

RETURN BIDS TO:
RETOURNER LES SOUMISSIONS À:
Bid Receiving - PWGSC / Réception des
soumissions - TPSGC
Place du Portage, Phase III
Core 0B2 / Noyau 0B2
11 Laurier St./11, rue Laurier
Gatineau
Québec
K1A 0S5

Invitation to Qualify /
Invitation à se Qualifier

Title - Sujet "HRP-RHP" ITQ - Phoenix Pay Stabilization Challenge	
Solicitation No. - N° de l'invitation EN920-190988/G	Date 2018-10-23
Client Reference No. - N° de référence du client EN920-190988	GETS Ref. No. - N° de réf. de SEAG EN920-190988
File No. - N° de dossier 681xe.EN920-190988	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2018-12-10	Time Zone Fuseau horaire Eastern Standard Time EST
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: Ouellette, Kristen	Buyer Id - Id de l'acheteur 681xe
Telephone No. - N° de téléphone (613) 402-8745 ()	FAX No. - N° de FAX () -
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction:	

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

Comments - Commentaires
Bidders may respond to any number of
the categories included in this ITQ.

Vendor/Firm Name and Address
Raison sociale et adresse du
fournisseur/de l'entrepreneur

Phoenix Pay Stabilization Challenge

**Invitation to Qualify
(ITQ)
No. EN920-190988/G**

for various categories:

- 1. Robotic Software Automation**
- 2. HR Processes**
- 3. Lowering the Queue**
- 4. Improving User Experience**
- 5. Enhanced User Access Management**
- 6. Training**

ITQ No. EN920-190988/G

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ITQ No. EN920-190988/G

Phoenix Pay Stabilization Challenge

1. General Information

1.1 Introduction

- a) **Procurement Process:** This Invitation to Qualify (ITQ) is part of the procurement process by Public Works and Government Services Canada (PWGSC) for the Phoenix Pay Stabilization Challenge (the “**Project**”). Suppliers are invited to qualify in accordance with the terms and conditions of this ITQ in order to become “**Qualified Respondents**” for any later phases of the procurement process, for any of the various “Challenge categories”. Only Qualified Respondents will be permitted to bid on any subsequent solicitation phases issued as part of the procurement process.
- b) **Further Evaluation of Qualified Respondents:** Even though certain suppliers may be qualified by Canada as a result of this ITQ, Canada reserves the right to re-evaluate any aspect of the qualification of any Qualified Respondent at any time during the procurement process. As well, Canada reserves the right to open any subsequent procurement process to any interested Bidder.

1.2 Overview of the Project

- a) **Overview of Project:** Canada is releasing this ITQ in conjunction with the various RFI Challenges, previously released on Buy and Sell, all under file Number EN920-190988. Bidders have the option of submitting a Response to one or more of the various Phoenix Pay Stabilization Challenge categories as they so choose. Participation in previous RFI Challenges, is not required. Canada may release subsequent Request for Proposals (RFP) individually for each Phoenix Pay Stabilization Challenge categories, either as a multi-line RFP or as separate RFPs, or any other variation thereof.
- b) **Scope of Procurement:**
 - i) **Potential Client Users:** This ITQ is being issued by PWGSC. It is intended that the contract(s) resulting from any subsequent solicitation would be used by PWGSC to provide shared services to one or more of its clients. PWGSC’s clients include PWGSC itself, those government institutions for whom PWGSC’s services are mandatory at any point during the life of any resulting instrument(s), and those other organizations for whom PWGSC’s services are optional at any point during the life of any resulting instrument(s) and that choose to use those services from time to time. This process will not preclude PWGSC from using another method of supply for any of its clients with the same or similar needs, unless a subsequent solicitation for this Project expressly indicates otherwise.
 - ii) **Number of contracts:** PWGSC may award 1 or multiple contracts.
 - iii) **Term of contract:** PWGSC will identify the term of any resulting contract and any options associated, once the procurement progresses to the RFP phase.

- c) **Applicable Trade Agreements:** The following trade agreements apply to this procurement process:

Trade Agreements
<i>Agreement on Internal Trade</i>
<i>North American Free Trade Agreement</i>
<i>World Trade Organization Agreement on Government Procurement</i>
<i>Canada-Chile Free Trade Agreement</i>
<i>Canada-Colombia Free Trade Agreement</i>
<i>Canada-Peru Free Trade Agreement</i>
<i>Canada-Panama Free Trade Agreement</i>
<i>Canada-Honduras Free Trade Agreement</i>
<i>Canada-Israel Free Trade Agreement</i>

1.3 Overview of Procurement Process

This ITQ is the first phase in the procurement process for the Project. Although the procurement process remains subject to change (and even to cancellation, in accordance with PWGSC's Standard Instructions), Canada anticipates that the procurement process will be conducted in the following phases:

- a) **Notice of Proposed Procurement (NPP):** PWGSC issued an NPP on August 24, 2018 as the first step of engaging Industry and indicating the next steps in both working towards a new solution and stabilizing the current pay system.
- b) **Request for Information (RFI) Phase:** PWGSC commenced its industry engagement on September 17, by launching the first of 6 planned RFIs. The objective of the RFI phase is to obtain feedback from Industry on Canada's preliminary requirements for various Phoenix Pay Stabilization Challenge categories.
- c) **ITQ Phase:** This ITQ will be used to qualify Respondents to participate in any subsequent phases of the procurement process.
- d) **Request for Proposals (RFP) Phase:** Canada anticipates releasing RFP(s) to those Qualified Respondents who remain qualified at the time an RFP is released.

1.4 Conflict of Interest or Unfair Advantage

As set out in the provisions of the Standard Instructions - Goods or Services - Competitive Requirements 2003 (2018-05-22), a response can be rejected due to an actual or apparent conflict of interest or unfair advantage.

2. Instructions for Respondents

2.1 Standard Instructions, Clauses and Conditions

- a) PWGSC Standard Instructions - Goods or Services - Competitive Requirements 2003 (2018-05-22), are incorporated by reference into and form part of the ITQ, as though they were expressly set out here in full. PWGSC Standard Instructions can be found in the Standard Acquisition Clauses and Conditions Manual, (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.
- b) If there is a conflict between the provisions of this document and any documents that are incorporated into it by reference as set out above, this document prevails.
- c) By submitting a response, the Respondent is confirming that it agrees to be bound by all the instructions, clauses and conditions of the ITQ.

2.2 Questions and Comments

Questions and comments about this ITQ can be submitted in accordance with provisions of the Standard Instructions - Goods or Services - Competitive Requirements 2003 (2018-05-22), no later than 5 calendar days prior to the closing date.

2.3 Submission of Only One Response (per category)

- a) A Respondent can be an individual, a sole proprietorship, a corporation, a partnership, or a joint venture.
- b) Each Respondent (including related entities) will be permitted to qualify only once, per category. If a Respondent or any related entities participate in more than one response (participating means being part of the Respondent, not being a subcontractor), Canada will provide those Respondents with 2 working days to identify the single response to be considered by Canada. Failure to meet this deadline may result in all the affected responses being disqualified or in Canada choosing, in its discretion, which of the responses to evaluate.
- c) For the purposes of this Article, regardless of the jurisdiction where any of the entities concerned is incorporated or otherwise formed as a matter of law (whether that entity is an individual, corporation, partnership, etc.) an entity will be considered to be "related" to a Respondent if:
 - i) they are the same legal entity as the Respondent (i.e., the same natural person, corporation, partnership, limited liability partnership, etc.);
 - ii) the entity and the Respondent are "related persons" or "affiliated persons" according to the Canada *Income Tax Act*;
 - iii) the entity and the Respondent have now or in the two years before the ITQ closing had a fiduciary relationship with one another (either as a result of an agency arrangement or any other form of fiduciary relationship); or
 - iv) the entity and the Respondent otherwise do not deal with one another at arm's length, or each of them does not deal at arm's length with the same third party.

