

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
Bid Fax: (819) 997-9776

**Invitation to Qualify/
Invitation à se qualifier**

Comments - Commentaires

Title - Sujet "HRP-RHP" ITQ - Gate 1 - HR and Pay Next Gen	
Solicitation No. - N° de l'invitation 24062-190560/C	Date 2018-12-08
Client Reference No. - N° de référence du client 24062-190560	GETS Ref. No. - N° de réf. de SEAG 24062-190560
File No. - N° de dossier 682xe.24062-190560	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2019-01-11	
Time Zone 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: Pelchat, Marco	Buyer Id - Id de l'acheteur 682xe
Telephone No. - N° de téléphone (819) 665-7128 ()	FAX No. - N° de FAX () -
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction: Treasury Board of Canada Secreteriat 90 Elgin Ottawa, ON K1A0R3	

Instructions: See Herein

Instructions: Voir aux présentes

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

Delivery Required - Livraison exigée Voir aux présentes	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

Solicitation No. - N° de l'offre
24062-190560/C
N° de réf. du client - Client Ref. No.
24062-190560

N° de la modif - Amd. No.
File No. - N° du dossier
681xe.24062-190560/C

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

NextGen HR and Pay

Gate 2

Invitation to Qualify (ITQ)

ITQ No. 24062-190560/C

Table of Contents

1. GENERAL INFORMATION	5
1.1 INTRODUCTION	5
1.2 OVERVIEW OF THE PROJECT	5
1.3 OVERVIEW OF PROCUREMENT PROCESS	6
1.4 CONFLICT OF INTEREST OR UNFAIR ADVANTAGE	7
1.5 FAIRNESS MONITOR	7
2. INSTRUCTIONS FOR RESPONDENTS	8
2.1 STANDARD INSTRUCTIONS, CLAUSES AND CONDITIONS	8
2.2 QUESTIONS AND COMMENTS	8
2.3 SUBMISSION OF ONLY ONE RESPONSE	8
2.4 SECURITY CLEARANCE REQUIREMENT	9
3. PREPARING AND SUBMITTING A RESPONSE	10
3.1 GENERAL INSTRUCTIONS	10
3.2 LANGUAGE FOR FUTURE COMMUNICATIONS	10
3.3 CONTENT OF RESPONSE	10
3.4 ELECTRONIC SUBMISSION OF RESPONSE	10
4. PROCESS FOR EVALUATING RESPONSES	12
4.1 EVALUATION OF RESPONDENT QUALIFICATIONS	12
4.2 BASIS OF QUALIFICATION	12
4.3 ITQ GATE 2 SECOND QUALIFICATION ROUND	13
5. ANNEX A – STATEMENT OF WORK	14
5.1 BACKGROUND	14
5.2 SCOPE	16
5.3 ASSUMPTIONS	16
6. ATTACHMENT 1 – RESPONSE SUBMISSION FORM	18
7. ATTACHMENT 2 – GATE 2 EVALUATION CRITERIA & CHECKLIST	20
R1. <i>User Experience (UX)</i>	20
R1.1. Usability	20
R2. <i>Business Capabilities</i>	22
R2.1. Business Capabilities	22
R3. <i>HR & Pay Usage Scenarios</i>	24
R3.1. Acting across Bargaining Units	24
R3.2. Transfer to separate agency, new province	26
R3.3. Leave with Income Averaging	28
R3.4. Collective Agreement Mass Retro	30
R3.5. Shift Work	32

R3.6.	Day in the life of an Senior Executive.....	34
R3.7.	Forecasting & Reconciliation	36
R4.	<i>Solution Architecture</i>	38
R4.1.	Proposed Technical Solution.....	38
R4.2.	Extensibility.....	39
R4.3.	Scalability and Portability	40
R4.4.	Responsible and Ethical use of Automated Decision Making Solutions.....	41
R5.	<i>Security & Privacy</i>	42
R5.1.	Access Management.....	42
R5.2.	GC Credentials Integration.....	43
R5.3.	Data Security & Privacy.....	44
R5.4.	Service Monitoring.....	45
R5.5.	Routine Access & Auditing.....	46
R5.6.	Certifications.....	47
R5.7.	Supply Chain Protection & Personnel Screening	48
R5.8.	Incident Management	49
R5.9.	Manage and control personal data.....	50
R5.10.	Protection of user information	51
R6.	<i>Interoperability</i>	52
R6.1.	Data Extraction	52
R6.2.	Data Ingestion & Bulk Load.....	54
R6.3.	Event driven architecture	55
R6.4.	Ability to invoke external synchronous web services	57
R6.5.	TLS 1.2 encryption	58
R6.6.	Interface handles external interoperability failure gracefully	59
R6.7.	APIs for Core Functionality	61
R7.	<i>Accessibility & Official Languages</i>	62
R7.1.	Accessibility Commitment	62
R7.2.	Accessibility Investment & Value	64
R7.3.	Change requests for official languages	65
R7.4.	Language capacity.....	66
R7.5.	Availability of content in both official languages	67
R8.	<i>Implementation</i>	68
R8.1.	Approach to Planning the Programme	68
R8.2.	Approach to Planning Pilots.....	69
R8.3.	Demonstrated Implementation Expertise	70
R8.4.	Value and Performance Management.....	71
R8.5.	Vendor Management.....	72
R8.6.	Data Management.....	73
R9.	<i>Support & Sustain</i>	74
R9.1.	Reliability	74
R9.2.	Service Management	75
R9.3.	Support Model.....	76
R9.4.	Input into Product Roadmaps.....	77
R9.5.	User Experience Practice	78
R9.6.	Product Updates Support	79
8.	ATTACHMENT 3: ADDITIONAL DETAILS FOR R1.1	80

8.1	HANDS-ON USER EXPERIENCE	80
8.2	USER EXPERIENCE EVALUATION	81
9.	ATTACHMENT 4: DRAFT SCOPE AND GENERIC CAPABILITIES FOR HR & PAY FUNCTIONS (FOR R2.1)	82
9.1	CONTEXT	82
9.2	MAP OF PROPOSED SCOPE (BASED ON GC HCM BUSINESS REFERENCE MODEL – ITERATION 1)	83
9.3	GENERIC SYSTEM CAPABILITIES FOR PRIMARY AND SECONDARY HCM BUSINESS REFERENCE MODEL SUB-FUNCTIONS	84
10.	ATTACHMENT 5: DRAFT LOGIC MODEL FOR THE HR FUNCTION (FOR R8.4)	88
	LONG TEXT DESCRIPTION	88

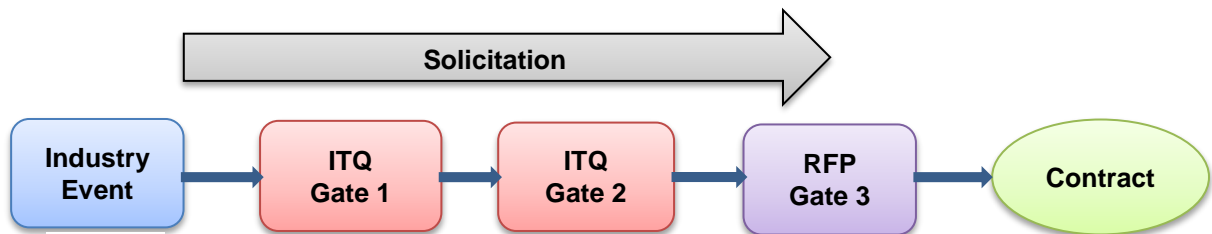
HR and Pay Next Generation Solution

ITQ – Gate 2

1. General Information

1.1 Introduction

- a) **This Invitation to Qualify (ITQ)** is the third phase of a multi-phase agile procurement process by Public Works and Government Services Canada (PWGSC), on behalf of the Treasury Board Secretariat of Canada (TBS), for the HR and Pay Next Generation Solution, (the “**Project**”). Suppliers who submitted a bid to ITQ Gate-1 and became “**Qualified Respondents**”, by meeting all the criteria in Gate 1, are invited to participate in ITQ-Gate 2. Only Qualified Respondents are permitted to submit a bid in response to ITQ-Gate 2. Gate 2 will include a Review and Refine Requirements (RRR) process.
- b) In order to participate in the subsequent RFP phase of this procurement process, Bidders must qualify in accordance with the terms and conditions of this ITQ-Gate 2. **Only the top 3 Bidders with the most points following the evaluation will be moving to the subsequent RFP phase on Gate 3.**
- c) The multi-phase agile procurement process:



- d) **Further Evaluation of Qualified Respondents:** Even though certain suppliers may be qualified by Canada as a result of this ITQ Gate 2, Canada reserves the right to re-evaluate any aspect of the qualification of any Qualified Respondent at any time during the procurement process.

1.2 Overview of the Project

- a) **Overview of Project:** ITQ-Gate 2 continues the procurement process to work towards the development of the next generation human resources and pay system solution, one that is better aligned with the complexity of the federal government pay structure.

This process is using an agile procurement approach in order to promote collaboration between the federal government, industry, unions, public servants and technology providers, as they work together to find a solution. As they move through the agile procurement process these stakeholder groups will be contributing to the solution, testing the requirements, refining them, and after several iterations, finalizing the details of the solution.

b) **Scope of Procurement:**

- i) **Potential Client Users:** This ITQ Gate 2 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 is currently contemplating the award of at least 1 contract.
- 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	Yes/No
<i>Canadian Free Trade Agreement (CFTA)</i>	YES
<i>North American Free Trade Agreement (NAFTA)</i>	YES
<i>World Trade Organization Agreement on Government Procurement (WTO-AGP)</i>	YES

1.3 Overview of Procurement Process

This ITQ Gate 2 is the third 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), the procurement process will be conducted in the following phases:

- a) **Industry Engagement :** PWGSC commenced its industry engagement by releasing an NPP on August 24, 2018 and then followed it up by holding an Industry Event on September 19, 2018. The objective of the Industry Day was to obtain feedback from Industry on Canada's preliminary requirements for the Project.
- b) **Meetings with potential Vendors:** PWGSC and TBS has met on several occasions with potential vendors to discuss and receive feedback about the published requirements as well as the process in general.
- c) **ITQ Gate 1:** This ITQ was used to qualify Respondents to participate in the subsequent ITQ Gate 2 and any subsequent phases of the procurement process.
- d) **ITQ Gate 2 :** This ITQ will be used to qualify Respondents to participate in the subsequent RFP phase of the procurement process.
- e) **Request for Proposals (RFP) Gate 3:** Canada anticipates releasing an RFP to those Qualified Respondents who remain qualified at the time the RFP is released.
- f) **Contract Award:** ITQ Gate 1 and ITQ Gate 2 constitute the phased qualification followed by the RFP; the multi-phased procurement process may or may not result in contract award.

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.

In this regard, Canada advises that it has used the services of a number of private sector consultants/contractors in preparing strategies and documentation related to this procurement process, including the following:

- a) Pleiad Canada Inc.
- b) Gartner
- c) Systematix
- d) I4C
- e) LeverageTek
- f) General Dynamics Mission Systems

1.5 Fairness Monitor

Canada has engaged Samson & Associates as a fairness monitor for this procurement. The fairness monitor will, for example, observe the evaluation of responses to determine whether PWGSC has adhered to the evaluation process described in the solicitation. The fairness monitor is under obligations pursuant to its contract with Canada to maintain the confidentiality of all information received as a result of its participation in this procurement process.

2. Instructions for Respondents

2.1 Standard Instructions, Clauses and Conditions

- a) All instructions, clauses and conditions identified in the ITQ by number, date and title are set out in the Standard Acquisition Clauses and Conditions Manual, (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.
- b) Firms who submit a response agree to be bound by the instructions, clauses and conditions of the ITQ.
- c) The 2003 (2018-05-22) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the ITQ, except that:
 - i) Wherever the term “bid solicitation” is used, substitute “Invitation to Qualify”;
 - ii) Wherever the term “bid” is used, substitute “Response”;
 - iii) Wherever the term “Bidder(s)” is used, substitute “Respondent(s)”;
- d) Subsection 05(4), which discusses a validity period, does not apply, given that this ITQ invites firms to qualify. Canada will assume that all firms who submit a Response wish to continue to qualify unless they advise the Contracting Authority that they wish to withdraw their Response;
- e) Delete subsection 01 – Integrity Provisions – Bid; and
- f) Delete subsection 20 – Further Information.
- g) 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 Gate 2 can be submitted in accordance with provisions of the Standard Instructions - Goods or Services - Competitive Requirements 2003 (2018-05-22), no later than 10 calendar days prior to the closing date.

2.3 Submission of Only One Response

- 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. 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 Gate 2.
- 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 Gate 2 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 at Attachment 1 (Requested at ITQ Gate 2 Closing):** Respondents are requested to include the Response Submission Form, found at **Attachment 2**, with their responses. 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 2 (Mandatory at ITQ Gate 2 Closing):** The response must include all the information required by Gate 2 Evaluation Criteria found at **Attachment 2**. Respondents are encouraged to use the provided checklist.

3.4 Electronic Submission of Response

- a) **Submission of Response:** This ITQ Gate 2 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.dgareceptiondessoumissions-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.

- viii) A bid transmitted by epost Connect service constitutes the formal bid of the Bidder and must be submitted in accordance with section 05.

