



RETURN BIDS TO:

RETOURNER LES SOUMISSIONS À:

Bid Receiving - PWGSC / Réception des
soumissions - TPSGC

11 Laurier St. / 11, rue Laurier

Place du Portage, Phase III

Core 0B2 / Noyau 0B2

Gatineau

Québec

K1A 0S5

Bid Fax: (819) 997-9776

LETTER OF INTEREST

LETTRE D'INTÉRÊT

Comments - Commentaires

Vendor/Firm Name and Address

Raison sociale et adresse du
fournisseur/de l'entrepreneur

Issuing Office - Bureau de distribution

Communication Procurement Directorate/Direction de
l'approvisionnement en communication

360 Albert St. / 360, rue Albert

12th Floor / 12ième étage

Ottawa

Ontario

K1A 0S5

Title - Sujet Telephone Services/Contact Centre S	
Solicitation No. - N° de l'invitation G9292-170324/C	Date 2018-10-04
Client Reference No. - N° de référence du client G9292-17-0324	GETS Ref. No. - N° de réf. de SEAG PW-\$\$CY-007-75582
File No. - N° de dossier cy007.G9292-170324	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2018-11-02	
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: Westall, Susan	Buyer Id - Id de l'acheteur cy007
Telephone No. - N° de téléphone (613) 949-8350 ()	FAX No. - N° de FAX () -
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction: EMPLOYMENT AND SOCIAL DEVELOPMENT CANADA NCR 300 Sparks Street Ottawa Ontario K1A0J6 Canada	

Instructions: See Herein

Instructions: Voir aux présentes

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

SUMMARY OF KEY INFORMATION

RFQ TITLE	1 800 O-Canada Contact Centre Services
PROCUREMENT AUTHORITY	The Procurement Authority for this RFQ is Public Services and Procurement Canada (the "Procurement Authority").
CANADA CONTACT PERSON	Susan Westall Susan.westall@pwgsc.gc.ca 613-949-8350
RESPONSE SUBMISSION DEADLINE	November 2, 2018 by 14:00 EDT
DELIVERY ADDRESS	Hardcopy Delivery Address is: Bid Receiving - PWGSC 11 Laurier St., Phase III, Place du Portage Core 0B2 Gatineau, Québec K1A 0S5 Canada Epost email address is: TPSGC.DGAreceptiondessoumissions-ABBidReceiving.PWGSC@tpsgc-pwgsc.gc.ca
ENQUIRIES	Enquiries regarding this RFQ should be submitted to the Procurement Authority no later than 10 calendar days before the Response Submission Deadline
INELIGIBLE PARTIES	See Appendix E, Section 15.4.
FAIRNESS MONITOR	KPMG

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1 PROJECT OVERVIEW

1.1 Purpose of RFQ

This Request for Qualifications (RFQ) is issued by Canada in respect of the Project generally described in Section 1.4 below for the provision of Contact Centre Services in support of the 1 800 O-Canada and Custom Information Services (CIS) programs within Service Canada.

The purpose of this RFQ is to invite interested parties to submit a Response indicating their interest in, and qualifications for, the Project. Based on these Responses, Canada intends to select, in accordance with the terms of this RFQ, a shortlist of up to four (4) Proponents to participate in the next stage of the procurement process, namely the Request for Proposals (RFP) stage for the selection of a single Contractor to provide the required 1 800 O-Canada and CIS Contact Centre Services.

In this RFQ, except to the extent the context or the express provisions of this RFQ otherwise require, any capitalized word or term not otherwise defined in the RFQ Respondent Instructions has the meaning set out for it in Appendix A.

1.2 Content of RFQ

This RFQ consists of the following documents:

The body of this document;
Appendix A – RFQ Process, Definitions and Interpretation;
Appendix B - Forms and Certifications;
Appendix C - Evaluation Criteria and Submission Requirements;
Appendix D - Applicable Scales for Rated Evaluation Criteria;
Appendix E - Respondent Instructions;
Appendix F - Enquiry Form;
Appendix G - Submission Agreement for RFP;
Appendix H - Security Guide;
Appendix I - Administrative Checklist;
Appendix J - Statement of Requirement;
Appendix J.1 Historical contact centre call volumetrics and staffing
Appendix J.2 Security Requirements Checklist.

Important Note: Appendix J and J.1 will be provided to interested parties upon request.

Requests for the documents must be submitted to:

Susan Westall
Supply Team Leader
Public Services and Procurement Canada

Telephone: 613-949-8350
Email: susan.westall@pwgsc-tpsgc.gc.ca

1.3 Eligibility to Participate in RFQ

Any interested party or parties may submit a Response. Respondents may be individuals, corporations, joint venture/consortia, partnerships or any other legal entities, subject to the provisions of Appendix E, Section 15 of this RFQ.

1.4 Project Information

The overall objective of the Project is to select a single, qualified provider of Contact Centre Services for the provision of Contact Centre Services, Facilities, and other related services as required to meet the 1 800 O-Canada and Customized Information Services (CIS) contact centre needs of Service Canada as set out in this RFQ Appendix J and as further defined in the subsequent RFP.

The Contractor selected through the RFP process will be awarded a non-exclusive contract for the provision of required Contact Centre Services for a period of up to 10 years. The detailed Contact Centre Services requirements and the terms and conditions of the contract will be provided to those Respondents qualified to participate in the RFP process as set out in this RFQ Section 4; Evaluation.

1.4.1 Project Background

The mission of ESDC, including Service Canada is to build a stronger and more inclusive Canada, to support Canadians in making choices that help them live productive and rewarding lives, and to improve Canadians' quality of life.

The Citizen Service Branch (CSB) of ESDC / Service Canada, through the Phone Operations and Integrated Content Management division (PO-ICM), is responsible for the Government of Canada Telephone General Enquiries Services Program that includes 1 800 O-Canada and Customized Information Services (CIS) (referred to as the 1 800 O-Canada contact centre in this document) and the associated content management activities. Since 1982, this program has been using alternative service delivery (ASD) contracts, competitively tendered, to provide the human resources required for the management and delivery of its contact centre services.

The current ASD contract expires on November 29, 2019.

This RFQ addresses the initial stage in the selection of a Contractor for the provision of Contact Centre (CC) Services as required to evolve the delivery of 1 800 O-Canada and associated CIS from the current service delivery model in which contact centre agents are provided through a third party contractor and where facilities, technical and telephony infrastructure, and overarching management services are provided by ESDC, to a model in which the Contact Centre Services and the facilities housing agents, supporting staff and infrastructure are provided by the Contractor and the core contact management, knowledgebase and supporting infrastructures continue to be provided by Canada.

The Appendix J "Statement of Requirements" (SOR) sets out the draft high-level requirements for the Contact Centre Services including the strawman technical environment, project implementation approach, and master project schedule. It also provides an overview of the current 1 800 O-Canada and CIS services and service delivery including as Appendix J.1: Historical Contact Centre Volumetrics and Staffing.

1.4.2 Project Objectives

The short term objectives of the project are to:

Maintain service delivery

- ✓ replace the current private-public arrangement with a new one that continues to effectively and efficiently deliver 1 800 O-Canada and CIS where such services are delivered in accordance with the quality and performance measures established in the associated contract
- ✓ maintain or improves the historically successful track record in delivering service results according to the performance framework established (which includes defined qualitative and quantitative standards) while maintaining flexibility and scalability of resources-on-demand to deliver on new or urgent GC service requirements
- ✓ provide continuity of services between the current and successor service provider(s) – with a targeted cutover to live service in October of 2019 and some overlap of service between the

current and new service contracts to best manage the transition of services and a seamless experience to Canadians

Support ESDC's service strategy

- ✓ maintains or improves interoperability with ESDC and other GC contact centres
- ✓ offers new capabilities to support future GC service delivery goals and outcomes, as they are funded and included in the contract.

Provide value for money : maintain or improve value for money

Balance risks

- ✓ balance risks between the vendor and Canada, in particular as it relates to capacity and demand management
- ✓ meet the security requirements of Canada
- ✓ meet the business continuity requirements of Canada (and improve on current situation where all facilities are located in Ottawa and therefore not geographically dispersed)

1.4.3 Strawman Target Environment

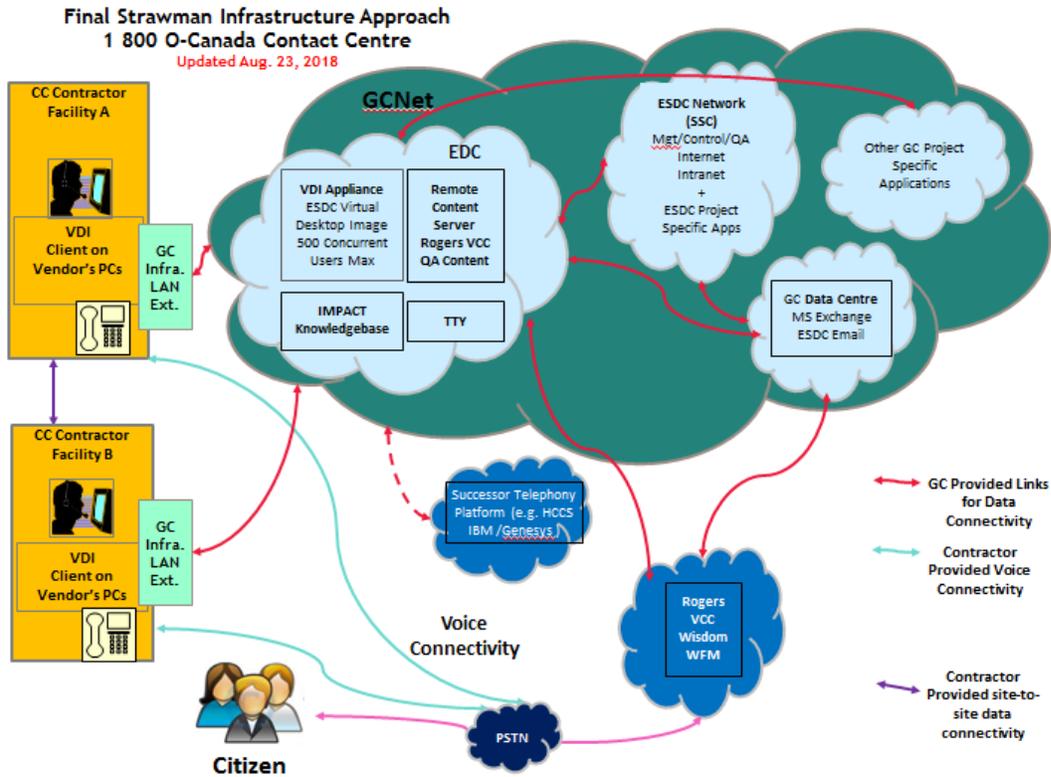


Figure 1.4.3-1: Strawman Technical Environment

In this model:

1. The telephony and call processing will be provided through the current voice infrastructure and the Rogers VCC platform (migration to the GC Genesys/IBM platform (HCCS) or an alternative will take place in a later phase of the project). Calls will be forwarded to the Contractor provided contact centre agents using a mechanism established between the Contractor and SSC/Rogers (e.g. using SIP trunking or direct call forwarding through the PSTN).
2. The contact centre agents, supervisors, QA, reporting, training and management resources will be provided, housed and managed by the Contractor.
3. The Contractor will provide multiple service locations to address requirements for business continuity and disaster recovery (minimum 2).
4. Connections to enable disaster recovery / continuity of operations must be provided by the Contractor.
5. Contractor Facilities used for service delivery under the contract must be approved to the Protected B level by CISD of Public Services and Procurement Canada (PSPC).
6. The knowledgebase and agent interface (IMPACT) will continue to be provided by Canada through SSC provided hosting and network infrastructures.
7. Access to the Government provided infrastructure, knowledgebase, and business systems (e.g. as required to support CIS initiatives) will be through secure VDI desktop access. The SSC provided remote VDI desktop access services.
8. The workforce management tools Wisdom WFO will be made available by Canada. Contractor-provided WFM tools may be used by the Contractor.

1.5 Key Entities

1.5.1 Canada Project Team

The Project's management and procurement is under the direction of a project office comprising officials from PSPC, ESDC and SSC.

1.5.2 Fairness Monitor

The Procurement Authority has engaged a Fairness Monitor for this procurement. The Fairness Monitor will provide formal oversight and independent validation of the fairness of the procurement process. The Fairness Monitor will submit its final report to Canada, which will be made public.

2 PROCUREMENT PROCESS

2.1 Two-Stage Process

The Procurement Authority expects to select a Contractor following a two-stage procurement process:

Stage 1 – this RFQ resulting in the selection of up to four (4) Qualified Respondents to be Proponents under Stage 2;

Stage 2 – an RFP issued to Proponents qualified through the Stage 1 RFQ process and resulting in the selection of a Bidder that will be recommended for contract award; and

Stage 3 – award of contract

2.2 Stage 1: Request for Qualifications (RFQ)

The objective of this RFQ is to qualify Respondents who meet the requirements of the RFQ (Qualified Respondents). A maximum of four (4) highest ranked Qualified Respondents will be invited to participate in the RFP. Respondents will be qualified and ranked based on the process set out in Section 4 of this RFQ.

The four (4) highest ranked Qualified Respondents will be invited to execute the Submission Agreement (Appendix G) prior to participation in the RFP. If there are less than four (4) Qualified Respondents then all Qualified Respondents will be invited.

Should there be an insufficient number of Qualified Respondents after Stage 1 to permit a competition in Stage 2, Canada reserves the right to cancel Stage 2 or to modify the Stage 1 requirements and re-publish the solicitation using the same or a different approach.

2.3 Stage 2: Request for Proposals (RFP)

The information provided in this section does not represent a commitment by Canada and is provided solely for information purposes. It may be modified by the Procurement Authority in its sole discretion, at the RFP stage.

As part of the RFP, the Procurement Authority intends to invite Qualified Respondents to submit proposals that must contain, in respect of the Project, a technical submission and a financial submission. The form of the RFP submission will be described in the RFP and will address both technical and financial aspects of the Project and may include, at Canada's discretion, a Proof of Proposal demonstration.

A draft Contract will be included with the RFP. It is anticipated that the Bidders will have the opportunity to submit comments, questions and suggested modifications to the draft Contract via commercially confidential meetings and written enquiries. In view of such comments and suggestions, the draft Contract could be revised by the Procurement Authority and incorporated through an amendment to the RFP prior to RFP closing.

The successful Bidder will be identified taking into consideration technical and financial criteria as set out in the RFP. Details regarding the submission requirements for the RFP and the factors to be considered in the evaluation of proposals will be set out in the RFP.

2.4 Anticipated Procurement Schedule

Table 2.4-1 outlines the indicative timelines for the procurement process and does not represent a commitment by Canada. Rather, it is provided solely for information purposes. Dates are subject to change at the sole discretion of the Procurement Authority.

Table 2.4-1: Anticipated Procurement Schedule

Key Activities		Timeline
STAGE 1 – REQUEST FOR QUALIFICATION		
RFQ posting		October 5, 2018
Information Session		October 17, 2018
End of Solicitation Enquiry Period		October 23, 2018
Response Submission Deadline		November 2, 2018
Response Evaluation Completion		November 30, 2018
STAGE 2 – REQUEST FOR PROPOSALS		
RFP release to Qualified Proponents		January 2019
Commercially Confidential Meetings		January 2019
Vendor proof of concept		March 2019
Proposal Submission Deadlines:	Technical	February 2019
	Financial	February 2019
Announcement of successful Bidder		April 2019
Award of Contract		May 2019

2.5 Enquiries during the RFQ Process

2.5.1 All enquiries regarding any aspect of this RFQ or the Project (each, an "Enquiry") must be submitted no later than the date and time indicated in the Summary of Key Information under Enquiries, by e-mail to the Procurement Authority at the e-mail address also found on the Summary of Key Information in order to be considered by the Procurement Authority.

2.5.2 To ensure the integrity of the procurement process, Enquiries and all other communications regarding the RFQ must be directed only to the Procurement Authority. Other than as expressly permitted in this RFQ, interested parties must not contact any other employee of Canada or any of the Ineligible Parties or other persons involved in the Project to discuss the RFQ. The Procurement Authority has designated as the Canada Contact Person the individual identified as such in the Summary of Key Information.

2.5.3 The Procurement Authority will have no obligation to respond to Enquiries that are not submitted in accordance with the procedures described herein. Interested parties should reference as accurately as possible the section and, where relevant, the sub-section of the RFQ to which the Enquiry relates. Care should be taken by interested parties to explain each question in sufficient detail to allow the Procurement Authority to provide an accurate answer.

2.5.4 During the RFQ stage, to ensure transparency and quality of information provided to interested parties, Enquiries received and the replies to such Enquiries, if any, will be provided in writing and subject to sections 2.5.5 to 2.5.7 will be posted on Buyandsell.gc.ca, without revealing the source of the Enquiry. If the Procurement Authority determines that an Enquiry requires an amendment of the RFQ, the Procurement Authority will issue an Amendment. It is the sole and entire responsibility of each interested party to regularly verify on Buyandsell.gc.ca the posting of any questions and answers and Amendments (<https://buyandsell.gc.ca>).

2.5.5 Enquiries that are "commercially confidential" must be clearly marked "commercially confidential" at each relevant item. Items identified as "commercially confidential" will be treated as such except where the Procurement Authority determines either that the Enquiry is not of a "commercially confidential" nature; or where the response would have implications beyond the interested party that has submitted the Enquiry in the Procurement Authority's sole discretion.

2.5.6 Subject to Section 2.5.5, if it is determined that the Enquiry is not "commercially confidential" by the Procurement Authority, then the Procurement Authority will inform the interested party, and the interested party will have the option of either terminating the Enquiry or having the Enquiry and reply posted in accordance with Section 2.5.4.

2.5.7 If it is determined that the Enquiry is "commercially confidential" by the Procurement Authority, then the Procurement Authority shall keep the Enquiry and response confidential and shall provide the response solely to the interested party which submitted the commercially confidential Enquiry. All Enquiries should be submitted using Appendix F - Enquiry Form as an attachment to the e-mail correspondence.

2.6 Information Session

An Information Session will be held on October 17, 2018 from 10:00 a.m. to 12:00 p.m. Eastern Time. All interested parties must register with the Procurement Authority before the Information Session to confirm their attendance and should provide, in writing, to the Procurement Authority, the names and e-mail addresses of the person(s) who will be attending (either in-person or via teleconference) and a list of questions they wish to discuss at least two (2) Business Days before the Information Session. There will be a maximum of two (2) in-person representatives per registered interested party. Additional representatives will be able to attend via teleconference. All interested parties who do not confirm attendance may not be allowed to participate in the Information Session. Any changes to the attendance list should be addressed to the Procurement Authority at least two (2) working days before the Information Session.

Any clarifications or changes to the RFQ resulting from the Information Session will be issued as an Addendum to the RFQ. Interested parties who do not attend will not be precluded from submitting a Response.

2.7 Security

Respondents must obtain Designated Organization Screening (DOS), or have been sponsored for DOS, prior to the RFQ Response Submission Deadline. Appendix H describes the activities and submissions that Respondents are strongly encouraged to undertake as soon as possible to be ready to participate as Proponents in the RFP stage and to respond to the RFP which will have security requirements as outlined in the Security Requirements Check List (SRCL) in Appendix J.2.

3 RESPONSE PREPARATION INSTRUCTIONS

Further Response preparation instructions can be found at Appendix E- Respondent Instructions

3.1 Delivery of Response

Respondents must ensure that Responses are received at the Delivery Address by the Response Submission Deadline. The Procurement Authority will return Responses received after the RFQ Response Submission Deadline to the Respondent unopened.

Respondents may use the epost Connect service provided by Canada Post Corporation to transmit their response electronically. Respondents must refer to Appendix E for further information.

Responses sent by fax will not be accepted.

Questions concerning receipt of Responses may be addressed to the Canada Contact Person.

Any delivery to any other address than the one indicated on page one, even to another address within PSPC/PWGSC, will be considered NOT delivered.