- d) A Respondent may act as a subcontractor to another Respondent.
- e) Any individual, sole proprietorship, corporation, or partnership that is a Respondent as part of a joint venture cannot submit another response on its own or as part of another joint venture.

Example 1: Supplier A does not itself have all the experience required by the ITQ. However, Supplier B has the experience that Supplier A lacks. If Supplier A and Supplier B decide to team up to submit a response together as a joint venture, both entities are together considered the Respondent. Neither Supplier A nor Supplier B can team up with another supplier to submit a separate response, because each is already part of a Respondent.

Example 2: Supplier X is a Respondent. Supplier X's subsidiary, Supplier Y, decides to team up with Supplier Z to submit a response as a joint venture. Suppliers Y and Z, as well as Supplier X, will all be asked to determine which one of the two responses will be considered by Canada. Both responses cannot be submitted, because Supplier Y is related to Supplier X as an affiliate.

- f) By submitting a response, the Respondent is certifying that it does not consider itself to be related to any other Respondent.

2.4 Security Clearance Requirement

- a) A Respondent is not required to have security clearance in order to become a Qualified Respondent. Security clearance and other security requirements will be identified at a later stage of the procurement process.

3. Preparing and Submitting a Response

3.1 General Instructions

- a) Responses must be submitted only to the Public Works and Government Services Canada (PWGSC) Bid Receiving Unit specified below by the date and time indicated on page 1 of this ITQ.
- b) Due to the nature of the bid solicitation, responses transmitted by facsimile to PWGSC will not be accepted.
- c) If there is a discrepancy between the wording of an electronic copy and a hard copy, the wording of the hard copy will have priority over the wording of the soft copy.
- d) If the Bidder chooses to submit its bid electronically, Canada requests that the Bidder submits its bid in accordance with section 08 of the 2003 Standard Instructions. Bidders must provide their bid in a single transmission. The epost Connect service has the capacity to receive multiple documents, up to 1GB per individual attachment.

3.2 Language for Future Communications

Each Respondent is requested to identify, in its Response Submission Form, which of Canada's two official languages it chooses to use for future communications with Canada regarding this ITQ and any subsequent phases of the procurement process.

3.3 Content of Response

A complete response to this ITQ consists of all of the following:

- a) **Response Submission Form (Requested at ITQ Closing)**: Respondents are requested to include the *Response Submission Form* with their responses, found at **Attachment 2**. It provides a common form in which Respondents can provide information required for evaluation, such as a contact name, the Respondent's Procurement Business Number, the language for future communications with Canada about this procurement process, etc. Using the form to provide this information is not mandatory, but it is recommended. If Canada determines that the information requested by the *Response Submission Form* is incomplete or requires correction, Canada will provide the Respondent with an opportunity to provide the additional information or make the correction. Providing the information when requested during the evaluation period is mandatory.
- b) **Specific Responses to the Qualification Requirements at Attachment 1 (Mandatory at ITQ Closing)**: The response must include all the information required by **Attachment 1**.
- c) **Mandatory Requirements Check List at Attachment 3 (Requested at ITQ Closing)**: The response should include all the information required by **Attachment 3**.
- d) **Certifications (Requested at ITQ Closing)**:
 - i) By submitting a response, the Respondent is automatically providing the certifications identified below as required.
 - ii) Although all these certifications are requested at ITQ closing, if Canada determines that any certification is missing, incomplete or requires correction, Canada will provide the Respondent with an opportunity to provide the required information. Providing the

certification when requested during the ITQ evaluation period is mandatory. If the Respondent fails to provide the requested information or certification within 5 working days (or a longer period provided by the Contracting Authority), Canada will disqualify the Respondent.

Federal Contractors Program for Employment Equity Certification	Required – please provide the information in the Response Submission Form
Former Public Servants Certification	Required – please provide the information in the Response Submission Form

Respondents should note that certain certifications that are not required at the ITQ stage may be required at a later stage of the procurement process.

3.4 Electronic Submission of Response

- a) **Submission of Response:** This ITQ solicitation allows bidders to use the [epost Connect](#) service provided by Canada Post Corporation to transmit their bid electronically.
- b) **[epost Connect](#)**
 - i) Unless specified otherwise in the bid solicitation, bids 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 bid solicitations issued by PWGSC headquarters is: tpsgc.dgareceptiondessaoumissions-abbidReceiving.pwgsc@tpsgc-pwgsc.gc.ca
or, if applicable, the email address identified in the bid solicitation.
 - ii) To submit a bid using [epost Connect](#) service, the Bidder must either:
 - (A) send directly its bid only to the specified PWGSC Bid Receiving Unit, using its own licensing agreement for epost Connect provided by Canada Post Corporation; or
 - (B) 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 bid solicitation number to the specified PWGSC Bid Receiving Unit requesting to open an epost Connect conversation. Requests to open an epost Connect conversation received after that time may not be answered.
 - iii) If the Bidder sends an email requesting epost Connect service to the specified Bid Receiving Unit in the bid solicitation, an officer of the Bid Receiving Unit will then initiate an epost Connect conversation. The epost Connect conversation will create an email notification from Canada Post Corporation prompting the Bidder to access and action the message within the conversation. The Bidder will then be able to transmit its bid afterward at any time prior to the solicitation closing date and time.
 - iv) If the Bidder is using its own licensing agreement to send its bid, the Bidder must keep the epost Connect conversation open until at least 30 business days after the solicitation closing date and time.

- v) The bid solicitation number should be identified in the epost Connect message field of all electronic transfers.
- vi) It should be noted that the use of epost Connect service requires a Canadian mailing address. Should a bidder not have a Canadian mailing address, they may use the Bid Receiving Unit address specified in the solicitation in order to register for the epost Connect service.
- vii) For bids transmitted by epost Connect service, Canada will not be responsible for any failure attributable to the transmission or receipt of the bid including, but not limited to, the following:
 - (A) receipt of a garbled, corrupted or incomplete bid;
 - (B) availability or condition of the epost Connect service;
 - (C) incompatibility between the sending and receiving equipment;
 - (D) delay in transmission or receipt of the bid;
 - (E) failure of the Bidder to properly identify the bid;
 - (F) illegibility of the bid;
 - (G) security of bid data; or,
 - (H) inability to create an electronic conversation through the epost Connect service.
- c) A bid transmitted by epost Connect service constitutes the formal bid of the Bidder and must be submitted in accordance with section 05, of the 2003 Standard Instructions.

4. Process for Evaluating Responses

4.1 Evaluation of Respondent Qualifications

Canada will evaluate whether each Response satisfies all the mandatory requirements described in this ITQ (including information that this ITQ indicates is required, but the ITQ specifically states that it may be submitted upon request after the closing date). The provisions of Standard Instructions - Goods or Services - Competitive Requirements 2003 (2018-05-22) that relate to evaluation also apply. A response must comply with all the requirements of the ITQ in order to be declared compliant.

4.2 Basis of Qualification

- a) Each Respondent whose response meets all the requirements of this ITQ will become a Qualified Respondent for the next stage of the procurement process.
- b) Canada reserves the right to re-evaluate the qualification of any Qualified Respondent at any time during the procurement process. For example, if a particular certification is a requirement of this ITQ and the Respondent's certification changes or lapses, so that the Respondent no longer meets the requirements of this ITQ, Canada may disqualify that Qualified Respondent. Similarly, if information comes to the attention of Canada that calls into question any of the Qualified Respondent's qualifications under this ITQ, Canada may re-evaluate that Qualified Respondent. If Canada re-evaluates the qualification of any Qualified Respondent, Canada may request further information and, if the Qualified Respondent fails to provide it within 5 working days (or a longer period provided by the Contracting Authority), Canada may disqualify the Qualified Respondent.
- c) Unsuccessful Respondents will not be given another opportunity to participate or be re-evaluated for the subsequent phases of the procurement process, unless Canada determines, in its sole discretion, that the circumstances require such a change.
- d) Canada will provide written notice to each Respondent informing of their qualification status.