4. Process for Evaluating Responses

4.1 Evaluation of Respondent Qualifications

Canada will evaluate and score each Response against all the rated requirements described in this ITQ Gate 2 (including information that this ITQ Gate 2 indicates is required, but the ITQ Gate 2 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.

Canada will be using three evaluation approaches for this ITQ: 1. Criteria marked as "Bid" in attachment #1 will be evaluated using the material provided at bid closing, 2. Criteria marked as "UX" will be evaluated using the UX Assessment approach that is further described in Attachment 4, 3. Criteria marked as "SME" will be evaluated using a Subject Matter Expert (SME) Challenge approach.

The SME Challenge approach will be an interactive evaluation session during which bidders will be asked to demonstrate, to GC subject matter experts, how they meet the Gate 2 requirements identified as "SME". During the session, SMEs may ask for additional clarifications and may ask on-the-spot variations to the requirement.

4.2 Basis of Qualification

- a) The top 3 Respondents with the most points following all 3 evaluation methods (Bid, UX and SME) of this ITQ Gate 2, will become a Qualified Respondent for the next phase of the procurement process, the Request for Proposals (RFP).
- 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 Gate 2 and the Respondent's certification changes or lapses, so that the Respondent no longer meets the requirements of this ITQ Gate 2, 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 Gate 2, 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.
- e) In case of a tie, the score for criteria R6 will be used as the tie breaker.

4.3 ITQ Gate 2 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.

5. Annex A – Statement of work

5.1 Background

As outlined in Budget 2018, the Government of Canada (GC) is committing to the next steps in addressing the ongoing challenges of the Phoenix pay system, including its intention to move to a next generation solution; one that will be better aligned with the complexity of the federal government's HR and pay structure. The Phoenix issues have shown that HR and pay are mutually dependent and don't exist in isolation. The next generation solution may therefore also support the full hire-to-retain employee lifecycle, enabling the GC to better attract, pay, retain and nurture its employees. This solution may cover aspects such as: recruitment, training, performance management and other HR processes and systems, and interdependencies with pay, and any other downstream systems like pension and receiver general.

The GC is committed to exploring all options, and will be working with experts, unions, public servants, and technology providers to define the way forward. In particular, we are committed to working in partnership with our bargaining agents and system users at the center of this process. The GC will also consider the lessons learned and best practices from the implementation of large-scale initiatives from other jurisdictions.

This Statement of Work sets forth the description of the capabilities required to provide the GC with an ability to build, maintain and operate a GC Human Capital Management solution, including Pay, and provide a common approach to supporting all the capabilities required in a typical Human Capital Lifecycle, including: the assurance of interoperability; standardizing what information is shared and how it is shared; and, to ensure industry best practice processes are utilized.

This Statement of Work is applicable to Gate 2, and should be considered a work in progress that will change and be updated throughout the procurement process as described in the separate Invitation to Qualify (ITQ) document.

a) User Centric – Designing for Employees

It is important to highlight that any potential solution will need to be designed in a user centric manner. A key lesson learned from multiple reports and engagements was to ensure that any solutions implemented post-Phoenix be done with the user as the focal point of all decisions and designs. The days of procuring ERPs based off of dated business requirements are long past, and the era of co-designing, user-centricity, and collaborative efforts is at hand.

Co-Designing, User-Centricity, and Collaboration

Co-designing future solutions invites teams to bring in members of the end-user community such as employees and managers into the team and give them a seat at the table to make recommendations, and even weigh in on decisions. This inverts the traditional approach to ERP where users were the "last

to know” when launching a new ERP. The traditional method kept most of the functionality as a surprise and made itself available only upon a User Acceptance Testing (UAT) or Training phases at the earliest, or, in most cases, post go-live with some lucky few getting the sneak peek of the pilot (if one occurred). Stemming from a more strategic mindset, co-designing brings in the traditional team players, such as functional and technical teams, and sits them amongst end users, policy resources, and even the vendor. The new “extended” family can even include resources who know applications that will integrate with the planned solution to ensure that information is considered from that point of view.

User-centered design (UCD), also referred to as User-Driven Development, is a methodology that puts the user at the forefront of design and design decisions. Playing heavily on how to make a particular product *usable* for the person it is intended for, UCD puts the human back as priority one in terms of workflows, process flows, and even in how the solution is anticipated to be used by the user vs. the more traditional approach of having the technology functions drive decisions. This, coupled with the theory of Design Thinking, where empathy is one of the key factors, once applied, will make for a solution that not only meets any business requirements, but increases the likelihood of proper use by the intended end-users.

b) Cloud Environment – SaaS

As stated in the GC Cloud Adoption Strategy, cloud computing can be compared to public utilities that deliver commodities such as electricity. Instead of buying and running infrastructure itself, an organization buys computing power from a provider - cloud computing is on-demand and the consumer pays for what they use.

- Cloud computing introduces a significant shift in how the GC:
 - Will obtain, use and manage technology; and,
 - Budget and pay for technology services
- Cloud computing benefits the GC by:
 - Delivering modern digital services comparable to commercial service providers such as Canadian financial institutions;
 - Providing the ability to keep pace with technological, legislative and policy changes affecting service offerings to Canadians; and,
 - Diminishing costs to deliver programs and services, i.e. the ability to trade capital expense for variable expense - reducing requirements to maintain aging data centers and networks, and only pay predictable subscription fees for cloud computing services based on usage.

The cloud is a very broad concept, and it covers just about every possible sort of online service, but when businesses refer to cloud procurement, there are usually three models of cloud service under consideration: Infrastructure as a Service (IaaS); Solution as a Service (PaaS); and, Software as a Service (SaaS). This represents a sliding scale of increasing vendor operation and maintenance of the IT

solution. As the vendor takes greater control of the operation and maintenance of the IT solution (IaaS → PaaS → SaaS) the benefits' return to the customer increases geometrically.

5.2 Scope

The purpose of this Statement of Work (SOW) is to define the requirements, activities and deliverables associated with Gate 2. The scope of this phase is to elaborate on requirements from Gate 1 with:

- real scenarios and case studies;
- actual testing and interaction with users; and
- presentations, demos, and real-time feedback.

For more information on potential requirements for the end solution, refer to R1, R2 and R3.

5.3 Assumptions

As per the ITQ, any proposed solution will be assessed and revised through collaboration, within each gate, according to the criteria set out in that gate. The GC intends on releasing an updated SOW prior to each gate and throughout the procurement when it is significantly revised. During later gates both implementation and sustainment options will be co-designed with successful vendors.

The NEXTGEN SOW will include the following services in order to support a multi-tenant solution. The services will be developed in increasing detail throughout each gate:

- **Solution:**
Business Capabilities and Technical Capabilities are provided on a scalable, elastic, and measurable cloud environment as described below;
- **Implementation:**
Will describe the methodology(s) for implementing the solution; highlight the recommended scope for the solution across the GC; describe the recommended implementation process for dealing with large, medium and small sized departments; describe the change management and transformation recommendations needed to successfully implement the solution;
- **Sustainment:**
Will describe System Management and Technical support, including management and operations to support NEXTGEN as per Software as a Service design principles; and
NEXTGEN Configuration and Asset Management for all in-scope services; and
NEXTGEN Capacity and Performance Management; and
NEXTGEN Solution Security; and

In scope environments may include: (SBX) Sandbox; Development (DEV), Integration (INT), Quality Assurance (QA), Training (TRN) Performance (PER), Production (PROD)

a) Overall Assumptions

1. The future solution will be based on one integrated HCM application that supports both the HR and Total Compensation functions.
2. Human Capital includes all components of the GC workforce (employees, terms, casuals, contractors, etc.).
3. The future Human Capital solution will provide interoperability/integration with key GC solutions (finance, procurement, travel, etc.) and HCM applications.
4. The future Human Capital solution must provide the appropriate level of privacy and security for personnel information and solution access in order to comply with legislation and policy.
5. The new Human Capital solution must comply with GC accessibility and official languages standards.
6. Capability statements identify the business needs and are not indicative of sequencing or processing requirements.

6. Attachment 1 – Response submission form

Invitation to Qualify No. 24062-190560/C 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		

7. Attachment 2 – Gate 2 evaluation criteria & checklist

R1. USER EXPERIENCE (UX)

The bidder must demonstrate that the proposed solution meets users' needs and offers a good user experience.

R1.1. USABILITY

Requirement			
<p>The bidder must make available the following:</p> <ul style="list-style-type: none"> An environment to allow users to complete tasks; Login credentials for 200 users; <ul style="list-style-type: none"> 100 users will be completing the employee tasks; 100 users will be completing the manager tasks; and Any native app(s) for the proposed solution so that users may conduct this evaluation from their mobile device. <p>The evaluation will focus on common manager and employee transactions. Bidders must ensure the proposed solution can be evaluated:</p> <ul style="list-style-type: none"> in both official languages, from various locations across Canada, using accessibility tools, and using various form factors and contexts of use (desktop, laptop, mobile...). <p>Users will fill out an evaluation grid after completing each task to provide their assessment of the proposed solution's usability.</p> <p>Refer to Attachment 3: Additional Details for R1.1 for additional information.</p> <p><u>Please Note</u> To facilitate the readiness and preliminary testing for this assessment, the GC would appreciate receiving the credentials as early as possible – preferably before December 31st, 2018.</p>		Weighting	5%
		Evaluation Method	UX
Evaluation Criteria			
Not Acceptable (0 pts)	Acceptable (5 pts)	Good (7 pts)	Excellent (10 pts)
The overall score from the User Experience Evaluation is less than 70%.	The score from the User Experience Evaluation is equal to at least 70% and less than 80%.	The score from the User Experience Evaluation is equal to at least 80% and less than 90%.	The score from the User Experience Evaluation is equal to at least 90%.

Bid Response

- Link to the environment to allow users to complete tasks
- The list of login credentials for the 200 users (100 for employee roles and 100 for manager roles)
- The store link to any native apps for the proposed solution that users use to conduct their evaluation from their mobile device

R2. BUSINESS CAPABILITIES

The bidder must explain how the proposed solution offers the breadth of functionality to meet the high-level capabilities required by the GC.

R2.1. BUSINESS CAPABILITIES

Requirement			
The bidder must demonstrate:		Weighting	10%
<ol style="list-style-type: none"> In 19 pages or less, how the proposed solution meets each primary capability defined in Attachment 4: Draft Scope and Generic Capabilities for HR & Pay Functions (for R2.1) In 8 pages or less, how the proposed solution meets any of the secondary capabilities defined in the Scope and Generic Capabilities document, as applicable. In 3 pages or less, how the proposed solution could support any of the remaining sub-functions as shown in the Scope and Generic Capabilities document, as applicable. 		Evaluation Method	Bid
<p><u>Please Note</u></p> <ul style="list-style-type: none"> Evaluators will stop reading once reaching the above described page limit. The bidder may, at their discretion, describe how the proposed solution could support any of the remaining sub-functions as shown in the Attachment 4: Draft Scope and Generic Capabilities for HR & Pay Functions (for R2.1), as applicable. Note that there are no points allotted to this portion of the criterion but it will be information beneficial to the GC for developing Gate 3. 			
Evaluation Criteria			
Not Acceptable (0 pts)	Acceptable (5 pts)	Good (7 pts)	Excellent (10 pts)
The proposed solution does not meet all of primary capabilities as per the Scope and Generic Capabilities document.	The proposed solution meets all of the primary capabilities.	Acceptable and: The proposed solution meets up to four of the secondary capabilities.	Good and: The proposed solution meets between five and all (eight) of the secondary capabilities.
Bid Response			

Solicitation No. - N° de l'offre
24062-190560/C
N° de réf. du client - Client Ref. No.
24062-190560

N° de la modif - Amd. No.
File No. - N° du dossier
681xe.24062-190560/C

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

Bid Self-Assessment			
Not Acceptable	Acceptable	Good	Excellent
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

R3. HR & PAY USAGE SCENARIOS

During the SME Challenge, the bidder must show the proposed solution in action, via a real-time demo, demonstrating how the proposed solution enables the GC to carry out complex HR and pay operations. During the demonstration, evaluators will ask questions and require on-the-spot explanations of variations of the usage scenarios. Bidders are encouraged to provide information on additional features which will facilitate better productivity and improved user experience with regards to the scenarios below.