3.1.1 Delayed Responses

1. A response delivered to the specified Bid Receiving Unit after the solicitation closing date and time but due solely to a delay in delivery that can be attributed to the Canada Post Corporation (CPC) (or national equivalent of a foreign country). Private courier (Purolator Inc., Fedex Inc., etc.) is not considered to be part of CPC for the purposes of delayed responses.
 - a. The only pieces of evidence relating to a delay in the CPC system that are acceptable to PWGSC are:
 - i. a CPC cancellation date stamp;
 - ii. a CPC Priority Courier bill of lading;
 - iii. a CPC Xpresspost label;that clearly indicates that the response was sent before the solicitation closing date.
 - b. The only piece of evidence relating to a delay in the epost Connect service provided by CPC system that is acceptable to PSPC is a CPC epost Connect service date and time record indicated in the epost Connect conversation history that clearly indicates that the response was sent before the solicitation closing date and time.
2. Misrouting, traffic volume, weather disturbances, labour disputes or any other causes for the late delivery of responses are not acceptable reasons for the response to be accepted by PSPC.
3. Postage meter imprints, whether imprinted by the Respondent, the CPC or the postal authority outside Canada, are not acceptable as proof of timely mailing.

3.2 Amendments to Responses

A Respondent may, before the RFQ Response Submission Deadline, amend any aspect of its Response by withdrawing its original Response by notifying the Canada Contact Person in writing and resubmitting the amended replacement Response to the Delivery Address.

3.3 Withdrawal of Responses

A Respondent may only withdraw its Response by giving written notice duly signed by the Respondent to the Canada Contact Person.

3.4 Response Form and Content

Responses to this RFQ should be in the format described in Section 3.5 – Format Instructions and Appendix C – Evaluation Criteria and Submission Requirements.

Each Response must:

1. be received at the Delivery Address before the Submission Deadline; and
2. include all required Forms and Certifications as outlined in Appendix B (B-1 to B-3).

3.5 Format Instructions

If the Respondent chooses to submit its response electronically, Canada requests that the Respondent submits its response in accordance with section 08 of Appendix E – Respondent Instructions (RFQ). Respondents must provide their response in a single transmission. The epost Connect service has the capacity to receive multiple documents in a single transmission, up to 1GB per individual attachment.

Respondents should follow the format instructions below in the preparation of their hard and electronic copy Responses:

- a. For each package, include a title page at the front of each copy of the Response that includes the RFQ title, date, the RFQ number as per the Summary of Key Information, and the Respondent's name and Respondent Representative Contact Individual;
- b. Use 8.5 x 11 inch (216 mm x 279 mm) non-glossy paper containing fibre certified as originating from a sustainably-managed forest and containing minimum 30% recycled content;
- c. Use a numbering system that corresponds to the RFQ;
- d. The text should not be smaller than Arial font size 10;
- e. Organizational charts may be provided on 11 x 17 inch (278 mm x 432 mm) paper, with text no smaller than Arial font size 8;
- f. Only material included within the Respondent's response will be evaluated. Reference material outside of the Respondent's response will not be considered; and
- g. For each package, include a table of contents.

If the Respondent is simultaneously providing copies of its response using multiple acceptable delivery methods, and if there is a discrepancy between the wording of any of these copies and the electronic copy provided through epost Connect service, the wording of the electronic copy provided through epost Connect service will have priority over the wording of the other copies.

3.6 Request for Advance Rulings

Canada has taken steps to protect the integrity of the procurement process including requiring all those involved with the process to comply with the Integrity Provisions and the Code of Conduct and to avoid and prevent situations that could give rise to a conflict of interest, or the appearance of a conflict of interest. A Respondent who has any concerns regarding their status to qualify based on Appendix E - Respondent Instructions, Section 12, Integrity Provisions, or Section 15, Conflict of Interest - Unfair Advantage, is encouraged to request an advance ruling in accordance with the following process not later than 15 Business Days in advance of the Response Submission Deadline.

For an advance ruling on the Integrity Provisions, please contact the PSPC Integrity Regime by:

- a. **Phone:** 1-844-705-2084;
- b. **Mail:**
Registrar of Ineligibility and Suspension
Public Services and Procurement Canada
Floor 10A1 Room 105
Portage III Tower A
11 Laurier St
Gatineau QC, K1A 0S5
- c. **E-mail:** pwgsc.o.integrity-tpsdc.o.integrite@pwgsc-tpsdc.gc.ca; or,
- d. Filling out the e-mail **form**.

For an advance ruling on Conflict of Interest - Unfair Advantage, please provide to the Canada Contact Person no later than 15 Business Days in advance of the Response Submission deadline:

- a. names and contact information of the Respondent and the person or entity for which the advance ruling is requested;
- b. a description of the person and/or entity's relationship to the Respondent;
- c. a description of the situation or relationship that raises the possibility or the perception of a conflict of interest;
- d. if applicable, a description of the steps taken to date and future steps proposed to be taken to minimize, mitigate or eliminate an actual, perceived or potential conflict of interest; and
- e. copies of any relevant documentation.

Canada may make additional inquiries or request additional information following receipt of the information above, in addition to the investigation and due diligence rights outlined at section 4.3 of this RFQ. Respondents must provide the information in accordance with Canada's request. As conflict of interests or unfair advantage are fact specific, Canada reserves its rights as outlined at section 15 of Appendix E – Respondent Instructions, and may alter any ruling regarding a real or perceived conflict of interest or unfair advantage at any time during this RFQ process, or the subsequent RFP process.

3.7 Additional Information

Additional information may be available for viewing on Buyandsell.gc.ca under "Attachments". Such additional information does not contain commitments by Canada nor form part of this RFQ. It is provided solely for information purposes. Further information may be added by the Procurement Authority prior to the RFQ Response Submission Deadline and Respondents are responsible for regularly checking Buyandsell.gc.ca for updates.

4 EVALUATION

Note: See also Appendix C - Evaluation Criteria and Submission Requirements for further evaluation information.

4.1 Conduct of Evaluation

- a) Responses will be assessed in accordance with the entire requirement of the RFQ including the mandatory and rated evaluation criteria.
- b) An evaluation team composed of representatives of Canada will evaluate the responses.

4.1.1 Phased Response Compliance Process

4.1.1.1 (2017-11-03) General

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

THE RESPONDENT ACKNOWLEDGES THAT THE REVIEWS IN PHASE I OF THIS PRCP ARE PRELIMINARY AND DO NOT PRECLUDE A FINDING IN PHASE II THAT THE RESPONSE IS NON-RESPONSIVE, EVEN FOR MANDATORY REQUIREMENTS WHICH WERE SUBJECT TO REVIEW IN PHASE I OR II AND NOTWITHSTANDING THAT THE RESPONSE HAD BEEN FOUND RESPONSIVE IN SUCH EARLIER PHASE. CANADA MAY DEEM A RESPONSE TO BE NON-RESPONSIVE TO A MANDATORY REQUIREMENT AT ANY PHASE AND ANYTIME DURING THE COURSE OF THIS RFQ PROCESS AND SUBSEQUENT RFP PROCESS.

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

- (c) Canada may, in its discretion, request and accept at any time from a Respondent and consider as part of the Response, any information to correct errors or deficiencies in the Response that are clerical or administrative, such as, without limitation, failure to sign the Response or any part or to checkmark a box in a form, or other failure of format or form or failure to acknowledge; failure to provide a procurement business number or contact information such as names, addresses and telephone numbers. This shall not limit Canada's right to request or accept any information after the RFQ closing in circumstances where the RFQ expressly provides for this right. The Respondent will have the time period specified in writing by Canada to provide the necessary documentation. Failure to meet this deadline will result in the Response being declared non-responsive.

- (d) The PRCP does not limit Canada's rights under Appendix E nor Canada's right to request or accept any information during the RFQ solicitation period or after RFQ closing in circumstances where the RFQ expressly provides for this right, or in the circumstances described in subsection (c).
- (e) Canada will send any CAR by any method Canada chooses, in its absolute discretion. The Respondent must submit its response by the method stipulated in the CAR. Responses are deemed to be received by Canada at the date and time they are delivered to Canada by the method and at the address specified in the CAR. An email response permitted by the CAR is deemed received by Canada on the date and time it is received in Canada's email inbox at Canada's email address specified in the CAR. A CAR sent by Canada to the Respondent at any address provided by the Respondent in or pursuant to the Response is deemed received by the Respondent on the date it is sent by Canada. Canada is not responsible for late receipt by Canada of a response, however caused.

4.1.1.2 Phase I: Technical Response

- (a) Canada's review at Phase I will be limited to a review of the Technical Response to identify any instances where the Respondent has failed to meet any Eligible Mandatory Criterion. This review will not assess whether the Technical Response meets any standard or is responsive to all RFQ requirements. Eligible Mandatory Criteria are all mandatory technical criteria that are identified in this solicitation as being subject to the PRCP. Mandatory technical criteria that are not identified in the RFQ as being subject to the PRCP, will not be evaluated until Phase II.
- (b) Canada will send a written notice to the Respondent (Compliance Assessment Report or "CAR") identifying any Eligible Mandatory Criteria that the Response has failed to meet. A Respondent whose Response has been found responsive to the requirements that are reviewed at Phase I will receive a CAR that states that its Response has been found responsive to the requirements reviewed at Phase I. Such Respondent shall not be entitled to submit any response to the CAR.
- (c) A Respondent shall have the period specified in the CAR (the "Remedy Period") to remedy the failure to meet any Eligible Mandatory Criterion identified in the CAR by providing to Canada in writing additional or different information or clarification in response to the CAR. Responses received after the end of the Remedy Period will not be considered by Canada, except in circumstances and on terms expressly provided for in the CAR.
- (d) The Respondent's response must address only the Eligible Mandatory Criteria listed in the CAR as not having been achieved, and must include only such information as is necessary to achieve such compliance. Any additional information provided by the Respondent which is not necessary to achieve such compliance will not be considered by Canada, except that, in those instances where such a response to the Eligible Mandatory Criteria specified in the CAR will necessarily result in a consequential change to other parts of the Response, the Respondent shall identify such additional changes.

- (e) The Respondent's response to the CAR should identify in each case the Eligible Mandatory Criterion in the CAR to which it is responding, including identifying in the corresponding section of the original Response, the wording of the proposed change to that section, and the wording and location in the Response of any other consequential changes that necessarily result from such change. In respect of any such consequential change, the Respondent must include a rationale explaining why such consequential change is a necessary result of the change proposed to meet the Eligible Mandatory Criterion. It is not up to Canada to revise the Respondent's Response, and failure of the Respondent to do so in accordance with this subparagraph is at the Respondent's own risk. All submitted information must comply with the requirements of this solicitation.
- (f) Any changes to the Response submitted by the Respondent other than as permitted in this solicitation, will be considered to be new information and will be disregarded. Information submitted in accordance with the requirements of this solicitation in response to the CAR will replace, in full, **only** that part of the original Response as is permitted in this Section.
- (g) Additional or different information submitted during Phase I permitted by this section will be considered as included in the Response, but will be considered by Canada in the evaluation of the Response at Phase I only for the purpose of determining whether the Response meets the Eligible Mandatory Criteria. It will not be used at any Phase of the evaluation to increase or decrease any score that the original Response would achieve without the benefit of such additional or different information. For instance, an Eligible Mandatory Criterion that requires a mandatory minimum number of points to achieve compliance will be assessed at Phase I to determine whether such mandatory minimum score would be achieved with such additional or different information submitted by the Respondent in response to the CAR. If so, the Response will be considered responsive in respect of such Eligible Mandatory Criterion, and the additional or different information submitted by the Respondent shall bind the Respondent as part of its Response, but the Respondent's original score, which was less than the mandatory minimum for such Eligible Mandatory Criterion, will not change, and it will be that original score that is used to calculate any score for the Response.
- (h) Canada will determine whether the Response is responsive for the requirements reviewed at Phase I, considering such additional or different information or clarification as may have been provided by the Respondent in accordance with this Section. If the Response is not found responsive for the requirements reviewed at Phase I to the satisfaction of Canada, then the Response shall be considered non-responsive and will receive no further consideration.
- (i) Only Responses found responsive to the requirements reviewed in Phase I to the satisfaction of Canada, will receive a Phase II evaluation.

4.1.1.3 Phase II: Final Evaluation of the Response

- (a) In Phase II, Canada will complete the evaluation of all Responses found responsive to the requirements reviewed at Phase I. A Response is non-responsive and will receive no further consideration if it does not meet all mandatory evaluation criteria of the RFQ. Responses will be assessed in accordance with the entire requirement of the RFQ including the technical evaluation criteria and due diligence verifications.

4.2 Selection of Qualified Respondents

A Response must comply with the requirements of the RFQ, meet all mandatory technical evaluation criteria and obtain the required minimum scores for the rated evaluation criteria as specified in Appendix C, to be declared responsive.

For each Response, the rated score for each of the rated evaluation criteria will be added to obtain a total aggregate score.

The four (4) Qualified Respondents with the highest total aggregate score will be selected as the Qualified Respondents for subsequent participation in the Stage 2 RFP process.

In the event of a tie between two Respondents as the 4th and final Qualified Respondent, Canada may, in its sole discretion, select the Qualified Respondent as the Respondent having the highest overall score in rated criteria R1: Corporate Capability. If a tie remains, the Respondent identifying their organization as an Aboriginal Business in Form B-3 Respondent Profile will be selected. If an additional method of tie breaking is required, the Respondent with the highest overall score in R2 will be selected.

If there are less than 4 Qualified Respondents, all Qualified Respondents will be selected for participation in the Stage 2 RFP process. Should there be an insufficient number of Qualified Respondents after Stage 1 to permit a competition in Stage 2, Canada reserves the right to cancel Stage 2 or to modify the Stage 1 requirements and re-publish the solicitation using the same or a different approach.

4.3 Additional Canada Investigations and Due Diligence

Canada may implement appropriate due diligence processes to verify any statement or claim made by a Respondent by whatever means Canada considers appropriate, including but not limited to contacting references other than those identified by the Respondent. Canada may disqualify any Respondent whose Response contains misrepresentations or any other inaccurate or misleading information.

Without limiting the foregoing, Canada may perform:

- a. Financial viability assessment
- b. Reference checks
- c. Integrity provisions checks
- d. conflict-of-interest checks; and
- e. safety record checks

Canada may disqualify Respondents if any of these checks are not satisfactory to Canada, in its sole discretion.

In addition, Canada may request that Respondents provide a copy of their audited or reviewed financial statements from the most recent fiscal year, and/or other financial records, and Canada reserves the right to disqualify Respondents if Canada considers the information in these records unsatisfactory, or if Respondents do not provide them.

4.3.1 Financial Viability Assessment

Financial Viability Requirement: Respondents must be financially viable to enter into this Qualification process. To determine the Respondent's financial viability, the Procurement Authority may, by written notice to the Respondents, require the submission of some or all of the financial information detailed below during the evaluation of qualification.

The Respondent must provide the following information to the Procurement Authority within 5 working days of the request or as specified by the Procurement Authority in the notice:

- a. Audited financial statements, if available, or the unaudited financial statements (prepared by the Respondent's outside accounting firm, if available, or prepared in-house if no external statements have been prepared) for the Respondent's last three fiscal years, or for the years that the Respondent has been in business if this is less than three years (including, as a minimum, the Balance Sheet, the Statement of Retained Earnings, the Income Statement and any notes to the statements).
- b. If the date of the financial statements in (a) above is more than five months before the date of the request for information by the Procurement Authority, the Respondent must also provide, unless this is prohibited by legislation for public companies, the last quarterly financial statements (consisting of a Balance Sheet and a year-to-date Income Statement), as of two months before the date on which the Procurement Authority requests this information.
- c. If the Respondent has not been in business for at least one full fiscal year, the following must be provided:
 - i. the opening Balance Sheet on commencement of business (in the case of a corporation, the date of incorporation); and
 - ii. the last quarterly financial statements (consisting of a Balance Sheet and a year-to-date Income Statement) as of two months before the date on which the Procurement Authority requests this information.
- d. A certification from the Chief Financial Officer or an authorized signing officer of the Respondent that the financial information provided is complete and accurate.

If the Respondent is a joint venture, the financial information required by the Procurement Authority must be provided by each member of the joint venture.

If the Respondent is a subsidiary of another company, then any financial information in (a) to (d) above required by the Procurement Authority must be provided by the ultimate parent company.

Financial Information Already Provided to Public Services and Procurement Canada (PSPC): The Respondent is not required to resubmit any financial information requested by the Procurement Authority that is already on file at PWGSC with the Contract Cost Analysis, Audit and Policy Directorate of the Policy, Risk, Integrity and Strategic Management Sector, provided that within the above-noted time frame:

- a. the Respondent identifies to the Procurement Authority in writing the specific information that is on file and the requirement for which this information was provided; and
- b. the Respondent authorizes the use of the information for this requirement.

It is the Respondent's responsibility to confirm with the Procurement Authority that this information is still on file with PWGSC.

Other Information: Canada reserves the right to request from the Respondent any other information that Canada requires to conduct a complete financial capability assessment of the Respondent. The Respondent also understands that a complete financial capability review of the Respondent may also be conducted at the time individual bid solicitations are issued under the RFP or any resulting Contract.

Confidentiality: If the Respondent provides the information required above to Canada in confidence while indicating that the disclosed information is confidential, then Canada will treat the information in a confidential manner as permitted by the [Access](#)

to Information Act, R.S., 1985, c. A-1, Section 20(1) (b) and (c).

Respondents must submit their financial statements for the legal entity outlined in their Response. Canada reserves the right to request further information if required.

4.4 Invitation to Execute Submission Agreement

The Procurement Authority will invite a maximum of four (4) Respondents who have qualified (in accordance with section 4.2) with the highest total aggregate score to execute the Submission Agreement, as a condition of being selected to participate in the RFP.

If any of these Qualified Respondents fail or refuse to execute the Submission Agreement within the allocated period, the Procurement Authority may, in its sole discretion, withdraw the invitation and extend it to the next highest ranked Qualified Respondent to execute the Submission Agreement, and participate in the RFP in accordance with the Submission Agreement.

4.5 Notification and Debrief

Respondents that are not selected as one (1) of the four (4) highest ranked Qualified Respondents will be notified in writing within a reasonable period of time following the end of the evaluation period and following the execution of the Submission Agreement by the four (4) highest ranked Respondents. Any Respondent which is not selected as one of the four (4) highest ranked Qualified Respondents to proceed to the RFP may request a debriefing, through the Canada Contact Person, within 20 Business Days following the receipt of the above mentioned written notification.

The debriefing will include the reasons the Respondent was not selected as one (1) of the four (4) highest ranked Qualified Respondents. The debrief will be limited to the details and results of the evaluation of the specific Respondent's response and will not provide any details on the contents of, or evaluation results of, Responses of other Respondents. The confidentiality of information relating to other Respondents will be protected.

Canada will not assume any costs in relation to any debriefing.