4.3 ITQ Phase Second Qualification Round

- a) Canada reserves the right, in its sole discretion, to conduct a second qualification round among the unsuccessful Respondents if, in Canada's opinion, the first qualification round results in an insufficient number of Qualified Respondents.
- b) If Canada determines that unsuccessful Respondents will be given a second opportunity to qualify, Canada will provide written information to all unsuccessful Respondents on the same day regarding the reasons they were unsuccessful during the first qualification round.
- c) Any Respondent who does not qualify as a result of any second qualification round conducted by Canada will not be given another opportunity to participate or be re-evaluated for any subsequent phases of this procurement process.

4.4 Ad-hoc Refresh of Qualified Respondent List

- a) Canada reserves the right, in its sole discretion, to conduct subsequent qualification round(s).

Attachment 1
Qualification Requirements

Phoenix Pay Stabilization Challenges

**Invitation to Qualify
(ITQ)**

No. EN920-190988/G

for various categories:

- 1. Robotic Software Automation**
- 2. HR Processes**
- 3. Lowering the Queue**
- 4. Improving User Experience**
- 5. Enhanced User Access Management**
- 6. Training**

Attachment 1 Qualification Requirements

1. Robotic Software Automation

Category	Criteria	Evaluation	Proof Required
Software Solution	a) The bidder must demonstrate that they are proposing a solution that can be used in conjunction with MS Office desktop applications and that can automate transactions in case management and ERP applications.	Pass / Fail	The bidder must demonstrate that the proposed automation technology can be used in conjunction with MS Office desktop applications, automating processes within ERP applications and within case management applications by providing a short video clip of the software in action; plus any additional product documentation that the bidder would like to include as an Annex.
	b) The bidder must demonstrate that they are legally entitled to sell the solution they are proposing.	Pass / Fail	The bidder must certify that they are the developer of the proposed technology or that they are offering it for sale through an approved re-seller agreement to be provided as part of the ITQ response.
	c) The bidder must demonstrate that the proposed solution functions in both of Canada's official languages (French and English).	Pass / Fail	The bidder must certify that its product functions in both official languages and will be required, as part of a Phase I engagement ramp up, to demonstrate that its' proposed products function in both French and English.
Reference Projects	d) The Government of Canada will qualify vendors proposing a software solution that: <ul style="list-style-type: none"> • Automated a minimum of 250,000 transactions that otherwise would have been manually executed for each of five reference projects. • Where the proposing vendor has a minimum of five reference projects where they 	Pass / Fail	The bidder must provide five client reference information that demonstrates that the proposed software solution resulted in the automation of 250,000 transactions that otherwise would have been manually executed at the client site. The bidder must provide client reference information that they successfully implemented the technology solution that they are proposing. Each client reference must contain the following information: <ul style="list-style-type: none"> • Client Name • Client Contact

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EN920-190988

N° de la modif - Amd. No.
File No. - N° du dossier
681xe.EN920-190988/G

Id de l'acheteur - Buyer ID
681xe
N° CCC / CCC No./ N° VME - FMS

	successfully automated processes using the automation software they are proposing.		<ul style="list-style-type: none">• Client Contact details including phone number and email address <p><i>Engagement details demonstrating the above requirements were met that will be verified through the reference checks.</i></p>
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2. HR Processes

Category	Criteria	Evaluation	Proof Required
Reference Projects	a) The bidder must demonstrate that they have undertaken multiple successful HR and / or Payroll transformation projects in public sector or unionized organizations that have > 15,000 employees where the transformation budget was > \$20 M Canadian dollars.	Pass / Fail	<p>The bidder must provide two references to demonstrate that, as a prime contractor, it has successfully delivered two HR or Pay transformation initiatives where the transformation project exceeded \$20M in budget and was for a public sector or unionized organization with greater than 15,000 employees. The scope of the transformation must have included the compensation business areas.</p> <p>Each client reference must contain the following information:</p> <ul style="list-style-type: none"> • Client Name • Client Contact • Client Contact details including phone number and email address <p><i>Engagement details demonstrating the above requirements were met that will be verified through the reference checks.</i></p>
	b) The bidder must demonstrate that they have experience transforming Human Capital Management business areas where the transformation scope included upstream HR process transformation and downstream payroll process transformation within a public sector or unionized environment.	Pass / Fail	<p>The bidder must provide two references to demonstrate that, as a prime contractor, it has successfully delivered a minimum of two Human Capital Management transformation projects where the scope of the each project included process transformation in both the HR and Pay business processes areas within a public sector or unionized environment.</p> <p>Each client reference must contain the following information:</p> <ul style="list-style-type: none"> • Client Name • Client Contact • Client Contact details including phone number and email address <p><i>Engagement details demonstrating the above requirements were met that will be verified through the reference checks.</i></p>

Category	Criteria	Evaluation	Proof Required
	<p>c) The bidder must demonstrate that they have experience transforming Human Capital Management environments that included the deployment of self-service technology as part of the technology roadmap.</p>	<p>Pass / Fail</p>	<p>The bidder must provide two references to demonstrate that, as a prime contractor, it has successfully delivered a minimum of two Human Capital Management transformation projects where the scope of the each project included the deployment of self-service technology as part of the technology roadmap.</p> <p>Each client reference must contain the following information:</p> <ul style="list-style-type: none"> • Client Name • Client Contact • Client Contact details including phone number and email address <p><i>Engagement details demonstrating the above requirements were met that will be verified through the reference checks.</i></p>

3. Lowering the Queue

Category	Criteria	Evaluation	Proof Required
Data Analytics	a) The bidder must demonstrate that it has an active data analytics program with extensive experience examining high volume business process outsourcing environments.	Pass / Fail	<p>The bidder must provide two references where their data analytics program was engaged to examine business process transaction data with the objective of identifying opportunities to introduce efficiencies into the target operating model. The analytics activity must have focussed on a transaction set that exceeded 100,000 transactions.</p> <p>Each client reference must contain the following information:</p> <ul style="list-style-type: none"> • Client Name • Client Contact • Client Contact details including phone number and email address <p><i>Engagement details demonstrating the above requirements were met that will be verified through the reference checks.</i></p>
Case Management Technologies	b) The bidder must demonstrate that it has extensive, current experience implementing case management or client relationship management technology.	Pass / Fail	<p>The bidder must provide four references where they were engaged to implement case management technology to manage high volume transaction processing operations. Each reference must have been completed within 3 years of the closing date of this ITQ with the case technology managing greater than 100,000 cases on an annualized basis.</p> <p>Each client reference must contain the following information:</p> <ul style="list-style-type: none"> • Client Name • Client Contact • Client Contact details including phone number and email address <p><i>Engagement details demonstrating the above requirements were met that will be verified through the reference checks.</i></p>

Category	Criteria	Evaluation	Proof Required
Payroll Operations	c) The bidder must demonstrate that it has relevant experience in processing payroll for large payroll operations.	Pass / Fail	<p>The bidder must provide two references where it has been contracted to process payroll operations for clients where the bi-weekly payroll exceeded 15,000 employees receiving a pay check.</p> <p>Each client reference must contain the following information:</p> <ul style="list-style-type: none"> • Client Name • Client Contact • Client Contact details including phone number and email address <p><i>Engagement details demonstrating the above requirements were met that will be verified through the reference checks.</i></p>
	d) The bidder must demonstrate that it has relevant experience documenting payroll processing business environments.	Pass / Fail	<p>The bidder must provide two references where the scope of their engagement included producing Standard Operating Procedure (SOP) documentation for the compensation business areas. The SOP documentation must have dictated the manual procedures to be followed in order to achieve accurate and timely payroll results.</p> <p>Each client reference must contain the following information:</p> <ul style="list-style-type: none"> • Client Name • Client Contact • Client Contact details including phone number and email address <p><i>Engagement details demonstrating the above requirements were met that will be verified through the reference checks.</i></p>