R3.1. ACTING ACROSS BARGAINING UNITS

Requirement			
<p>Usage Scenario Jerry recently had an employee (Bill) leave his team to go work in another department. While we search for a permanent replacement, he will ask Joan to take an Acting Assignment to fill the role temporarily 3 months starting on the 5th business day of the month. This role which Joan will be filling is in a different bargaining unit from her current position. In her current position, Joan is at the top of the salary scale. Joan also has a garnishment (percentage based) for unpaid tickets to the city of Toronto.</p> <p>Expected Results</p> <ul style="list-style-type: none"> Employee record is updated Salary should be updated Bargaining Agent is updated Union Dues deduction is updated on the first of the following month and being submitted to the new Bargaining Agent. Notification to both Unions Garnishment deduction recalculated based on new acting salary Org chart / hierarchy has been updated <p>Additional Context Guidelines for the Processing of Garnishment http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=25600 Treasury Board Secretariat Directive on Union Dues https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=21104</p>		Weighting	3%
		Evaluation Method	SME
Evaluation Criteria			
Not Acceptable (0 pts)	Acceptable (5 pts)	Good (7 pts)	Excellent (10 pts)
The information provided as part of the	The demo of the proposed solution in	Acceptable plus:	Good plus:

<p>SME Challenge does not, or insufficiently demonstrate the proposed solution in action and how it meets the requirement.</p>	<p>action, conducted as part of the SME Challenge, clearly demonstrates how the proposed solution meets the usage scenario and all of the expected results.</p> <p>Should any 3rd party product(s) be required as part of the proposed solution to meet all expected results, the bidder may provide a detailed explanation of the proposed approach, in lieu of a demo, only for the capabilities covered by the 3rd party product.</p>	<p>The information provided during the SME Challenge clearly demonstrates process automation and configuration options for relevant capabilities.</p> <p>The information provided during the SME Challenge also provides clear and thorough explanations and/or demonstrations for up to half of the on-the-spot scenario variations.</p>	<p>The information provided during the SME Challenge also provides clear and thorough explanations and/or demonstrations for more than half of the on-the-spot scenario variations.</p>
<p>Bid Response</p>			
<p>Not Applicable, will be evaluated during the SME Challenge</p>			

R3.2. TRANSFER TO SEPARATE AGENCY, NEW PROVINCE

Requirement			
<p>Usage Scenario Bill is leaving his role at a Core department (Core Public Administration) in Gatineau, QC to go work at a separate agency in Ottawa, ON. In addition, Bill is currently in an overpayment situation - some monies have been recovered under his Core department, and need to continue when he moves to his new job in the separate agency.</p> <p>Expected Results Transfer Out:</p> <ul style="list-style-type: none"> Employee record is updated Separation process initiated Exit/Off boarding form completed Return of Assets / Removal of Access Review of any pending activities, such as: completion of performance agreement for period and addressing pending leave requests (past requests not yet approved, and future requests which are planned) <p>Transfer In:</p> <ul style="list-style-type: none"> Employee record updated (salary, bargaining agent, province of employment, etc.) Onboarding process initiated Leave plans / benefits plans updated Performance agreement transferred or created <p>Overall:</p> <ul style="list-style-type: none"> Org Charts / Hierarchy is updated Notifications to Unions Notifications to finance teams in both organizations <p>Additional Context Performance review period at GC for the majority of departments, runs from April 1st to March 31st.</p>	Weighting	3%	
	Evaluation Method	SME	
Evaluation Criteria			
Not Acceptable (0 pts)	Acceptable (5 pts)	Good (7 pts)	Excellent (10 pts)

<p>The information provided as part of the SME Challenge does not, or insufficiently demonstrate the proposed solution in action and how it meets the requirement.</p>	<p>The demo of the proposed solution in action, conducted as part of the SME Challenge, clearly demonstrates how the proposed solution meets the usage scenario and all of the expected results.</p> <p>Should any 3rd party product(s) be required as part of the proposed solution to meet all expected results, the bidder may provide a detailed explanation of the proposed approach, in lieu of a demo, only for the capabilities covered by the 3rd party product.</p>	<p>Acceptable plus:</p> <p>The information provided during the SME Challenge clearly demonstrates process automation and configuration options for relevant capabilities.</p> <p>The information provided during the SME Challenge also provides clear and thorough explanations and/or demonstrations for up to half of the on-the-spot scenario variations.</p>	<p>Good plus:</p> <p>The information provided during the SME Challenge also provides clear and thorough explanations and/or demonstrations for more than half of the on-the-spot scenario variations.</p>
<p>Bid Response</p>			
<p>Not Applicable, will be evaluated during the SME Challenge</p>			

R3.3. LEAVE WITH INCOME AVERAGING

Requirement		
	Weighting	3%
<p>Usage Scenario Shelly is a full-time employee applying for a leave with income averaging. She will be on leave without pay for 6 weeks, which includes one full calendar month.</p> <p>Expected Results</p> <ul style="list-style-type: none"> • Leave with Income Averaging request is submitted and approved by management (refer to TBS 325-10E for information required) • Employee record is updated • Salary is adjusted • Bilingual Bonus allowance is adjusted • Leave credits are adjusted according to the GC 10-day rule • Benefit deductions remain intact • Union Dues are adjusted • Notifications to Unions <p>Additional Context Directive on Leave and Special Working Arrangements, Appendix D-Leave with Income Averaging: A Special Working Arrangement https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=15774</p> <p>The GC 10-day rule stipulates that full time employees (working a standard 37.5 hrs per week) must receive pay for a minimum of 10 days in the calendar month in order to be eligible for the leave credits for vacation and sick, and to receive the Bilingual Bonus.</p> <p>Bilingual Bonus is an allowance for employees meeting specific language requirements, in the amount of \$800 per year, paid on each pay (biweekly).</p> <p>Bilingualism Bonus Directive: https://www.njc-cnm.gc.ca/directive/d1/v1/en</p> <p>Treasury Board Secretariat Directive on Union Dues https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=21104</p>	Evaluation Method	SMEs
Evaluation Criteria		

Not Acceptable (0 pts)	Acceptable (5 pts)	Good (7 pts)	Excellent (10 pts)
<p>The information provided as part of the SME Challenge does not, or insufficiently demonstrate the proposed solution in action and how it meets the requirement.</p>	<p>The demo of the proposed solution in action, conducted as part of the SME Challenge, clearly demonstrates how the proposed solution meets the usage scenario and all of the expected results.</p> <p>Should any 3rd party product(s) be required as part of the proposed solution to meet all expected results, the bidder may provide a detailed explanation of the proposed approach, in lieu of a demo, only for the capabilities covered by the 3rd party product.</p>	<p>Acceptable plus:</p> <p>The information provided during the SME Challenge clearly demonstrates process automation and configuration options for relevant capabilities.</p> <p>The information provided during the SME Challenge also provides clear and thorough explanations and/or demonstrations for up to half of the on-the-spot scenario variations.</p>	<p>Good plus:</p> <p>The information provided during the SME Challenge also provides clear and thorough explanations and/or demonstrations for more than half of the on-the-spot scenario variations.</p>
Bid Response			
Not Applicable, will be evaluated during the SME Challenge			

R3.4. COLLECTIVE AGREEMENT MASS RETRO

Requirement		
	Weighting	3%
<p>Usage Scenario</p> <p>A new collective agreement is signed and includes retroactive updates to salaries, effective 1 year ago. This will impact a small group of employees in the affected Occupational Group, as follows:</p> <ul style="list-style-type: none"> • Employee A - currently active and has been active in the same position for the entire retro period. • Employee B - is currently on Maternity leave for the last 3 months. • Employee C - retired 7 months ago • Employee D - was acting in the impacted Occupational Group for 4 months during the retro period (their substantive position is not impacted) • Employee E - moved to a different Occupational Group 5 months ago, and requires a review of their salary in accordance with the GC Promotion/Demotion rules. • Employee F - is an excluded employee who received performance pay (a percentage of salary) applicable to the retro period • Employee G - moved to a separate agency 6 months ago • Employee H - has worked overtime during the retro period • Employee I - has passed away 2 months ago. <p>Expected Results</p> <ul style="list-style-type: none"> • Salary rate tables are updated • Employee records are updated • Retro pay is accurately calculated and issued as follows: <ul style="list-style-type: none"> ○ Employee A - receives retro pay for the entire period ○ Employee B - receives retro pay for the period worked, as well as for the maternity leave top-up period ○ Employee C - receives retro pay, notification for updates to pension ○ Employee D - receives retro pay for the period of acting ○ Employee E - receives retro pay for the period worked, and an update to their salary based on GC Promotions/Demotion rules. ○ Employee F - receives retro pay for their base salary as well as their performance pay (a percentage of salary) ○ Employee G - receives retro pay for the period worked ○ Employee H - receives retro pay for base salary and overtime 	<p>Evaluation Method</p>	<p>SME</p>

<ul style="list-style-type: none"> ○ Employee I - retro pay is issued to the estate, and death benefits are adjusted <p>Additional Context Occupational groups for the public service (CPA) https://www.canada.ca/en/treasury-board-secretariat/services/collective-agreements/occupational-groups.html</p> <p>GC has a policy to provide top-up to employees on maternity/paternity leave to bring them to 93% of their regular salary.</p> <p>Promotion, deployment or demotion (from Public Services and Procurement Canada) https://www.tpsgc-pwgsc.gc.ca/remuneration-compensation/services-paye-pay-services/paye-information-pay/vie-life/emploi-change-employment/pro-mut-ret-pro-dep-dem-eng.html?wbdisable=true</p>		
--	--	--

Evaluation Criteria

Not Acceptable (0 pts)	Acceptable (5 pts)	Good (7 pts)	Excellent (10 pts)
<p>The information provided as part of the SME Challenge does not, or insufficiently demonstrate the proposed solution in action and how it meets the requirement.</p>	<p>The demo of the proposed solution in action, conducted as part of the SME Challenge, clearly demonstrates how the proposed solution meets the usage scenario and all of the expected results.</p> <p>Should any 3rd party product(s) be required as part of the proposed solution to meet all expected results, the bidder may provide a detailed explanation of the proposed approach, in lieu of a demo, only for the capabilities covered by the 3rd party product.</p>	<p>Acceptable plus:</p> <p>The information provided during the SME Challenge clearly demonstrates process automation and configuration options for relevant capabilities.</p> <p>The information provided during the SME Challenge also provides clear and thorough explanations and/or demonstrations for up to half of the on-the-spot scenario variations.</p>	<p>Good plus:</p> <p>The information provided during the SME Challenge also provides clear and thorough explanations and/or demonstrations for more than half of the on-the-spot scenario variations.</p>

Bid Response

Not Applicable, will be evaluated during the SME Challenge

R3.5. SHIFT WORK

Requirement			
<p>Usage Scenario Fatima works as a Radio Operating Officer and works 12 hour shifts on a rotating schedule of 4 days on, 5 days off. As per the collective agreement, Radio Operators hours of work must not exceed an average of 37.50 hours per week over a period not exceeding 126 days.</p> <p>Fatima falls ill during his 3rd shift of the current week and is expected to be off on Sick Leave for at least 2 weeks. Fatimas's manager, Elizabeth, needs to ensure operational coverage, equitable allocation of overtime, and abide by the rules of the collective agreement.</p> <p>Expected Results</p> <ul style="list-style-type: none"> Employee record is updated Work schedules are updated Overtime is paid accordingly & timely (OT rate is 1.75) Additional meal allowances are paid accordingly & timely Overtime may be banked by one or several employees, to be taken as Compensatory leave at a later date, to be computed at the same premium rate as the overtime <p>Additional Context Refer to Collective Agreement, Article 22 - hours of work and overtime: http://www.tbs-sct.gc.ca/agreements-conventions/view-visualiser-eng.aspx?id=17#tocxx211546</p>		Weighting	3%
		Evaluation Method	SME
Evaluation Criteria			
Not Acceptable (0 pts)	Acceptable (5 pts)	Good (7 pts)	Excellent (10 pts)
The information provided as part of the SME Challenge does not, or insufficiently demonstrate the proposed solution in action and how it meets the requirement.	The demo of the proposed solution in action, conducted as part of the SME Challenge, clearly demonstrates how the proposed solution meets the usage scenario and all of the expected results.	Acceptable plus: The information provided during the SME Challenge clearly demonstrates process automation and configuration options for relevant capabilities.	Good plus: The information provided during the SME Challenge also provides clear and thorough explanations and/or demonstrations for more than half of the on-the-spot scenario variations.