APPENDIX A – DEFINITIONS AND INTERPRETATION

1 Acronyms

Acronym or Abbreviation	Definition
ACD	Automated Call Distribution
API	Application Programming Interface
BI	Business Intelligence
BRP	Business Resumption Plan
CAR	Compliance Assessment Report
CC	Contact Centre
CCM	Commercially Confidential Meeting
CM	Content Management
CIS	Customized Information Services
CISD	Canadian Industrial Security Directorate (CISD) of, Public Services and Procurement Canada (PSPC).
CSB	Citizen Service Branch
CTI	Computer Telephony Integration
DRP	Disaster Recovery Plan
ESDC	Employment and Social Development Canada
FAQ	Frequently asked question
FSC	Facility Security Clearance
FTE	Full-time Equivalent
HCCS	Hosted Contact Centre Service (an SSC provided enterprise service based on a Genesys/IBM platform)
GC	Government of Canada
GCNet	Government of Canada data Network
IAM	Identity and Access Management
ICAM	Identity, Credential, and Access Management
IVR	Interactive Voice Response
KM	Knowledge Management
KPI	Key Performance Indicator
NIP	Network interface point
OPI	Office of Prime Interest
PCI	Payment Card Industry
PCRA	Project Complexity and Risk Assessment
PMO	Project Management Office
PO-ICM	Phone Operations and Integrated Content Management division of ESDC
PRCP	Phased Response Compliance Process
PSPC	Public Services and Procurement Canada
PSTN	Public Switched Telephone Network
RFP	Request for Proposals
RFQ	Request for Qualification
RFx	RFP or RFQ in context
SOR	Statement of Requirements
SIP	System interface point
SL	Service Level
SLA	Service Level Agreement
SLO	Service Level Objective
SLT	Service Level Target
SOA	Service Oriented Architecture
SR	Service Request

Acronym or Abbreviation	Definition
SRCL	Security Requirements Checklist
SSC	Shared Services Canada
TB	Treasury Board
VCC	Rogers Virtual Call Centre solution
VDI	Virtual Desktop Infrastructure
VoIP	Voice over Internet Protocol
WFM	Work Force Management

2 Definitions

Definition	Meaning
1 800 O-Canada Contact Centre	A term that includes both the 1 800 O-Canada and the associated Customized Information Services (CIS) in context.
Aboriginal Business	<p>For the purposes of this requirement, an Aboriginal Business is:</p> <ul style="list-style-type: none"> i. a band as defined by the Indian Act ii. a sole proprietorship iii. a limited company iv. a co-operative v. a partnership vi. a not-for-profit organization <p>in which Aboriginal persons have at least 51 percent ownership and control,</p> <p>OR</p> <p>A joint venture consisting of two or more Aboriginal businesses or an Aboriginal business and a non-Aboriginal business(es), provided that the Aboriginal business(es) has at least 51 percent ownership and control of the joint venture.</p>
Acceptance Test	Any and all tests of all or any part of the Deliverables to be carried out by Canada or its representatives to determine if such Deliverables conform to the requirements, Specifications, warranties and standards set out in or incorporated into the Statement of Requirements.
Adaptive Maintenance	Modification of a software product performed after delivery to keep a software product usable in a changed or changing environment.
Agent	A CC Agent, or an "Agent" is an individual that performs the activities associated with responding to a Contact where such activities of an Agent are as set out in this RFQ.
Application	One of more a computer programs and includes all documentation, source code, media, data and databases that perform specific data processing and telecommunication tasks.
Application Deployment	The implementation of an application in whole or in part (e.g. deployment of an individual program that constitutes part of an application) and execution of required installation instructions; undertaking of data conversions/updates, database table updates (content updates e.g. lookups, standard lists), and/or database schema implementation.
Application Development	Building new applications or adding a large amount of new programming code as a new module to an existing application.
Application Enhancement	Changes required to provide additional or improved functionality, improve performance, or maintainability to existing applications.
Application Maintenance	The planned activities required to keep an Application or system operational, inclusive of Adaptive Maintenance, Corrective Maintenance, and Preventive Maintenance.
Application Operations	Middleware management of the operational state of an Application, including setup, configuration and tuning of middleware software environment; database tuning, tablespace management, optimization, capacity management (resource monitoring), parameter updates, application administration, monitoring application queues, file cleanup, event logs, start/stop services, configure application parameters, account management/access control.

“API” or “Application Programming Interface”	A clearly defined set of specifications and interfaces to support communications between software components. Examples include but are not limited to POSIX, Java APIs, and the Microsoft Windows API.
Application Support	The ongoing services required to keep an Application, system or other identified application asset operational. The Services include responding to and resolving Incidents; troubleshooting and investigating production issues; answering technical questions; and similar types of Services, activities and deliverables as defined by Tier 2 Application Support, Tier 3 Application Support.
Amendment	An addition to, deletion from, correction or modification of any solicitation document, resulting agreement or contract.
Bidder	The Respondent to an RFP.
Business Cycle	The full period between regular, scheduled events in the operation of the business. Business cycles may be daily, weekly, monthly, annually, or established on some other defined, repeated schedule. The primary Business Cycle for ESDC is Annual – i.e. a Business Cycle is 12 months continuous.
Business Day	A day other than a Saturday, Sunday or statutory holiday in the Province of Ontario
Business Hours	The hours of 6:00 AM through 6:00 PM inclusive during a Business Day in the Location of Work in which the work is being formed.
Business Resumption	Process of restoring the interrupted operations of a firm in the immediate aftermath of an accident, disaster, emergency, and/or threat.
Business Unit	An organizational unit within a company (e.g.: a division or unit within the Bidder’s organization) or a company (e.g.: specialized subcontractor) that provides a focal point for the provision of specialized skills or expertise in a target business area, service delivery area or infrastructure service. These specialized skills, services or expertise can be demonstrated by subject-area specific assets within that unit or company, and these assets may include but are not limited to people, processes and potentially specific infrastructure or technologies that provide heightened capabilities in that target business area.
Canada	Her Majesty the Queen in Right of Canada as represented for the purposes of this RFQ by the Minister of Public Services and Procurement Canada
Canada Contact Person	The contact provided in the Summary of Key Information
Canadian Industrial Security Directorate (CISD)	A directorate of Public Services and Procurement Canada responsible for administering industrial security in Canada through the Contract Security Program
Claim	Any contractual, extra contractual or statutory claim, demand, motion, action, cause of action, suit or proceeding
Code of Conduct	The Government of Canada's Code of Conduct for Procurement available at http://www.tpsgc-pwgsc.gc.ca/app-acq/cndt-cndct/contexte-context-eng.html
Company Security Officer (CSO)	The individual appointed by a Respondent/Proponent/Bidder/Contractor to be responsible for management of the security screening process for the Respondent/Proponent/Bidder/Contractor, and to be the sole point of contact for Canada in all security screening matters.
Contact	A Contact is an event initiated by an external party (e.g. citizens, clients) in which the external party communicates with the Contact Centre. The contact may be made using a modality for contact supported by the Contact Centre where modalities include but are not limited to voice calls, email, chat, text, click-to-talk. New modalities will emerge to reflect changes in preference for contact modalities by external parties.
Contact Centre	Contact Centre is a facility, staff (agents, supervisory, management, administrative, technical support, training, HR, and others), enabling technologies and infrastructure, and other assets as required to provide Contact Centre Services.
Contact Centre (CC) Services	The portfolio of services provided by a a Contact Centre to respond to a contact from an external party. Contact Centre Services may include but are not limited to: <ol style="list-style-type: none"> 1. CC Project Planning Services (see Section 5 of Appendix J);

	<ol style="list-style-type: none"> 2. CC Project Design Services (see Section 5 of Appendix J); 3. CC Project Onboarding Services including staffing, training, testing and making ready for live production (See Section 5 of Appendix J); 4. CC Agent, Supervisory and Operational services (see Section 5 of Appendix J); 5. CC Infrastructure Integration, Operation, Management and Support (see Section 5 of Appendix J); 6. CC Transition-out Services (see Section 5 of Appendix J); and 7. CC initial start-up, implementation and transition-in services (see Section 4 of Appendix J).
Content Creator	The author, creator of content.
Content Manager	An entity within an organization that is responsible for the co-ordination of content and content related metadata. The content manager is generally the individual responsible for the management of content for a defined subject area or group within the organization – e.g. staff responsible for content provided to the enterprise Contact Centre Knowledgebase.
Content Management	The management of content (including the associated metadata). Such content may be utilized in an Internet context (e.g. as web-content) or in an intranet context (e.g. in support of internal administrative systems or Contact Centre knowledgebase).
Contractor	The successful Bidder contracted by Canada for the supply and implementation of its proposed Integrated CC Services.
Core Respondent Team	The firms (Core Respondent Team Members) that join to form a team and use their combined corporate experience to provide a Response. One firm, however, must identify itself as the Main Contractor.
Core Respondent Team Member	An entity that the Respondent is proposing, to perform any part of the work and whose experience is being used to meet the RFP requirements.
Core Project Team	The roles and individuals (people) filling those roles that constitute the core of the implementation project team resources provided by the Contractor to perform the work. The Core Project Team must include the following roles: <ol style="list-style-type: none"> 1. Executive sponsor 2. Account Manager / Demand Manager 3. Operations and Support Lead 4. Integrated CC Solution Architect Lead 5. Transition Lead 6. Project Manager
Corrective Maintenance	Modification of a software product performed after delivery to correct discovered problems (e.g., bug fixes).
COTS	Commercial-off-the-shelf, i.e. Commercially Available products.
Data Sovereignty	The provisions supporting ESDC's rights to ensure that all access to ESDC's data and information is governed by the laws of Canada.
Disaster Recovery (DR)	The ability of an organization to respond to significant events that result in the temporary inability of the organization to function normally. With respect to provision of hosted critical business systems and services, DR incorporates specific capabilities to minimize service disruption by providing, for example, data centre services protection that is provided out of region and across data centres using replication technologies such as platform based replication and asynchronous storage based replication.
Development Tool	Any Contractor Materials that the Contractor or its Subcontractors use or would need to use to develop or modify, implement or maintain the Deliverables.
Documentation	Documents, whether in printed or electronic form, including installation guides, instructional materials, layouts, maintenance materials, manuals, system documentation, training materials, and user guides, and includes all developments and modifications to the foregoing.
Documentation Room	A defined physical or electronic location through which the Procurement Authority provides access to Documentation relevant to the procurement. A documentation room may be an actual room in which physical copies of documents are provided and access is controlled or which houses devices that provide managed access to electronic Documentation. Electronic

	mechanisms / locations may include providing relevant materials on removable media (e.g. CD) or provision of managed access to an on-line repository (e.g. website).
Document Safeguarding Clearance (DSC)	A clearance that permits the recipient of an FSC to safeguard and use Sensitive Information at the recipient's site.
Delivery Address	The address for delivery of the Responses set out in the Summary of Key Information;
Employee	A person that has a formal employer/employee relationship with the Respondent as defined by the Canada Revenue Agency (CRA).
End User	Internal staff or external parties that have been granted access to the Application for use.
Enquiry	The meaning set out in Section 2.5
ETL	Extract, transform and load and refers to a process for moving and transforming data, which is usually automated.
Evaluation Committee	The committee of persons appointed by the Procurement Authority to carry out the evaluation of Responses in accordance with the terms of this RFQ
Facility	The location within the sovereign territory of Canada from which the Contractor will provide and deliver Contact Centre Services as required by Canada.
Facility Security Clearance (FSC):	A clearance that permits the recipient of the clearance and its security-cleared employees to access Sensitive Information and/or restricted work sites
Fairness Monitor	The independent person/firm identified in the Summary of Key Information and who will perform the role set out in Section 1.5.2 of this RFQ
Full-Time Equivalent or FTE	The number of working hours that one full-time employee completes during a fixed time period, generally a day or a week. FTE calculations may include the role of part-time staff based on the contribution of hours worked – e.g. 2 part-time employees each working half-time are equivalent to 1 full-time employee. For the purposes of this initiative one FTE is equivalent to 37.5 hours of work in a 5 day work week.
Geographic Boundaries of Canada	All locations within Canada and locations in foreign jurisdictions, such as embassies or other Canadian government offices that are afforded consideration under diplomatic law permitting Canada to control its assets.
Incident	“Incident” as defined for ITIL V.3 means an unplanned interruption to an IT Service or a reduction in the quality of an IT Service.
Incident Management	“Incident Management” as defined in ITIL V3.0 Enterprise Incident Management (EIM) is “the process for dealing with all Incidents.”
Incident Resolution	Restoring an IT Service to the user(s) after repair and recovery from an Incident.
Incident Resolution Time	The Resolution Time to resolve an Incident. Incident Resolution Time may be defined within a Statement of Work and used as a measurement of Contractor Performance.
Incident Response Time	The time between the time at which the “Incident” is reported to the Service Provider (e.g. through a call to the ESDC Tier 1 helpdesk or through detection and alerts being posted automatically) and the time at which the Service Provider responds to the client organization that action is being taken to resolve the Incident. For the purposes of this RFP, the response time is the time calculated during Business Hours between the ESDC helpdesk issuing an Incident ticket to the Contractor and the Contractor responding to the ESDC helpdesk that the Contractor is investigating the Incident. Incident Response Time may be defined within a Statement of Requirements and used as a measurement of Contractor Performance.
Ineligibility and Suspension Policy	The Government of Canada's policy found at http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html , also referred to as Integrity Provisions
Ineligible Party	An entity referred to in Appendix E - Conflict of Interest - Unfair Advantage
Integrated Contact Centre Solution	An integrated solution providing the functionality as required for this ESDC Contact Centre solution as defined in Annex J of this RFQ.
Integrity Provisions	The Government of Canada's <i>Ineligibility and Suspension Policy</i> available at http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html
ITIL	Information Technology Infrastructure Library. See www.iti-officialsite.com
IVR Survey	Provides Quality Management by connecting Client (inbound or outbound or both) to IVR so

	that Client can respond to questions about Client experience
Joint venture	A joint venture is an association of two or more parties who combine their money, property, knowledge, expertise or other resources in a single joint business enterprise, sometimes referred as a consortium, to respond together on a requirement. In any contract they will be determined as being joint and several.
Laws	Those designated in Appendix E
Main Contractor	“ Main Contractor ” means the Contractor who is responsible for the completion of a project, under contract with the owner of the job. The obligation of the Main Contractor is to complete a project and include, but is not limited to, the obligations of any subcontractors contracted for the purposes of delivering the project. In the case of a Joint Venture submitting a response, the Main Contractor must be the Representative of the Joint Venture.
Named Agent	An Agent who is configured in the CC solution whether or not Agent is logged in.
National Interest	Concerns the defence and maintenance of the social, political and economic stability of Canada.
Platform	General purpose information systems components used to process and store electronic data, such as desktop computers, servers, network devices, and mobile devices. Platforms usually contain server hardware, storage hardware, utility hardware, software and operating systems.
Successful Bidder	The Bidder selected by the Procurement Authority during the RFP process to enter into final discussions to complete and sign the Contract
Preventive Maintenance	Maintenance to Software after deployment to detect and correct latent faults in the Software.
Procurement Authority	The authority identified in Summary of Key Information
Product	Any copyrighted/trademarked item that has been manufactured and marketed for sale off the shelf and for which the name of the manufacturer and the model or version # can be easily identified.
Product Provider	The provider of a product that has the intellectual property rights to license, maintain, delegate property rights including escrow rights, for that product.
Project	As generally described in Section 1.4 and further defined in Appendix J – Statement of Requirements, for the provision of Contact Centre Services in support of the 1 800 O-Canada and Custom Information Services (CIS) programs within Service Canada
Proponent	One of the Qualified Respondents that has executed a Submission Agreement and is invited to take part in the RFP
Proposal	The formal proposal submitted by a Bidder in response to the RFP
Push Messaging	The generation and transmission of messages from the system to identified recipients by email, text message or other means.
PWGSC	Public Works and Government Services Canada, also known as Public Services and Procurement Canada (PSPC)
Qualified Respondent	A Respondent who complies with Sections 4.2 of the RFQ
Rated Evaluation Criteria	The rated evaluation criteria set out in Appendix C – Rated Evaluation Criteria and Submission Requirements
Recovery Point Objective (RPO)	The maximum tolerable period of time in which data might be lost from an IT service due to a major incident.
Recovery Time Objective (RTO)	The duration of time and a service level within which a business process must be restored after a disaster
Request for Advance Ruling	A request made by a Respondent to Canada pursuant to Section 3.6 of this RFQ

Reliability Status	A security clearance level that allows an individual to access information and assets designated PROTECTED A and B
Respondent	The person or entity (or, in the case of a consortium, the persons or entities) submitting a Response
Respondent Team	for a Respondent means the Respondent and all of its Team Members
Respondent Representative	The person or persons identified as such in, and which signs the Master RFQ Submission Form (Form B-1 in Appendix B, Forms and Certifications), and which is fully authorized to represent the Respondent in any and all matters related to its Response
Respondent Representative Contact Individual	The individual who is the authorized representative of the Respondent Representative and the point of contact with Canada with respect to this RFQ
Response or RFQ Response	The formal response by a Respondent to this RFQ, submitted to Canada as described in Section 3.5 – Format Instructions and Appendix C – Evaluation Criteria and Submission Requirements;
Response Lead	The Respondent of a Core Respondent Team.
Response Submission Deadline or RFQ Response Submission Deadline	The deadline for submitting Responses set out in the Summary of Key Information
Representative of Consortia/Joint Venture	The member that has been appointed to act on behalf of all members of the joint venture/consortia and has the authority to bind all members.
RFP	The Request for Proposals, as amended over time
RFQ	Means this Request for Qualifications, as amended over time
Scalability	The ability to run the Software Solution on whatever size system makes sense and be able to move that application to either smaller or larger systems when needed.
Security Assessment	The on-going process of evaluating the performance of IT security controls throughout the lifecycle of information systems to establish the extent to which the controls are implemented correctly, operating as intended, and producing the desired outcome with respect to meeting the departmental business needs for security. Security assessment supports authorization by providing the grounds for confidence in information system security.
Security Authorization	The on-going process of obtaining and maintaining official management decision by a senior organizational official to authorize operation of an information system and to explicitly accept the risk of relying on the information system to support a set of business activities based on the implementation of an agreed upon set of security controls, and the results of continuous security assessment.
Security Posture	A characteristic of an information system that represents the ability of implemented security controls to satisfy the business needs for security and counter a selected threat environment. Note: <ol style="list-style-type: none"> 1. A security posture that satisfies the business needs for security and counters a selected threat environment is deemed adequate. The security posture may vary over time, as threats and business needs for security evolve, and vulnerabilities are discovered. To maintain an adequate security posture requires the review and update of implemented security controls to adapt to changes. 2. The security posture of an information system is assessed using the same methodology as security risks assessment, and is thus a closely related concept. The adequacy of a security posture implies that the residual risks are low.
Separate Geographic Zones	Separate Geographic Zones for the purposes of enabling Disaster Recovery / Business Continuity means that the physical locations of Facilities from which services are

	delivered are demonstrably on separate infrastructures, located in different climate zones, have access to sufficient local resources to maintain delivery of services and exhibits other attributes required to ensure continuity of services where one Facility becomes unable to provide required services or deliver required service performance. For clarity, multiple Facilities in a single municipal region are not considered to be in separate geographic zones. Multiple Facilities in a single Province or in multiple provinces where such Facilities share common climate, infrastructure or other seismic risk profiles are also not considered to be in separate geographic zones.
Services	All technical and professional services provided in accordance with the resulting contract and must include, without limitation, those services required to: <ol style="list-style-type: none"> 1. plan, design, install, configure, test, make operational, and support the Project throughout the term of the agreement; 2. provide project-related training and documentation; 3. provide ongoing operation of the Work both prior to and after Acceptance by Canada; 4. provide transition-out support on conclusion of the contract however this condition arises.
Software Solution	The suite of software products required to meet the requirements as defined in an associated statement of requirements. The Software Solution as proposed may consist of a software product augmented by plug-ins to meet individual functional requirements, or, may consist of an integrated suite of core portal environment and complementary function (products), or other combination of software products that in combination meet the requirements. The Software Solution may in whole or in part provide a solution.
Solution	The sum total of all products and implementation services as contemplated by the requirements set out in the associated Statement of Requirements or Statement of Requirements prepared by Canada for a specific business requirement and provided in accordance with the technical and financial proposals presented by a Bidder in its written response to an RFP.
Solution Provider	The firm that provides the Solution.
Submission Agreement	The agreement that Canada intends to invite a maximum of the four (4) highest Qualified Respondents to enter into as a condition of being selected as a Proponent to participate in the RFP, substantially in the form attached in Appendix G - Submission Agreement
Summary of Key Information	The table set forth immediately after the title page of this RFQ and which includes certain key information regarding the RFQ
Supervisor	An Agent Supervisor, or a "Supervisor" is an individual that performs the activities associated with supervising the activities of Agents responding to a Contact where such activities of a Supervisor are as set out in this RFx.
Supported Application	An application for which Canada has entered into a support or maintenance agreement with the Contractor.
System	A generic term used to mean network and other devices, operating systems, computing platforms, virtualization software and applications or any combination thereof. Its use is context specific.
Systems Integration	The integration of individual component subsystems to provide a unified solution to address a defined business requirement.
Systems Integration Services	The range of services required to perform system integration. Systems integration services may include but are not limited to planning, definition, design, implementation, coordination, integration, testing, deployment, training, program and project management, and operational support services.
Task Authorization (TA)	A TA is a structured administrative tool enabling PWGSC or a client to authorize work by a contractor on an "as and when requested" basis in accordance with the conditions of the contract.
Telecoil or T Coil	Electromagnetically: the signal inside the phone's speaker is picked up by the hearing aid's

or T Switch	"telecoil" or "T-coil", a special loop of wire inside the hearing aid
Threat Vector	A path or a tool that a hacker uses to gain access to a computer or network server in order to deliver a malicious outcome.
Third Party Service Provider	Any consultant, agent, advisor, or independent contractor who renders services to the Respondent/Bidder/Main Contractor who is not directly controlled by the Respondent/Main Contractor/Bidder
Tier 1 Application Support	The Services required for Incident Management, including being the first point of contact, which receives service requests and Incidents from users of the Application, and is outside the scope of the RFX.
Tier 2 Application Support	The Services required to respond to any service request that cannot be fulfilled by Tier 1 Application Support, including performing triage on Incidents, responding and resolving them, if possible, or routing to appropriate Tier 2 Application Support or Tier 3 Application Support groups based on predetermined escalation processes, coordination and oversight of response to service interruptions.
Tier 3 Application Support	The Services entailing in-depth technical understanding of application code and configuration to implement fixes or work-arounds to resolve Incidents pertaining to an Application. Tier 3 Application Support Services are provided in response to requests for service emanating from Tier 1 or Tier 2 Application Support resources that have been authorized to escalate support request for service to a Tier 3 Application Support resource.
Unit Testing	A method by which individual units of source code are tested to determine if they are fit for use. A unit is the smallest testable part of an Application.
User Acceptance Testing	The test phase where the user(s) from ESDCESDC test the application to ensure that it works and satisfies the business needs and is consistent with the requirements as expressed in the application Statement of Requirements.
Wisdom WFO	Workplace management tool currently used by Canada
Work	The supply and implementation of the integrated CC Solution to Canada and shall be understood to mean the provision of Products or Services or a combination thereof as will be set out in a Task Authorization for the Work.

