12+ to 15 years • 3 points – 15+ years | 3 | | |
| R2 | The Bidder should demonstrate that the proposed resource has experience working with business clients to plan and administer the delivery of training, within a Government of Canada environment. | Point Allocation: • 1 point – 6 months to 1 year • 2 points – 1+ years | 2 | | |
| R3 | The Bidder should demonstrate that the proposed resource has experience delivering SharePoint training courses. | Point Allocation: • 1 points – 3 to 5 years • 2 points – 5+ to 7 years • 3 points – 7+ years | 3 | | |
| R4 | The Bidder should demonstrate that the proposed resource has | Point Allocation: • 1 points – 6 months to 1 | 3 | | |

| | | | | | |
|---|--|---|--|---|--|
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| experience developing SharePoint (version 2007 or higher) training material for training or coaching clients. | | year • 2 points – 1+ to 5 years • 3 points – 5+ years | | | |
| Total Points | | | | 11 | |
| Minimum Points Required | | | | 6 | |

2.17. P.1 Change Management Consultant – Level 3 – Mandatory Criteria

| Mandatory Criteria for P.1 Change Management Consultant – Level 3 | | | |
|--|--|--------------------|--------------------------------|
| | Mandatory Evaluation Criteria | Met/Not Met | Demonstrated Experience |
| M1 | The Bidder must demonstrate that the proposed resource has a minimum of ten (10) years of experience in a Change Management Communication role identifying and analyzing the communications needs for EDRMS (eDocs / GCDOCS) and/or SharePoint programs and projects. | | |
| M2 | The Bidder must demonstrate that the proposed resource has a minimum of five (5) years of experience in developing communication material, organizing information and setting-up learning events in preparation for implementation and for post implementation to ensure continuous change management events are in place. | | |
| M3 | The Bidder must demonstrate that the proposed resource has a minimum of ten (10) years of experience working in Change Management, developing and implementing change management strategies, plans, and framework. | | |
| Compliant: (Met or Not Met) | | | |

2.18. P.1 Change Management Consultant– Level 3 – Rated Criteria

| Point Rated Criteria for P.1 Change Management – Level 3 | | | | | |
|---|--|--|-------------------|--------------|--------------------------------|
| | Point-Rated Evaluation Criteria | Point Allocation | Max Points | Score | Demonstrated Experience |
| R1 | The Bidder should demonstrate that the proposed resource has experience in providing communication material and change management services on EDRMS projects (eDocs DM 10 (or higher) / Open Text Content Server 10 (or higher) or SharePoint project (version 2007 or higher) in a Government of Canada environment within the last ten (10) years. | Point Allocation: • 1 point – 10+ years to 12 years • 2 points – 12+ years to 15 years • 3 points – 15+ years | 3 | | |

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| | | | | | |
|-----------|---|--|---|--|--|
| R2 | The Bidder should demonstrate that the proposed resource has experience, within the last five (5) years, in developing Communications products for an EDRMS (eDocs DM 10 (or higher) / Open Text Content Server 10 (or higher) or SharePoint (version 2007 or higher) implementation. | <p>Point Allocation:</p> <ul style="list-style-type: none"> • 1 point – Developed a minimum of three (3) Change Management Strategies and Change Management Detailed Work Plans. • 1 point - Developed, at least three (3) promotional materials such as: posters, information handouts, Fact sheets, FAQs and How-To documents for EDRMS or SharePoint project. • 1 point - Developed a minimum of three (3) or more communities or collaboration sites to support client engagements for an EDRMS or SharePoint project. • 1 point - Prepared presentations, speaking notes and key messages for senior managers relating to an EDRMS or SharePoint project. • 1 point - Developed end-user engagement bulletins for an EDRMS or SharePoint implementation. | 5 | | |
| R3 | The Bidder should demonstrate that the proposed resource has experience in developing dashboards, surveys and metrics for an EDRMS (eDocs / Open Text Content Server) or SharePoint (version 2007 or higher) implementation. | <p>Point Allocation:</p> <ul style="list-style-type: none"> • 1 point – 1 to 3 years • 2 points – 3+ to 5 years • 3 points – 5+ years | 3 | | |
| R4 | <p>The Bidder should demonstrate that the proposed resource has experience working with the Government of Canada in either*:</p> <ul style="list-style-type: none"> • EDRMS (EMPO GCDOCS Gold Build, and of the Information Management Common Core (IMCC)); or • SharePoint. <p>* To be specified at the time of Task Authorization</p> | <p>Point Allocation:</p> <ul style="list-style-type: none"> • 1 point – 1+ to 2 years • 2 points – 2+ to 5 years • 3 points – 5+ years | 3 | | |

| | | |
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| Total Points | | 14 |
| Minimum Points Required | | 9 |