	<p>Should any 3rd party product(s) be required as part of the proposed solution to meet all expected results, the bidder may provide a detailed explanation of the proposed approach, in lieu of a demo, only for the capabilities covered by the 3rd party product.</p>	<p>The information provided during the SME Challenge also provides clear and thorough explanations and/or demonstrations for up to half of the on-the-spot scenario variations.</p>	
<p>Bid Response</p>			
<p>Not Applicable, will be evaluated during the SME Challenge</p>			

R3.6. DAY IN THE LIFE OF AN SENIOR EXECUTIVE

Requirement			
<p>Usage Scenario Anaya is an Assistant Deputy Minister in charge of finance and human resources in a large department. The Deputy Minister asked her to put together some reports to be presented at a departmental executive committee. Anaya needs to quickly extract information and insights from the organization's HR & Pay solution.</p> <p>Expected Results The proposed solution:</p> <ol style="list-style-type: none"> 1. Manages, aggregates and presents real-time HR & Pay information to help senior executives make informed and data-driven strategic decisions. 2. Enables users to easily design reports without requiring knowledge of table structure and field names as well as easily configure and contextualize the content and labels for the audience's needs. 3. Leverages predictive analytics and AI-assisted insights to highlight important data-driven insights. <p>Additional Context Refer to the GC InfoBase for additional information on HR & Pay reporting.</p>		Weighting	3%
		Evaluation Method	SME
Evaluation Criteria			
Not Acceptable (0 pts)	Acceptable (5 pts)	Good (7 pts)	Excellent (10 pts)
The information provided as part of the SME Challenge does not, or insufficiently demonstrate the proposed solution in action and how it meets the requirement.	The demo of the proposed solution in action, conducted as part of the SME Challenge, clearly demonstrates how the proposed solution meets the usage scenario and all of the expected results.	<p>Acceptable plus:</p> <p>The information provided during the SME Challenge clearly demonstrates process automation and configuration options for relevant capabilities.</p> <p>The information provided during the SME Challenge also</p>	<p>Good plus:</p> <p>The information provided during the SME Challenge also provides clear and thorough explanations and/or demonstrations for more than half of the on-the-spot scenario variations.</p>

Solicitation No. - N° de l'offre
24062-190560/C
N° de réf. du client - Client Ref. No.
24062-190560

N° de la modif - Amd. No.
File No. - N° du dossier
681xe.24062-190560/C

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

		provides clear and thorough explanations and/or demonstrations for up to half of the on-the-spot scenario variations.	
Bid Response			
Not Applicable, will be evaluated during the SME Challenge			

R3.7. FORECASTING & RECONCILIATION

Requirement			
<p>Usage Scenario Nathalie is a Financial Management Analyst in a department and is about to finalize the plan for the next quarter. She reviews the latest salary forecast and sees a potential issue with one of the manager's (John) forecast. She meets with John and asks him to review his forecast and update it if needed. To provide a good forecast, John wants to see if there was any under or over spending from the past quarter.</p> <p>Nathalie is also in charge of monitoring efforts to ensure timely and accurate pay. She wants to monitor, on a pay by pay cycle basis, the forecasted salary expenses against the actual salary expenses and be able to quickly reconcile if needed.</p> <p>Expected Results</p> <ul style="list-style-type: none"> John can view his salary financial management performance from the past quarter (or month) John can easily update his salary forecast Nathalie can view the salary forecast for the next quarter Nathalie can monitor and reconcile salary forecast and actual pay efficiently and effectively <p>Additional Context</p> <ul style="list-style-type: none"> The GC currently uses SAP as the system standard for financial management 		<p>Weighting</p> <p>2%</p>	
		<p>Evaluation Method</p> <p>SME</p>	
Evaluation Criteria			
Not Acceptable (0 pts)	Acceptable (4 pts)	Good (7 pts)	Excellent (10 pts)
The information provided as part of the SME Challenge does not, or insufficiently demonstrate the proposed solution in action and how it meets the requirement.	The demo of the proposed solution in action, conducted as part of the SME Challenge, clearly demonstrates how the proposed solution meets the usage scenario and all of the expected results.	<p>Acceptable plus:</p> <p>The information provided during the SME Challenge clearly demonstrates process automation and configuration options for relevant capabilities.</p>	<p>Good plus:</p> <p>The information provided during the SME Challenge also provides clear and thorough explanations and/or demonstrations for more than half of the on-the-spot scenario variations.</p>

	Should any 3 rd party product(s) be required as part of the proposed solution to meet all expected results, the bidder may provide a detailed explanation of the proposed approach, in lieu of a demo, only for the capabilities covered by the 3 rd party product.	The information provided during the SME Challenge also provides clear and thorough explanations and/or demonstrations for up to half of the on-the-spot scenario variations.	
Bid Response			
Not Applicable, will be evaluated during the SME Challenge			

R4. SOLUTION ARCHITECTURE

The bidder must demonstrate how the proposed solution is provided through a modern and integrated architecture that enables the GC to deliver the planned business outcomes.

R4.1. PROPOSED TECHNICAL SOLUTION

Requirement			
<p>In a document of 40 pages or less, the bidder must describe the architecture of their proposed solution, including a description of the enabling technology stack as well as any required 3rd party products and services.</p> <p>The description must highlight how the proposed solution meets the GC Digital Standards, the GC Architecture Standards described in the Mandatory Procedures for Enterprise Architecture (Appendix C) and the GC Digital Landscape described in slide 31 of the Industry Day Material.</p>		Weighting	4%
		Evaluation Method	Bid
Evaluation Criteria			
Not Acceptable (0 pts)	Acceptable (5 pts)	Good (7 pts)	Excellent (10 pts)
The information provided does not, or insufficiently, meet the requirement.	The information provided describes the proposed solution's architecture, including the details of the business, information, application, technology, security and privacy domains.	<p>Acceptable plus:</p> <p>The information provided clearly maps the proposed solution's architecture with at least: A. 4 of the 10 Digital Standards and, B. 20 of the 58 GC Architectural standards.</p>	<p>Good plus:</p> <p>The information provided clearly maps the proposed solution's architecture with at least: A. 7 of the 10 Digital Standards and, B. 35 of the 58 GC Architectural standards.</p>
Bid Response			
Bid Self-Assessment			
Not Acceptable	Acceptable	Good	Excellent
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

R4.2. EXTENSIBILITY

Requirement				
In a document of 10 pages or less the bidder must identify if the underlying platform, on which the SaaS is delivered, is available to the Crown in order to leverage other capabilities that may be available by the bidder but not a part of the proposed solution and/or is available for the Crown to add additional capabilities through additional products or services.			Weighting	2%
			Evaluation Method	Bid
Evaluation Criteria				
Not Acceptable (0 pts)	Acceptable (3 pts)	Good (5 pts)	Excellent (10 pts)	
The information provided does not, or insufficiently, meet the requirement.	The information provided clearly states that the Crown is unable to access additional capabilities existing on the underlying platform and/or the Crown is unable to add additional products or services.	The information provided clearly describes how additional capabilities can be leveraged and/or added by the Crown by integrating additional solutions or products with the bidder's guidance.	Good and: The information provided clearly describes how additional capabilities can be leveraged and/or added by the Crown through a self-service partner or product marketplace and ecosystem, which includes user ratings.	
Bid Response				
Bid Self-Assessment				
Not Acceptable	Acceptable	Good	Excellent	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

R4.3. SCALABILITY AND PORTABILITY

Requirement				
In a document of 20 pages or less the bidder must demonstrate that the proposed solution has the ability to be scaled and operated in multiple environments to accommodate a Hybrid IT architecture and that the solution is able to be ported and transferred from one environment to another.			Weighting	2%
			Evaluation Method	Bid
Evaluation Criteria				
Not Acceptable (0 pts)	Acceptable (5 pts)	Good (7 pts)	Excellent (10 pts)	
The information provided does not, or insufficiently, describes how the proposed solution meets the requirement.	<p>The information provided somewhat demonstrates how the proposed solution manages scalability.</p> <p>However, the information provided does not sufficiently address how the solution can be ported from one environment to another.</p>	<p>Acceptable plus:</p> <p>The information provided clearly demonstrates how the proposed solution can be implemented in a combination of public cloud, private cloud and on premise environments.</p>	<p>Good plus:</p> <p>The information provided clearly demonstrates how the proposed solution can support services for organizations requiring high security requirements (Secret environment and above) in an approved data center that meets the GC standards for processing Secret and above data.</p>	
Bid Response				
Bid Self-Assessment				
Not Acceptable	Acceptable	Good	Excellent	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

R4.4. RESPONSIBLE AND ETHICAL USE OF AUTOMATED DECISION MAKING SOLUTIONS

Requirement			
<p>The bidder must demonstrate: 1. If, and where, the proposed solution architecture makes use of automated decision-making technologies (AI, machine learning, predictive analytics, cognitive computing, robotics...) and 2, How the proposed solution follows responsible and ethical automated decision making practices.</p> <p>For more information, see the latest draft Directive on Automated Decision Making: https://docs.google.com/document/d/1LdcIG-UYeokx3U7ZzRng3u4T3IHrBXXk9JddjjueQok/edit</p>		Weighting	2%
		Evaluation Method	Bid
Evaluation Criteria			
Not Acceptable (0 pts)	Acceptable (5 pts)	Good (7 pts)	Excellent (10 pts)
<p>The information provided does not, or insufficiently, describes how the proposed solution meets the requirement.</p>	<p>The information provided describes how the proposed solution meets the requirement.</p>	<p>Acceptable and:</p> <p>The information provided includes the organization's documented approach or policy on automated decision-making. The approach or policy describes the monitoring framework to ensure automated decision-making practices are ethical.</p>	<p>Good and:</p> <p>The information provided describes how the GC, as a government entity, can maintain transparency and accountability towards its citizens when making use of automated decisions-making solutions.</p>
Bid Response			
Bid Self-Assessment			
Not Acceptable	Acceptable	Good	Excellent
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

R5. SECURITY & PRIVACY

The bidder must demonstrate how the proposed solution is secure and manages privacy efficiently and effectively.

R5.1. ACCESS MANAGEMENT

Requirement			
The bidder must demonstrate how the GC, as a subscriber of the solution, would manage roles, privileges, and access to the proposed solution to achieve separation of duties and least privilege.		Weighting	1%
		Evaluation Method	SME
Evaluation Criteria			
Not Acceptable (0 pts)	Acceptable (5 pts)	Good (7 pts)	Excellent (10 pts)
The information provided during the SME Challenge does not, or insufficiently, describes how the proposed solution meets the requirement.	The information provided during the SME Challenge describes how the GC would manage roles, privileges, and access to the solution.	Acceptable and: The information provided during the SME Challenge systematically describes how the GC would manage roles, privileges, and access to the solution, including segregation of duties between the bidder and the GC; some elements could have been clearer or more detailed.	Good and: The information provided is excellent, complete and systematically demonstrates how the GC would manage roles, privileges, and access to the solution.
Bid Response			
Not Applicable, will be evaluated during the SME Challenge			

R5.2. GC CREDENTIALS INTEGRATION

Requirement			
<p>In a document or presentation of no more than 5 pages, the bidder must demonstrate how the GC could make use of GC credentials to access the solution using single sign-on (SSO).</p> <p><u>Additional Context</u> Directive on Identify Management: https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=16577 Standard on Identity and Credential Assurance https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=26776 Guideline on Defining Authentication Requirements https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=26776 Guidance on Identity Assurance https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=30678</p>		Weighting	1%
		Evaluation Method	Bid
Evaluation Criteria			
Not Acceptable (0 pts)	Acceptable (5 pts)	Good (7 pts)	Excellent (10 pts)
The information provided does not, or insufficiently, describe how the proposed solution meets the requirement.	The information provided demonstrates, at a high-level, how the proposed solution meets the requirement.	The information provided systematically demonstrates how the GC could configure the solution to enable SSO using GC credentials; some elements could have been clearer or more detailed.	The information provided is excellent, complete and systematically demonstrates how the GC could configure the solution to enable SSO using GC credentials.
Bid Response			
Bid Self-Assessment			
Not Acceptable	Acceptable	Good	Excellent
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

R5.3. DATA SECURITY & PRIVACY

Requirement			
In a document or presentation of no more than 5 pages, the bidder must demonstrate how the proposed solution would protect GC data through capture, storage, exchange, use, and retention to protect the data's confidentiality, integrity, and availability.		Weighting	1%
		Evaluation Method	Bid
Evaluation Criteria			
Not Acceptable (0 pts)	Acceptable (5 pts)	Good (7 pts)	Excellent (10 pts)
The information provided does not, or insufficiently, describe how the proposed solution meets the requirement.	The information provided describes how the proposed solution meets the requirement.	<p>Good information is provided and systematically demonstrates, for each of the actions listed, how GC data would be protected; some elements could have been clearer or more detailed.</p> <p>The organization has also supplied privacy policies that demonstrate the processes, practices and controls in place within the organization.</p>	<p>Good and:</p> <p>The information provided is excellent, complete and systematically demonstrates, for each of the actions listed, how GC data would be protected.</p> <p>The information provided includes a description of how privacy policies and practices will be integrated/adapted for the proposed solution.</p>
Bid Response			
Bid Self-Assessment			
Not Acceptable	Acceptable	Good	Excellent
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

R5.4. SERVICE MONITORING

Requirement			
The bidder must demonstrate how the GC could use the proposed solution's monitoring capabilities to centrally monitor use, health, and security of services, taking into consideration the requirement for the GC to collect system and audit log records.		Weighting	1%
		Evaluation Method	SME
Evaluation Criteria			
Not Acceptable (0 pts)	Acceptable (5 pts)	Good (7 pts)	Excellent (10 pts)
The information provided during the SME Challenge does not, or insufficiently, describes how the proposed solution meets the requirement.	The information provided during the SME Challenge describes how the proposed solution meets the requirement.	The information provided during the SME Challenge systematically demonstrates how the GC would centrally monitor the use, health, and security of the services; some elements could have been clearer or more detailed.	The information provided during the SME Challenge is excellent, complete and systematically demonstrates how the GC would centrally monitor the use, health, and security of the services.
Bid Response			
Not Applicable, will be evaluated during the SME Challenge			

R5.5. ROUTINE ACCESS & AUDITING

Requirement			
<p>The bidder must demonstrate how the proposed solution will allow the GC to meet its personal information access and auditing responsibilities in the context of the following scenarios:</p> <p>Zoya works as an internal auditor within the GC. As part of a routine audit, she needs to access the solution, through a specific role, to determine who accessed the pay records of three specific employees and the date and time of each access.</p> <p>Shaun is a public servant and wants to verify who accessed his personal information, what was altered, added and/or deleted during a specified time period.</p>		Weighting	1%
		Evaluation Method	SME
Evaluation Criteria			
Not Acceptable (0 pts)	Acceptable (5 pts)	Good (7 pts)	Excellent (10 pts)
<p>The information provided during the SME Challenge does not, or insufficiently, describes how the proposed solution meets the requirement.</p>	<p>The information provided during the SME Challenge demonstrates: 1. How Zoya would view the audit records, and 2. How Shaun can determine who accessed their personal information, when and for what purpose.</p> <p>Some elements could have been clearer or more detailed.</p>	<p>Acceptable plus:</p> <p>The information provided during the SME Challenge demonstrates: 1. How Shaun can determine what specific data elements were altered, added and/or deleted during a specified time period.</p>	<p>Good plus:</p> <p>The information provided during the SME Challenge is excellent, complete and systematically demonstrates how Shaun can get the information he is seeking a through a self-service capability.</p>
Bid Response			
Not Applicable, will be evaluated during the SME Challenge			