4. Improving User Experience

Category	Criteria	Evaluation	Proof Required
Recommended Identification and Selection Approach	a) The bidder must demonstrate their recommended approach(es) to identifying and selecting improvements to end-to-end user experience across multiple processes, organizations and systems.	Pass / Fail	Detailed presentation and/or documentation thoroughly outlining the recommended approach(es) used to identify and select improvements to the user experience and any supporting documentation such as diagrams, spreadsheets or information the bidder would like to include as an annex.
Recommended Implementation Approach	b) The bidder must demonstrate that they are proposing an improved user experience solution that is feasible and can be used in the Federal government environment.	Pass / Fail	The bidder must demonstrate that the proposed improved user experience solution is a viable solution by developing a detailed presentation and/or providing documentation thoroughly outlining the recommended implementation approach and including supporting documentation such as spreadsheets, diagrams (if necessary).
	c) The bidder must provide implementation timelines.	Pass / Fail	The bidder must provide a detailed and viable project plan that is acceptable to the Crown outlining the implementation timelines.
	d) The bidder must demonstrate that they are legally entitled to sell the solution they are proposing.	Pass / Fail	The bidder must certify with a signed letter that they are the developer of the proposed solution and are approved to deliver this solution to the Federal government.
	e) The bidder must demonstrate that the proposed solution functions in both of Canada's official languages (French and English).	Pass / Fail	The bidder must certify that its product functions in both official languages and will be required, as part of initial engagement, to demonstrate that its proposed solution functions in both French and English.
Reference Projects	f) The Government of Canada will qualify vendors proposing a viable "improved user experience" solution that: <ul style="list-style-type: none"> Provides employees with easier and more transparent interaction with the Pay Centre 	Pass / Fail	The bidder must provide client reference information that demonstrates that the proposed "improved user experience" solution is viable for an employee population of approximately 300,000. The bidder must provide client reference information that they successfully implemented the solution that they are proposing.

Category	Criteria	Evaluation	Proof Required
	<ul style="list-style-type: none"> Provides business users with more efficient use of the Case Management Tool and Phoenix System Provides stakeholders with more timely and targeted access to pay information. <p>The user population is approximately 300,000 employees.</p>		<p>Each client reference must contain the following information:</p> <ul style="list-style-type: none"> Client Name Client Contact Client Contact details including phone number and email address Engagement details demonstrating the above requirements were met that will be verified through the reference check <p><i>Engagement details demonstrating the above requirements were met that will be verified through the reference checks.</i></p>
	g) The bidder must provide reference projects that demonstrate previous success in improving user experiences in complex environments such as payroll.	Pass / Fail	The bidder must supply in one page or less per project, a description of the improved user experience solution(s) previously implemented.
Technical Architecture	h) The bidder must provide a description of the technical architecture on which the required improved user experience technology would operate.	Pass / Fail	The bidder must supply, in one page or less, a brief description of the high level architectural information. Supporting documentation can also be provided as an annex to the one page description.
	i) The bidder must demonstrate that the solution is scalable for different volumes of users on multiple systems (Case Management Tool and Phoenix for example) within the Federal government. <ul style="list-style-type: none"> 300,000 users 360,000 users (20% increase) 450,000 users (50% increase) 	Pass / Fail	<p>The bidder must provide client reference information to demonstrate that their solution is scalable for different volumes or users.</p> <p>Each client reference must contain the following information:</p> <ul style="list-style-type: none"> Client Name Client Contact Client Contact details including phone number and email address

Category	Criteria	Evaluation	Proof Required
			<i>Engagement details demonstrating the above requirements were met that will be verified through the reference checks.</i>
Security and Privacy Architecture	j) The bidder must demonstrate that the proposed improved user experience solution is designed and developed to ensure the security of the solution, including implementing information security policies, procedures, and security controls that are consistent with Government of Canada standards.	Pass / Fail	The bidder must supply a third-party audited security certification and documentation for a recognized certification or evidence that the solution will meet and satisfy Crown security requirements prior to receiving any contract award.
	k) The bidder must demonstrate that the proposed solution is designed and developed to ensure the protection of personal information throughout its lifecycle in accordance with Canadian legislative and policy standards, with the ability to audit data use and retention.	Pass / Fail	The bidder must supply, in less than one page, a brief description of how they meet the protection of personal information and describing standards ensuring the safeguarding of personal information and provide technical documentation or presentations highlighting compliance.

5. Enhanced User Access Management

Category	Criteria	Evaluation	Proof Required
Recommended Implementation Approach	a) The bidder must demonstrate that they are proposing an automated user access management solution that is feasible and can be used in the Federal government environment.	Pass / Fail	The bidder must demonstrate that the proposed automated user access management solution is a viable solution by developing a detailed presentation and/or providing documentation thoroughly outlining the recommended approach and including supporting documentation such as spreadsheets, diagrams (if necessary).
	b) The bidder must provide implementation timelines.	Pass / Fail	The bidder must provide a detailed and viable project plan that is acceptable to Canada outlining the implementation timelines.
	c) The bidder must demonstrate that they are legally entitled to sell the solution they are proposing.	Pass / Fail	The bidder must certify with a signed letter that they are the developer of the proposed solution and are approved to deliver this solution to the Federal government.
	d) The bidder must demonstrate that the proposed solution functions in both of Canada's official languages (French and English).	Pass / Fail	The bidder must certify that its product functions in both official languages and will be required, as part of initial engagement, to demonstrate that its proposed solution functions in both French and English.
Reference Projects	e) The Government of Canada will qualify vendors proposing a viable automated user access management solution software solution that: <ul style="list-style-type: none"> Automated a minimum of 50,000 user accesses that otherwise would have been manually executed. 	Pass / Fail	The bidder must provide client reference information that demonstrates that the proposed automated user access management solution resulted in the automation of 50,000 user accesses that otherwise would have been manually executed. The bidder must provide client reference information that they successfully implemented the solution that they are proposing.

Category	Criteria	Evaluation	Proof Required
	<ul style="list-style-type: none"> Where the proposing vendor has a minimum of 1 reference project where they successfully automated user access in a payroll environment or a similar complex process using the automation they are proposing. 		<p>Each client reference must contain the following information:</p> <ul style="list-style-type: none"> Client Name Client Contact Client Contact details including phone number and email address <p><i>Engagement details demonstrating the above requirements were met that will be verified through the reference checks.</i></p>
	f) The bidder must provide reference projects that demonstrate previous success in improving user access management in complex processes such as payroll.	Pass / Fail	The bidder must supply in one page or less per project, a description of the automated user access management solution(s) previously implemented.
Technical Architecture	g) The bidder must provide a description of the technical architecture on which the required user access management technology would operate.	Pass / Fail	The bidder must supply, in one page or less, a brief description of the high level architectural information. Supporting documentation can also be provided as an annex to the one page description.
	h) The bidder must demonstrate that the solution is scalable for different volumes of users within the Federal government. <ul style="list-style-type: none"> 20,000 users 24,000 users (20% increase) 30,000 users (50% increase) 	Pass / Fail	<p>The bidder must provide client reference information do demonstrate that their solution is scalable for different volumes or users.</p> <p>Each client reference must contain the following information:</p> <ul style="list-style-type: none"> Client Name Client Contact Client Contact details including phone number and email address