2.11 Rated Requirements Points Summary

| Resource Category | Maximum Score | Minimum Score | Bidder Score |
|--|----------------------|----------------------|---------------------|
| 2.2 I.11 Technology Architect (SharePoint) – Level 3 | 21 | 12 | |
| 2.4 I.11 Technology Architect (SharePoint) – Level 3 | 21 | 12 | |
| 2.6 B.1 Business Analyst (eDocs/GCDOCS) – Level 3 | 12 | 9 | |
| 2.8 B.1 Business Analyst (eDocs/GCDOCS) – Level 3 | 12 | 9 | |
| 2.10 B.1 Business Analyst (eDocs/GCDOCS) – Level 3 | 12 | 9 | |
| 2.12 B.1 Business Analyst (eDocs/GCDOCS) – Level 2 | 13 | 8 | |
| 2.14 B.11 IM / IT Instructor (SharePoint) – Level 3 | 11 | 6 | |
| 2.16 B.11 IM / IT Instructor (SharePoint) – Level 3 | 11 | 6 | |
| 2.18 P.1 Change Management Consultant– Level 3 | 14 | 9 | |
| Total Points: | 127 | | |

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**ATTACHMENT 4.2
PRICING SCHEDULE**

In respect of the "Estimated Number of Days" listed below in (C*) the estimated number of days is for evaluation purposes only during the solicitation process and does not represent a commitment of the future usage.

INITIAL CONTRACT PERIODS:

| Initial Contract Period – Year 1 | | | | |
|---|-----------------------------------|--|-----------------------------------|------------------------------------|
| Resource Category | (B) Level of Expertise | (C*) Estimated Number of Days | (D) Firm Per Diem Rate | (E) Total Cost (C* x D) |
| A.6 Programmer/Software Developer | LEVEL 3 | 220 | \$ | \$ |
| A.8 System Analyst | LEVEL 2 | 440 | \$ | \$ |
| I.9 System Administrator | LEVEL 3 | 220 | \$ | \$ |
| I.11 Technology Architect (General) | LEVEL 3 | 2200 | \$ | \$ |
| I.11 Technology Architect (eDocs/GCDOCS) | LEVEL 3 | 220 | \$ | \$ |
| B.1. Business Analyst (General) | LEVEL 3 | 220 | \$ | \$ |
| B.1. Business Analyst (eDocs/GCDOCS) | LEVEL 3 | 8800 | \$ | \$ |
| B.1. Business Analyst (eDocs/GCDOCS) | LEVEL 2 | 440 | \$ | \$ |
| B.11. IM/IT Instructor (eDocs/GCDOCS/ SharePoint) | LEVEL 3 | 1760 | \$ | \$ |
| P.1. Change Management Consultant | LEVEL 3 | 440 | \$ | \$ |
| P.9. Project Manager | LEVEL 3 | 220 | \$ | \$ |
| Total Price Initial Contract Period – Year 1 | | | | \$ <TBD> |