R5.6. CERTIFICATIONS

Requirement			
The bidder must demonstrate how they will maintain and, if needed, obtain, the following security certifications for the proposed solution: <ul style="list-style-type: none"> • ISO 27001 • ISO 27017 • ISO 27018 • GC Cloud PBMM • SOC 2 Type II 		Weighting	1%
		Evaluation Method	Bid
Evaluation Criteria			
Not Acceptable (0 pts)	Acceptable (5 pts)	Good (7 pts)	Excellent (10 pts)
The information provided does not, or insufficiently, describes how the proposed solution meets the requirement.	The information provided describes how the proposed solution meets the requirement.	Good information is provided and systematically demonstrates, for each of the listed certifications, how the vendor would obtain and/or maintain compliance; some elements could have been clearer or more detailed.	The information provided is excellent, complete and systematically demonstrates, for each of the listed certifications, how the vendor would obtain and/or maintain compliance.
Bid Response			
Bid Self-Assessment			
Not Acceptable	Acceptable	Good	Excellent
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

R5.7. SUPPLY CHAIN PROTECTION & PERSONNEL SCREENING

Requirement			
<p>In a document or presentation of no more than 5 pages, the bidder must demonstrate how they manage supply chain risks as they relate to third-party facilities, components, and services, including how it screens the employees and contractors responsible for or involved in the operations and maintenance of the proposed solution.</p> <p>Please refer to the GC Standard on Security Screening for additional information: https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=28115</p>		Weighting	1%
		Evaluation Method	Bid
Evaluation Criteria			
Not Acceptable (0 pts)	Acceptable (5 pts)	Good (7 pts)	Excellent (10 pts)
The information provided does not, or insufficiently, describes how the proposed solution meets the requirement.	The information provided describes how the proposed solution meets the requirement.	Good information is provided and systematically demonstrates how 1. The bidder manages supply chain risks for its facilities, components, and services, and 2. How the bidder performs personnel screening. Some elements could have been clearer or more detailed.	The information provided is excellent, complete and systematically demonstrates 1. How the bidder manages supply chain risks for its facilities, components, and services, and 2. How the bidder performs personnel screening.
Bid Response			
Bid Self-Assessment			
Not Acceptable	Acceptable	Good	Excellent
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

R5.8. INCIDENT MANAGEMENT

Requirement			
Assuming that there is a successful cyberattack against the proposed solution that involves GC data or that affects the service, the bidder must demonstrate how they would manage the incident.		Weighting	1%
		Evaluation Method	SME
Evaluation Criteria			
Not Acceptable (0 pts)	Acceptable (5 pts)	Good (7 pts)	Excellent (10 pts)
The information provided during the SME Challenge does not, or insufficiently, describes how the proposed solution meets the requirement.	The information provided during the SME Challenge demonstrates how the proposed solution meets the requirement.	The information provided during the SME Challenge systematically demonstrates how the vendor would manage the incident; some elements could have been clearer or more detailed and answers to the questions during the SME challenge could have been stronger.	The information provided and answers to the questions during the SME Challenge were excellent, complete and systematically demonstrates how the vendor would manage the incident.
Bid Response			
Not Applicable, will be evaluated during the SME Challenge			

R5.9. MANAGE AND CONTROL PERSONAL DATA

Requirement			
In a document or presentation of no more than 5 pages, the bidder must demonstrate how the proposed solution allows users to manage and control their personal data.		Weighting	1%
		Evaluation Method	Bid
Evaluation Criteria			
Not Acceptable (0 pts)	Acceptable (5 pts)	Good (7 pts)	Excellent (10 pts)
The information provided does not, or insufficiently, describes how the proposed solution allows users to manage and control their personal data.	The information provided describes in general terms and broad statements how the proposed solution allows users to manage and control their personal data.	Acceptable and: The information provided describes specific functionality and details on how the proposed solution allows users to manage and control their personal data.	Good and: The information provided is excellent and describes the specific functionality. And The organization has supplied examples from previous implementation of the proposed solution through which users were able to manage and control their personal data.
Bid Response			
Bid Self-Assessment			
Not Acceptable	Acceptable	Good	Excellent
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

R5.10. PROTECTION OF USER INFORMATION

Requirement			
In a document or presentation of no more than 5 pages, the bidder must demonstrate how they will efficiently balance the need for high quality testing and the protection of user information.		Weighting	1%
		Evaluation Method	Bid
Evaluation Criteria			
Not Acceptable (0 pts)	Acceptable (5 pts)	Good (7 pts)	Excellent (10 pts)
The information provided does not, or insufficiently, describes how the proposed solution will efficiently balance the need for high quality testing and the protection of user information.	The information provided describes in general terms and broad statements how the proposed solution will balance the need for high quality testing and the protection of user information.	Acceptable and: The information provided describes specific functionality and details on how the proposed solution will efficiently balance the need for high quality testing and the protection of user information.	Good and: The organization has supplied examples from previous solutions will efficiently balance the need for high quality testing and the protection of user information.
Bid Response			
Bid Self-Assessment			
Not Acceptable	Acceptable	Good	Excellent
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

R6. INTEROPERABILITY

The bidder must demonstrate how the proposed solution is interoperable. For context, the GC has recently updated the [Directive on Management of Information Technology](#) which now includes an Appendix specific to APIs: Appendix D - Mandatory Procedures for Application Programming Interfaces.

R6.1. DATA EXTRACTION

Requirement			
In a document of 4 pages or less, the bidder must demonstrate that all business data can be extracted to an external data warehouse via bulk interfaces: 1: File-based data extract must support a wide variety of file formats 2: The solution must demonstrate ability to export data via an ETL capability, either out-of-box or via other commercial platforms (e.g., DataStage, Golden Gate, Informatica)		Weighting	1%
		Evaluation Method	Bid
Evaluation Criteria			
Not Acceptable (0 pts)	Acceptable (5 pts)	Good (7 pts)	Excellent (10 pts)
The information provided is not able to demonstrate their solution provides bulk interfaces of sufficient capability to meet the needs of the Government of Canada. e.g., file size limits smaller than the expected data extraction size for Government of Canada	The information provided is able to demonstrate their solution provides a file-based data extract facility capable of a wide variety of file formats. The information provided includes a link to detailed technical documentation describing the use and capability of the file-based data extract facility. The information provided also includes a description of the mechanisms and considerations by which the Crown can receive its data at the termination of the contract, including	Acceptable and: The information provided demonstrates that the proposed solution provides an ETL capability: 1. Using an out of the box data integration toolkit and/or, 2. Via commercial platforms. AND The information provided includes a link to technical documentation describing: 1. How interfaces would be constructed and exposed and/or, 2. The 3 rd party ETL integration and configuration.	Good and: The Information provided includes a project description or link to a case study of a past implementation describing their approach to integrating with external data warehouse, BI, and analytics capabilities, including the use of open and modern BI solutions such as Hadoop, data lakes and others.

Solicitation No. - N° de l'offre
24062-190560/C
N° de réf. du client - Client Ref. No.
24062-190560

N° de la modif - Amd. No.
File No. - N° du dossier
681xe.24062-190560/C

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

	format and fees for data (if any).		
Bid Response			
Bid Self-Assessment			
Not Acceptable	Acceptable	Good	Excellent
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

R6.2. DATA INGESTION & BULK LOAD

Requirement			
In a document or presentation of no more than 3 pages, the bidder must demonstrate the ability to bulk load reference data (e.g., organizations, work locations, cost centres) and historical data from legacy systems via both an API and a bulk interface as well as demonstrate the ability to support the ingestion of data from external sources and reporting across multiple information domains (i.e. HR/Pay, Finance, other).		Weighting	1%
		Evaluation Method	Bid
Evaluation Criteria			
Not Acceptable (0 pts)	Acceptable (5 pts)	Good (7 pts)	Excellent (10 pts)
The proposed solution does not include capability to electronically load reference data from Government of Canada master data systems	The information provided describes how the proposed solution will electronically load reference data from Government of Canada master data systems via both an API and a bulk interface.	Acceptable and: The information provided includes a link to detailed technical documentation describing data import interfaces, including: data type; protocols supported; security controls; data validation; and any constraints such as: size or volume. The information provided also demonstrates how that data can be used with the embedded reporting capabilities.	Good and: The bidder is able to articulate a strategy for managing the ongoing synchronization of master data in the proposed solution with reference data from other Government of Canada master data systems.
Bid Response			
Bid Self-Assessment			
Not Acceptable	Acceptable	Good	Excellent
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

R6.3. EVENT DRIVEN ARCHITECTURE

Requirement			
<p>The bidder must demonstrate the ability to publish business events (e.g., employee name change, pay action) as asynchronous messages:</p> <p>1: The solution must be able to publish messages as either JMS or AMQP</p> <p>2: Any business event message must be atomic in nature and not require correlation of different events or from different message feeds (e.g., an employee being placed in a newly created position must send a single atomic event rather than having to correlate between an employee update and a position creation event)</p> <p>The proposed solution can publish business events for at least the following events:</p> <p>1) New employee joins a Department into an existing position 2) Movement of a position along with the associated employee to a new organizational unit within the same Department 3) Transfer of an employee from one Department to another 4) Change in position and associated pay of an employee 5) An overtime request being made 6) A pay adjustment being made</p>		Weighting	3%
		Evaluation Method	SME
Evaluation Criteria			
Not Acceptable (0 pts)	Acceptable (5 pts)	Good (7 pts)	Excellent (10 pts)
<p>The information provided during the SME Challenge does not, or insufficiently, demonstrate how the proposed solution does include an event driven architecture that meets the requirement.</p>	<p>The information provided during the SME Challenge demonstrates how the proposed solution implements an event driven architecture and can be configured to publish events.</p> <p>At a minimum, the information provided must include a link to detailed technical documentation for the event scenarios described in the requirement.</p>	<p>Acceptable plus:</p> <p>The information provided during the SME Challenge demonstrates in detail how published events must be consumed by downstream systems.</p>	<p>Good plus:</p> <p>The information provided during the SME Challenge demonstrates the bidder's experience with implementing event driven architectures which follow a RESTful model with clients of similar size and complexity.</p>

Solicitation No. - N° de l'offre
24062-190560/C
N° de réf. du client - Client Ref. No.
24062-190560

N° de la modif - Amd. No.
File No. - N° du dossier
681xe.24062-190560/C

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

	The linked technical documentation must include at least the following: 1. Data being passed, 2. Protocols, 3: trigger conditions, and 4: Message schemas.		
Bid Response			
Not Applicable, will be evaluated during the SME Challenge			

R6.4. ABILITY TO INVOKE EXTERNAL SYNCHRONOUS WEB SERVICES

Requirement			
In a document or presentation of no more than 3 pages, the bidder must demonstrate the ability to invoke external synchronous web service APIs via open industry standards when the authoritative source of that data and/or functionality resides in other systems.		Weighting	2%
		Evaluation Method	Bid
Evaluation Criteria			
Not Acceptable (0 pts)	Acceptable (5 pts)	Good (7 pts)	Excellent (10 pts)
The information provided does not, or insufficiently, demonstrates how the proposed solution can invoke external synchronous web service APIs via open industry standards when the authoritative source of that data and/or functionality resides in other systems.	<p>The information provided demonstrates how the proposed solution invokes external system functionality in real time via web service APIs.</p> <p>The information provided includes a link to detailed technical documentation describing how workflows or automated processes consume external systems through APIs.</p>	<p>Acceptable and:</p> <p>The information provided demonstrates how the proposed solution is able to invoke either SOAP or REST/JSON APIs but not both.</p>	<p>Acceptable and:</p> <p>The information provided demonstrates how the proposed solution is able to invoke both SOAP and REST/JSON APIs.</p>
Bid Response			
Bid Self-Assessment			
Not Acceptable	Acceptable	Good	Excellent
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

R6.5. TLS 1.2 ENCRYPTION

Requirement			
In a document or presentation of no more than a page, the bidder must demonstrate the ability to support TLS 1.2 encryption for all interfaces as a minimum level of connectivity security.		Weighting	1%
		Evaluation Method	Bid
Evaluation Criteria			
Not Acceptable (0 pts)	Acceptable (5 pts)	Good (7 pts)	Excellent (10 pts)
The solution does not support TLS 1.2 encryption for all interfaces as a minimum level of connectivity security	The information provided includes a link to detailed technical documentation on transport encryption for all interfaces demonstrating how the proposed solution supports TLS 1.2 encryption for all interfaces as a minimum level of connectivity security.	Acceptable plus: The information provided demonstrates: 1. That the proposed solution's roadmap supports TLS 1.3 encryption for all interfaces and, 2. There is backward compatible with TLS 1.2 and, 3. There is a pre-release build available to test.	Good plus: The information provided demonstrates that the proposed solution currently supports TLS 1.3 encryption for all interfaces and is backward compatible with TLS 1.2.
Bid Response			
Bid Self-Assessment			
Not Acceptable	Acceptable	Good	Excellent
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