Category	Criteria	Evaluation	Proof Required
			<i>Engagement details demonstrating the above requirements were met that will be verified through the reference checks.</i>
	i) The bidder must demonstrate that the solution is scalable for number of automated user accesses. <ul style="list-style-type: none"> • 50,000 user accesses • 60,000 user accesses (20% increase) • 75,000 user accesses (50% increase) 	Pass / Fail	The bidder must provide client reference information do demonstrate that their solution is scalable for different volumes or users. Each client reference must contain the following information: <ul style="list-style-type: none"> • Client Name • Client Contact • Client Contact details including phone number and email address <i>Engagement details demonstrating the above requirements were met that will be verified through the reference checks.</i>
Security and Privacy Architecture	j) The bidder must demonstrate that the proposed automated user access management solution is designed and developed to ensure the security of the solution, including implementing information security policies, procedures, and security controls that are consistent with Government of Canada standards.	Pass / Fail	The bidder must supply a third-party audited security certification and documentation for a recognized certification or evidence that the solution will meet and satisfy Crown security requirements prior to receiving any contract award.
	k) The bidder must demonstrate that the proposed solution is designed and developed to ensure the protection of personal information throughout its	Pass / Fail	The bidder must supply, in less than one page, a brief description of how they meet the protection of personal information and describing standards ensuring the safeguarding of personal information

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Category	Criteria	Evaluation	Proof Required
	lifecycle in accordance with Canadian legislative and policy standards, with the ability to audit data use and retention.		and provide technical documentation or presentations highlighting compliance.

6. Training

Category	Criteria	Evaluation	Proof Required
Recommended Approach	a) The bidder must demonstrate their recommended approach(es) to identifying and implementing improvements to the development, delivery and measurement of the effectiveness of training materials.	Pass / Fail	Presentation outlining the recommended approach(es) and any supporting documentation such as diagrams, spreadsheets or information the bidder would like to include as an annex.
Recommended Implementation Approach	b) The bidder must demonstrate that they are proposing innovative solutions to: <ul style="list-style-type: none"> • The development of training materials • The delivery of training materials • Address the national geographical distribution of learners • Adult learning which includes multiple learning formats • Measuring the effectiveness of training materials (MAF) • Increasing user productivity • Implement best practices 	Pass / Fail	The bidder must demonstrate that the proposed innovative solutions are viable solutions by developing a presentation outlining the recommended approach and including supporting documentation such as spreadsheets, diagrams (if necessary) and critical path.
	c) The bidder must provide implementation timelines.	Pass / Fail	The bidder must provide a project plan outlining the implementation timelines.
	d) The bidder must demonstrate that they are legally entitled to sell the solution they are proposing.	Pass / Fail	The bidder must certify that they are the developer of the proposed solution and are approved to deliver this solution to the Federal government.
	e) The bidder must demonstrate that the proposed solution functions in both of Canada's official languages (French and English).	Pass / Fail	The bidder must certify that its product functions in both official languages and will be required, as part of initial engagement, to demonstrate that its proposed solution functions in both French and English.

Category	Criteria	Evaluation	Proof Required
	<p>f) The Government of Canada will qualify vendors proposing innovative solutions that:</p> <ul style="list-style-type: none"> • Provides all users and integration type with an enhanced training experience in-class or online. • Provides all users and integration types with better tools which includes checklists, job aids, and cheat sheets to easily complete their work. • New ways to measure the effectiveness of the training materials • New ways that increase user productivity <p>Users are part of various roles:</p> <ul style="list-style-type: none"> • Employees • Managers • Timekeepers • Human Resources • Compensation Advisors • Finance (ex. Section 33 authorizers, auditors) <p>There are 3 integration types:</p> <ul style="list-style-type: none"> • Direct Entry • Web Services • Integrated (MyGCHR 9.1 or GCHRMS 8.9) 	<p>Pass / Fail</p>	<p>The bidder must provide client reference information that demonstrates that the proposed enhanced user experience solution is viable for all users and integration types.</p> <p>The bidder must provide client reference information that they successfully implemented the solution that they are proposing.</p> <p>Each client reference must contain the following information:</p> <ul style="list-style-type: none"> • Client Name • Client Contact • Client Contact details including phone number and email address <p><i>Engagement details demonstrating the above requirements were met that will be verified through the reference checks.</i></p>

Category	Criteria	Evaluation	Proof Required
Reference Projects	g) The bidder must provide reference projects that demonstrate previous success in improving training in an overall environment that is complex. This includes but is not limited to multiple stakeholders, user roles and different forms of integration.	Pass / Fail	The bidder must supply in one page or less per project, a description of the training solution(s) previously implemented.
Cost Model	h) The bidder must provide the generic costing parameters and cost associated with the improvement of the current training material and tools.	Pass / Fail	The bidder must supply the generic costing parameter(s) and framework required to implement training improvements. Please include any relevant spreadsheet(s) or information that describes the key elements that drive the solution implementation and sustainment costing model.
Technical Architecture	i) The bidder must provide a description of the technical architecture on which training material would operate.	Pass / Fail	The bidder must supply, in one page or less, a brief description of the high level architectural information. Supporting documentation can also be provided as an annex to the one page description.
	j) The bidder must demonstrate that the solution is accessible to users, specifically with the following criteria: <ul style="list-style-type: none"> • Access to a training environment • Develop and identify hosting solution for online courses • Learning Management System • Accessible to high security departments (CSIS, CSE, RCMP) • Accessibility to people with disabilities (WCAG compliant) • Available across Canada 	Pass / Fail	The bidder must provide client reference information do demonstrate that their solution is accessible to users. Each client reference must contain the following information: <ul style="list-style-type: none"> • Client Name • Client Contact • Client Contact details including phone number and email address <i>Engagement details demonstrating the above requirements were met that will be verified through the reference checks.</i>

Category	Criteria	Evaluation	Proof Required
Security and Privacy Architecture	k) The bidder must demonstrate that the proposed training materials and tools are designed and developed to ensure the security of the solution, including implementing information security policies, procedures, and security controls that are consistent with Government of Canada standards.	Pass / Fail	The bidder must supply a third-party audited security certification and documentation for a recognized certification or evidence of meeting within 1 year as of time of bidding. A signed statement agreeing to this requirement must be received as part of the bidding process.
	l) The bidder must demonstrate that the proposed solution is designed and developed to ensure the protection of personal information throughout its lifecycle in accordance with Canadian legislative and policy standards, with the ability to audit data use and retention.	Pass / Fail	The bidder must supply, in less than one page, a brief description of how they meet the protection of personal information and describing standards ensuring the safeguarding of personal information and provide technical documentation or presentations highlighting compliance.

Attachment 2
Response Submission Form

Phoenix Pay Stabilization Challenge

Invitation to Qualify
(ITQ)

No. EN920-190988/G

for various categories:

- 1. Robotic Software Automation**
- 2. HR Processes**
- 3. Lowering the Queue**
- 4. Improving User Experience**
- 5. Enhanced User Access Management**
- 6. Training**