APPENDIX B – FORMS AND CERTIFICATIONS

Instructions:

Respondents must provide the required forms, certifications and documentation as set out herein.

- > Form B-1 -Master RFQ Submission Form;
- > Form B-2 -Team Member Consent Declaration Form;
- > Form B-3 - Respondent Profile;

FORM B-1: MASTER RFQ SUBMISSION FORM

Name of Respondent	
Name and Title of Respondent Representative(s)	
Address	
Telephone Number(s)	
E-Mail Address	
Registered Address	
Preferred Language (English or French)	

The above named Respondent Representative hereby declares on its own behalf and, for clarity, on behalf of all Respondent Team Members that:

- a. it has the power and authority to bind the Respondent for the purpose of the RFQ;
- b. the Respondent is a:
 - a sole proprietor;
 - a limited liability or general partnership;
 - a corporation; or
 - an unincorporated consortium carrying on business under the above mentioned Respondent name
- c. if invited to participate in the RFP, the Respondent would prefer to receive correspondence and associated procurement documentation in the following language during the RFP process. Please select just one (1) language as the Respondent's preferred language:
 - English, or
 - French
- d. this Form B-1 - RFQ Master Submission Form has not been modified in any manner, except to include the Respondent's required information and the Amendment information required by this Form; and
- e. the Respondent and its affiliates are in compliance with the Integrity Provisions and with the Code of Conduct for Procurement set forth in Appendix E, Section 12 and 13.

In witness whereof, the Respondent Representative has executed this Form B-1 - Master RFQ Submission Form as of the date indicated below.

Respondent Representative:

Per: _____

Name: _____

Title: _____

Date: _____

Signature

I/We have authority to bind the Respondent Representative and to bind the Respondent and each Respondent Team Member

FORM B-2: JOINT VENTURE/CONSORTIA DECLARATION

Respondents who respond as a joint venture/consortia must indicate clearly that it is a joint venture and provide the following information:

1. the name of the representative of the joint venture/consortia, i.e. the member chosen by the other members to act on their behalf, if applicable;
2. the name of the joint venture/consortia, if applicable; and
3. the legal name and procurement business number for each member of the joint venture/consortia.

Representative of the joint venture/consortia	
Name of the joint venture/consortia	
Legal name of each member of the joint venture/consortia	
Procurement business number for each member of the joint venture/consortia	

If the information is not clearly provided in the response, the Respondent must provide the information on request from the Procurement Authority.

The response and any resulting contract must be signed by all the members of the joint venture/consortia unless one member has been appointed to act on behalf of all members of the joint venture/consortia and has the authority to bind all members. The Procurement Authority may, at any time, require each member of the joint venture/consortia to confirm that the representative has been appointed with full authority to act as its representative for the purposes of the RFQ, any resulting RFP and any resulting contract. If a contract is awarded to a joint venture/consortia, all members of the joint venture/consortia will be jointly and severally or solidarily liable for the performance of any resulting contract.

FORM B-3: RESPONDENT PROFILE

1 – GENERAL

Respondent's Registered legal Business Name ("Respondent"):	
Street Address:	
City/Province:	
Postal Code:	
Phone Number:	
Parent Organization (if any):	
Names of Board of Directors or Owner(s):	
Procurement Business Number:	
RFQ Contact Person	Name: Title: Email Address: Telephone Number
Respondent is an Aboriginal Business as defined in Appendix A (Yes / No)	

2 - RESPONDENT TEAM STRUCTURE

Primary Provider of Resources for the transition of ESDC from their current Contact Centre Services contract to a Contractor provided service as set out in the RFQ Statement of Requirements at Appendix J	
Primary Provider of resources for the ongoing delivery of 1 800 O-Canada Contact Centre Services as set out in the RFQ Appendix J	

3 - LIST OF SUBCONTRACTORS /THIRD PARTY SERVICE PROVIDERS THAT WOULD BE INVOLVED IN THE DELIVERY OF 1-800 O-Canada CONTACT CENTRE SERVICES (i.e. provider of voice telephony services, data processing related services, etc.)

SUBCONTRACTOR LEGAL NAME	SUBCONTRACTOR BUSINESS NAME	SERVICES PROVIDED

APPENDIX C – EVALUATION CRITERIA AND SUBMISSION REQUIREMENTS

1.0 Instructions to Respondents

- 1.1 Respondents should submit their Responses in accordance with the requirements set out in Section 3.5 Response Form and Content.
- 1.2 In its Response, the Respondent should demonstrate its understanding of the requirements contained in the RFQ and explain how it will meet these requirements. The Respondent should demonstrate its experience and describe its approach for carrying out the Project in a thorough, concise and clear manner.
- 1.3 The Response should address clearly and in sufficient depth the points that are subject to the Mandatory and Rated Criteria against which the Response will be evaluated. Simply repeating the statement contained in the RFQ is not sufficient.
- 1.4 If the quantity of reference projects in the Response exceeds the limit stipulated by the submission requirements, projects will be evaluated in the order they are supplied and any extraneous examples will not be evaluated.
- 1.5 Projects may be referenced in response to more than one submission requirement. However, Respondents should complete one (1) project experience form for each reference to a project (even if the project is referred to more than once) and not cross-reference projects referred to in responses to other sections. For example, if a project is referenced in a Respondent's response to Section B-2 and the Respondent intends to use the same project in its response to Section C-2, the Respondent must complete a separate project experience form for each of Section B-2 and Section C-2.

2.0 RFQ Evaluation Summary

- 2.1 The Mandatory Criteria will be evaluated on a pass/fail basis (i.e. responsive / non-responsive) and subject to the Phased Response Compliance Process described in Section 4 – Evaluation – 4.1 Conduct of Evaluation. To be responsive, Respondents must clearly detail how they meet the criteria identified in the mandatory requirement. Simply stating that the Respondent complies with the requirement is not sufficient. The Response will fail to meet an Eligible Mandatory Criterion where Canada determines that the information provided is insufficient in detailing how the Respondent meets a mandatory requirement(s).
- 2.2 Responses to the Rated Evaluation Criteria will be evaluated in accordance with the applicable scales found in Appendix D - Applicable Scales for Rated Evaluation Criteria.
- 2.3 Responses will be evaluated in accordance with the criteria and weight factors indicated in 3.0 Technical Evaluation Criteria and Appendix D below. To be considered as a Qualified Respondent, Responses must obtain the minimum weighted scores specified. Failure to achieve the applicable minimum score will prevent a Respondent from proceeding further in the evaluation process.
- 2.4 Each reference project provided in relation to the experience assessed in criteria R-1, R-2, R-3, R-4 will be rated individually against the Rated Evaluation Criteria. The individual scores will then be averaged to arrive at an aggregate score and the applicable weighting will then be applied.

3.0 Technical Evaluation

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

3.1 Mandatory Technical Criteria

The Mandatory Criteria listed below will be evaluated on a met/not met (i.e. responsive/non-responsive or compliant/non-compliant) basis.

Where a mandatory criteria requests a Respondent to ‘**demonstrate**’: to be responsive, the technical response must substantiate how the Respondent meets the criteria identified in the mandatory requirement. The substantiation must not simply be a repetition of the requirement(s), but must provide sufficient detail to demonstrate how they will meet the requirements. Simply stating that the Response complies with the requirement is not sufficient. The response will fail to meet a mandatory criterion where Canada determines that the substantiation is insufficient in detailing how the Respondent demonstrates a mandatory requirement(s).

#	Mandatory Criteria	Met (yes/No)	Page Number(s) in Bid
M-1	<p><u>Respondent Profile – Core Contact Centre Services Organization</u></p> <p>The Respondent must have an existing Business Unit that is focused on the provision of Contact Centre Services (as defined in Appendix A) for external clients (i.e. third party organizations not affiliated with the Respondent).</p> <p>The Respondent must demonstrate compliance by identifying:</p> <ol style="list-style-type: none"> 1. the Contact Centre Services Business Unit with explicit responsibility for the delivery of CC Services; 2. where the Contact Centre Services Business Unit is positioned within the Respondent’s corporate structure (e.g. by providing a corporate organization structure which clearly identifies the position of the CC Services Business Unit in that structure); and, 3. the portfolio Contact Centre Services provided by the Business Unit. The services must be comparable to the Contract Centre Services as defined in Appendix A with explicit reference to handling of incoming voice calls as envisaged for the ESDC 1 800 O-Canada and CIS initiatives. 		
	<p><u>Response</u></p>		

<p>M-2</p>	<p><u>Respondent Profile – Previous Project Experience</u></p> <p>The Respondent must provide 3 projects that demonstrate that the Respondent has performed the Main Contractor role in projects for the provision of Contact Centre Services as defined in Appendix A. The Respondent must complete the Main Contractor Sample Project form provided in Annex C-1.1 Previous Project Experience References for each project.</p> <p>The provided projects must each:</p> <ol style="list-style-type: none"> 1. Be for the Respondent directly. The experience of subcontracted organizations will not be accepted for evaluation purposes in response to this criterion. 2. Have delivered services from a Respondent facility in Canada. 3. Have provided services requiring a minimum of 100 concurrent agents from Respondent facilities in Canada. 4. Have provided Contact Centre Services for which independent security vetting was required for agents prior to training. 5. Have provided Contact Centre Services in English and French. 6. At least one of the projects must have been in live operation accepting incoming voice calls for a period of at least 6 months from the date of issue of this RFQ. 7. At least one of the projects must have provided services requiring a minimum of 175 concurrent agents from Respondent facilities in Canada <p>In the case of a Joint Venture submitting a response, the Main Contractor must be the Representative of the Joint Venture.</p>		
<p>Response</p>			

<p>M-3</p>	<p><u>Respondent Profile – Core Infrastructure Resources</u></p> <p>The Respondent must demonstrate that they have sufficient resources in Canada to provide and deliver a CC initiative of the size and scope of the required ESDC CC initiative by:</p> <ol style="list-style-type: none"> 1. Identifying the locations in Canada from which they currently provide Contact Centre Services where: <ol style="list-style-type: none"> a. The Respondent must provide the location (city, province) of each facility and the number of agents currently working at that facility. b. At least one Respondent facility in Canada must currently house a minimum of 175 concurrent CC agents and be located in an area with existing commercial high-capacity network services. 2. Identifying the number of full time Employees in Canada providing Contact Centre Services including specifically the following details: <ol style="list-style-type: none"> a. The number of Employees providing CC agent services (must be greater than 300). b. The number of Full-Time Equivalents (FTEs) providing quality assurance (QA). c. The number of FTEs providing supervisory, workforce management and other critical operational support services such as training, technical support and reporting. 		
<p>Response</p>			

M-4	<p><u>Respondent Profile – Security</u></p> <p>The Respondent must hold a valid Designated Organization Screening (DOS) with approved Document Safeguarding and Production Capabilities at the level of PROTECTED B, issued by the Canadian Industrial Security Directorate (CISD), Public Services and Procurement Canada (PSPC), or have been sponsored for DOS.</p> <p>Respondents must demonstrate compliance by providing a valid Security Screening Certificate file number issued by CISD that confirms DOS clearance at the level of Protected B or confirmation of sponsorship.</p>		
	<p><u>Response</u></p>		
M-5	<p><u>Respondent Profile – Financial Viability</u></p> <p>The Respondent must be financially viable to fulfill the requirement. By submitting a proposal in response to this RFQ, any Respondent will have consented to Canada performing its own financial viability assessment of the Respondent.</p> <p>To determine the Respondent’s financial viability, Canada will, by written notice to the Respondent, require the submission of financial information as described in 4.3.1 – Financial Viability Assessment. Respondents must indicate in the Response below that they acknowledge and accept their consent to Canada performing its own financial viability assessment of the Respondent.</p> <p>Respondents that do not provide such consent or that are determined by Canada not to demonstrate sufficient financial viability will be removed from further consideration.</p>		
	<p><u>Response</u></p> <p><u>Response – agree to provision</u></p>		

<p>M-6</p>	<p><u>Respondent Profile – Facility Location</u></p> <p>Respondents must indicate in the Response below that they acknowledge and accept that the location of the Respondent Facilities that will be proposed in response to any RFP resulting from this procurement process must:</p> <ol style="list-style-type: none"> 1. be located in an area where a carrier grade, redundant fibre network is available with the following characteristics: <ol style="list-style-type: none"> a. a minimum bandwidth requirement of 1gbps that can be upgraded as required; and b. a latency tolerance of no more than 100ms roundtrip to Canada’s datacenters located in Barrie in Ontario and Gatineau in Quebec. 2. Be located in municipal areas with a population base sufficient to sustain and support the staffing requirements including the linguistic profile requirements of this ESDC initiative. <p>Respondents that do not provide such affirmation will be removed from further consideration.</p>		
<p><u>Response</u></p> <p><u>Response – agree to provision</u></p>			

3.2 Rated Technical Criteria

Bids will be evaluated against the following point rated technical criteria, using the evaluation factors and weighting indicators specified for each criterion. Bids not meeting the identified minimum point requirements will be deemed non-responsive.

#	Rated Evaluation Criteria	Scoring Method
R-1	Corporate Capability	
R-1.1	<p><u>Understanding of 1 800 O-Canada CC Project Requirements</u></p> <p>The Respondent should demonstrate an understanding of the overall ESDC CC project requirements and deliverables as set out in the RFQ SOR at Appendix J by describing concisely and in its own words:</p> <ol style="list-style-type: none"> 1. The overall project objectives as set out in the attached SOR 2. The target CC environment as expected by Canada 3. The requirement of the Respondent to provide appropriate facilities and resources in a geographic location with required population and network services 4. The overall incremental implementation approach and project schedule 5. The role of Canada in providing infrastructure and services in support of the target environment 6. The scope of the required Contact Centre Services in support of the Wave 1 deployments for both 1 800 O-Canada and CIS projects 7. The potential scope of services in response to changes in technology, policy and business requirements over the project lifecycle 8. The requirements for flexibility in deployment and operations (in particular, scalability/flexibility requirements and fast turnaround time for new CIS projects or changing service delivery requirements or campaigns for existing services) 9. The requirements for minimizing risk in the migration and deployment approach adopted 10. The security requirements associated with the location of work and the resources employed 	<p>Points will be awarded in the following manner:</p> <p>5 pts = Response addresses 9 or more of points 1 through 10 4 pts = Response addresses 7 or 8 of points 1 through 10 3 pts = Response addresses 6 of points 1 through 10 2 pts= Response addresses 4 or 5 of points 1 through 10 1 pt = Response addresses 3 of points 1 through 10 0 pts = Response address less than 3 of points 1 through 10</p> <p>Note: "Addresses a point" means that the Respondent has provided sufficient level of detail to demonstrate the point (e.g. recognition of the requirement to use government provided call management and knowledgebase systems and services) and indicates that they recognize that it is a requirement that needs to be addressed in the scope of the project and identified their assumptions in creating their response.</p> <p>Responses to this criterion which contain an excessive amount of text copied directly from the RFQ and/or supporting material will not be regarded as indicating an understanding of the proposed ESDC CC project requirements and deliverables.</p>
Response:		

#	Rated Evaluation Criteria	Scoring Method
R-1.2	<p><u>Respondent Business Maturity - Years</u></p> <p>The Respondent should state the number of years for which the Respondent has been providing Contact Centre Services (as defined in Appendix A) in Canada.</p>	<p>Points will be awarded in the following manner:</p> <p>5 pts = >=7 or more years delivering Contact Centre Services in Canada</p> <p>4 pts = >=5 < 7 years</p> <p>3 pts = >=4 < 5 years</p> <p>2 pts = >=3 < 4 years</p> <p>1 pt = >=2 <3 years</p> <p>0 pts = <2 years or no comparable response</p>
<p>Response:</p>		
R-1.3	<p><u>Respondent Business Maturity – Sector</u></p> <p>The Respondent should demonstrate maturity in the CC industry by:</p> <ol style="list-style-type: none"> 1. Identifying membership to Canadian CC professional organizations (e.g. provincial CC associations) 2. Identifying CC industry awards received within the past 3 years from date of issue of the RFQ 3. Identifying third-party benchmarking performed on CC operations in Canada within the past 3 years and providing summary results (e.g. Service Quality Management benchmarks). 	<p>Points will be awarded in the following manner:</p> <p>5 pts Respondent identifies membership to one or more Canadian CC professional organization, identifies one or more industry awards received within the past 3 years, and, provides a third party benchmark report of their CC performance in Canada.</p> <p>4 pts Respondent identifies membership to one or more Canadian CC professional organization, identifies one or more industry awards received within the past 3 years, and, identifies a third party benchmark but does not provide report of their CC performance in Canada.</p> <p>3 pts Respondent identifies membership to one or more Canadian CC professional organization, does not identify industry awards received within the past 3 years, and, identifies a third party benchmark but does not provide report of their CC performance in Canada.</p> <p>2 pts Respondent identifies membership to one or more Canadian CC professional organization, does not identify industry awards received within the past 3 years, and, identifies a third party benchmark but does not provide report of their CC performance in Canada.</p> <p>1 pts Respondent identifies membership to one or more Canadian CC professional organization.</p> <p>0 pts Respondent is not a member of a Canadian CC professional organization or does not provide a response.</p>
<p>Response:</p>		

#	Rated Evaluation Criteria	Scoring Method
R-1.4	<p>Respondent Business Facilities in Canada</p> <p>The Respondent should describe the facilities in Canada from which the Respondent provides CC services by stating for each such facility:</p> <ol style="list-style-type: none"> 1. The location (City, Province); 2. The number of CC agents, supervisory and support staff operating from that location. 3. The connectivity of the CC facility to redundant, high-bandwidth data communications 	<p>Points will be awarded in the following manner:</p> <p>5 pts Respondent identifies 2 or more facilities in Canada from which the Respondent provides CC services where:</p> <ol style="list-style-type: none"> 1. at least 2 identified facilities houses 175 or more CC agents, supervisory and support staff; 2. at least 2 identified facilities housing 175 or more CC agents, supervisory and support staff are in separate Geographic Zones for the purposes of enabling disaster recover / business continuity; and, 3. at least 2 identified facilities housing 175 or more CC agents, supervisory and support staff are located in areas with existing commercial high-capacity network services. <p>4 pts Respondent identifies 2 or more facilities in Canada from which the Respondent provides CC services where:</p> <ol style="list-style-type: none"> 1. at least one such facility houses 175 or more CC agents, supervisory and support staff and a second facility houses at least 100 or more CC agents, supervisory and support staff; 2. the facility housing 175 or more CC agents, supervisory and support staff and a second facility housing at least 100 or more CC agents, supervisory and support staff are in separate Geographic Zones for the purposes of enabling disaster recover / business continuity; and, 3. the facility housing 175 or more CC agents, supervisory and support staff and a second facility housing at least 100 or more CC agents, supervisory and support staff are located in areas with existing commercial high-capacity network services. <p>3 pts Respondent identifies 2 or more facilities in Canada from which the Respondent provides CC services where:</p> <ol style="list-style-type: none"> 1. at least one such facility houses 175 or more CC agents, supervisory and support staff and a second facility houses at least 50 or more CC agents, supervisory and support staff; 2. the facility housing 175 or more CC agents, supervisory and support staff and a second facility housing at least 50 or more CC agents, supervisory and support staff are in separate Geographic Zones for the purposes of enabling disaster recover / business continuity; and, 3. the facility housing 175 or more CC agents, supervisory and support staff and a second facility housing at least 50 or more CC agents, supervisory and support staff are located in areas with