R6.6. INTERFACE HANDLES EXTERNAL INTEROPERABILITY FAILURE GRACEFULLY

Requirement			
In a document or presentation of no more than 4 pages, the bidder must demonstrate the solution interfaces are resilient to failure and infrastructure independent; able to effectively handle situations where external systems experience degradation or are unavailable.		Weighting	2%
		Evaluation Method	Bid
Evaluation Criteria			
Not Acceptable (0 pts)	Acceptable (5 pts)	Good (7 pts)	Excellent (10 pts)
The information provided does not, or insufficiently, demonstrates how the proposed solution does effectively handles situations where external systems experience failure or are unavailable.	The information provided demonstrates how the proposed solution effectively handles situations where external systems experience degradation or are unavailable.	Acceptable and: The information provided demonstrates how the proposed solution will effectively handle the following scenarios: 1) A real-time lookup against an external authoritative source fails due to connectivity outage; 2) The response from a real-time lookup against an external authoritative source is delayed due to high load on the external authoritative source; 3) A schedule data load from an external system did not trigger at the expected time; 4) An inbound data feed fails mid-job due to connectivity failure; 5) A downstream system become unavailable in the middle of a series of event publications.	Good and: The information provided includes a link to detailed technical documentation on the proposed solution's integration error handling capabilities including retry methods, manual processing queues, error notifications, or error dashboards.
Bid Response			

Solicitation No. - N° de l'offre
24062-190560/C
N° de réf. du client - Client Ref. No.
24062-190560

N° de la modif - Amd. No.
File No. - N° du dossier
681xe.24062-190560/C

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

Bid Self-Assessment			
Not Acceptable	Acceptable	Good	Excellent
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

R6.7. APIS FOR CORE FUNCTIONALITY

Requirement			
<p>The bidder must demonstrate that the solutions core functionality can be surfaced via APIs.</p> <p>With reference to the business scenario detailed in R3.2 (Transfer) the bidder must fully demonstrate access to the solutions functionality using APIs.</p>		Weighting	4%
		Evaluation Method	SME
Evaluation Criteria			
Not Acceptable (0 pts)	Acceptable (5 pts)	Good (7 pts)	Excellent (10 pts)
<p>The information provided during the SME Challenge does not, or insufficiently, demonstrate how the proposed solution's core functionality can be accessed by APIs out-of-box.</p>	<p>The information provided during the SME Challenge specifies which APIs are used to realize the story in R3.2 and demonstrates how they are expected to be used and executed by external systems.</p>	<p>Acceptable plus:</p> <p>The information provided during the SME Challenge demonstrate how out-of-box APIs support SOAP or REST/JSON.</p>	<p>Good plus:</p> <p>The information provided during the SME Challenge demonstrates how a workflow in the solution makes an asynchronous call to initiate a process in a third party (ticket/incident/case) solution and listens for a process complete response from the third party solution.</p>
Bid Response			
Not Applicable, will be evaluated during the SME Challenge			

R7. ACCESSIBILITY & OFFICIAL LANGUAGES

GC services, solutions and employment must be and remain accessible to all, including people with disabilities, and available in both official languages.

R7.1. ACCESSIBILITY COMMITMENT

Requirement			
The bidder must demonstrate its commitment towards maintaining the proposed solution's accessibility and usability. In a document of 10 pages or less, the bidder must provide a documented accessibility testing approach or process demonstrating how the organization systematically tests for accessibility in product releases to ensure the proposed solution's accessibility and usability is maintained.		Weighting	2%
		Evaluation Method	Bid
Evaluation Criteria			
Not Acceptable (0 pts)	Acceptable (3 pts)	Good (7 pts)	Excellent (10 pts)
The information provided does not demonstrate, or insufficiently demonstrates the approach the bidder would take to support and maintain accessibility and usability.	The bidder commits to supporting and maintaining accessibility and usability. The evidence provided is not specific enough to assess its reliability, feasibility and comprehensiveness.	The bidder commits to supporting and maintaining accessibility and usability through regular user-testing. The evidence provided highlights specific strategies to integrate improvements to accessibility and usability including mechanisms to address user-feedback in a timely fashion.	The bidder demonstrates an excellent track record in including accessibility and usability criteria in the design of its proposed solution. The bidder provides a detailed plan with strategies and timelines to maintain and improve accessibility and usability for each release. The bidder provides a documented accessibility testing approach or process demonstrating how the organization systematically tests for accessibility in product releases to ensure the proposed solution's accessibility and usability will be maintained.
Bid Response			

Solicitation No. - N° de l'offre
24062-190560/C
N° de réf. du client - Client Ref. No.
24062-190560

N° de la modif - Amd. No.
File No. - N° du dossier
681xe.24062-190560/C

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

Bid Self-Assessment			
Not Acceptable	Acceptable	Good	Excellent
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

R7.2. ACCESSIBILITY INVESTMENT & VALUE

Requirement			
In a document of 10 pages or less, the bidder must demonstrate its continued investment and value of accessibility, for example to support WCAG 2.1 AA and/or EN 301 549 which may become the minimum standard for the Government of Canada, within the next 1-3 years.		Weighting	1%
		Evaluation Method	Bid
Evaluation Criteria			
Not Acceptable (0 pts)	Acceptable (5 pts)	Good (7 pts)	Excellent (10 pts)
The information provided does not demonstrate, or insufficiently demonstrates the bidder's continued investment and value of accessibility.	The information provided describes steps taken to date to make their solution accessible. The bidder shows where accessibility needs are addressed in their product design and implementation activities.	Acceptable plus: The information provided describes the specific technology and/or design changes, included in the proposed solution's roadmap that will improve the proposed solution's accessibility and usability beyond WCAG 2.0 AA.	Good plus: The information provided demonstrates its established track record in product accessibility. It also demonstrates its commitment to continuous improvement through its pursuit of excellence and innovation in accessibility by outlining plans and investments in this area.
Bid Response			
Bid Self-Assessment			
Not Acceptable	Acceptable	Good	Excellent
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

R7.3. CHANGE REQUESTS FOR OFFICIAL LANGUAGES

Requirement			
In a document of 4 pages or less, the bidder must explain how the GC would be able to change delivered terminology in the proposed solution to meet official language (English and French) obligations.		Weighting	1%
		Evaluation Method	Bid
Evaluation Criteria			
Not Acceptable (0 pts)	Acceptable (5 pts)	Good (7 pts)	Excellent (10 pts)
The information provided does not, or insufficiently, demonstrate how the terminology in the solution can be modified to meet official language obligations.	The information provided demonstrates how the terminology in the solution can be modified only by the bidder.	The information provided demonstrates how terminology in the proposed solution can be modified directly by the GC.	The information provided demonstrates how the GC can modify all terminology in the proposed solution directly, without approval from the bidder.
Bid Response			
Bid Self-Assessment			
Not Acceptable	Acceptable	Good	Excellent
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

R7.4. LANGUAGE CAPACITY

Requirement			
<p>The bidder must explain and demonstrate through a video, how the proposed solution supports users working in either of Canada's official languages (English and French) by allowing users to enter information in both official languages and allowing at a minimum, the use of:</p> <ul style="list-style-type: none"> • Diacritics (accents on letters); • English and French special characters; and • English and French date/time, number, and financial formats. 		Weighting	1%
		Evaluation Method	Bid
Evaluation Criteria			
Not Acceptable (0 pts)	Acceptable (5 pts)	Good (7 pts)	Excellent (10 pts)
The information provided does not, or insufficiently, demonstrate how the terminology in the solution supports users working in both of Canada's official languages.	The information provided includes video evidence detailing how the solution allows users to work in both official languages (English and French), using Unicode and other technologies.	<p>Acceptable and:</p> <p>The information provided demonstrates how the proposed solution allows users to toggle back and forth between languages without having to log out / log in.</p>	<p>Good and:</p> <p>The information provided demonstrates how the proposed solution allows users to enter data in both languages simultaneously, through localization support by design.</p>
Bid Response			
Bid Self-Assessment			
Not Acceptable	Acceptable	Good	Excellent
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

R7.5. AVAILABILITY OF CONTENT IN BOTH OFFICIAL LANGUAGES

Requirement			
The bidder must confirm whether new releases (e.g., patches, updates, fixes, enhancements) are made available to end users in both official languages (English and French) simultaneously and in equal quality.		Weighting	1%
		Evaluation Method	Bid
Evaluation Criteria			
Not Acceptable (0 pts)	Acceptable (5 pts)	Good (7 pts)	Excellent (10 pts)
The information provided does not, or insufficiently, demonstrate how content is updated simultaneously in both official languages.	The information provided demonstrates that both official languages are fully provided but that certain content in one language is delayed; and, the GC has the ability to postpone the release to end users until both official languages have been updated.	The information provided demonstrates that all content is provided in both official languages simultaneously.	The information provided demonstrates that all content is provided in both official languages simultaneously and in equal quality. GC has the ability to review and influence the terminology in advance of release.
Bid Response			
Bid Self-Assessment			
Not Acceptable	Acceptable	Good	Excellent
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

R8. IMPLEMENTATION

The bidder must demonstrate how they will successfully plan and implement the proposed solution for GC organizations, informed and supported by Service Design principles. Given the scale of the change, a programme management approach, such as that described in Axelos' Managing Successful Programmes mythology, or PMI's Standard for Program Management 4th Edition, has also been assumed. If the bidder believes an alternate approach would be more appropriate, they are encouraged to adjust their response accordingly.

R8.1. APPROACH TO PLANNING THE PROGRAMME

Requirement			
In a document or presentation of no more than 10 pages, the bidder must demonstrate the approach in which they would plan, cost, and deliver Phase II, as described in slide 8 of the material shared at Industry Day .		Weighting	2%
		Evaluation Method	Bid
Evaluation Criteria			
Not Acceptable (0 pts)	Acceptable (5 pts)	Good (7 pts)	Excellent (10 pts)
The information provided does not demonstrate, or insufficiently demonstrates the approach the bidder would take to plan, cost, and deliver Phase II.	The information provided demonstrates the bidder's approach to planning, costing, and delivering Phase II.	Acceptable plus: The bidder's approach uses at least one industry-recognized programme management methodology and specifically includes concepts from the Ontario Digital Service Design Playbook .	Good plus: The bidder's approach specifically incorporates published lessons learned from the Transformation of Pay Administration Initiative (Phoenix).
Bid Response			
Bid Self-Assessment			
Not Acceptable	Acceptable	Good	Excellent
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

R8.2. APPROACH TO PLANNING PILOTS

Requirement			
In a document or presentation of no more than 10 pages, the bidder must demonstrate the manner in which they would select, plan, cost, and deliver 2 fully operational pilot projects within Phase II to prove the proposed programme delivery approach.		Weighting	4%
		Evaluation Method	SME
Evaluation Criteria			
Not Acceptable (0 pts)	Acceptable (5 pts)	Good (7 pts)	Excellent (10 pts)
The information provided during the SME Challenge does not demonstrate, or insufficiently demonstrates the approach the bidder would take to select, plan, cost, and deliver 2 fully operational pilots within phase II.	The information provided during the SME Challenge demonstrates the bidder's approach to selecting, planning, costing, and delivering 2 fully operational pilots within phase II. And includes a list of the data and information needed to configure the proposed solution for the pilots, focused on core HR & Pay.	Acceptable plus: The information provided during the SME Challenge demonstrates that the bidder's proposed approach uses an industry recognized methodology and specifically includes concepts from the Ontario Digital Service Design Playbook .	Good plus: The information provided during the SME Challenge demonstrates how insights gained from the pilots will be used to inform the direction of the larger programme.
Bid Response			
Not Applicable, will be evaluated during the SME Challenge			

R8.3. DEMONSTRATED IMPLEMENTATION EXPERTISE

Requirement			
In a document or presentation of no more than 10 pages, the bidder must demonstrate their expertise in successfully implementing the proposed or similar solutions in client organizations.		Weighting	2%
		Evaluation Method	Bid
Evaluation Criteria			
Not Acceptable (0 pts)	Acceptable (5 pts)	Good (7 pts)	Excellent (10 pts)
The information provided does not demonstrate, or insufficiently demonstrate the bidder's expertise in successfully implementing the proposed or similar solutions in client organizations.	The information provided demonstrates the bidder's expertise in successfully implementing the proposed or similar solutions in client organizations.	Acceptable plus: The information provided includes specific insights or lessons learned from the engagement(s) and the manner in which those lessons have been incorporated in their current implementation approach.	Good plus: The information provided includes a maximum of 5 resumes for core members of the implementation team, which demonstrate the bidder's competencies and experience in the following areas: programme management, service design and change management.
Bid Response			
Bid Self-Assessment			
Not Acceptable	Acceptable	Good	Excellent
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