Attachment 2

Response Submission Form

Invitation to Qualify No. EN920-190988/G Response Submission Form			
Respondent's full legal name <i>In the case of a joint venture, please identify all members.</i>			
Authorized Representative of Respondent for evaluation purposes (e.g., clarifications)	Name		
	Title		
	Address		
	Telephone #		
	Fax #		
	Email		
Respondent's Procurement Business Number (PBN) <i>Please see PWGSC Standard Instructions. Please make sure that your PBN matches the legal name under which you have submitted your response. If it does not, the Respondent will be determined based on the legal name provided, not based on the PBN, and the Respondent will be required to submit the PBN that matches the legal name of the Respondent.</i>			
Former Public Servants <i>Please see the Section of PWGSC Standard Instructions entitled "Former Public Servants" for more information.</i> <i>If you are submitting a response as a joint venture, please provide this information for each member of the joint venture.</i>	Is the Respondent a Former Public Servant in receipt of a pension as defined in PWGSC Standard Instructions? If yes, provide the information required by the Section in PWGSC Standard Instructions entitled "Former Public Servant"	Yes	
		No	
	Is the Respondent a Former Public Servant who received a lump sum payment under the terms of the work force adjustment directive? If yes, provide the information required by the Section in PWGSC Standard Instructions entitled "Former Public Servant"	Yes	
		No	
Federal Contractors Program for Employment Equity Certification <i>Please see the section of PWGSC Standard Instructions entitled "Federal Contractors Program for Employment Equity" for more information.</i> <i>Please check one of the boxes or provide the required information. If you are submitting a response as a joint venture, please provide this information for each member of the joint venture.</i>	The Respondent certifies having no work force in Canada.		
	The Respondent certifies being a public sector employer.		
	The Respondent certifies being a federally regulated employer subject to the <i>Employment Equity Act</i> .		
	The Respondent certifies having a combined work force in Canada of fewer than 100 permanent full-time, part-time and temporary employees.		
	The Respondent has a combined workforce in Canada of 100 or more permanent full-time, part-time and temporary employees.		
	Valid and current Certificate number.		
	The Respondent certifies having submitted the Agreement to Implement Employment Equity (LAB1168) to ESDC-Labour.		
Requested language for future communications regarding this procurement process – <i>please indicate either French or English</i>			

Requested Canadian province or territory for applicable laws		
Respondent's Proposed Site or Premises Requiring Safeguard Measures and document safeguarding security level	Street Address with Unit/Apartment, if applicable	
	City	
	Province/Territory/State	
	Postal Code/Zip Code	
	Country	
Security Clearance Level of Respondent <i>Please ensure that the security clearance matches the legal name of the Respondent. If it does not, the security clearance is not valid for the Respondent.</i>	Clearance Level	
	Date Granted	
	Issuing Entity (PWGSC, RCMP, etc.)	
	Legal name of entity to which clearance issued	
<p>On behalf of the Respondent, by signing below, I confirm that I have read the entire ITQ, including the documents incorporated by reference into the ITQ, and I certify and agree that:</p> <ol style="list-style-type: none"> 1. The Respondent considers itself and its products able to meet all the mandatory requirements described in the ITQ; 2. All the information provided in the response is complete, true and accurate; and 3. The Respondent agrees to be bound by all the terms and conditions of this ITQ, including the documents incorporated by reference into it. 		
Signature of Authorized Representative of Respondent		

Attachment 3
Mandatory Requirements Checklist

Phoenix Pay Stabilization Challenge

**Invitation to Qualify
(ITQ)
No. EN920-190988/G**

for various categories:

- 1. Robotic Software Automation**
- 2. HR Processes**
- 3. Lowering the Queue**
- 4. Improving User Experience**
- 5. Enhanced User Access Management**
- 6. Training**

Respondent	
Name	
Phone number	
email	

1. Robotic Software Automation

Software Solution

MANDATORY CRITERIA 1.a)

The bidder must demonstrate that they are proposing a solution can be used in conjunction with MS Office desktop applications and that can automate transactions in case management and ERP applications.

Proof Required: The bidder must provide a short five (5) minute video demonstrating the product functioning with MS Office desktop applications, automating processes within ERP applications and within case management applications plus any additional product documentation that the bidder would like to include as an annex.

Respondent Name	RESULT	
Email	PASS	FAIL
File Name(s) or Link to URL		
Explanation		

Software Solution

MANDATORY CRITERIA 1.b)

The bidder must demonstrate that they are legally entitled to sell the solution they are proposing.

Proof Required: The bidder must certify that it is the developer of the software being proposed or provide a written statement from the developer that they are authorized to sell the product they are proposing.

Respondent Name	Result	
Email	Pass	Fail
File Name(s) or link to URL		
Explanation		

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Software Solution

MANDATORY CRITERIA 1.c)

The bidder must demonstrate that the proposed solution functions in both of Canada's official languages (French and English).

Proof Required: The bidder must provide a 5 minute video of its product operating in both official languages as part of its bid submission. As part of Phase I activities the GC will conduct an assessment of the product to ensure that the product functions in an identical manner in both official languages.

Respondent Name	Email	Result	
		Pass	Fail
File Name(s) or link to URL			
Explanation			

Reference Projects

MANDATORY CRITERIA 1.d)

The bidder must provide reference projects that meet the project reference criteria established in Attachment 1.

Proof Required: The bidder must provide the required client details for five (5) projects where the proposed automation software automated 250,000 tasks that otherwise would have been manually executed. The bidder must also provide the required client details for five (5) projects where they successfully implemented the robotic software automation at client sites.

Please note that Government of Canada may, at its own discretion, contact client references.

References for automation of 250,000 tasks

Respondent Name		Result	
Email		Pass	Fail
Phone Number			
Client Reference 1			
Company Name			
Contact Name			
Contact Details			
Contact Phone Number			
Contact Email Address			
Engagement Details			
Client Reference 2			
Company Name			
Contact Name			
Contact Details			
Contact Phone Number			
Contact Email Address			
Engagement Details			
Client Reference 3			
Company Name			
Contact Name			
Contact Details			
Contact Phone Number			
Contact Email Address			
Engagement Details			

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Id de l'acheteur - Buyer ID
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Client Reference 4	
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Company Name	
Contact Name	
Contact Details	
Contact Phone Number	
Contact Email Address	

Engagement Details	
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Client Reference 5	
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Company Name	
Contact Name	
Contact Details	
Contact Phone Number	
Contact Email Address	

Engagement Details	
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References for bidder having implemented proposed software solution

Respondent Name		Result	
		Pass	Fail
Email			

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Phone Number		
Client Reference 1		
Company Name		
Contact Name		
Contact Details		
Contact Phone Number		
Contact Email Address		
Engagement Details		
Client Reference 2		
Company Name		
Contact Name		
Contact Details		
Contact Phone Number		
Contact Email Address		
Engagement Details		
Client Reference 3		
Company Name		
Contact Name		
Contact Details		
Contact Phone Number		
Contact Email Address		
Engagement Details		

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Client Reference 4	
Company Name	
Contact Name	
Contact Details	
Contact Phone Number	
Contact Email Address	
Engagement Details	
Client Reference 5	
Company Name	
Contact Name	
Contact Details	
Contact Phone Number	
Contact Email Address	
Engagement Details	

2. HR Processes

Reference Projects

MANDATORY CRITERIA 2.a)

The bidder must demonstrate that they have undertaken multiple successful HR and / or Payroll transformation projects in public sector or unionized organizations that have > 15,000 employees where the transformation budget was > \$20 M Canadian dollars.

Proof Required: The bidder must provide the required client details for two (2) successful HR and / or payroll transformation projects in public sector or unionized organization for projects where they acted as the prime contractor where the client employee total was > 15,000 employees and the transformation budget was > \$20M Canadian dollars. The scope of the transformation must have included the compensation business areas.

Bidders are requested to provide no more than a one page description of their client engagements.

Please note that Government of Canada may, at its own discretion, contact client references.

Respondent Name	Result	
Email	Pass	Fail
Phone Number		
Client Reference 1		
Company Name		
Contact Name		
Contact Details		
Contact Phone Number		
Contact Email Address		
Engagement Details		
Client Reference 2		
Company Name		
Contact Name		
Contact Details		
Contact Phone Number		
Contact Email Address		
Engagement Details		

Reference Projects

MANDATORY CRITERIA 2.b)

The bidder must demonstrate that they have experience transforming Human Capital Management business areas where the transformation scope included upstream HR process transformation and downstream payroll process transformation within a public sector or unionized environment.

Proof Required: The bidder must provide the required client details for two (2) successful Human Capital Transformation projects, for projects where they acted as the prime contractor, where the transformation scope included both upstream HR processes and downstream payroll processes for a public sector client or a client with a unionized work environment.