#	Rated Evaluation Criteria	Scoring Method
		<p>existing commercial high-capacity network services. 0 pts Respondent identifies no locations in Canada from which the Respondent delivers CC Services.</p>
<p>Response:</p>		
R-1.5	<p>Respondent Capability – Range of Supported CC Services across all clients. The Respondent should describe the range of contact centre Contacts supported where the range of contact types over the past 12 months should include but is not limited to:</p> <ol style="list-style-type: none"> 1. Traditional incoming voice contacts at volumes greater than 1000 calls per peak hour 2. Incoming email contacts at average volume greater than 100 per day 3. Services in support of web-channel click-to-talk 4. Services in support of chat 5. Services in support of text messaging 	<p>Points will be awarded in the following manner: 5 pts Respondent identifies support for 5 of points 1 through 5 including points 1 and 2. 4 pts Respondent identifies support for 4 of points 1 through 5 including points 1 and 2. 3 pts Respondent identifies support for points 1 and 2. 0 pts Respondent does not provide response.</p>
<p>Response:</p>		
R-1.6	<p>Respondent Capability – CC Resourcing and Management The Respondent should demonstrate that it has sufficient experience in recruiting, employing, and managing resources for CC initiatives as described in section 2 of Appendix J by identifying the number of Employees in Canada currently employed by the Respondent's Contact Centre Services organization excluding any contractors</p>	<p>Points will be awarded in the following manner: 5 pts = 500 or more Employees 4 pts = 400 up to and including 499 Employees 3 pts = 300 up to and including 399 Employees 0 pts = response does not address requirement, no response</p>
<p>Response:</p>		
R-1.7	<p>Respondent Capability – Training</p>	<p>Points will be awarded in the following manner:</p>

#	Rated Evaluation Criteria	Scoring Method
	<p>The Respondent should demonstrate an established training capability by:</p> <ol style="list-style-type: none"> 1. Identifying the number of Respondent full time Employees providing training 2. Describing the Respondent's overall approach to training where such approach should address: <ol style="list-style-type: none"> a. Development and delivery of training materials (e.g. classroom, on-line, computer-based training). b. Use of client provided training materials c. New agent training for program or services d. Testing and validation of capability to provide service e. Training associated with revisions or enhancements to CC client programs or services 	<p>5 pts = The Respondent has identified a minimum of 5 full time Employees providing training and has provided a detailed and comprehensive response to points 2a through 2e. 4 pts = The Respondent has identified a minimum of 5 full time Employees providing training and has provided a very good and comprehensive response to points 2a through 2e. 3 pts = The Respondent has identified a minimum of 5 full time Employees providing training and has provided a good response to points 2a through 2e; or, the Respondent has identified a minimum of 3 full time Employees providing training and has provided at least a very good and comprehensive response to points 2a through 2e. 2 pts = The Respondent has identified a minimum of 3 full time Employees providing training and has provided a fair response to points 2a through 2e. 1 pts = The Respondent has identified a minimum of 3 full time Employees providing training and has provided a poor response to points 2a through 2e, or, the has not identified a minimum of 3 Employees providing training and has provided at least a good and comprehensive response to points 2a through 2e. 0 pts = Response does not address the requirement.</p>
Response:		
R-1.8	<p><u>Respondent Capability – Staff Tenure</u> The Respondent should demonstrate a track record in retaining trained staff by:</p> <ol style="list-style-type: none"> 1. Stating the average employment tenure for employees in Canada as calculated over a 4 year period ending July 31, 2018 (i.e. average number of years of employment with the Respondent). 2. Describing the Respondent's overall approach to staff retention including: <ol style="list-style-type: none"> a. Consideration of retention attributes in recruitment process when recruiting and selecting new agents. b. Consideration of financial compensation and related benefits in staff retention. 	<p>Points will be awarded in the following manner:</p> <p>5 pts = The Respondent has identified an average employment tenure of 4 or more years and has provided a detailed and comprehensive response to points 2a through 2d. 4 pts = The Respondent has identified an average employment tenure of 4 or more years and has provided a very good and comprehensive response to points 2a through 2d. 3 pts = The Respondent has identified has identified an average employment tenure of 4 or more years and has provided a good response to points 2a through 2d; or, the Respondent has identified an average employment tenure of 3 or more years and has provided at least a very good and comprehensive response to points 2a through 2d.</p>

#	Rated Evaluation Criteria	Scoring Method
	<p>c. Consideration of training and skills development in staff retention</p> <p>d. Consideration of staff retention in determining the location of its facilities</p>	<p>2 pts = The Respondent has identified an average employment tenure of 2 or more years and has provided a fair response to points 2a through 2d.</p> <p>1 pts = The Respondent has an average employment tenure of 2 or more years and has provided a poor response to points 2a through 2d, or, the Respondent has not identified a retention rate and has provided at least a good and comprehensive response to points 2a through 2d.</p> <p>0 pts = Response does not address the requirement.</p>
Response:		
R-1.9	<p><u>Respondent Capability – Innovations and Investment</u></p> <p>The Respondent should demonstrate commitment to continued innovation and investment in their Contact Centre Services capability by providing up to 3 examples of its use of innovative business processes or technologies to reduce costs or increase effectiveness in service delivery. Examples may include but are not limited to:</p> <ol style="list-style-type: none"> 1. Use of enhanced data analytics 2. Use of artificial intelligence tools and methods 3. Adoption of channel shifting tools and methods 4. Adoption of “green” / environmentally friendly processes and methods 	<p>Points will be awarded in the following manner:</p> <p>5 pts = The Respondent has provided a detailed response addressing 3 examples of application of innovative business processes or technologies to reduce costs or increase effectiveness in service delivery.</p> <p>4 pts = The Respondent has provided a good response addressing 3 examples of application of innovative business processes or technologies to reduce costs or increase effectiveness in service delivery.</p> <p>3 pts = The Respondent has provided a general response lacking in detail addressing 3 examples of application of innovative business processes or technologies to reduce costs or increase effectiveness in service delivery.</p> <p>2 pts = The Respondent has provided a general response lacking in detail and providing at most 2 examples of application of innovative business processes or technologies to reduce costs or increase effectiveness in service delivery.</p> <p>1 pts = The Respondent has provided a general response lacking in detail and providing at most 1 example of application of innovative business processes or technologies to reduce costs or increase effectiveness in service delivery.</p> <p>0 pts = Response does not address examples of application of innovative business processes or technologies to reduce costs or increase effectiveness in service delivery.</p>
Response:		

Rated Evaluation Criteria		Scoring Method
#	Rated Evaluation Criteria	Scoring Method
R-2	References	
R-2.1	<p><u>Respondent Implementation Project References</u> The Respondent should demonstrate that it has experience in providing the range of services that are required for the 1 800 O-Canada CC initiative (as illustrated by the 1 800 O-Canada and portfolio of CIS projects) by identifying up to 3 relevant CC projects.</p> <p>Respondents should complete the CC Implementation Project Services reference form provided in Annex C-1.2: CC Implementation Project Services References for each of the proposed reference projects.</p>	<p>Points will be awarded in the following manner:</p> <p>Each individual reference will be scored according to the scoring guide set out in Annex C-1.2 CC Implementation Project Services References.</p> <p>The weight of each project is as set out in Appendix D Table 1 – Technical Capability and Experience – Weighting and Minimum Score</p>
R-2.2	<p><u>Respondent Project Onboarding, Staffing and Recruitment References</u> The Respondent should demonstrate its capability to identify and recruit qualified resources in a timely manner by providing up to 3 project references for which the Respondent recruited, trained, and deployed at least 175 agents in support of a client CC project by completing the Onboarding and Staffing Reference Project form provided in Annex C-1.3: Onboarding and Staffing Reference Project Form for each referenced project.</p>	<p>Points will be awarded in the following manner:</p> <p>Each individual reference will be scored according to the scoring guide set out in Annex C-1.3: Onboarding and Staffing Reference Project Form.</p> <p>The weight of each project are as set out in Appendix D Table 1 – Technical Capability and Experience – Weighting and Minimum Score</p>
R-3	Processes and Methodologies	
R-3.1	<p><u>Respondent Capability – Process and Methodology</u> The Respondent should demonstrate that it has documented processes and methodologies for the planning and implementation of CC projects by providing sample documents demonstrating the major phases in the Respondent's onboarding approach and the planning documents produced. Documents submitted for evaluation may include Respondent transition and operational planning templates and should address the following points: 1) Validation of user requirements including services, service levels, language, security, branding, reporting and related requirements. 2) Development of high-level solution design.</p>	<p>Points will be awarded in the following manner:</p> <p>5 pts = Response addresses 7 or more of points 1 through 8 including sample documents for every point addressed. 4 pts = Response address 6 of points 1 through 8 including sample documents for every point addressed. 3 pts = Response addresses 5 of points 1 through 8 including sample documents for every point addressed. 2 pts = Response addresses 3 or more of points 1 through 8 without including sample documents for every point addressed. 1 pt = Response addresses 2 of points 1 through 8</p>

#	Rated Evaluation Criteria	Scoring Method
	<ul style="list-style-type: none"> 3) Development of detailed telephony migration and operations. 4) Development of detailed telecommunications and technical infrastructure design and implementation 5) The development and implementation of a detailed staffing and training plan. 6) The development and implementation of master test plans. 7) The integration of multiple service providers to form an integrated "Core Bid Team" where required. 8) The role of governance in establishing effective project management with the client organization. 	<p>0 pts = Response addresses less than 2 of points 1 through 8 or provides no relevant response</p> <p>Note:</p> <ol style="list-style-type: none"> 1. "Addresses a point" means that the response demonstrates that the submitted documents, processes or methodologies are part of the Respondent's methodology. 2. Sample documents may include but are not limited to templates, checklists, training materials, and extracts from client reports.
Response:		
R-3.2	<p>Respondent Capability – Process and Methodology</p> <p>The Respondent should demonstrate how its prior experience in implementing start-up and initial transition for CC projects would be applied to the ESDC CC initiative as described section 4 of Appendix J, by demonstrating how it will use:</p> <ol style="list-style-type: none"> 1. the Respondent's experience, methodologies and templates based on previous migration projects; 2. the Respondent's specific CC planning and implementation training for Respondent staff; 3. the Respondent's CC specific start-up and initial transition processes, tools and technologies. <p>The experience of subcontracted organizations will not be accepted for evaluation purposes in response to this criterion.</p>	<p>Points will be awarded in the following manner:</p> <p>5 pts = Response has addressed the requirements in points 1 through 3 and has tailored its response to the ESDC CC Project.</p> <p>4 pts = Response addressed the requirements in 2 of points 1 through 3 and has tailored its response to the ESDC CC Project.</p> <p>3 pts = Response has addressed the requirements in points 1 through 3 and has not tailored its response to the ESDC CC Project.</p> <p>2 pts = Response addressed the requirements in 2 of points 1 through 3 and has not tailored its response to the ESDC CC Project.</p> <p>1 pt = Response has addressed at most 1 of points 1 through 3.</p> <p>0 pts = Response does not address any of points 1 through 3.</p>
Response:		

#	Rated Evaluation Criteria	Scoring Method
R-4	Security and Privacy	
R-4.1	<p><u>Project Security – Security Policy</u></p> <p>The Respondent should demonstrate that it has a comprehensive security policy that is aligned with the security requirements of this ESDC CC initiative as set out in Appendix J Section 3.4. The Respondent should demonstrate that the proposed security policy addresses:</p> <ol style="list-style-type: none"> 1. The requirement to ensure that only resources with the level of security clearances required for a specific task are permitted to perform the task; 2. The requirement to ensure that the security policy is applied throughout the entire Respondent Team including all subcontractors. <p>The security policy of subcontracted organizations will not be accepted for evaluation purposes in response to this criterion.</p> <p>Response:</p>	<p>Points will be awarded in the following manner:</p> <p>5 pts = Response has addressed the requirements in points 1 and 2 and has tailored its response to the ESDC CC Project..</p> <p>3 pts = Response has addressed the requirements in one of points 1 or 2, and has tailored its response to the ESDC CC Project.</p> <p>2 pts = Response addressed the requirements in one of points 1 or 2 and has not tailored its response to the ESDC CC Project.</p> <p>0 pts = Response addresses neither points.</p>
R-4.2	<p><u>Project Security - Privacy Policy</u></p> <p>The Respondent should demonstrate its understanding of the requirements for compliance with applicable privacy legislation and processes by providing the Respondent's corporate Privacy Protection Plan or equivalent privacy policy and process materials. The Respondent's Privacy Protection Plan should address the following key components:</p> <ol style="list-style-type: none"> 1. Prohibition of trans-border flow of Personal Information (communication, transfer, disclosure, retention, processing and management of Personal Information outside the boundaries of Canada) throughout its lifecycle and all Contract stages; 2. Provisions for applying the Privacy Protection Plan to subcontractors, contractors and Employees; 3. Provision of Personal Information protection and privacy agreements with subcontractors, agent, Employees and contractors; 	<p>Points will be awarded in the following manner:</p> <p>5 pts = Response addresses 10 or more of points 1 through 13 including sample documents demonstrating how point is addressed.</p> <p>4 pts = Response addresses 8 or 9 of points 1 through 13 including sample documents demonstrating how point is addressed.</p> <p>3 pts = Response addresses 7 of points 1 through 13 including sample documents demonstrating how point is addressed.</p> <p>2 pts = Response addresses 6 of points 1 through 13 including sample documents demonstrating how point is addressed , or addressed more than 6 points but without including sample documents demonstrating how point is addressed.</p>

#	Rated Evaluation Criteria	Scoring Method
	<p>4. Provisions to ensure that Personal Information is protected against such risks as loss or theft, as well as unauthorized access, disclosure, transfer, copying, use, modification or disposal;</p> <p>5. Provisions emphasizing as the client, the Government of Canada's sovereignty over the data and information;</p> <p>6. Provisions for maintaining the accuracy, privacy and integrity of Personal Information;</p> <p>7. Provisions for safeguarding of Personal Information through the duration of the Contract;</p> <p>8. Provision of access controls governing authorized personnel with access to Personal Information and databases;</p> <p>9. Provision of detailed audit trails and reports on all access to government information or databases;</p> <p>10. Provision of records of and proof of any government information destruction;</p> <p>11. Provision that the contractor, its subcontractors, agents, and Employees are prohibited from the accessing, communication, transfer, disclosure, retention, processing and management of Personal Information without the written permission of the Government of Canada.</p> <p>12. Provision that access to and the migration of Production Data (data with Personal Information) to be executed only by personnel so authorized by Canada.</p> <p>13. Provision of a "privacy breach protocol" that describes and includes detail on the notification processes and records associated with any Personal Information disclosure or breaches throughout the information lifecycle during all stages of planning, development, testing implementation and service delivery, and that describes how any privacy breaches will be identified, reported, investigated, and mitigated.</p> <p>The Privacy Protection Plan of subcontracted organizations will not be accepted for evaluation purposes in response to this criterion.</p>	<p>1 pt = Response addresses 4 or 5 of points 1 through 13 including sample documents demonstrating how point is addressed, or addressed more than 4 points but without including sample documents demonstrating how point is addressed.</p> <p>0 pts = Response addressed less than 4 of points 1 through 13 or provides no relevant response</p> <p>Note: "Addresses a point" means that the response demonstrates that the required provisions or activities are explicitly provided for through a component of the Respondent Privacy Policy or equivalent.</p>
Response:		

#	Rated Evaluation Criteria	Scoring Method
R-4.3	<p><u>Project Security – Disaster Recovery / Business Continuity</u> The Respondent should demonstrate its processes and infrastructure for the assurance of business continuity and recovery from major service disruptions by:</p> <ol style="list-style-type: none"> 1. Outlining the Respondent’s overall approach to ensuring continuity of services in response to service disruptions (e.g. power, telecommunications, data processing services, and staffing availability). 2. Outlining the Respondent’s disaster recovery plan for technical and operational infrastructure and processes to recover from major outages including the target recovery time objective, RTO (e.g. for recovery from prolonged loss of service due to natural disaster). 	<p>Points will be awarded in the following manner:</p> <p>5 pts = The Respondent has provided a detailed response addressing both business continuity and disaster recovery incidents.</p> <p>4 pts = The Respondent has provided a good response addressing both business continuity and disaster recovery incidents but lacking in substantiating detail.</p> <p>3 pts = The Respondent has provided a general response addressing both business continuity and disaster recovery incidents but lacking in detail.</p> <p>2 pts = The Respondent has provided a general response lacking in detail and addressing one but not both of business continuity and disaster recovery.</p> <p>0 pts = Response does not address either of business continuity nor disaster recovery.</p>
Response:		
R-4.4	<p><u>Respondent Business Location Security</u></p> <p>The Respondent should identify the facility security measures currently implemented by the Respondent on behalf of existing clients where the facility security features should include but are not limited to:</p> <ol style="list-style-type: none"> 1. Formal certification or accreditation of facility security (e.g. third party audit and review of facility security as illustrated by federal CISO review or similar commercial body) 2. Segregation of facilities for clients requiring secure CC operations within a Respondent multi-client CC facility. 3. Multi-factor authentication and logging for access to secure / segregated CC operating area. 	<p>Points will be awarded in the following manner:</p> <p>5 pts = The Respondent has provided a detailed response addressing all of points 1 through 3.</p> <p>4 pts = The Respondent has provided a good response addressing all of points 1 through 3 but lacking in substantiating detail.</p> <p>3 pts = The Respondent has provided a general response addressing all of points 1 through 3 but lacking in detail.</p> <p>2 pts = The Respondent has provided a general response lacking in detail and addressing at most 2 of points 1 through 3.</p> <p>1 pts = The Respondent has provided a general response lacking in detail and addressing at most 1 of points 1 through 3.</p> <p>0 pts = Response does not address any of points 1 through 3.</p>
Response:		

3.3 Annex C-1: Project References Forms

This Annex to the Rated Requirements provides the templates for project references:

1. Annex C-1.1 Previous Project Experience References – 3 reference projects are required in response to Mandatory M-2.
2. Annex C-1.2 CC Implementation Project Services References – 3 reference projects are required in response to Rated R-2.1
3. Annex C-1.3 Onboarding and Staffing Reference Project Form – 3 reference projects are required in response to Rated R-2.2

Respondents may use the same reference project in response to each of these requirements. Respondents must ensure that the responses are complete and provide the required completed reference forms for each of M-2, R-2.1 and R-2.2.

For clarity, although the same project may be used in each case, each set of reference projects has specific focus and have different embedded criteria.

3.3.1 Annex C-1.1 Previous Project Experience References

Instructions for completion:

1. Three (3) relevant sample projects must be provided.
2. A separate Previous Project Experience References form must be completed for each sample project.
3. Responses will be used to validate compliance with M-2: References.

Respondent	
Client	
Contact Name	
Contact Title	
Telephone Number	
Project Name	

Brief Overview of the Project	
Project Timeframe	

#	Criteria	Provide a brief description of the service provided by the Respondent organization in the sample project and identify how the criterion was met.
1	The Respondent must identify the Main Contractor with whom the referenced organization had entered into the contract for the delivery of services. For compliance with M-2, the Respondent must be identified as the Main Contractor. In the case of a Joint Venture submitting a response, the Main Contractor must be the Representative of the Joint Venture.	
2	The Respondent must identify the location(s) (i.e. the city, province) in the sovereign territory of Canada from which the CC Services were provided as part of the referenced project.	
3	The Respondent must identify the daily peak number of concurrent CC agents involved in the provision of Contact Centre Services in the referenced project where the number of concurrent CC agents must be equal to or greater than 100 simultaneously active agents handling inbound calls.	
4	The Respondent must identify the minimum level of security vetting required for all agents delivering Contact Centre Services on the referenced project where the minimum level of security vetting must include agent background checks.	
5	The Respondent must identify the languages required to be supported by CC agents in the referenced project where the supported languages must include English and French.	

3.3.2 Annex C-1.2: CC Implementation Project Services References

Instructions for completion:

1. Respondents should provide up to 3 relevant CC Implementation Project Services references.
2. A separate CC Implementation Project Services Reference form should be completed for each sample project.
3. Canada will evaluate the first 3 projects in order of presentation in the response. Project references in excess of 3 will not be considered.
4. Responses will be evaluated individually with the rated scores consolidated under rated requirements R-2-1.
5. If fewer than 3 reference projects are proposed, points will only be awarded for those references provided.