| Initial Contract Period – Year 2 | | | | |
|---|-----------------------------------|--|-----------------------------------|-----------------------------------|
| Resource Category | (B) Level of Expertise | (C*) Estimated Number of Days | (D) Firm Per Diem Rate | (E) Total Cost (C x D) |
| A.6 Programmer/Software Developer | LEVEL 3 | 220 | \$ | \$ |
| A.8 System Analyst | LEVEL 2 | 440 | \$ | \$ |
| I.9 System Administrator | LEVEL 3 | 220 | \$ | \$ |
| I.11 Technology Architect (General) | LEVEL 3 | 2200 | \$ | \$ |
| I.11 Technology Architect (eDocs/GCDOCS) | LEVEL 3 | 220 | \$ | \$ |
| B.1. Business Analyst (General) | LEVEL 3 | 220 | \$ | \$ |
| B.1. Business Analyst (eDocs/GCDOCS) | LEVEL 3 | 8800 | \$ | \$ |
| B.1. Business Analyst (eDocs/GCDOCS) | LEVEL 2 | 440 | \$ | \$ |
| B.11. IM/IT Instructor (eDocs/GCDOCS/ SharePoint) | LEVEL 3 | 1760 | \$ | \$ |
| P.1. Change Management Consultant | LEVEL 3 | 440 | \$ | \$ |
| P.9. Project Manager | LEVEL 3 | 220 | \$ | \$ |
| Total Price Initial Contract Period – Year 2 | | | | \$ <TBD> |

| | | |
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OPTION PERIODS:

| Option Period 1 – Year 3 | | | | |
|---|--------------------|--------------------------|--------------------|-----------------------|
| | (B) | (C*) | (D) | (E) |
| Resource Category | Level of Expertise | Estimated Number of Days | Firm Per Diem Rate | Total Cost (C x D) |
| A.6 Programmer/Software Developer | LEVEL 3 | 220 | \$ | \$ |
| A.8 System Analyst | LEVEL 2 | 440 | \$ | \$ |
| I.9 System Administrator | LEVEL 3 | 220 | \$ | \$ |
| I.11 Technology Architect (General) | LEVEL 3 | 1100 | \$ | \$ |
| I.11 Technology Architect (eDocs/GCDOCS) | LEVEL 3 | 220 | \$ | \$ |
| B.1. Business Analyst (General) | LEVEL 3 | 220 | \$ | \$ |
| B.1. Business Analyst (eDocs/GCDOCS) | LEVEL 3 | 3740 | \$ | \$ |
| B.1. Business Analyst (eDocs/GCDOCS) | LEVEL 2 | 440 | \$ | \$ |
| B.11. IM/IT Instructor (eDocs/GCDOCS/ SharePoint) | LEVEL 3 | 1100 | \$ | \$ |
| P.1. Change Management Consultant | LEVEL 3 | 440 | \$ | \$ |
| P.9. Project Manager | LEVEL 3 | 220 | \$ | \$ |
| Total Price Option Period 1 – Year 3 | | | | \$ <TBD> |

| Option Period 2 – Year 4 | | | | |
|---|--------------------|--------------------------|--------------------|-----------------------|
| | (B) | (C*) | (D) | (E) |
| Resource Category | Level of Expertise | Estimated Number of Days | Firm Per Diem Rate | Total Cost (C x D) |
| A.6 Programmer/Software Developer | LEVEL 3 | 220 | \$ | \$ |
| A.8 System Analyst | LEVEL 2 | 440 | \$ | \$ |
| I.9 System Administrator | LEVEL 3 | 220 | \$ | \$ |
| I.11 Technology Architect (General) | LEVEL 3 | 1100 | \$ | \$ |
| I.11 Technology Architect (eDocs/GCDOCS) | LEVEL 3 | 220 | \$ | \$ |
| B.1. Business Analyst (General) | LEVEL 3 | 220 | \$ | \$ |
| B.1. Business Analyst (eDocs/GCDOCS) | LEVEL 3 | 3740 | \$ | \$ |
| B.1. Business Analyst (eDocs/GCDOCS) | LEVEL 2 | 440 | \$ | \$ |
| B.11. IM/IT Instructor (eDocs/GCDOCS/ SharePoint) | LEVEL 3 | 1100 | \$ | \$ |
| P.1. Change Management Consultant | LEVEL 3 | 440 | \$ | \$ |
| P.9. Project Manager | LEVEL 3 | 220 | \$ | \$ |
| Total Price Option Period 2 – Year 4 | | | | \$ <TBD> |

| Option Period 3 – Year 5 | | | | |
|---------------------------------|--------------------|--------------------------|--------------------|--------------------|
| | (B) | (C*) | (D) | (E) |
| Resource Category | Level of Expertise | Estimated Number of Days | Firm Per Diem Rate | Total Cost (C x D) |