R8.4. VALUE AND PERFORMANCE MANAGEMENT

Requirement			
In a document or presentation of no more than 5 pages, the bidder must demonstrate the manner in which they will support value & performance management for Phase II.		Weighting	2%
		Evaluation Method	Bid
Evaluation Criteria			
Not Acceptable (0 pts)	Acceptable (5 pts)	Good (7 pts)	Excellent (10 pts)
The information provided does not demonstrate, or insufficiently demonstrates the approach the bidder would take to supporting value & performance management for phase II.	The information provided demonstrates the approach the bidder would take to supporting value & performance management for phase II.	Acceptable plus: The information provided demonstrates the use of an industry recognized methodology.	Good plus: The information provided demonstrates how the proposed solution and approach will help generate the outcomes included in the logic model available in Attachment 5: Draft Logic Model for the HR Function (for R8.4).
Bid Response			
Bid Self-Assessment			
Not Acceptable	Acceptable	Good	Excellent
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

R8.5. VENDOR MANAGEMENT

Requirement			
In a document or presentation of no more than 5 pages, the bidder must demonstrate the manner in which they will select and maintain the optimum mix of product vendors, and professional services for the life of any potential engagement.		Weighting	1%
		Evaluation Method	Bid
Evaluation Criteria			
Not Acceptable (0 pts)	Acceptable (5 pts)	Good (7 pts)	Excellent (10 pts)
The information provided does not demonstrate, or insufficiently demonstrates the approach the bidder would take vendor management.	The information provided includes an attestation from their senior leadership that the optimum mix of vendors will be maintained for the life of any potential engagement, including the ability to terminate existing and initiate new partnerships and contracts if needed.	Acceptable plus: The information provided demonstrates the approach that will be taken to managing the performance of product vendors, and professional services.	Good plus: The information provided demonstrates the approach that will be taken to managing the contracts of product vendors, and professional services.
Bid Response			
Bid Self-Assessment			
Not Acceptable	Acceptable	Good	Excellent
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

R8.6. DATA MANAGEMENT

Requirement			
In a document or presentation of no more than 20 pages, the bidder must demonstrate how the GC can leverage the proposed solution's built-in data model as well as the bidder's expertise and understanding of master data management, data architecture and data governance to help successfully implement and sustain the proposed solution. Please refer to the GC Data Strategy Roadmap for additional information.		Weighting	3%
		Evaluation Method	Bid
Evaluation Criteria			
Not Acceptable (0 pts)	Acceptable (4 pts)	Good (7 pts)	Excellent (10 pts)
The information provided does not demonstrate, or insufficiently demonstrates the requirement.	The information provided includes the logical data model and/or data catalogue for the proposed solution. The data model can be for the generic configuration of the solution.	Acceptable and: The information provided includes a high-level data conversion and migration strategy detailing the key considerations for the GC regarding, at a minimum, the method and amount of data that should be migrated from legacy HR and pay systems to the proposed solution.	Good and: The information provided includes a proposed master data management and governance framework specific to the GC detailing, at a minimum, how data should be governed and managed to ensure an appropriate balance of standardization efficiency gains and departmental-level flexibility and specificity.
Bid Response			
Bid Self-Assessment			
Not Acceptable	Acceptable	Good	Excellent
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

R9. SUPPORT & SUSTAIN

The bidder must demonstrate that the proposed solution and related services will be maintained, sustained and enhanced efficiently and effectively.

R9.1. RELIABILITY

Requirement			
In a document or presentation of no more than 10 pages, the bidder must demonstrate that the proposed solution will be available with minimal interruptions. This covers reliability attributes similar to the ones defined in the ISO 25010:2011 standard: Maturity, Availability, Fault Tolerance, and Recoverability.		Weighting	2%
		Evaluation Method	Bid
Evaluation Criteria			
Not Acceptable (0 pts)	Acceptable (5 pts)	Good (7 pts)	Excellent (10 pts)
The information provided does not, or insufficiently, describes how the proposed solution meets the reliability attributes.	The information provided describes how the proposed solution meets the reliability attributes.	Acceptable and: The information provided demonstrates that the bidder has in place a documented and detailed contingency plan for preventing and recovering from service outages and recovery expectations are stated in the SLA.	Good and: The information provided includes proof of a recent (in the last 2 years) disaster or outage recovery testing exercise, including results and lessons learned.
Bid Response			
Bid Self-Assessment			
Not Acceptable	Acceptable	Good	Excellent
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

R9.2. SERVICE MANAGEMENT

Requirement			
In a document or presentation of no more than 10 pages, the bidder must demonstrate that the proposed solution will be supported efficiently and effectively, by describing the support provided and the availability in both official languages.		Weighting	2%
		Evaluation Method	Bid
Evaluation Criteria			
Not Acceptable (0 pts)	Acceptable (5 pts)	Good (7 pts)	Excellent (10 pts)
The information provided does not, or insufficiently, demonstrates how the proposed solution will be supported efficiently and effectively.	The information provided includes a clear standard service level commitment and agreement (SLA) and clearly demonstrates how support is available in both official languages across all channels (self-service, phone, chat, portal, user documentation, training...).	Acceptable and: The information provided includes a Service User Guide, Service Management framework or other that describes at least the following items: 1. What Service/support channels exist and how to use/contact them 2. Hours of operation 3. Supported and unsupported devices/OS..., 4. Clear SLA (time expectations) for each support channel, 5. Priority and/or severity assessment method	Good and: The information provided demonstrates: 1.How the proposed solution is supported by modern service methods such as chatbots or voice assistive technology and, 2. That the bidder has at least one SLA for which the client is financially compensated if the bidder does not meet the stated service level agreements targets.
Bid Response			
Bid Self-Assessment			
Not Acceptable	Acceptable	Good	Excellent
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

R9.3. SUPPORT MODEL

Requirement			
The bidder must demonstrate that incidents and service requests impacting the proposed solution will be resolved efficiently and effectively. The bidder should take into account the need to service and support multiple GC organizations – each with their own helpdesk – as well as the existence of a GC central pay support office.		Weighting	2%
		Evaluation Method	Bid
Evaluation Criteria			
Not Acceptable (0 pts)	Acceptable (5 pts)	Good (7 pts)	Excellent (10 pts)
The information provided does not, or insufficiently, demonstrates how incidents and service requests will be resolved efficiently and effectively.	The information provided includes a documented and generic incident management process.	Acceptable and: As it relates to the incident management process, the information provided highlights potential integration points and responsibilities for the GC during incident identification and resolution.	Good and: The information provided includes a recommended escalation management process detailing the various levels of support and who would own each level of support, including the roles for department helpdesks and any central GC support organization.
Bid Response			
Bid Self-Assessment			
Not Acceptable	Acceptable	Good	Excellent
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

R9.4. INPUT INTO PRODUCT ROADMAPS

Requirement			
The bidder must demonstrate how the GC will be able to provide input into, and influence, product management decisions.		Weighting	2%
		Evaluation Method	Bid
Evaluation Criteria			
Not Acceptable (0 pts)	Acceptable (5 pts)	Good (7 pts)	Excellent (10 pts)
The information provided does not, or insufficiently, describe how the GC will be able to provide input into, and influence, product management decisions.	The information provided describes: 1. A clear channel for clients to provide product design feedback, 2. How client input is used and prioritized to inform product roadmaps.	Acceptable and: The information provided describes how clients can see, vote & comment on other clients' suggestions.	Good and: The information provided describes how each suggestion has a clear status as it relates to product roadmaps and implementation lifecycles. The organization also has defined and existing user groups per capability or vertical (industry) to allow for similar clients to benefit from shared knowledge.
Bid Response			
Bid Self-Assessment			
Not Acceptable	Acceptable	Good	Excellent
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

R9.5. USER EXPERIENCE PRACTICE

Requirement				
The bidder must demonstrate how it will maintain and enhance the quality of the proposed solution's user experience.			Weighting	1%
			Evaluation Method	Bid
Evaluation Criteria				
Not Acceptable (0 pts)	Acceptable (5 pts)	Good (7 pts)	Excellent (10 pts)	
The information provided does not, or insufficiently, demonstrates how it will maintain and enhance the quality of the proposed solution's user experience.	The information provided describes the bidder's user experience design and research framework and practices.	Acceptable and: The information provided describes the organization's dedicated internal User Experience team or practice.	Good and: The information provided describes at least the following items: 1. Overview of the use of task completion rates and/or usability analytics to improve the products UX, 2. User advisory groups, usability and heuristics testing and/or other research methods...	
Bid Response				
Bid Self-Assessment				
Not Acceptable	Acceptable	Good	Excellent	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

R9.6. PRODUCT UPDATES SUPPORT

Requirement				
The bidder must demonstrate how the GC will be effectively supported to ensure smooth transitions to new product updates.			Weighting	2%
			Evaluation Method	Bid
Evaluation Criteria				
Not Acceptable (0 pts)	Acceptable (5 pts)	Good (7 pts)	Excellent (10 pts)	
<p>The information provided does not, or insufficiently, demonstrates how the GC will be effectively supported to ensure smooth transitions to new product updates.</p>	<p>The information provided describes how the GC will be effectively supported to ensure smooth transitions to new product updates.</p>	<p>Acceptable and:</p> <p>The information provided describes a defined and documented client release readiness framework which includes at least the following items: 1. Communication framework for product updates, 2. Process to produce and update support documentation, 3. Pre-release testing process & tools.</p>	<p>Good and:</p> <p>The information provided also includes at least the following: 1. A defined process to include common customer scenarios as part of the pre-release test suite, 2. Proof of client involvement in pre-release testing, 3. Tools and support given to clients for them to test an upcoming product update to ensure a smooth transition</p>	
Bid Response				
Bid Self-Assessment				
Not Acceptable	Acceptable	Good	Excellent	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

8. Attachment 3: Additional Details for R1.1

8.1 Hands-on User Experience

The bidder must demonstrate the usability of the proposed solution. This will focus on routine manager and employee transactions.

a) Requirements

As part of the first Gate 2 criteria, the bidder will be asked to make available:

- A commercial environment accessible (Sandbox) :
 - From all regions across Canada
 - Across multiple form factors (desktop/laptop, tablet, mobile)
- Login credentials for 200 users
 - 50% will be for managers
 - 50% will be for employees
- Any native app(s) for the proposed solution

b) Evaluations

Participants will be asked to login and complete simple tasks in each proposed solution with little to no guidance being provided in advance. Users may evaluate the solutions using multiple devices.

Users will be asked to evaluate:

- Their ability to successfully complete the task; and
- The overall usability of the proposed solution as it relates to the task.
- An overall ranking of the proposed solutions according to their experience.

Here are the transactions users will be asked to complete:

Employee

- Update your personal contact information
- Request a 1 week vacation
- View your paystub
- Cancel a leave request
- Request a schedule change
- Review a performance agreement

Manager

- Approve a leave request
- Change an employee's schedule
- Create a performance agreement for an employee
- View your team's profiles
- Initiate a hiring request
- Enter overtime on behalf of an employee

Responsibilities

For the period of the assessments, the bidder will be responsible for:

- Providing and supporting the Sandbox;
- Ensuring the availability of the Sandbox; and
- Providing a contact and support resource in the event that the GC had any question or issues.

The GC will be responsible for providing all information to the evaluators and to conduct the user experience evaluation. Evaluators will be able to use any self-service support features available in the proposed solution to help them complete the required tasks.

8.2 User Experience Evaluation

Question #	Response Frequency	Evaluation Questions	Response Type	Weight
1	For Each Task	Were you able to complete the task?	Yes / No	25%
2	For Each Task	Please rate the level of ease or difficulty experienced while completing the task.	6-point scale	50%
3	Overall	Please rank order the bidders based on your experience using all five (5) proposed solutions (Ranking 1 to 5 with 1 representing the best experience)	Ranking 1 to 5	25%

Q2 Rating Scale	
0	very difficult
1	difficult
2	somewhat difficult
3	somewhat easy
4	easy
5	very easy

Q3 Ranking Points	
1	35
2	25
3	20
4	15
5	5

9. Attachment 4: Draft Scope and Generic Capabilities for HR & Pay Functions (for R2.1)

9.1 Context

- This scope is based on the GC Human Capital Management (HCM) Business Reference Model, Iteration 1. The map on the next page illustrates which HR and pay sub-functions are primary (i.e., mandatory) for the procurement of the new solution and which ones are secondary or tertiary (i.e., optional). Certain functions are secondary for the procurement of a new solution due to outstanding questions and decisions around ownership and authorities.
- This document uses generic, industry-leading HCM system capabilities provided by Gartner. These generic capabilities have not been adapted to the GC's environment yet; this is planned to be done in Gate 3.
- Generic system capabilities have been used in Gate 2 because the GC has yet to define agreed upon HR and pay business and/or system capabilities.
- Primary and secondary sub-functions have supporting system capabilities detailed in this document; tertiary sub-functions do not. The tertiary sub-functions are not traditionally supported directly by HCM systems.
- Gate 2 is intended to ensure that successful bidders offer the system functionality to meet basic GC needs. Gate 3 will address the GC complexity and require bidders to clearly demonstrate their capacity to meet that complexity.