Respondent	
Client	
Contact Name	
Contact Title	
Telephone Number	
Project Name	
Brief Overview of the project	
Project Timeframe	

#	Criteria	Weight (100)	Scoring Methodology	Respondent Response
1	<p>The Respondent should identify the Contact Centre Services provided in the referenced project. The referenced project must be an external-facing Contact Centre (i.e. not an internal help desk as an example). The CC Services should include, but are not limited to:</p> <ol style="list-style-type: none"> 1. Support of voice calls in support of client programs and services 2. Support for email queries in support of client programs and services 	5%	<p>Points will be awarded in the following manner: 5 pts - CC project met the requirement for 1 and 2 and also provided support for additional externally facing contact modalities (e.g. chat, SMS). 4 pts - CC project met the requirement of 1 and 2 only with no additional externally facing contact modalities 3 pts – CC project met the requirement of 1 but not 2. 0 pts – the CC project did not meet the requirement for support of voice calls in support of client programs and services.</p>	
2	<p>The Respondent should identify the number of CC agents scheduled to provide Contact Centre Services during the peak operating periods of the referenced project.</p>	10%	<p>Points will be awarded in the following manner: 5 pts - the number of CC agents scheduled to provide Contact Centre Services during peak operating periods exceeded 175 active agents. 4 pts - the number of CC agents scheduled to provide Contact Centre Services during peak operating periods exceeded 150 but was less than 175 active agents 3 pts – the number of CC agents scheduled to provide Contact Centre Services during peak operating periods exceeded 100 but was less than 150 active agents. 2 pts – the number of CC agents scheduled to provide Contact Centre Services during peak</p>	

#	Criteria	Weight (100)	Scoring Methodology	Respondent Response
			<p>operating periods exceeded 50 but was less than 100 active agents. 0 pts – the number of CC agents scheduled to provide Contact Centre Services during peak operating periods was less than 50 active agents.</p>	
3	<p>The Respondent should identify the geographic location(s) (e.g. city, province) from which the services were provided.</p>	5%	<p>Points will be awarded in the following manner: 5 pts - the geographic location(s) (e.g. city, province) from which the services were provided are in Canada. 0 pts – the geographic location(s) (e.g. city, province) from which the services were provided are not in Canada.</p>	
4	<p>The Respondent should identify the planning, design and implementation services provided. The services must have been provided directly by the Respondent in support of the CC referenced project. The services provided by the Respondent should include, but are not limited to:</p> <ol style="list-style-type: none"> 1. Project planning and design services 2. Infrastructure and connectivity planning and design services 3. Workforce Management and Operations Planning services 4. Recruitment and training services 5. Testing and cutover to live services 	20%	<p>Points will be awarded in the following manner: 5 pts - the Respondent provided each of services 1 - 5 4 pts - the Respondent provided at most 4 of services 1 - 5 3 pts – the Respondent provided at most 3 of services 1 - 5 2 pts - the Respondent provided at most 2 of services 1 - 5 1 pt - the Respondent provided at most 1 of services 1 - 5 0 pts – the Respondent does not identify provision of any of services 1 - 5.</p>	
5	<p>The Respondent should identify the operations management and reporting services provided. The services must have been provided directly by the Respondent in support of the CC referenced project. The provided services should include, but are not limited to:</p> <ol style="list-style-type: none"> 1. Operational performance dashboards / 	20%	<p>Points will be awarded in the following manner: 5 pts - the Respondent provided each of services 1 - 5 4 pts - the Respondent provided at most 4 of services 1 - 5 3 pts – the Respondent provided</p>	

#	Criteria	Weight (100)	Scoring Methodology	Respondent Response
	<ul style="list-style-type: none"> reporting 2. Workforce scheduling 3. Staffing related services 4. Respondent CC technical infrastructure operations and support services 5. Escalation and exception condition reporting 		<p>at most 3 of services 1 - 5 2 pts - the Respondent provided at most 2 of services 1 - 5 1 pt - the Respondent provided at most 1 of services 1 - 5 0 pts – the Respondent does not identify provision of any of services 1 - 5.</p>	
6	<p>The Respondent should identify the security related services provided. The services must have been provided directly by the Respondent in support of the CC referenced project. The provided security services should include, but are not limited to:</p> <ul style="list-style-type: none"> 1. Facility-related security services (e.g. access security, client segregation). 2. Personnel related security services (e.g. personnel screening). 3. IT related security services (e.g. intrusion protection) 	15%	<p>Points will be awarded in the following manner: 5 pts - the Respondent provided each of services 1 - 3 3 pts – the Respondent provided at most 2 of services 1 - 3 1 pt - the Respondent provided at most 1 of services 1 - 3 0 pts – the Respondent does not identify provision of any of services 1 - 3.</p>	
7	<p>The Respondent should identify the source of the call management solution as used in the referenced project – i.e. the call management solution was provided by the client organization (e.g. as envisaged in the use of VCC as provided by Canada for this project), or, by the Respondent.</p>	5%	<p>Points will be awarded in the following manner: 5 pts – CC used the voice call management solution provided by the client organization. 0 pts – CC did not use the voice call management solution provided by the client organization.</p>	
8	<p>The Respondent should identify the source of the knowledgebase and knowledge management solution as used in the referenced project – i.e. the knowledgebase and knowledge management solution was provided by the client organization (e.g. as envisaged in the use of IMPACT as provided by Canada for this project), or, by the Respondent.</p>	5%	<p>Points will be awarded in the following manner: 5 pts – CC used the knowledgebase and knowledge management solution provided by the client organization. 0 pts – CC did not use the knowledgebase and knowledge management solution provided by the client organization.</p>	

#	Criteria	Weight (100)	Scoring Methodology	Respondent Response
9	<p>The Respondent should provide the date (month, year) at which the reference project CC went live and the length of time for which the CC was in live production where:</p> <ol style="list-style-type: none"> The referenced project went into live production within 3 years of the date of issue of this RFQ and was in live operation for a minimum of 6 months or The reference project has been in continuous operation for the past 3 years. 	5%	<p>Points will be awarded in the following manner: 5 pts - CC project met the requirement for 1 or 2. 3 pts — CC Project went live more than 3 years before the date of issue of the RFQ and was in production for 6 or more months, or, project went live within the past 3 years but length of live operation was less than 6 months. 0 pts – the CC project went into live production more than 3 years before the date of issue of the RFQ and had a production time of less than 6 months.</p>	
10	<p>The Respondent should identify the languages explicitly required to be supported through the CC project. The Respondent should explicitly identify any required support for English and French.</p>	10%	<p>Points will be awarded in the following manner: 5 pts – CC supported both English and French 3 pts - CC supported multiple languages including English or French but not both. 2 pts – CC supported only English or French. 0 pts – CC supported neither English nor French.</p>	

3.3.3 Annex C-1.3: Onboarding and Staffing Reference Project Form

Instructions for completion:

1. Respondents should provide up to 3 relevant CC Onboarding and Staffing Reference projects.
2. A separate CC Onboarding and Staffing Reference form should be completed for each sample project.
3. Canada will evaluate the first 3 projects in order of presentation in the response. Project references in excess of 3 will not be considered.
4. Responses will be evaluated individually with the rated scores consolidated under rated requirements R-2.2.
5. If fewer than 3 reference projects are provided, points will only be awarded for those references provided.

Respondent	
Client	
Contact Name	
Contact Title	
Telephone Number	
Project Name	
Brief Overview of the project	
Project Timeframe	

#	Criteria	Weight (100)	Scoring Methodology	Respondent Response
1	<p>The Respondent should identify the Contact Centre Services provided in the referenced project. The referenced project must be an external-facing Contact Centre. The CC Services should include, but are not limited to:</p> <ol style="list-style-type: none"> 1. Support of voice calls in support of client programs and services 2. Support for email queries in support of client programs and services 3. Support for modalities in addition to voice and email – e.g. chat, SMS. 	10%	<p>Points will be awarded in the following manner: 5 pts - CC project met the requirement for 1 and 2 and also provided support for additional externally facing contact modalities (e.g. chat, SMS). 4 pts - CC project met the requirement of 1 and 2 only with no additional externally facing contact modalities. 3 pts – CC project met the requirement of 1 but not 2. 0 pts – the CC project did not meet the requirement for support of voice calls in support of client programs and services..</p>	
2	<p>The Respondent should identify the onboarding, staffing and recruitment services provided. The services must have been provided directly by the Respondent in support of the CC referenced project. The services provided by the Respondent should include, but are limited to:</p> <ol style="list-style-type: none"> 1. Project planning and design services 2. Infrastructure and connectivity planning and design services 3. Workforce Management and Operations Planning services 4. Recruitment and training services 5. Testing and cutover to live services 	20%	<p>Points will be awarded in the following manner: 5 pts - the Respondent provided each of services 1 - 5 4 pts - the Respondent provided at most 4 of services 1 - 5 3 pts – the Respondent provided at most 3 of services 1 - 5 2 pts - the Respondent provided at most 2 of services 1 - 5 1 pt - the Respondent provided at most 1 of services 1 - 5 0 pts – the Respondent does not identify provision of any of services 1 - 5.</p>	

3	<p>The Respondent should identify the number of Full Time Equivalent CC Agents recruited for the purposes of delivering the referenced project's CC services.</p>	20%	<p>Points will be awarded in the following manner: 5 pts - the number of recruited FTE Agents was >= 500 4 pts - the number of recruited FTE Agents was >= 300 but < 500 3 pts - the number of recruited FTE Agents was >= 175 but < 300 2 pts - the number of recruited FTE Agents was >= 100 but < 175 1 pts - the number of recruited FTE Agents was >= 50 but < 100 0 pts - the number of recruited FTE Agents was < 50</p>	
4	<p>The Respondent should identify the process used to source the required CC Agents. Respondents should explicitly identify:</p> <ol style="list-style-type: none"> 1. Use of existing Respondent FTEs 2. Use of pre-existing pool of pre-qualified resources (e.g. resources used on previous Respondent CC projects) 3. Use of third party staffing and resourcing firms. 	15%	<p>Points will be awarded in the following manner: 5 pts - Where the number of agents sourced is greater than or equal to 100 - the Respondent identifies use of existing or pre-existing Respondent FTEs for all resources requirements. 4 pts - Where the number of agents sourced is greater than or equal to 75 - the Respondent identifies use of existing or pre-existing resources for 50 or more resources and identifies use of third party sourcing firm for balance. 3 pts - Where the number of agents sourced is greater than or equal to 50 - the Respondent identifies use of existing or pre-existing resources for 20 or more resources and identifies use of third party sourcing firm for balance. 2 pts - Where the number of agents sourced is greater than or equal to 20 - the Respondent identifies use of existing or pre-existing resources for 5 or more</p>	

				resources and identifies use of third party sourcing firm for balance. 1 pts – Respondent identifies use of third party sourcing firm only. 0 pts – No relevant response provided.	
5	<p>The Respondent should identify the length of time in weeks that it took to staff the project where:</p> <ol style="list-style-type: none"> The project start is defined to be the contract award or contract defined project start date (e.g. where the project was one of a portfolio of CC programs or campaigns initiated under a broader CC Services contract). The length of time is defined as the number of weeks between the project start date and the date on which the CC went into live production. 	15%	<p>Points will be awarded in the following manner:</p> <p>5 pts - the number of weeks was <= 3</p> <p>4 pts - the number of weeks was <= 4</p> <p>3 pts -- the number of weeks was <= 5</p> <p>2 pts -- the number of weeks was <= 6</p> <p>1 pts -- the number of weeks was >= 7 but < 10</p> <p>0 pts – the number of weeks was >= 10</p>		
6	<p>The Respondent should identify the security related services provided in support of the CC referenced project. The provided security services should include, but are limited to:</p> <ol style="list-style-type: none"> Facility-related security services (e.g. access security, client segregation). Personnel related security services (e.g. personnel screening). IT-related security services (e.g. intrusion protection) 	10%	<p>Points will be awarded in the following manner:</p> <p>5 pts - the Respondent provided each of services 1 - 3</p> <p>3 pts – the Respondent provided at most 2 of services 1 - 3</p> <p>1 pt - the Respondent provided at most 1 of services 1 - 3</p> <p>0 pts – the Respondent does not identify provision of any of services 1 - 3.</p>		

7	<p>The Respondent should identify the language requirements that applied to the sourcing of CC agents. Specifically the Respondent should identify project requirements for sourcing agents with language skills in English, French and other languages.</p>	10%	<p>Points will be awarded in the following manner: 5 pts – the project specifically required agents with language skills in both English and French. 4 pts - the project specifically required agents with language skills in English or French and also required skills in other languages. 3 pts -- the project specifically required agents with language skills in English or French only. 1 pts -- the required agents with language skills excluding English or French. 0 pts – the project did not identify specific language skills</p>	
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APPENDIX D – APPLICABLE SCALES FOR RATED EVALUATION CRITERIA

Scoring key

The rated evaluation criteria are divided into four sections, R-1, R-2, R-3 and R-4. For each section that has a minimum pass mark, it will be indicated as a percentage in Table 1 under the column titled Minimum Pass Mark. If a minimum pass mark does not apply for a given section, it will be indicated as not applicable (N/A).

Table 1 – Technical Capability and Experience – Weighting and Minimum Score

#	Rated Evaluation Criteria	Section Weight	Criterion Weight	Minimum Pass Mark
R-1	Corporate Capability	55%		60%
R-1.1	Understanding of 1 800 O-Canada CC Project Requirements		1.65%	
R-1.2	Respondent Business Maturity - Years		4.40%	
R-1.3	Respondent Business Maturity - Sector		6.60%	
R-1.4	Respondent Business Facilities in Canada		5.50%	
R-1.5	Respondent Capability – Range of Supported CC Services		3.85%	
R-1.6	Respondent Capability – Resources		13.75%	
R-1.7	Respondent Capability – Training		6.60%	
R-1.8	Respondent Capability – Staff Retention		8.25%	
R-1.9	Respondent Capability – Innovations and investment		4.40%	
R-2	Respondent Implementation Project References	25%		60%
R-2.1	Respondent Implementation Project References – Reference #1		5.00%	
	Respondent Implementation Project References – Reference #2		5.00%	
	Respondent Implementation Project References – Reference #3		5.00%	
R-2.2	Respondent Onboarding and Staffing Reference Project #1		3.33%	
	Respondent Onboarding and Staffing Reference Project #2		3.33%	
	Respondent Onboarding and Staffing Reference Project #3		3.33%	
R-3	Processes and Methodologies	10%		60%
R-3.1	Respondent Capability – Process and Methodology		6.00%	
R-3.2	Respondent Capability – Process and Methodology		4.00%	
R-4	Security and Privacy	10%		60%
R-4.1	Project Security – Security Policy		1.50%	
R-4.2	Project Security - Privacy Policy		3.50%	
R-4.3	Project Security – Disaster Recovery / Business Continuity		2.50%	
R-4.1	Project Security – Security Policy		2.50%	
Total Technical Proposal		100%		

Scoring Instructions for Rated Requirements

For each of the rated criteria, the Scoring Method sets out how a response will be assessed based on a defined 0 to 5 scale for that specific criterion. The Respondent's score for each rated criterion is calculated as (the 0 to 5 score obtained by the Respondent based on the 0 to 5 scale set out in the Scoring Method for each rated criteria) multiplied by (the Criterion Weight available for that criterion as set out in Table 1).

For example, for criterion R-1.2:

- a) Where a Respondent is awarded a score of 5 out of 5 points, their score of 5 is divided by 5 and multiplied by the criterion weighting factor of 4.4000 to obtain a weighted score of 4.4000 [i.e.: $(5/5) \times 4.4000 = 4.4000$]
- b) Where a Respondent is awarded a score of 4 out of 5 points, their score of 4 is divided by 5 and multiplied by the criterion weighting factor of 4.4000 to obtain a weighted score of 3.5200 [i.e.: $(4/5) \times 4.4000 = 3.5200$]
- c) Where a Respondent is awarded a score of 3 out of 5 points, their score of 3 is divided by 5 and multiplied by the criterion weighting factor of 4.4000 to obtain a weighted score of 2.6400 [i.e.: $(3/5) \times 4.4000 = 2.6400$]

The following example demonstrates:

- (i) How the weighted score for a section is calculated;
- (ii) how the minimum pass mark for a section is calculated;
- (iii) how the overall minimum pass mark for the rated criteria is calculated;
- (iv) how the Respondent's total weighted score is calculated; and
- (v) what is required for the Respondent to be found responsive to the evaluation criteria at Annex C.

As outlined above, the Respondent's 0 to 5 scores for each evaluation criterion are multiplied by the weighting factors indicated in Table 1 to obtain a weighted score for each criterion. The section score is then calculated as the sum of the weighted scores for each criterion as shown below:

Table 2 - Scoring Example for Section R-4

Criterion	Respondent's Score	x Weighting Factor	= Weighted Score
R-4.1	4/5 pts	1.50%	1.20
R-4.2	3/5 pts	3.50%	2.10
R-4.3	5/5 pts	2.50%	2.50
R-4.1	4/5 pts	2.50%	2.00
Section Score:			7.8

The weighted score of 7.8 exceeds the minimum pass mark at $60\% * 10\% = 6.0$. Failure to meet or exceed the minimum pass mark would result in the Response being removed from further consideration.

The Respondent's total weighted score for the point rated technical evaluation criteria is then calculated by taking the sum of the Respondent's weighted scores for each of sections R-1, R-2, R-3 and R-4.

To be found responsive to the evaluation criteria, the Respondent must:

- (i) Meet all the mandatory criteria; and,
- (ii) obtain the minimum pass mark for each of sections R-1, R-2, R-3 and R-4.

Scoring Instructions for Sample Project Forms

For evaluation criteria R-2.1 and R-2.2 it is indicated that the sample project forms attached at Annex C-1.2 and C-1.3 should be completed in order to respond to the criterion. These forms contain evaluation criteria against which the Respondent’s bid will be evaluated and scored using the same 0 to 5 Scoring Method as above.

For each of criteria R-2.1 and R-2.2, a weighting factor for each referenced project is set out in Table 1.

The scores obtained by the Respondent for each evaluation criterion on the sample project form will be multiplied by the criterion weighting factor associated with the criterion on the form. A weighted project score for each project evaluated will be calculated using the sum of the weighted scores for each criterion shown on the form.

Scoring Example for Annex C-1.2: CC Implementation Project Services References

From Table 1, the available score for R-2.1 Project #1 is 5% of the total available rated score of 100%.

The available score for Project #1 criterion 1 is 5% of the available score for Project #1 as a whole. Hence the available score for criterion 1 is 5% of the 5% available total score – i.e. 0.25% of the total rated score.

Where the Project #1 criterion 1 response was awarded a score of 4/5, the contribution of Project #1 criterion 1 is calculated as:

$$(4/5 * \text{project weighting factor for criterion 1 (5\%)} * \text{overall project \#1 available score (5\% of 100)}) = (4/5 * 0.05 * 5) = 0.2\%$$

As illustrated in the table below, based on the sample scores awarded for criteria 1 through 10, the contribution of R-2.1 Project 1 is 3.8% out of a possible total contribution of 5% of the overall response score.

R-2.1 Project 1 – overall weight from Table 1				
Criterion	Respondent’s Score	x Project Weighting Factor	x overall project #1 available score	= Weighted Score
1.	4/5 pts	5%	5%	0.2
2.	5/5 pts	10%	5%	0.5
3.	5/5 pts	5%	5%	0.25
4.	4/5 pts	20%	5%	0.8
5.	3/5 pts	20%	5%	0.6

6.	3/5 pts	15%	5%	0.45
7.	5/5 pts	5%	5%	0.25
8.	0/5 pts	5%	5%	0.2
9.	5/5 pts	5%	5%	0.25
10	3/5 pts	10%	5%	0.3
	Weighted Project Score:			3.8

APPENDIX E – RESPONDENT INSTRUCTIONS (RFQ)

1.0 Interpretation

In this RFQ, except to the extent the context or the express provisions of this RFQ otherwise require, any capitalized word or term not otherwise defined in the RFQ Respondent Instructions has the meaning set out for it in Appendix A.