Reference description details must include the identification of in scope business processes. Bidders are requested to provide no more than a one page description of their client engagements.

Please note that Government of Canada may, at its own discretion, contact client references.

Respondent Name	Result	
Email	Pass	Fail
Phone Number		
Client Reference 1		
Company Name		
Contact Name		
Contact Details		
Contact Phone Number		
Contact Email Address		
Engagement Details		

Client Reference 2	
Company Name	
Contact Name	
Contact Details	
Contact Phone Number	
Contact Email Address	
Engagement Details	

Reference Projects

MANDATORY CRITERIA 2.c)

The bidder must demonstrate that they have experience transforming Human Capital Management environments that included the deployment of self-service technology as part of the technology roadmap.

Proof Required: The bidder must provide the required client details for two (2) successful Human Capital Transformation projects, for projects where they acted as the prime contractor, where the transformation scope included the deployment of self-service technology.

Bidders are requested to provide no more than a one page description of their client engagements.

Please note that Government of Canada may, at its own discretion, contact client references.

Respondent Name		Result	
		Pass	Fail
Email			
Phone Number			
Client Reference 1			
Company Name			
Contact Name			
Contact Details			
Contact Phone Number			
Contact Email Address			
Engagement Details			

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Client Reference 2	
Company Name	
Contact Name	
Contact Details	
Contact Phone Number	
Contact Email Address	
Engagement Details	

3. Lowering the Queue

Data Analytics

MANDATORY CRITERIA 3.a)

The bidder must demonstrate that it has an active data analytics program with extensive experience examining high volume business process outsourcing environments.

Proof Required: The bidder must provide two (2) references where their data analytics program was engaged to examine business process transaction data with the objective of identifying opportunities to introduce efficiencies into the target operating model. The analytics activity must have focused on a transaction set that exceeded 100,000 transactions.

Please note that Government of Canada may, at its own discretion, contact client references.

Respondent Name		Result	
Email		Pass	Fail
Phone Number			
Client Reference 1			
Company Name			
Contact Name			
Contact Details			
Contact Phone Number			
Contact Email Address			
Engagement Details			
Client Reference 2			
Company Name			
Contact Name			
Contact Details			
Contact Phone Number			
Contact Email Address			

Engagement Details

Case Management Technologies

MANDATORY CRITERIA 3.b)

The bidder must demonstrate that it has extensive, current experience implementing case management or client relationship management technology.

Proof Required: The bidder must provide four (4) references where they were engaged to implement case management technology to manage high volume transaction processing operations. Each reference must have been completed within 3 years of the closing date of this ITQ with the case technology managing greater than 100,000 cases on an annualized basis.

Please note that Government of Canada may, at its own discretion, contact client references.

Respondent Name	Result	
Email	Pass	Fail
Phone Number		
Client Reference 1		
Company Name		
Contact Name		
Contact Details		
Contact Phone Number		
Contact Email Address		
Completion Date		
Engagement Details		

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Client Reference 2	
Company Name	
Contact Name	
Contact Details	
Contact Phone Number	
Contact Email Address	
Engagement Details	
Client Reference 3	
Company Name	
Contact Name	
Contact Details	
Contact Phone Number	
Contact Email Address	
Engagement Details	
Client Reference 4	
Company Name	
Contact Name	
Contact Details	
Contact Phone Number	
Contact Email Address	

Engagement Details

Payroll Operations

MANDATORY CRITERIA 3.c)

The bidder must demonstrate that it has relevant experience in processing payroll for large payroll operations.

Proof Required: The bidder must provide two (2) references where it has been contracted to process payroll operations for clients where the bi-weekly payroll exceeded 15,000 employees receiving a pay check.

Please note that Government of Canada may, at its own discretion, contact client references.

Respondent Name	Result	
Email	Pass	Fail
Phone Number		
Client Reference 1		
Company Name		
Contact Name		
Contact Details		
Contact Phone Number		
Contact Email Address		
Engagement Details		

Client Reference 2	
Company Name	
Contact Name	
Contact Details	
Contact Phone Number	
Contact Email Address	
Engagement Details	

Payroll Operations

MANDATORY CRITERIA 3.d)

The bidder must demonstrate that it has relevant experience documenting payroll processing business environments.

Proof Required: The bidder must provide two (2) references where the scope of their engagement included producing Standard Operating Procedure (SOP) documentation for the compensation business areas. The SOP documentation must have dictated the manual procedures to be followed in order to achieve accurate and timely payroll results.

Please note that Government of Canada may, at its own discretion, contact client references.

Respondent Name		Result	
		Pass	Fail
Email			
Phone Number			
Client Reference 1			
Company Name			
Contact Name			
Contact Details			
Contact Phone Number			
Contact Email Address			
Engagement Details			

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Client Reference 2	
Company Name	
Contact Name	
Contact Details	
Contact Phone Number	
Contact Email Address	
Engagement Details	

4. Improving User Experience

Recommended Identification and Selection Approach

MANDATORY CRITERIA 4.a)

The bidder must demonstrate their recommended approach(es) to identifying and selecting improvements to end-to-end user experience across multiple processes, organizations and systems.

Proof Required: Detailed presentation and/or documentation thoroughly outlining the recommended approach(es) and any supporting material such as diagrams, spreadsheets or information the bidder would like to include as an annex.

Respondent Name	RESULT	
Email	PASS	FAIL
File Name(s) or Link to URL		
Explanation		

Recommended Implementation Approach

MANDATORY CRITERIA 4.b), c), d), e)

The bidder must demonstrate their recommended implementation approach(es) to identifying, designing and delivering an improved user experience in both official languages, including draft implementation timelines.

Proof Required: Detailed presentation and/or documentation thoroughly outlining the Implementation approach(es) and any supporting material such as diagrams, spreadsheets or information the bidder would like to include as an annex. A detailed and viable project plan outlining implementation timelines is required.

Respondent Name	RESULT	
Email	PASS	FAIL
Explanation		

--

Reference Projects

MANDATORY CRITERIA 4. f), g)

The bidder must provide reference projects that demonstrate previous success in improving user experience in complex processes such as payroll.

Proof Required: The bidder must supply, in one page or less per project, a description of how they meet the criteria.

Respondent Name	Email	RESULT	
		PASS	FAIL
Explanation			

Technical Architecture

MANDATORY CRITERIA 4.h), i)

The bidder must provide a description of the technical architecture on which the required technology would operate.

Proof Required: The bidder must supply, in one page or less, a brief description of how they meet the criteria. High level architectural information and supporting documentation can also be provided as an annex to the one page description.

Respondent Name	RESULT	
Email	PASS	FAIL
Explanation		

Security and Privacy Architecture

MANDATORY CRITERIA 4.j)

The bidder must demonstrate that the proposed improvement to user experience is designed and developed to ensure the security of the solution, including implementing information security policies, procedures, and security controls that are consistent with Government of Canada standards.

Proof Required: The bidder must supply a third-party audited security certification and documentation for a recognized certification or evidence that the solution will meet and satisfy Crown security requirements prior to receiving any contract award.

Respondent Name	RESULT	
Email	PASS	FAIL
Third-party Auditor Name	File Name(s) or Link to URL	

Security and Privacy Architecture

MANDATORY CRITERIA 4.k)

The bidder must demonstrate that the proposed solution is designed and developed to ensure the protection of personal information with the ability to audit data use and retention.

Proof Required: The bidder must supply, in less than one page, a brief description of how they meet the criteria by describing standards ensuring the safeguarding of personal information throughout its lifecycle in accordance with Canadian legislative and policy standards and provide technical documentation or presentations highlighting compliance.

