



RETURN BIDS TO :
RETOURNER LES SOUMISSION À:

Canada Revenue Agency
Agence du revenu du Canada

Proposal to: Canada Revenue Agency

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

Proposition à : l'Agence du revenu du Canada

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

Bidder's Legal Name and Address (ensure the Bidder's complete legal name is properly set out)
Raison sociale et adresse du Soumissionnaire (s'assurer que le nom légal au complet du soumissionnaire est correctement indiqué)

Blank lines for bidder's legal name and address.

Bidder MUST identify below the name and title of the individual authorized to sign on behalf of the Bidder -
Soumissionnaire doit identifier ci-bas le nom et le titre de la personne autorisée à signer au nom du soumissionnaire

Name /Nom

Title/Titre

Signature

Date (yyyy-mm-dd)/(aaaa-mm-jj)
()

Telephone No. - No de téléphone
()

Fax No. - No de télécopieur

E-mail address - Adresse de courriel

REQUEST FOR PROPOSAL /
DEMANDE DE PROPOSITION

Table with 2 columns: Solicitation No., Date, Solicitation closes, Time zone, Contracting Authority, Telephone No., Fax No., Destination. Contains details for 'Standardized Internet Tests for Staffing and Development'.



This bid solicitation cancels and supersedes previous bid solicitation number 1000331261 dated October 15, 2018 with a closing of December 3, 2018 at 2:00 PM EDT. A debriefing or feedback session will be provided upon request to bidders/offerors/suppliers who bid on the previous solicitation.

Request for Proposal (RFP)

THIS DOCUMENT CONTAINS A SECURITY REQUIREMENT

Title: Standardized Internet Tests for Staffing and Development

Part 1 General Information

1.1 Introduction

The solicitation is divided into seven parts plus appendices and annexes, as follows:

Part 1 General Information: provides a general description of the requirement;

Part 2 Bidder Instructions: provides the instructions, clauses and conditions applicable to the solicitation;

Part 3 Proposal Preparation Instructions: provides bidders with instructions on how to prepare their bid;

Part 4 Evaluation and Selection: indicates how the evaluation will be conducted, the evaluation criteria that must be addressed in the bid, and the basis of selection;

Part 5 Certifications and Additional Information

Part 6 Security, Financial and Other Requirements: includes specific requirements that must be addressed by bidders; and

Appendices

Appendix 1: Mandatory Criteria

Appendix 2: Point Rated Criteria

Appendix 3: Financial Proposal

Part 7 Model Contract: includes the clauses and conditions and any annexes that will apply to any resulting contract.

Annexes

Annex A: STATEMENT OF WORK

Annex B: BASIS OF PAYMENT

Annex C: SECURITY REQUIREMENTS



1.2 Summary

The Canada Revenue Agency (CRA) is seeking one or more Contractors to provide standardized internet tests on an “as and when requested” basis. Standardized internet tests will be used as screening tools to improve the quality of hiring and to streamline large-volume staffing processes, as well as leadership development assessment tools to identify the strengths and development needs of those aspiring to leadership positions within the CRA.

Standardized internet tests required to fulfill this RFP are categorized in the following four (4) streams:

- Stream 1 - Internet Tests for Staffing of Entry Level Positions
- Stream 2 - Internet Tests for Management Development
- Stream 3 - Internet Tests for Management Readiness
- Stream 4 - Internet Tests for Staffing of Management Position

Bidders may submit a proposal for any of the four (4) streams. Bidders can bid on more than one stream.

The anticipated period of Contract(s) will be for two years, with three (3) irrevocable options to extend the Contract period. Each option is for up to a twelve (12) month period.

1.3 Glossary of Terms

TERM	DEFINITION
CRA	Canada Revenue Agency
Day/Month/Year	For purposes of technical evaluation, one (1) month shall equal a minimum of 16.67 billable days (a day equals 7.5 hours) and one (1) year equals a minimum of 200 billable days. Any additional billable days within the same year will not increase the experience gained for the purposes of evaluation.
Project	A set of activities required to produce certain defined outputs, or to accomplish specific goals or objectives, within a defined schedule and resource budget. A project exists only for the duration of time required to complete its stated objectives.
Proposal	A solicited submission by one party to supply certain goods or services. The word “proposal” is used interchangeably with “bid”
Solicitation	An act or instance of requesting proposals/bids on specific products and/or services.
Tendering Authority	Canada Revenue Agency



1.4 Debriefings

Bidders may request a debriefing on the results of the solicitation process. Bidders should make the request to the Contracting Authority within ten (10) business days of receipt of the results of the solicitation process. The debriefing may be in writing, by telephone or in person.