2.0 Entire Requirement

- 2.1 This RFQ contains all applicable requirements for submitting a Response. Any other information or documentation provided to or obtained by a Respondent from any source is not relevant unless issued by the Procurement Authority in accordance with the terms and conditions of this RFQ.
- 2.2 Respondents should not assume that practices used under previous contracts with Canada would continue, unless expressly included in this RFQ. Respondents should also not assume that their existing capabilities meet the requirements of this RFQ simply because they have met previous requirements under any other prior RFQ or similar document issued by the Procurement Authority.
- 2.3 Each Appendix attached to this RFQ is an integral part of this RFQ as if set out at length in the body of this RFQ.
- 2.4 Canada will make available Notices of Proposed Procurement (NPP), bid solicitations (RFQ) and related documents for download through buyandsell.gc.ca. Canada is not responsible and will not assume any liabilities whatsoever for the information found on websites of third parties. In the event an NPP, bid solicitation or related documentation would be amended, Canada will not be sending notifications. Canada will post all amendments, including significant enquiries received and their replies, on buyandsell.gc.ca. It is the sole responsibility of the Respondent to regularly consult buyandsell.gc.ca for the most up-to-date information. Canada will not be liable for any oversight on the Respondent's part nor for notification services offered by a third party.
- 2.5 Addenda
 - 2.5.1 Canada may, in its absolute discretion, amend or clarify the terms or contents of this RFQ at any time before the RFQ Response Submission Deadline by issuing a written Addendum and posting it on Buyandsell.gc.ca. Addenda are the only means of amending or clarifying this RFQ, and no other form of communication, whether written or oral, including any responses to Respondent enquiries submitted pursuant to Section 2.5 of the body of this RFQ, will in any way amend or clarify this RFQ. Only the Procurement Authority is authorized to amend or clarify this RFQ by issuing an Addendum. No other employee or agent of Canada is authorized to amend or clarify this RFQ.
 - 2.5.2 Each Respondent is responsible for ensuring that it has received all Addenda and is advised to check Buyandsell.gc.ca for Addenda regularly and up to the Response Submission Deadline.

3.0 Applicable Laws

This RFQ will be governed by the laws applicable in the Province of Ontario, including applicable federal laws ("Laws").

4.0 Priority of Documents

- 4.1 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 subsequently appears on the list:
 - a. any Addendum issued prior to RFQ Response Submission Deadline;
 - b. the RFQ; and
 - c. Responses.
- 4.2 In the event of any conflict, discrepancy or inconsistency between two Addenda, the most recent Addendum shall prevail.
- 4.3 In the event of any conflict, discrepancy or inconsistency between a provision of general application and a specific provision that has been tailored or created for purposes of this Project, the latter shall prevail.

5.0 No Assignment

A Respondent cannot assign its rights in its Response. If any assignment is made the Response will be rejected.

6.0 Rights of the Procurement Authority

- 6.1 Canada reserves the right to do any/or all of the following without liability to Canada:
 - a. reject any or all Responses received in response to the RFQ pursuant to Section 9, Section 10, Section 12, Section 13, Section 14, Section 15, Section 16, or Section 20 of this Appendix;
 - b. reject the Response if the Respondent assigns or transfers its rights in its Response;
 - c. cancel or defer the RFQ or the Project at any time;
 - d. reissue the same RFQ or a different RFQ document in relation to the Project;
 - e. if less than four (4) Qualified Responses are received and the requirements are not substantially modified, reissue the RFQ by inviting only the Respondents to resubmit Responses within a period designated by the Procurement Authority;
 - f. change the dates, deadlines, process and requirements described in this RFQ;
 - g. accept or reject any or all of the Responses; and
 - h. change the limits, scope and details of the Project.

7.0 Submission of Responses

- 7.1 It is the Respondent's sole responsibility to:
 - a. obtain clarification of the requirements contained in the RFQ, if necessary, before submitting a Response;
 - b. prepare its Response in accordance with the instructions contained in the RFQ;
 - c. submit a Response before the RFQ Response Submission Deadline at the Delivery

Address;

- d. ensure that the Respondent's name, return address, the RFQ number, and RFQ Response Submission Deadline are clearly visible on the envelope or the parcel(s) containing the RFQ Response; and
 - e. provide a comprehensible and sufficiently detailed Response, including all forms and certifications with the requested detail, that will permit a complete evaluation in accordance with the Evaluation Criteria.
 - f. Responses and documentation in support of Responses must be submitted in either English or French.
- 7.2 Responses received before the stipulated RFQ Response Submission Deadline will become the property of Canada and will not be returned. All Responses will be treated as confidential, subject to section 7 of Appendix E - Respondent Instructions, as well as the provisions of the Access to Information Act (R.S. 1985, c. A-1) and the Privacy Act (R.S., 1985, c. P-21).
- 7.3 Unless specified otherwise in this RFQ, Canada will evaluate only the documentation provided with a Response. Canada will not evaluate information such as references to web site addresses where additional information can be found, or technical manuals or brochures not submitted with the Response.

8.0 Transmission by epost Connect

- 8.1 Responses may be submitted by using the epost Connect service provided by Canada Post Corporation.
- a. PWGSC, National Capital Region: The only acceptable email address to use with epost Connect for responses to solicitations issued by PWGSC headquarters is:
tpsgc.dgareceptiondessoumissions-abbidReceiving.pwgsc@tpsgc-pwgsc.gc.ca.
 - b. To submit a response using epost Connect service, the Respondent must either:
 - i. send directly its response only to the specified PSPC Response Receiving Unit, using its own licensing agreement for epost Connect provided by Canada Post Corporation; or
 - ii. send as early as possible, and in any case, at least six business days prior to the solicitation closing date and time, (in order to ensure a response), an email that includes the response solicitation number to the specified PWGSC Response Receiving Unit requesting to open an epost Connect conversation. Requests to open an epost Connect conversation received after that time may not be answered.
 - c. If the Respondent sends an email requesting epost Connect service to the specified Response Receiving Unit in the response solicitation, an officer of the Response Receiving Unit will then initiate an epost Connect conversation. The epost Connect conversation will create an email notification from Canada Post Corporation prompting the Respondent to access and action the message within the conversation. The Respondent will then be able to transmit its response afterward at any time prior to the solicitation closing date and time.
 - d. If the Respondent is using its own licensing agreement to send its response, the Respondent must keep the epost Connect conversation open until at least 30 business days after the solicitation closing date and time.

- e. The response solicitation number should be identified in the epost Connect message field of all electronic transfers.
- f. It should be noted that the use of epost Connect service requires a Canadian mailing address. Should a respondent not have a Canadian mailing address, they may use the Response Receiving Unit address specified in the solicitation in order to register for the epost Connect service.
- g. For responses transmitted by epost Connect service, Canada will not be responsible for any failure attributable to the transmission or receipt of the response including, but not limited to, the following:
 - i. receipt of a garbled, corrupted or incomplete response;
 - ii. availability or condition of the epost Connect service;
 - iii. incompatibility between the sending and receiving equipment;
 - iv. delay in transmission or receipt of the response;
 - v. failure of the Respondent to properly identify the response;
 - vi. illegibility of the response;
 - vii. security of response data; or,
 - viii. inability to create an electronic conversation through the epost Connect service.
- h. A response transmitted by epost Connect service constitutes the formal response of the Respondent and must be submitted in accordance with Appendix E – Response Instructions.

9.0 Late RFQ Responses

For late bids submitted using means other than the Canada Post Corporation's epost Connect service, the physical bid will be returned.

For bids submitted electronically, the late bids will be deleted. As an example, bids submitted using Canada Post Corporation's epost Connect service, conversations initiated by the Bid Receiving Unit via the epost Connect service pertaining to a late bid, will be deleted. Records will be kept documenting the transaction history of all late bids submitted using epost Connect.

10.0 Rejection of Responses

- 10.1 Without limiting any other provision of this RFQ, Canada may, at its sole discretion, disqualify a Response:
 - a. if the Respondent or a Core Respondent Team Member has been declared ineligible for selection, following unsatisfactory performance in a previous project as determined in accordance with PSPC's performance review procedures, found at <https://buyandsell.gc.ca/policy-and-guidelines/supply-manual/section/8/180>;
 - b. if the Respondent's bidding privileges are suspended or are in the process of being suspended by Canada;
 - c. if the bidding privileges of any member of the Respondent Team are suspended or are in the process of being suspended by Canada, which suspension or pending suspension would render that member of the Respondent Team ineligible to bid on the Project or the portion of the Project that it is to perform;
 - d. if the Respondent, is bankrupt, in any bankruptcy, insolvency, company credit arrangement or other insolvency proceedings or where for whatever reason, its activities

are rendered inoperable for an extended period;

- e. if evidence, satisfactory to Canada, of fraud, bribery, fraudulent misrepresentation or failure to comply with any law protecting individuals against any manner of discrimination, has been received with respect to the Respondent, a member of the Respondent Team or any of their respective representatives;
- f. if evidence satisfactory to Canada that based on past conduct or behavior the Respondent, or any member of the Respondent Team, is unsuitable or has conducted itself improperly; or
- g. With respect to current or prior transactions with Canada if:
 - i. Canada has exercised, or intends to exercise, the contractual remedy of taking the work away from the Respondent or a member of the Respondent Team pursuant to any contract previously entered into with Canada; or
 - ii. Canada determines that the Respondent's or a member of the Respondent Team's performance on other contracts with Canada is sufficiently poor to jeopardize the successful completion of the Project.

10.2 Where Canada intends to reject a Response pursuant to this Section 10, Canada will so inform the Respondent and provide the Respondent ten (10) Business Days within which to respond to the circumstances which Canada is relying on to reject the Response.

11.0 Response Costs

No payment will be made for costs incurred in the preparation and submission of a response to the RFQ. Costs associated with preparing and submitting a response, as well as any costs incurred by the Respondent associated with the evaluation of the response, are the sole responsibility of the Bidder.

12.0 Integrity Provisions

- 12.1 The Ineligibility and Suspension Policy (the "Policy") in effect on the date the RFQ is issued, and all related directives in effect on that date, are incorporated by reference into, and form a binding part of the response solicitation. The Respondent must comply with the Policy and Directives found at <http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html>.
- 12.2 Under the Policy, charges and convictions of certain offences against a Respondent, its affiliates or first tier subcontractors, and other circumstances, will or may result in a determination by PSPC that the Respondent is ineligible to enter, or is suspended from entering into a contract with Canada. The list of ineligible and suspended Respondents is contained in PSPC's integrity database. The Policy describes how enquiries can be made regarding the ineligibility or suspension of Respondents.
- 12.3 In addition to all other information required in the Response solicitation, the Respondent must provide the following:
 - 12.3.1 by the time stated in the Policy, all information required by the Policy described under the heading "Information to be Provided when Bidding, Contracting or Entering into a Real Property Agreement"; and

with its Response, a complete list of all foreign criminal charges and convictions pertaining to itself, its affiliates and its proposed first tier subcontractors that, to the best of its knowledge and belief, may be similar to one of the listed offences in the Policy. The list of foreign criminal charges and convictions must be submitted using an Integrity Declaration Form, which can be found at [Declaration form for procurement](#).

12.4 Subject to subsection 12.5, by submitting a response to this solicitation, the Respondent certifies that:

12.4.1 it has read and understands the Policy;

12.4.2 it understands that certain domestic and foreign criminal charges and convictions, and other circumstances, as described in the Policy, will or may result in a determination of ineligibility or suspension under the Policy;

12.4.3 it is aware that Canada may request additional information, certifications, and validations from the Respondent or a third party for purposes of making a determination of ineligibility or suspension;

12.4.4 it has provided with its response a complete list of all foreign criminal charges and convictions pertaining to itself, its affiliates and its proposed first tier subcontractors that, to the best of its knowledge and belief, may be similar to one of the listed offences in the Policy;

12.4.5 none of the domestic criminal offences, and other circumstances, described in the Policy that will or may result in a determination of ineligibility or suspension, apply to it, its affiliates and its proposed first tier subcontractors; and

12.4.6 it is not aware of a determination of ineligibility or suspension issued by PSPC that applies to it.

12.5 Where a Respondent is unable to provide any of the certifications required by subsection 12.4, it must submit with its Response a completed Integrity Declaration Form, which can be found at [Declaration form for procurement](#).

12.6 Canada will declare non-responsive any Response in respect of which the information requested is incomplete or inaccurate, or in respect of which the information contained in a certification or declaration is found by Canada to be false or misleading in any respect. If Canada establishes after award of the Contract that the Successful Bidder provided a false or misleading certification or declaration, Canada may terminate the Contract for default. Pursuant to the Policy, Canada may also determine the Respondent to be ineligible for award of a contract for providing a false or misleading certification or declaration.

13.0 Code of Conduct for Procurement

The Code of Conduct for Procurement provides that Respondents must respond to bid solicitations in an honest, fair and comprehensive manner, accurately reflect their capacity to satisfy the requirements set out in the bid solicitation and resulting Contract, submit bids and enter into Contracts only if they will fulfill all obligations of the Contract. By submitting a response, the Respondent is certifying that it is complying with the Code of Conduct for Procurement. Failure to comply with the Code of Conduct for Procurement may render the bid non-responsive.

14.0 Prohibited Contacts

Effective with the issue of this RFQ, other than as expressly permitted in this RFQ, all communications by an actual or prospective Respondent, its Team Member or each of their respective representatives with respect to this RFQ or the Project shall be made exclusively to the Procurement Authority. Canada may, at its sole discretion, disqualify any Respondent(s) that fails to comply with this requirement.

15.0 Conflict of Interest - Unfair Advantage

- 15.1 In order to protect the integrity of the procurement process, Respondents are advised that Canada may reject a Response in the following circumstances:
- a. if the Respondent, any Respondent Team Member, any of its subcontractors, any of their current or former Representatives was involved in any manner in the preparation of the RFQ or in any situation of conflict of interest or appearance of conflict of interest;
 - b. if the Respondent, any Respondent Team Member, any of its subcontractors, any of their respective employees or former employees had access to information related to the RFQ that was not available to other Respondents and that would, in Canada's opinion, give or appear to give the Respondent an unfair advantage.
- 15.2 The experience acquired by a Respondent who is providing or has provided the goods and services described in the Response (or similar goods or services) will not, in itself, be considered by Canada as conferring an unfair advantage or creating a conflict of interest. This Respondent remains however subject to the criteria established above.
- 15.3 Where Canada intends to reject a Response under Section 15, Canada will inform the Respondent and provide the Respondent an opportunity to respond before making a final decision. Respondents which are in doubt about a particular situation should contact the Canada Contact Person before the RFQ Response Submission Deadline. By submitting a Response, the Respondent represents that it does not consider itself to be in conflict of interest nor to have an unfair advantage. The Respondent acknowledges that it is within Canada's sole discretion to determine whether a conflict of interest, unfair advantage or an appearance of conflict of interest or unfair advantage exists.
- 15.4 Without limiting rights under 15.0 – Conflict of Interest – Unfair Advantage, the following private sector business entities have been engaged in the preparation of this solicitation:

Business Entity
BDO LLP
E&Y LLP – Steve Bennetts – Project Management Support
ForwardVu Solutions Inc.
KPMG LLP

16.0 Changes to Respondent Team

- 16.1 During the period between the Response Submission Deadline and issuance of the RFP, where a Respondent wishes or requires to add or remove any Core Respondent Team Member from those identified in the Respondent's RFQ Response, the Respondent must submit a written application to Canada for approval, including supporting information that may assist Canada in evaluating the change.

- 16.2 Canada, at its discretion, may approve or refuse an application under this Section 16. In exercising its discretion, Canada may, without limitation, (i) consider the objective of carrying out an RFQ evaluation that is fair to the other Respondents; and (ii) refuse to permit a change to the membership of a Respondent Team or Core Respondent Team Member if:
- a. the change would, in Canada's judgment, result in a Respondent Team that no longer holds similar qualifications and experience as that which was submitted by the Respondent in its original RFQ Response; or
 - b. the evaluation of the new Team Member or of the new Respondent Team, using the Evaluation Criteria described in the RFQ, would rank it or them lower than a respondent to the RFQ that was not selected as one of the four (4) highest ranked Qualified Respondents.
- 16.3 Without limiting the extent of the foregoing, Canada may refuse a change to a Respondent Team and may, at its discretion, disqualify the Respondent where the Respondent has undergone or carried out a change contemplated by this Section 15 without Canada's prior written approval.
- 16.4 Respondents should note that the Proposal must be made in the same name as the person(s) or entity(ies) named as Respondent in this RFQ. Qualified Respondents must utilize, in their Proposal, the same Respondent Team, subject to the provisions of this Section 15.
- 16.5 If the Respondent has proposed any Third Party Service Provider in its Response, the Respondent certifies in Form B-1 - Master RFQ Submission Form that it has the permission from such Third Party Service Provider to propose his/her services in relation to the work to be performed and to submit his/her resume to Canada.
- 16.6 During the time period between the Response Submission Deadline and issuance of the RFP, where a Respondent becomes aware of any event which has or may have a material adverse change on the Respondent, (including any event or change which would render the Respondent's financial situation following the event or change materially different from that which was previously disclosed to Canada in the RFQ Response), the Respondent will forthwith in writing disclose the event to Canada for its consideration. Based on the disclosure, Canada may take any action it deems necessary as determined in its sole discretion up to and including disqualification of the Respondent.

17.0 Access to Information Act

- 17.1 The Respondent acknowledges that the documents and other records under the control of Canada or any other federal government institution are subject to the Access to Information Act (RSC 1985, c A 1) ("ATI") and other applicable Laws. Except as expressly stated in this RFQ and subject to the ATI or other applicable Laws, all documents and other records submitted in response to this RFP will be considered confidential; however such information or parts thereof may be released pursuant to requests under the ATI, other applicable Laws or court/tribunal order. The Respondent waives any right it may have to make any Claim or take any other action against Canada or any other government institution as a result of any action taken or required to be taken by Canada and any other federal government institution for the purpose of complying with the ATI or other applicable Laws or court/tribunal order.

18.0 Non-Disclosure

Respondents must not disclose, issue a news release or other public announcement in respect of any details pertaining to their Response in whole or in part to anyone not specifically involved in their Response, without the prior written approval of Canada which consent may be withheld in Canada's sole discretion.

19.0 RFQ Intent

This RFQ outlines Canada's general intent with respect to the Project and the competitive procurement process that it intends to follow, including an RFP stage, leading to the selection of a Successful Bidder and the award of a Contract for the Project. Information in this RFQ respecting the RFP, the Contract and other Project documents is provided to indicate Canada's general intentions, but Canada reserves complete discretion to draft these subsequent documents as Canada may decide, in a manner which may include variances from the descriptions in this RFQ.

20.0 Exclusivity

A firm or individual must participate as a member of only one Respondent Team and each Respondent Team may submit only one Response. In the event that a firm or individual fails to comply with the requirements of this Section 20, Canada may, at its discretion, require the applicable Respondent(s) to remove such firm or individual from their Respondent Team and if such Respondent(s) fail to comply with this requirement, Canada may, at its discretion, disqualify the Respondent(s).

21.0 Respondent Due Diligence

- 21.1 Canada and its advisors make no representations or warranties, and there are no representations, warranties or conditions, either express or implied, statutory or otherwise, in fact or in law, with respect to the accuracy or completeness of this RFQ or any information, data, materials or documents (electronic or otherwise) provided to the Respondents or their Team Members in this RFQ or during this RFQ with respect to the RFQ or the Project. Canada and its advisors shall not be liable for any Claim of any kind whatsoever arising from any Respondent's or Core Respondent Team Member's reliance on or use of this RFQ or any other information, data, materials or documents (electronic or otherwise) provided or made available to the Respondents or their Team Members by Canada or its advisors during this RFQ Process or with respect to the RFQ or the Project.
- 21.2 Each Respondent, and each Team Member, is responsible for obtaining its own independent financial, legal, accounting, engineering, environmental, architectural and other technical and professional advice with respect to the RFQ, and the Project and with respect to any information, data, materials or documents (electronic or otherwise) provided or made available to the Respondents or their Team Members by Canada or its advisors during the RFQ or with respect to the RFQ or the Project.
- 21.3 Each Respondent, and each Team Member, is responsible for ensuring that it has all of the information necessary to prepare its Response in response to this RFQ and for independently informing and satisfying itself with respect to the information contained in this RFQ, or provided during this RFQ with respect to the RFQ or the Project and with respect to any conditions that may in any way affect its Response.