| | | | | | |
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| A.6 Programmer/Software Developer | LEVEL 3 | 220 | \$ | \$ | |
| A.8 System Analyst | LEVEL 2 | 440 | \$ | \$ | |
| I.9 System Administrator | LEVEL 3 | 220 | \$ | \$ | |
| I.11 Technology Architect (General) | LEVEL 3 | 1100 | \$ | \$ | |
| I.11 Technology Architect (eDocs/GCDOCS) | LEVEL 3 | 220 | \$ | \$ | |
| B.1. Business Analyst (General) | LEVEL 3 | 220 | \$ | \$ | |
| B.1. Business Analyst (eDocs/GCDOCS) | LEVEL 3 | 3740 | \$ | \$ | |
| B.1. Business Analyst (eDocs/GCDOCS) | LEVEL 2 | 440 | \$ | \$ | |
| B.11. IM/IT Instructor (eDocs/GCDOCS/SharePoint) | LEVEL 3 | 1100 | \$ | \$ | |
| P.1. Change Management Consultant | LEVEL 3 | 440 | \$ | \$ | |
| P.9. Project Manager | LEVEL 3 | 220 | \$ | \$ | |
| Total Price Option Period 3 – Year 5 | | | | | \$ <TBD> |

| | |
|---|-----------------------|
| Total Bid Price | |
| (Year 1 + Year 2 + Year 3 + Year 4 + Year 5) | \$ <TBD> |

| | | |
|--|--|--|
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**ATTACHMENT 5.1
FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY - CERTIFICATION**

I, the Bidder, by submitting the present information to the Contracting Authority, certify that the information provided is true as of the date indicated below. The certifications provided to Canada are subject to verification at all times. I understand that Canada will declare a bid non-responsive, or will declare a contractor in default, if a certification is found to be untrue, whether during the bid evaluation period or during the contract period. Canada will have the right to ask for additional information to verify the Bidder's certifications. Failure to comply with any request or requirement imposed by Canada may render the bid non-responsive or constitute a default under the Contract.

For further information on the Federal Contractors Program for Employment Equity visit [Employment and Social Development Canada \(ESDC\) - Labour's](#) website.

Date: _____ (YYYY/MM/DD) (If left blank, the date will be deemed to be the bid solicitation closing date.)

Complete both A and B.

A. Check only one of the following:

- A1. The Bidder certifies having no work force in Canada.
- A2. The Bidder certifies being a public sector employer.
- A3. The Bidder certifies being a federally regulated employer being subject to the [Employment Equity Act](#).
- A4. The Bidder certifies having a combined work force in Canada of less than 100 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).

| | | |
|---|---|---|
| Solicitation No. N° de l'invitation W6369-18P5MD/A | Amd. No – N° de la modif. | Buyer ID – Id de l'acheteur 0006IPS |
| Client Ref. No. – N° de réf. De client W6369-18P5MD | File No. – N° du dossier 006IPS. W6369-18P5MD | CCC No./ N° CCC – FMS No/ N° VME |

FORM 1
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)

| | | |
|--|--|--|
| Solicitation No. N° de l'invitation W6369-18P5MD/A | Amd. No – N° de la modif. | Buyer ID – Id de l'acheteur 0006IPS |
| Client Ref. No. – N° de réf. De client W6369-18P5MD | File No. – N° du dossier 006IPS. W6369-18P5MD | CCC No./ N° CCC – FMS No/ N° VME |

**FORM 2
CUSTOMER REFERENCE CONTACT INFORMATION FORM**

| | |
|---|------------------|
| Customer Reference Contact Information: | |
| Name of client organization: _____ | |
| Name of client: _____ | |
| Client's title: _____ | |
| Client telephone n°: _____ | |
| Email address: _____ | |
| Contract Information: The Bidder must provide with this Form a copy of the reference contract. | |
| Contract n°: _____ | |
| Start date: _____ End date: _____ | |
| Total contract value (excluding Applicable Taxes and not including amendments): _____ | |
| Core categories provided: _____ | |
| By signing below, the Bidder certifies that the information provided in this Form is accurate. | |
| Signature of authorized representative of the Bidder: | Name: _____ |
| | Title: _____ |
| | Signature: _____ |
| | Date: _____ |