1.5 Office of the Procurement Ombudsman (OPO)

The Office of the Procurement Ombudsman (OPO) was established by the Government of Canada to provide an independent avenue for suppliers to raise complaints regarding the award of contracts under \$25,000 for goods and under \$100,000 for services. If you have issues or concerns regarding the solicitation, you have the option of raising them with the CRA, or, you may have the option of raising them with the OPO depending upon the nature of the complaint. You may contact the OPO by telephone at 1-866-734-5169 or by e-mail at boa.opo@boa.opo.gc.ca. You can also obtain more information on the OPO services available to you at their website at www.opo-boa.gc.ca ..

1.6 Canadian International Trade Tribunal

As a general rule, a complaint regarding this procurement process must be filed with the Canadian International Trade Tribunal (the Tribunal) within 10 working days from the date on which a bidder becomes aware, or reasonably should have become aware, of a ground of complaint. Alternatively, within that time frame, a bidder may first choose to raise its ground of complaint by way of an objection to the CRA; if the CRA denies the relief being sought, a bidder may then file a complaint with the Tribunal within 10 working days of that denial. More information can be obtained on the Tribunal's Web site (www.citt-tcce.gc.ca) or by contacting the Registrar of the Tribunal at 613-993-3595.

Also consult [Recourse Mechanisms \(https://buyandsell.gc.ca/for-businesses/selling-to-the-government-of-canada/recourse-mechanisms\)](https://buyandsell.gc.ca/for-businesses/selling-to-the-government-of-canada/recourse-mechanisms).



Part 2 Bidder Instructions

2.1 Mandatory Requirements

Wherever the words “shall”, “must” and “will” appear in this document or any related document forming a part hereof, the item being described is a mandatory requirement.

Failure to comply or demonstrate compliance with a mandatory requirement will render the bid non-responsive and the bid will receive no further consideration.

2.1.1 Signatures

Bidders MUST sign Page 1 (front page) of the Request for Proposal and any certifications identified in Part 5.

2.2 Standard Instructions, Clauses and Conditions

All instructions, clauses and conditions identified in the bid solicitation by number, date and title are set out in the Standard Acquisition Clauses and Conditions Manual issued by Public Works and Government Services Canada (PWGSC). The Manual is available on the PWGSC Website: <https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>.

Bidders who submit a bid agree to be bound by the instructions, clauses and conditions of this solicitation and accept the clauses and conditions of the resulting contract.

The standard instructions and conditions 2003 (2016-04-04) are incorporated by reference into and form part of the bid solicitation.

The following clauses are incorporated by reference:

SACC Reference	Clause Title	Date
A3005T	Status and Availability of Resources	2010-08-16
A3010T	Education and Experience	2010-08-16
A3015T	Certifications	2014-06-26
C3011T	Exchange Rate Fluctuation	2013-11-06

2.2.1 Revisions to Standard Instructions 2003

Standard Instructions - Goods or Services – Competitive Requirements 2003 (2016-04-04) are revised as follows.

Section 01 titled “Integrity Provisions– Bid”, is deleted in its entirety and replaced with the following:

1. The *Supplier Integrity Directive* (SID) dated May 24, 2016, is incorporated by reference into, and forms a binding part of the bid solicitation. The Bidder must comply with the SID, which can be found on the Canada Revenue Agency’s website at



<https://www.canada.ca/en/revenue-agency/corporate/about-canada-revenue-agency-cra/procurement-cra/supplier-integrity-directive.html>