9.2 Map of Proposed Scope (based on GC HCM Business Reference Model – Iteration 1)

Government-wide – Enterprise Level				Department/Agency – Enabling Strategic Level		Employee Lifecycle – Department/Agency Operational					Supporting Department/Agency Service Delivery		
G1	G2	G3	G4	DA1	DA10	DA2	DA3	DA4	DA5	DA6	DA7	DA8	DA9
GC People Management Leadership	GC Oversight and Evaluation	GC Benefits Planning / Contract and Administration	GC Retirement	People Management Strategy, Policies and Operational Plan	People Management Evaluation	Talent Acquisition	Talent Development	Departmental / Agency Employee Performance Management	Compensation and Leave	Separation	Compliance with Workplace and Workforce Policies and Standards	Labour Relations	Workforce Analytics and Employee Records
G1.1 GC HR Regulation, Policies and Standards	G2.1 People Management Strategy Oversight Evaluation Framework	G3.1 Benefit Program Administration and Oversight	G4.1 Pension Program Administration and Oversight	DA1.1 People Management Operation Strategy	DA10.1 People Management Strategic Evaluation Guidance	DA2.1 Talent Acquisition Action Plan	DA3.1 Talent Development Planning	DA4.1 Employee Performance Management	DA5.1 Compensation and Leave Management	DA6.1 Separation Management	DA7.1 Employee Conduct	DA8.1 Labour Management Relations Consultation and Compliance	DA9.1 Employee People Management Inquiry Processing
G1.2 HR Program Strategy and Tools			G4.2 Retirement Inquiries	DA1.2 Workforce Planning	DA10.2 People Management and HR Operations Evaluation	DA2.2 Applicant Sourcing and Recruitment	DA3.2 Talent Development and Training	DA4.2 Recognition Management	DA5.2 Work Schedule and Leave Administration	DA6.2 Separation Processing and Off Boarding	DA7.2 Redress Process and Third Party Proceedings	DA8.2 Redress Process and Third Party Proceedings	DA9.2 Research
G1.3 HR Service Delivery Management			G4.3 Retirement Case Processing	DA1.3 Organization Design and Position Management		DA2.3 Candidate Assessment and Selection	DA3.3 Learning Administration				DA7.3 Accommodations Management	DA8.3 Negotiation Preparation and Support	DA9.3 Workforce and Performance Analytics
				DA1.4 Diversity and Inclusion		DA2.4 - Onboarding					DA7.4 Conditions of Employment Monitoring		DA9.4 Workforce and Performance Reporting
											DA7.5 Personnel Relations and Engagement		DA9.5 Employee Records and Recordkeeping
											DA7.6 Workplace Compliance		DA9.6 Employee Records Disclosure

Primary - bidders must support this sub-function and related capabilities with their proposed solutions.

Secondary - bidders will not be penalized for not supporting this sub-function and related capabilities.

Tertiary - bidders are not required to support this sub-function.

9.3 Generic System Capabilities for Primary and Secondary HCM Business Reference Model Sub-Functions

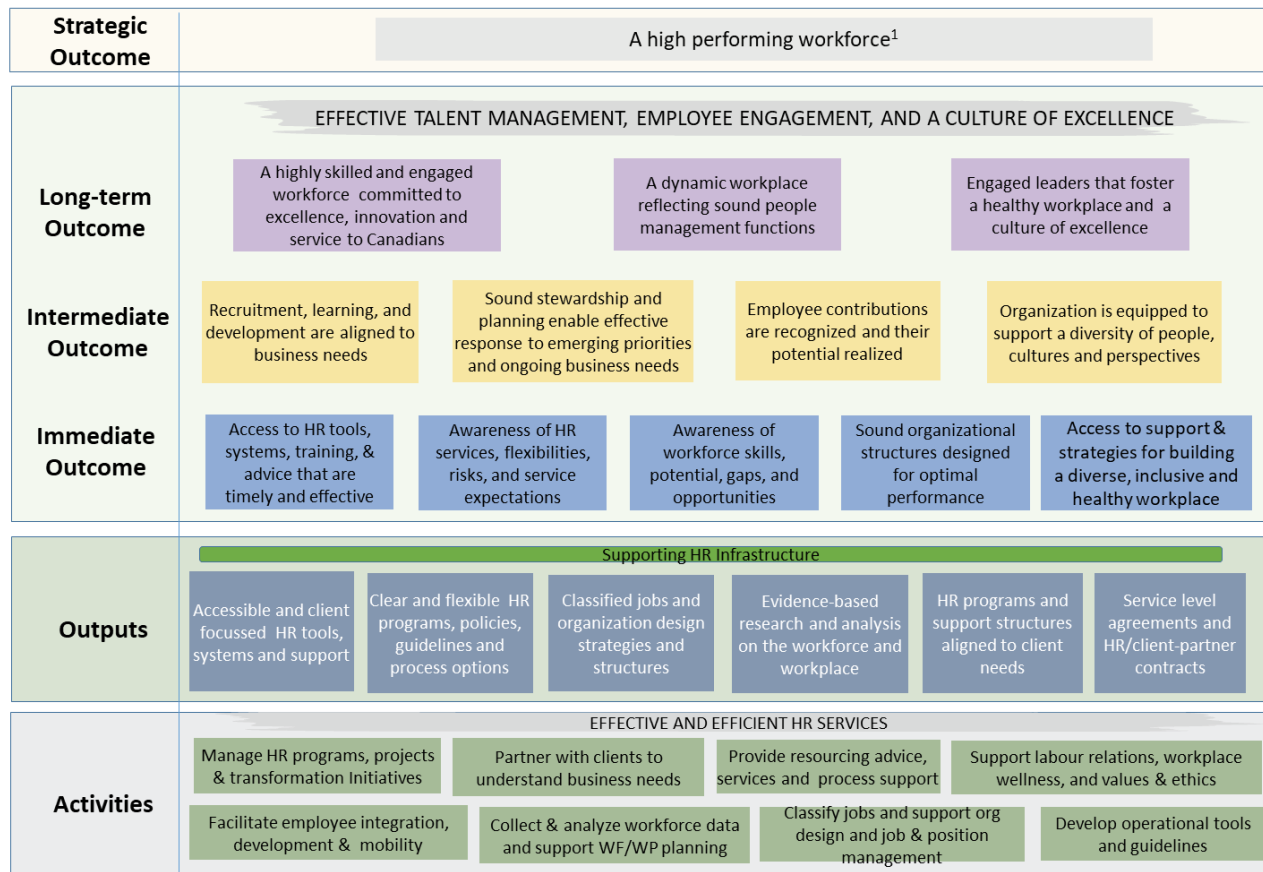
Sub-Function	Primary or Secondary	System Capability
G3.1 Benefits Program Administration and Oversight	Secondary	1. Enroll, administer and process benefits including health, disability and life insurance
G4.1 Pension Program Administration and Oversight	Secondary	1. Enroll and administer pension
G4.2 Retirement Inquiries	Secondary	1. Administer intake, perform needs assessment, service planning and evaluation
G4.3 Retirement Case Processing	Secondary	1. Enroll and administer pension
DA1.2 Workforce Planning	Primary	<ol style="list-style-type: none"> 1. Identify current and future human resources needs for the organization to achieve its goals 2. Align the needs of the organization with those of its workforce to meet its legislative, regulatory, service/production requirements and organizational objectives.
DA1.3 Organization Design and Position Management	Primary	<ol style="list-style-type: none"> 1. Manage the relationship between positions, the organizational structure and budget control/funding for positions etc. 2. Manage position relativity and classification decisions.
DA2.2 Applicant Sourcing and Recruitment	Secondary	<ol style="list-style-type: none"> 1. Request a new position, fill a vacant position or reallocate/promote a current employee 2. Develop employee job ads, interview, screen and select high-quality and productive employees 3. Track and process an applicant
DA2.3 Candidate Assessment and Selection	Secondary	<ol style="list-style-type: none"> 1. Develop employee job ads, interview, screen and select high-quality and productive employees 2. Track and process an applicant

Sub-Function	Primary or Secondary	System Capability
		3. Manage offers, documents and strategic hiring
DA2.4 Onboarding	Primary	1. Setup an employee, assign assets, complete employee checklist.
DA3.1 Talent Development Planning	Primary	1. Capture and track employee skills, competencies, certifications, etc. 2. Plan for attrition of top-level talent
DA3.2 Talent Development and Training	Secondary	1. Capture and track employee skills, competencies, certifications, etc. 2. Capture and track employee training, course enrollment, course creation and delivery
DA3.3 Learning Administration	Secondary	1. Capture and track employee training, course enrollment, course creation and delivery
DA4.1 Employee Performance Management	Primary	1. Set goals and objectives, conduct performance reviews, self/manager appraisals, track metrics against organizational goals and mission statement, and individual development
DA4.2 Recognition Management	Primary	1. Track and recognize employees including milestones/anniversaries
DA5.1 Compensation and Leave Management	Primary	1. Manage the frequency of pay periods and the pay dates for positions 2. Set up and manage earning codes, earning code groups, taxes, tax regions, tax codes, and tax groups 3. Administer backdated pay to employees 4. Generate and distribute ROE 5. Generate earnings for employees, issue worker payments, post payroll distributions 6. Generate and distribute year end documentation
DA5.2 Work Schedule and Leave Administration	Primary	1. Process and approve requests for leave

Sub-Function	Primary or Secondary	System Capability
		<ol style="list-style-type: none"> 2. Administer wage replacement and medical benefits to employees injured in the course of employment 3. Develop schedules that align to staffing needs to budget, available skills and demand 4. Manage employee absences including sick days, maternity, short term leave, long term disability, etc. 5. Capture and monitor employee time and attendance, labour tracking, and data collection
DA6.2 Separation Processing and Off Boarding	Primary	<ol style="list-style-type: none"> 1. Return assets, complete required paperwork and exit survey.
DA7.1 Employee Conduct	Primary	<ol style="list-style-type: none"> 1. Identify and track disciplinary actions assigned to the employee.
DA7.2 Redress Process and Third Party Proceedings (Policy)	Primary	<ol style="list-style-type: none"> 1. Capture formal complaints and related outcomes.
DA7.3 Accommodations Management	Primary	<ol style="list-style-type: none"> 1. Track participation and completion of related programs
DA7.4 Conditions of Employment Monitoring	Primary	<ol style="list-style-type: none"> 1. Measure and track compliance to collective agreements and provide guidance on how to interpret policy, collective agreements, etc.
DA7.6 Workplace Compliance	Primary	<ol style="list-style-type: none"> 1. Capture formal complaints and related outcomes 2. Track illnesses and/or injuries
DA8.2 Redress Process and Third Party Proceedings (Labour Relations)	Primary	<ol style="list-style-type: none"> 1. Capture formal complaints and related outcomes

Sub-Function	Primary or Secondary	System Capability
DA9.1 Employee People Management Inquiry Processing	Primary	1. Provide HR services and guidance to employees and/or managers on how to interpret HR policy 2. Collect and publish <u>policies</u> or benefits 3. Administer intake, perform needs assessment, service planning and evaluation
DA9.3 Workforce and Performance Analytics	Primary	1. Report on employee/employment statistics including status of actions to be completed.
DA9.4 Workforce and Performance Reporting	Primary	1. Report on employee/employment statistics including status of actions to be completed
DA9.5 Employee Records and Recordkeeping	Primary	1. Manage personnel related data elements. View assigned personnel data and/or add/change data 2. Capture and manage employee setup; and management of employee data 3. Capture and manage disciplinary action, termination

10. Attachment 5: Draft Logic Model for the HR Function (for R8.4)



¹ Aligned to strategic outcome of the OCHRO People Management Logic Model

Long text description

STRATEGIC OUTCOME

- A high performance workforce
 - Aligned to strategic outcome of the OCHRO People Management Logic Model

EFFECTIVE TALENT MANAGEMENT, EMPLOYEE ENGAGEMENT, AND A CULTURE OF EXCELLENCE

Long-term Outcome

- A highly skilled and engaged workforce committed to excellence, innovation and service to Canadians
- A dynamic workplace reflecting sound people management functions
- Engaged leaders that foster a healthy workplace and a culture of excellence

Intermediate Outcome

- Recruitment, learning, and development are aligned to business needs
- Sound stewardship and planning enable effective response to emerging priorities and ongoing business needs
- Employee contributions are recognized and their potential realized
- Organization is equipped to support a diversity of people, cultures and perspectives

Immediate Outcome

- Access to HR tools, systems, training, & advice that are timely and effective
- Awareness of HR services, flexibilities, risks, and service expectations
- Awareness of workforce skills, potential, gaps, and opportunities
- Sound organizational structures designed for optimal performance
- Access to support & strategies for building a diverse, inclusive and healthy workplace

SUPPORTING HR INFRASTRUCTURE

Outputs

- Accessible and client focussed HR tools, systems and support
- Clear and flexible HR programs, policies, guidelines and process options
- Classified jobs and organization design strategies and structures
- Evidence-based research and analysis on the workforce and workplace
- HR programs and support structures aligned to client needs
- Service level agreements and HR/client-partner contracts

EFFECTIVE AND EFFICIENT HR SERVICES

Activities

- Manage HR programs, projects & transformation Initiatives
- Partner with clients to understand business needs
- Provide resourcing advice, services and process support
- Support labour relations, workplace wellness, and values & ethics
- Facilitate employee integration, development & mobility
- Collect & analyze workforce data and support WF/WP planning
- Classify jobs and support org design and job & position management
- Develop operational tools and guidelines