22.0 Legal Capacity

The Respondent must have the legal capacity to contract. If the Respondent is a sole proprietorship, a partnership or a corporate body, the Respondent must provide, if requested by the Procurement Authority, a statement and any requested supporting documentation indicating the laws under which it is registered or incorporated together with the registered or corporate name and place of business. This also applies to respondents submitting a bid as a joint venture.

APPENDIX F – ENQUIRY FORM

Do you request that this Enquiry be considered commercially confidential in accordance with Section 2.5 of the RFQ	o Yes	o No
Justification (where applicable)		

Enquiry number (sequential number of the Enquiry):	
Respondent:	
Respondent Representative:	
Date of Enquiry:	

Subject of the Enquiry (specify whether Enquiry relates to a specific section of the RFQ itself or to another document or matter)	
RFQ Section:	
Other:	

Enquiry (only one subject per Enquiry Form):

APPENDIX G – SUBMISSION AGREEMENT FOR RFP

(For Information Purposes ONLY at the RFQ Stage)

[Note: This Submission Agreement should be executed by the Qualified Respondent and all of the Qualified Respondent's Team Members, as per the definition of these terms in the RFQ.

To: The Procurement Authority Attention

Re: Participation in the Request for Proposals (RFP) phase for the 1-800 O-Canada Contact Centre

1.0 INTRODUCTION

Canada has selected [insert shortlisted Qualified Respondent's name] under the Request for Qualifications as a "Qualified Respondent", and Canada intends to invite the Qualified Respondent to participate as one of up to four participants (each a "Proponent") under the RFP for the Project.

As a condition of such invitation, Canada requires the Qualified Respondent to enter into an agreement with Canada (the "Submission Agreement") respecting its participation under the RFP.

Following receipt of a signed Submission Agreement, Canada intends to finalize and issue the RFP. The terms of the RFP will apply to the procurement of the Project, subject to amendment by way of formal Amendment.

ACCORDINGLY, in consideration of Canada's agreement to allow the Qualified Respondent to participate in the RFP the Qualified Respondent agrees with Canada as follows:

2.0 DEFINED TERMS

In this Submission Agreement, the defined terms will have the meanings as set out in Appendix A of the RFQ, unless defined otherwise in this Submission Agreement.

3.0 PARTICIPATION

3.1 Preparation of Proposal

The Proponent will prepare and submit to Canada, a bona fide Proposal in response to the RFP, and as a condition of participating in the RFP, including any Commercially Confidential Meetings and obtaining access to the Documentation Room, the Qualified Respondent will comply with the terms of this Submission Agreement..

Any breach of the terms of this Submission Agreement will constitute sufficient grounds to disqualify a Qualified Respondent from participation in the RFP.

3.2 No Representation or Warranty

The Qualified Respondent will investigate and satisfy itself of every condition that affects the preparation of its Proposal. The Qualified Respondent further acknowledges and represents that its investigations have been based on its own examination, knowledge, information, and judgment, and not upon any statement, representation, or information made or given by Canada, its employees or representatives, or any advisor to Canada, other than the information contained in the RFP, as may be amended from time to time by Amendments.

3.3 Cost of Preparing the Proposal

The Proponent will be solely responsible for all costs it incurs in the preparation of a Proposal, including all costs of providing information requested by Canada, preparing for and attending meetings including any Commercially Confidential Meetings and conducting due diligence.

4.0 CONFIDENTIALITY

All information which has not otherwise been made public pertaining to Canada or the Project, which is obtained by the Qualified Respondent directly or indirectly through participation in the RFP including all information in the Documentation Room, is confidential and will not be disclosed to any third party without the prior written authorization from Canada which may be unreasonably withheld.

4.1 Interpretation

In this Section 4 of this Submission Agreement:

"Confidential Information" means all documents, knowledge and information provided by Canada or any of its Representatives (the "Disclosing Party") to, or otherwise obtained by, the Qualified Respondent or any of its Representatives (the "Receiving Party"), whether before or after the date of this Submission Agreement, and whether orally, in writing or other visual or electronic form in connection with or relevant to the Project or the RFP, and including information made available in the Documentation Room including, without limitation, all design, operational and financial information, together with all analyses, compilations, data, studies, photographs, specifications, manuals, memoranda, notes, reports, maps, documents, computer records or other information in hard copy, electronic or other form obtained from the Disclosing Party or prepared by the Receiving Party containing or based upon any such information. Notwithstanding the foregoing, Confidential Information does not include information which:

- a. is or subsequently becomes available to the public, other than through a breach of this Submission Agreement by the Receiving Party or through a breach of a confidentiality agreement which another person has entered into concerning the Confidential Information;
- b. is subsequently communicated to the Receiving Party by an independent third party, other than a third party introduced to the Receiving Party by the Disclosing Party or connected with the Project, without breach of this Submission Agreement and which party did not receive such information directly or indirectly under obligations of confidentiality;
- c. was rightfully in the possession of the Receiving Party or was known to the Receiving Party before the date of this Agreement and did not originate, directly or indirectly, from the Disclosing Party;
- d. was developed independently by the Receiving Party without the use of any Confidential Information; or
- e. is required to be disclosed pursuant to any judicial, regulatory or governmental order validly issued under applicable law.

"Permitted Purposes" means preparing a Proposal, and any other use permitted by this Section 5 of this Submission Agreement.

"Representative" means a director, officer, employee, agent, accountant, lawyer, consultant, financial advisor, subcontract, or other member of the Qualified Respondent or any other person contributing to or involved with the preparation of Proposals, as the case may be, or otherwise retained by the Qualified Respondent, in connection with the Project.

4.2 Confidentiality

The Qualified Respondent will keep all Confidential Information strictly confidential and will not without the prior written consent of Canada, which may be unreasonably withheld, disclose, or allow any person to

disclose, in any manner whatsoever, in whole or in part, or use, or allow any of its Representatives to use, directly or indirectly, the Confidential Information for any purpose other than the Permitted Purposes. The Qualified Respondent will make all reasonable, necessary, and best efforts to safeguard the Confidential Information from disclosure to any other person, firm, corporation, or other entity except as permitted in this Section 4 of this Submission Agreement, and will ensure that any party receiving the Confidential Information agrees to keep such information confidential and to be bound by the terms contained herein.

4.3 Ownership of Confidential Information

Canada owns all right, title and interest in the Confidential Information and, subject to any disclosure requirements under applicable law, and except as permitted by this Section 4, the Qualified Respondent will keep all Confidential Information that the Qualified Respondent receives, has access to, or otherwise obtains strictly confidential for a period of ten years after the date of this Submission Agreement, and will not, without the prior express written consent of an authorized representative of Canada, which may not be unreasonably withheld, use, divulge, give, release or permit or suffer to be used, divulged, given or released, any portion of the Confidential Information to any other person, firm, corporation or other entity for any purpose whatsoever.

4.4 Limited Disclosure

The Qualified Respondent may disclose Confidential Information only to persons who need to know the Confidential Information for Permitted Purpose and on the condition that all such Confidential Information be retained as strictly confidential on terms identical to those expressed in this Submission Agreement.

4.5 Destruction on Demand

On written request from Canada, the Qualified Respondent will promptly deliver to Canada or destroy all documents and copies thereof in its possession or control constituting or based on the Confidential Information and the Qualified Respondent will confirm that delivery or destruction to Canada in writing, all in accordance with the instructions of Canada; provided, however, that the Qualified Respondent may retain one copy of any Confidential Information which it may be required to retain or furnish to a court or regulatory authority pursuant to applicable law.

4.6 Acknowledgment of Irreparable Harm

The Qualified Respondent acknowledges and agrees that the Confidential Information is proprietary and confidential and that Canada may be irreparably harmed if any provision of this Section 5 were not performed by the Qualified Respondent or any party to whom the Qualified Respondent provides Confidential Information in accordance with its terms, and that any such harm could not be compensated reasonably or adequately in damages. The Qualified Respondent further acknowledges and agrees that Canada will be entitled to injunctive and other equitable relief to prevent or restrain breaches of any of the provisions of this Section 5 by the Qualified Respondent or to enforce the terms and provisions hereof, by an action instituted in a court of competent jurisdiction, which remedy or remedies are in addition to any other remedy to which Canada may be entitled at law or in equity.

4.7 Waiver

No failure to exercise, and no delay in exercising, any right or remedy under this Section 5 by Canada will be deemed to be a waiver of that right or remedy. No waiver of any breach of any provision of this Section 5 will be deemed to be a waiver of any subsequent breach of that provision or of any similar provision.

5.0 PUBLIC COMMUNICATIONS

To ensure that all public information generated about the Project is fair and accurate and will not inadvertently or otherwise influence the RFP, the disclosure of any information related to the Project, including communications with the media and the public, will be coordinated with, and is subject to prior written approval of Canada. Accordingly the Qualified Respondent will:

- a. notify Canada in writing of any and all requests for information or interviews received from the media or any third party; and
- b. not disclose any information related to the Project, including communications with the media and the public, without the prior written approval of Canada.

6.0 SEVERABILITY

If any portion of this Submission Agreement is found to be invalid or unenforceable by law by a court of competent jurisdiction then that portion will be severed and the remaining portion will remain in full force and effect.

7.0 ENUREMENT

This Submission Agreement enures to the benefit of Canada and binds the Qualified Respondent and the undersigned, and their respective successors.

8.0 GOVERNING LAW

This Submission Agreement will be governed by the laws applicable in the Province of Ontario, including applicable federal laws.

SIGNATURE OF QUALIFIED RESPONDENT	
Name of authorized representative	
Company (Registered or Corporate Name)	
Address (Registered Head Office and place of business)	
E-mail Address	
Telephone	
Signature	

SIGNATURES OF QUALIFIED RESPONDENT'S TEAM MEMBERS	
Name of authorized representative	

Company (Registered or Corporate Name)	
Address (Registered Head Office and place of business)	
E-mail Address	
Telephone	
Signature	

APPENDIX H – RFQ SECURITY GUIDE

1.0 Security Clearance Requirements for RFQ Stage

Respondents must obtain Designated Organization Screening (DOS), or have been sponsored for DOS, prior to the closing of the RFQ.

This Appendix describes activities and submissions that Respondents are strongly encouraged to undertake as soon as possible to be ready to participate as Proponents in the RFP stage and to respond fully to the RFP which will include security requirements as outlined in the SRCL in Appendix J.2.

2.0 Security Clearance Requirements for RFP Stage

Canada will not be responsible if required security clearances are not obtained in an appropriate time frame by any Respondent/Bidder.

The following are the minimum security clearance clearances required:

- 1) Prior to closing of this Request for Qualification:

Designated Organization Screening (DOS), or have been sponsored for DOS;

- 2) Prior to closing of subsequent Request for Proposals:

Designated Organization Screening approved by PSPC's Canadian Industrial Security Directorate (CISD);

Approved Document Safeguarding at the PROTECTED B level issued by CISD **for one** of the Bidder's facilities; and

Sponsorship for Approved Document Safeguarding at the PROTECTED B level issued by the CISD for **a second** of the Bidder's facilities.

Due to the time involved in obtaining such security clearances, potential Respondents are strongly encouraged to initiate the security clearance process and submit the required documentation as soon as possible during the RFQ Stage to the Canada Contact Person. A common reason for delay in clearance is incomplete or incorrectly completed documents, as such potential Respondents are encouraged to check the documents carefully prior to submission.

3.0 Contract Award

Prior to Contract award the successful Bidder must have obtained Document Safeguarding at the PROTECTED B level issued by the CISD **for a minimum of two (2)** of the Bidder's facilities.

Canada will not delay award of contract for the Bidder to obtain the required security clearances.

4.0 Start of Project

Following award of contract and prior to the start of Work under the contract, the Contractor personnel requiring access to PROTECTED information, assets or sensitive work site(s) must EACH hold a valid **RELIABILITY STATUS**, granted or approved by CISD/PWGSC.

5.0 General Information on Application Procedures and Responsibilities

Information technology (IT) requirements will be defined during the solicitation process and associated certification completed after the contract is awarded and prior to full service implementation.

For additional information, see the attached Security Requirements Check List (Annex J.2), which is applicable to any resulting contract.

Canada intends that the security processes be as practical as possible in order to prevent delay to the Project schedule and to limit the time and cost demands on Respondents/Bidders while meeting the essential security requirements of Canada.

It is recommended that Respondents visit the PSPC CISD Industrial Security Manual website at <https://www.tpsgc-pwgsc.gc.ca/esc-src/msi-ism/index-eng.html> and become knowledgeable of the specific submission requirements.

Canada will not be responsible if required security clearances are not obtained in an appropriate time frame by any Proponent.

6.0 Sponsorship Request

Potential Respondents whose organizations currently do not hold a valid DOS security clearance nor a valid PROTECTED B level Document Safeguarding issued by the CISD for two facilities (must be located in Canada) are encouraged to initiate the security clearance process immediately. Requests for sponsorship should be sent to the Procurement Authority Canada Contact Person identified in the summary information.

It is the responsibility of potential Respondents to ensure that the information required concerning the security clearance is provided on time to either the requesting authority or the CISD.

The sponsorship request should include the following information:

- a) Legal name of the company
- b) Business name, if different from legal name
- c) Mailing address
- d) Civic address for the two facilities in Canada
- e) Company telephone number
- f) Company fax number
- g) Surname and given name of the contact person (Canadian official)
- h) Title of the contact person
- i) Telephone number of the contact person
- j) Email address of the contact person
- k) Language preference (English or French)

APPENDIX I – ADMINISTRATIVE CHECKLIST

Section Reference		Submitted
Package 1 - Forms and Certifications - Appendix B to the RFQ		
Form B-1		Yes / No
Form B-2		Yes / No
Form B-3		Yes / No

APPENDIX J – STATEMENT OF REQUIREMENT

Important Note: Appendix J and J.1 will be provided to interested parties upon request.

Requests for the documents must be submitted to:

Susan Westall
Supply Team Leader
Public Services and Procurement Canada

Telephone: 613-949-8350
Email: susan.westall@pwgsc-tpsgc.gc.ca

APPENDIX J.1 – HISTORICAL CONTACT CENTRE CALL VOLUMETRICS AND STAFFING

Important Note: Appendix J and J.1 will be provided to interested parties upon request.

Requests for the documents must be submitted to:

Susan Westall
Supply Team Leader
Public Services and Procurement Canada

Telephone: 613-949-8350
Email: susan.westall@pwgsc-tpsgc.gc.ca

APPENDIX J.2– SECURITY REQUIREMENTS CHECK LIST (SRCL)

Note: This SRCL will be updated at the RFP stage with IT security requirements to meet the target infrastructure environment (as described in section 3.32 of Appendix J)



Contract Number / Numéro du contrat G9292-170324
Security Classification / Classification de sécurité PROTECTED B

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	Employment and Social Development Canada	2. Branch or Directorate / Direction générale ou Direction Citizen Service Branch (CSB)
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 Contact Centre Service - GC Telephone Enquiries Program - 1 800 C-Canada and Customized Information Services (CIS)		
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
5. 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? (Specify the level of access using the chart in Question 7. c) (Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c)		<input type="checkbox"/> No / Non <input checked="" type="checkbox"/> Yes / Oui
6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé.		<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
6. c) Is this a commercial courier or delivery requirement with no overnight storage? S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit?		<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès		
Canada <input checked="" type="checkbox"/>	NATO / OTAN <input type="checkbox"/>	Foreign / Étranger <input type="checkbox"/>
7. b) Release restrictions / Restrictions relatives à la diffusion		
No release restrictions / Aucune restriction relative à la diffusion <input checked="" type="checkbox"/>	All NATO countries / Tous les pays de l'OTAN <input type="checkbox"/>	No release restrictions / Aucune restriction relative à la diffusion <input type="checkbox"/>
Not releasable / À ne pas diffuser <input type="checkbox"/>		
Restricted to / Limité à <input type="checkbox"/>	Restricted to / Limité à <input type="checkbox"/>	Restricted to / Limité à <input type="checkbox"/>
Specify country(ies) / Préciser le(s) pays	Specify country(ies) / Préciser le(s) pays	Specify country(ies) / Préciser le(s) pays
7. c) Level of information / Niveau d'information		
PROTECTED A / PROTÉGÉ A <input type="checkbox"/>	NATO UNCLASSIFIED / NATO NON CLASSIFIÉ <input type="checkbox"/>	PROTECTED A / PROTÉGÉ A <input type="checkbox"/>
PROTECTED B / PROTÉGÉ B <input checked="" type="checkbox"/>	NATO RESTRICTED / NATO DIFFUSION RESTREINTE <input type="checkbox"/>	PROTECTED B / PROTÉGÉ B <input type="checkbox"/>
PROTECTED C / PROTÉGÉ C <input type="checkbox"/>	NATO CONFIDENTIAL / NATO CONFIDENTIEL <input type="checkbox"/>	PROTECTED C / PROTÉGÉ C <input type="checkbox"/>
CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>	NATO SECRET / NATO SECRET <input type="checkbox"/>	CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>
SECRET / SECRET <input type="checkbox"/>	COSMIC TOP SECRET / COSMIC TRÈS SECRET <input type="checkbox"/>	SECRET / SECRET <input type="checkbox"/>
TOP SECRET / TRÈS SECRET <input type="checkbox"/>		TOP SECRET / TRÈS SECRET <input type="checkbox"/>
TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>		TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>



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 / Non Yes / 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?

No / Non Yes / Oui

Short Title(s) of material / Titre(s) abrégé(s) du matériel:
Document Number / Numéro du document:

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

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

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

Special comments / Commentaires spéciaux:

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

10. b) May unscreened personnel be used for portions of the work?
Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail?

No / Non Yes / Oui

If Yes, will unscreened personnel be escorted?
Dans l'affirmative, le personnel en question sera-t-il escorté?

No / Non Yes / 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 / Non Yes / 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 / Non Yes / 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 / Non Yes / Oui

INFORMATION TECHNOLOGY (IT) MEDIA / SUPPORT RELATIF A 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 / Non Yes / 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 / Non Yes / Oui



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

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

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

SUMMARY CHART / TABLEAU RÉCAPITULATIF

Category / Catégorie	PROTECTED / PROTÉGÉ			CLASSIFIED / CLASSIFIÉ			NATO				COMSEC					
	A	B	C	CONFIDENTIAL	SECRET	TOP SECRET	NATO RESTRICTED	NATO CONFIDENTIAL	NATO SECRET	COSMIC TOP SECRET	PROTECTED / PROTÉGÉ			CONFIDENTIAL	SECRET	TOP SECRET
							NATO DIFFUSION RESTRICTED	NATO CONFIDENTIAL	A		B	C				
Information / Assets / Renseignements / Biens / Production		✓														
IT Tools / Support IT / IT LRM / Non 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).

PART D - AUTHORIZATION / PARTIE D - AUTORISATION			
13 Organization Project Authority / Chargé de projet de l'organisme			
Name (print) - Nom (en lettres moulées) BEATRICE CIRCIRO		Title - Titre DIRECTOR	Signature 
Telephone No - N° de téléphone 613-998-3875	Facsimile No - N° de télécopieur	E-mail address - Adresse courriel beatrice.pirovini@servcanada.gc.ca	Date 25/06/2018
14 Organization Security Authority / Responsable de la sécurité de l'organisme			
Name (print) - Nom (en lettres moulées) Gameau Yvon		Title - Titre SO Manager, RSO	Signature 
Telephone No - N° de téléphone 19-654-4561	Facsimile No - N° de télécopieur 819-953-2001	E-mail address - Adresse courriel yvonne.gameau@servcanada.gc.ca	Date 2018-06-28
15 Are there additional instructions (e.g. Security Guide, Security Classification Guide) attached? Des instructions supplémentaires (p. ex. Guide de sécurité, Guide de classification de la sécurité) sont-elles jointes?			<input type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
16 Procurement Officer / Agent d'approvisionnement			
Name (print) - Nom (en lettres moulées) SUSAN WESTALL		Title - Titre SUPPLY TEAM LEADER	Signature
Telephone No - N° de téléphone 613-949-8350	Facsimile No - N° de télécopieur	E-mail address - Adresse courriel SUSAN.WESTALL@ATGSC.GC.CA	Date
17 Contracting Security Authority / Autorité contractante en matière de sécurité			
Name (print) - Nom (en lettres moulées)		Title - Titre	Signature
Telephone No - N° de téléphone	Facsimile No - N° de télécopieur	E-mail address - Adresse courriel	Date