2. Under the SID, charges and convictions of certain offences against a Supplier, its affiliates or first tier subcontractors, and other circumstances, will or may result in a determination by Public Works and Government Services Canada (PWGSC) that the Supplier is ineligible to enter, or is suspended from entering into a contract with Canada. The list of ineligible and suspended Suppliers is contained in PWGSC's Integrity Database. The SID describes how enquiries can be made regarding the ineligibility or suspension of Suppliers.
3. In addition to all other information required in the bid solicitation, the Bidder must provide the following:
 - a. by the time stated in the SID, all information required by the SID described under the heading "Mandatory Provision of Information"; and
 - b. with its bid, a complete list of all foreign criminal charges and convictions pertaining to itself, its affiliates and its proposed first tier subcontractors that, to the best of its knowledge and belief, may be similar to one of the listed offences in the SID. The list of foreign criminal charges and convictions must be submitted using an Integrity Declaration Form, which can be found at [Declaration form for procurement](#).
4. Subject to subsection 5, by submitting a bid in response to this bid solicitation, the Bidder certifies that:
 - a. it has read and understands the SID (<http://www.cra-arc.gc.ca/gncy/prcrmnt/menu-eng.html>)
 - b. it understands that certain domestic and foreign criminal charges and convictions, and other circumstances, as described in the SID, will or may result in a determination of ineligibility or suspension under the SID;
 - c. it is aware that Canada may request additional information, certifications, and validations from the Bidder or a third party for purposes of making a determination of ineligibility or suspension;
 - d. it has provided with its bid a complete list of all foreign criminal charges and convictions pertaining to itself, its affiliates and its proposed first tier subcontractors that, to the best of its knowledge and belief, may be similar to one of the listed offences in the SID;
 - e. none of the domestic criminal offences, and other circumstances, described in the SID that will or may result in a determination of ineligibility or suspension, apply to it, its affiliates and its proposed first tier subcontractors; and
 - f. it is not aware of a determination of ineligibility or suspension issued by PWGSC that applies to it.
5. Where a Bidder is unable to provide any of the certifications required by subsection 4, it must submit with its bid a completed Integrity Declaration Form, which can be found at [Declaration form for procurement](#).
6. Canada will declare non-responsive any bid in respect of which the information requested is incomplete or inaccurate, or in respect of which the information contained in a certification or declaration is found by Canada to be false or misleading in any respect. If Canada establishes after award of the Contract that the Bidder provided a false or misleading certification or declaration, Canada may terminate the Contract for default. Pursuant to the SID, Canada may also determine the Bidder to be ineligible for award of a contract for providing a false or misleading certification or declaration.

Section 02 titled "Procurement Business Number", is hereby deleted in its entirety and replaced with:



Suppliers should obtain a Business Number (BN) before contract award. Suppliers may register for a BN online at <http://www.cra-arc.gc.ca/tx/bsnss/tpcs/bn-ne/menu-eng.html>.

Section 03 titled “Standard Instructions, Clauses and Conditions”, “Pursuant to the Department of Public Works and Government Services Act (S.C. 1996, c.16),” is hereby deleted.

Section 05 titled “Submission of Bids”, paragraph 2 (d) is deleted in its entirety and replaced with the following:

(d) send its bid only to the Canada Revenue Agency Bid Receiving Unit or to the address specified in the solicitation in Section 2.3.

Section 05 titled “Submission of Bids” paragraph 4, delete sixty (60) days and replace with 180 days.

Section 06, titled “Late Bids”, reference to “PWGSC” is hereby deleted and replaced with CRA.

Section 07 titled “Delayed Bids”, all references to “PWGSC” are hereby deleted and replaced with “CRA”.

Section 12 titled “Rejection of Bid”, delete subsections 1(a) and 1(b) in their entirety.

Section 20 titled “Further Information”, Paragraph 2 is hereby deleted and replaced with the following: Enquiries concerning receipt of bids may be addressed to the Contracting Authority identified in the bid solicitation.

Section 21 titled “Code of Conduct for Procurement-bid” is hereby deleted in its entirety.



2.3 Submission of Proposals

When responding, the proposal SHALL be delivered to the Bid Receiving Unit address indicated below by the time and date indicated on Page 1.

BIDDERS ARE TO SUBMIT PROPOSALS TO:

Canada Revenue Agency
Bid Receiving Unit
Ottawa Technology Centre
Receiving Dock
875 Heron Road, Room D-95
Ottawa, ON K1A 1A2
Telephone No: (613) 941-1618

Bidders are hereby advised that the Bid Receiving Unit of CRA is open Monday to Friday inclusive, between the hours of 0730 and 1530, excluding those days that the federal government observes as a holiday.

ELECTRONIC BIDS WILL NOT BE ACCEPTED. Due to the nature of this solicitation, electronic transmissions of a proposal by such means as electronic mail or facsimile is not considered to be practical and therefore will not be accepted.

2.4 Communications - Solicitation Period

All enquiries must be submitted to the Contracting Authority no later than 5 calendar days before the bid closing date. Enquiries received after that time may not be answered.

Bidders should reference as accurately as possible the numbered item of the bid solicitation to which the enquiry relates. Care should be taken by bidders to explain each question in sufficient detail in order to enable Canada to provide an accurate answer. Technical enquiries that are of a "proprietary" nature must be clearly marked "proprietary" at each relevant item. Items identified as proprietary will be treated as such except where Canada determines that the enquiry is not of a proprietary nature. Canada may edit the question(s) or may request that the Bidder do so, so that the proprietary nature of the question(s) is eliminated and the enquiry can be answered to all bidders. Enquiries not submitted in a form that can be distributed to all bidders may not be answered by Canada.