Solicitation No. - N° de l'offre
EN920-190988/G
N° de réf. du client - Client Ref. No.
EN920-190988

N° de la modif - Amd. No.
File No. - N° du dossier
681xeEN920-190988/G

Id de l'acheteur - Buyer ID
681xe
N° CCC / CCC No./ N° VME - FMS

Respondent Name		RESULT	
Email		PASS	FAIL
File Name(s) or Link to URL			
Explanation			

5. Enhanced User Access Management

Recommended Implementation Approach

MANDATORY CRITERIA 5.a), b), c), d)

The bidder must demonstrate their recommended implementation approach(es) to identifying, designing and delivering automated user access management, including potential implementation timelines

Proof Required: Detailed presentation and/or documentation thoroughly outlining the recommended approach(es) and any supporting material such as diagrams, spreadsheets or information the bidder would like to include as an annex.

A detailed and viable project plan outlining implementation timelines is required.

Respondent Name	RESULT	
Email	PASS	FAIL
File Name(s) or Link to URL		
Explanation		

Reference Projects

MANDATORY CRITERIA 5.e), f)

The bidder must provide reference projects that demonstrate previous success in improving user access management in complex processes such as payroll.

Proof Required: The bidder must supply, in one page or less per project, a description of how they meet the criteria.

Respondent Name	RESULT	
Email	PASS	FAIL
Explanation		

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Technical Architecture

MANDATORY CRITERIA 5.g), h), i)

The bidder must provide a description of the technical architecture on which the required technology would operate.

Proof Required: The bidder must supply, in one page or less, a brief description of how they meet the criteria. High level architectural information and supporting documentation can also be provided as an annex to the one page description.

Respondent Name		RESULT	
Email		PASS	FAIL
Explanation			

Security and Privacy Architecture

MANDATORY CRITERIA 5.j)

The bidder must demonstrate that the proposed automated user access management solution is designed and developed to ensure the security of the solution, including implementing information security policies, procedures, and security controls that are consistent with Government of Canada standards.

Proof Required: The bidder must supply a third-party audited security certification and documentation for a recognized certification or evidence that the solution will meet and satisfy Crown security requirements prior to receiving any contract award.

Respondent Name		RESULT	
Email		PASS	FAIL
Third-party Auditor Name	File Name(s) or Link to URL		

Security and Privacy Architecture

MANDATORY CRITERIA 5.k)

The bidder must demonstrate that the proposed solution is designed and developed to ensure the protection of personal information throughout its lifecycle in accordance with Canadian legislative and policy standards, with the ability to audit data use and retention.

Proof Required: The bidder must supply, in less than one page, a brief description of how they meet the criteria. describing standards ensuring the safeguarding of personal information throughout its lifecycle in accordance with Canadian legislative and policy standards and provide technical documentation or presentations highlighting compliance.

Respondent Name	RESULT	
Email	PASS	FAIL
File Name(s) or Link to URL		
Explanation		

6. Training

Recommended Identification and Selection Approach

MANDATORY CRITERIA 6.a)

The bidder must demonstrate their recommended approach(es) to identifying and implementing improvements to the development, delivery and measurement of the effectiveness of training materials.

Proof Required: Presentation outlining the recommended approach(es) and any supporting documentation such as diagrams, spreadsheets or information the bidder would like to include as an annex.

Respondent Name	Email	RESULT	
		PASS	FAIL
File Name(s) or Link to URL			
Explanation			

Recommended Implementation Approach

MANDATORY CRITERIA 6.b),c),d),e),f)

The bidder must demonstrate that they are proposing innovative solutions to:

- The development of training materials
- The delivery of training materials
- Address the national geographical distribution of learners
- Adult learning which includes multiple learning formats
- Measuring the effectiveness of training materials (MAF)
- Increasing user productivity
- Implement best practices

The bidder must provide implementation timelines.

The bidder must demonstrate that they are legally entitled to sell the solution they are proposing.

The bidder must demonstrate that the proposed solution functions in both of Canada's official languages (French and English).

The Government of Canada will qualify vendors proposing innovative solutions that:

- Provides all users and integration type with an enhanced training experience in-class or online.
- Provides all users and integration types with better tools which includes checklists, job aids, cheat sheets to easily complete their work.
- New ways to measure the effectiveness of the training materials
- New ways the increase user productivity

Users are part of various roles:

- Employees
- Managers
- Timekeepers
- Human Resources
- Compensation Advisors
- Finance (ex. Section 33 authorizers, auditors)

There are 3 integration types:

- Direct Entry
- Web Services
- Integrated (MyGCHR 9.1 or GCHRMS 8.9)

Proof Required: The bidder must demonstrate that the proposed innovative solutions are viable solutions by developing a presentation outlining the recommended approach and including supporting documentation such as spreadsheets, diagrams (if necessary) and critical path.

The bidder must provide a project plan outlining the implementation timelines.

The bidder must certify that they are the developer of the proposed solution and are approved to deliver this solution to the Federal government.

The bidder must certify that its product functions in both official languages and will be required, as part of initial engagement, to demonstrate that its proposed solution functions in both French and English.

The bidder must provide client reference information that demonstrates that the proposed solution is viable for all users and integration types.

Each client reference must contain the following information:

- Client Name
- Client Contact
- Client Contact details including phone number and email address

Engagement details demonstrating the above requirements were met that will be verified through the reference checks.

Respondent Name		RESULT	
Email		PASS	FAIL
Explanation			

Reference Projects

MANDATORY CRITERIA 6.g)

The bidder must provide reference projects that demonstrate previous success in improving user experiences in an overall environment that is complex. This includes but is not limited to multiple stakeholders, user roles and different forms of integration.

Proof Required: The bidder must supply in one page or less per project, a description of the enhanced user access solution(s) previously implemented.

Respondent Name		RESULT	
Email		PASS	FAIL
Explanation			

Costing Model

MANDATORY CRITERIA 6.h)

The bidder must provide the generic costing parameters and cost model associated with acquiring the services.

Proof Required: The bidder must supply the generic costing parameter(s) and framework required to implement training improvements. Please include any relevant spreadsheet(s) or information that describes the key elements that drive the solution implementation and sustainment costing model.

Respondent Name		RESULT	
Email		PASS	FAIL

Explanation

Technical Architecture

MANDATORY CRITERIA 6.i),j)

The bidder must provide a description of the technical architecture on which training material would operate.

The bidder must demonstrate that the solution is accessible to users, specifically with the following criteria:

- Access to a training environment
- Develop and identify hosting solution for online courses
- Learning Management System
- Accessible to high security departments (CSIS, CSE, RCMP)
- Accessibility to people with disabilities (WCAG compliant)
- Available across Canada

Proof Required: The bidder must supply, in one page or less, a brief description of the high level architectural information. Supporting documentation can also be provided as an annex to the one page description.

The bidder must provide client reference information do demonstrate that their accessible to users following specific criteria.

Each client reference must contain the following information:

- Client Name
- Client Contact
- Client Contact details including phone number and email address

Engagement details demonstrating the above requirements were met that will be verified through the reference checks.

Respondent Name	RESULT
Email	PASS FAIL
Explanation	

Security and Privacy Architecture

MANDATORY CRITERIA 6.k),j)

The bidder must demonstrate that the proposed training materials and tools are designed and developed to ensure the security of the solution, including implementing information security policies, procedures, and security controls that are consistent with Government of Canada standards.

The bidder must demonstrate that the proposed solution is designed and developed to ensure the protection of personal information throughout its lifecycle in accordance with Canadian legislative and policy standards, with the ability to audit data use and retention.

Proof Required: The bidder must supply a third-party audited security certification and documentation for a recognized certification or evidence of meeting within 1 year as of time of bidding. A signed statement agreeing to this requirement must be received as part of the bidding process.

The bidder must supply, in less than one page, a brief description of how they meet the protection of personal information and describing standards ensuring the safeguarding of personal information and provide technical documentation or presentations highlighting compliance.

Respondent Name		RESULT	
Email		PASS	FAIL
Third-party Auditor Name	File Name(s) or Link to URL		