2.5 Applicable Laws

Any resulting contract shall be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario.

The Bidder may, at its discretion, substitute the applicable laws of a Canadian province or territory of its choice without affecting the validity of its bid, by deleting the name of the Canadian province or territory specified and inserting the name of the Canadian province or territory of its choice. If no change is made, it acknowledges that the applicable laws specified are acceptable to the Bidder.



2.6 Terms and Conditions

By submitting a bid, the Bidder hereby certifies compliance with and acceptance of all of the articles, clauses, terms and conditions contained or referenced in this Request for Proposal (RFP) and Statement of Work (SOW). Any modifications or conditional pricing by the bidder, including deletions or additions to the articles, clauses, terms and conditions contained or referenced in this RFP and/or SOR document will render the bid non-responsive and the bid will receive no further consideration.



Part 3 Proposal Preparation Instructions

3.1 Bid – Number of Copies

Canada requests that bidders provide their bid in separately bound sections as follows:

Section I: Technical Bid (1 hard copy and 1 soft copy on USB)

In their technical bid, bidders should demonstrate their understanding of the requirements contained in the bid solicitation and explain how they will meet these requirements. Bidders should demonstrate their capability in a thorough, concise and clear manner for carrying out the Work.

The technical bid should address clearly and in sufficient depth the points that are subject to the evaluation criteria against which the bid will be evaluated. Simply repeating the statement contained in the bid solicitation is not sufficient. In order to facilitate the evaluation of the bid, Canada requests that bidders address and present topics in the order of the evaluation criteria under the same headings. To avoid duplication, bidders may refer to different sections of their bids by identifying the specific paragraph and page number where the subject topic has already been addressed.

Section II: Financial Bid (1 hard copy and 1 soft copy on USB)

Bidders must submit their financial bid in accordance with the format outlined in Appendix 3: Financial Proposal. The total amount of Applicable Taxes must be shown separately.

If there is a discrepancy between the wording of the soft copy and the hard copy, the wording of the hard copy will have priority over the wording of the soft copy.

Prices must appear in the financial bid only. No prices must be indicated in any other section of the bid.

Section III: Certifications (1 hard copy and 1 soft copy on USB)

Bidders must submit the certifications required under Part 5.

Section IV: Additional Information (1 hard copy and 1 soft copy on USB)

3.2 Bid Format and Numbering System

Canada requests that bidders follow the format instructions described below in the preparation of their bid.

- a. use 8.5 x 11 inch (216 mm x 279 mm) paper;
- b. Use recycled-fibre content paper and two-sided printing. Reduction in the size of documents will contribute to CRA's sustainable development initiatives and reduce waste;
- c. avoid the use of colour and glossy formats
- d. use a numbering system corresponding to that of the bid solicitation;
- e. include the certification as a separate section of the bid.



Part 4 Evaluation and Selection

4.1 General

A committee composed of representatives of CRA will evaluate the proposals on behalf of the Agency. The services of independent consultants may be called upon to assist in the evaluation of, or in the validation of, specific aspects of the solution proposed. CRA reserves the right to engage any independent consultant, or use any Government resources, which it deems necessary to evaluate any proposal.

Proposals will be evaluated in accordance with the evaluation criteria identified in Appendices 1 and 2 and in conjunction with the Statement of Work (SOW). Bidders are encouraged to address these criteria in sufficient depth in their proposals to permit a full evaluation of their proposals. The onus is on the Bidder to demonstrate that it meets the requirements specified in the solicitation.

Bidders are advised that only listing experience without providing any supporting information to describe where and how such experience was obtained will not be considered to be demonstrated for the purpose of the evaluation. The Bidder should not assume that the evaluation team is necessarily cognizant of or knowledgeable about the experience and capabilities of the Bidder or any of the proposed resource(s); as such, any relevant experience must be demonstrated in the Bidders' written proposal.

4.2 Steps in the Evaluation Process

The selection process to determine the successful Bidder will be carried out as follows:

Notwithstanding Steps 1 and 2 below, in order to expedite the evaluation process, CRA reserves the right to conduct Step 3 - Evaluation of Financial Proposals concurrently with Steps 1 and 2. Should CRA elect to conduct Step 3 prior to the completion of Step 2, the information in the Financial Proposal will not be disclosed to the team evaluating the mandatory and rated sections until the completion of Steps 1 and 2. However, if the Contracting Authority is able to ascertain that a proposal is non-responsive by virtue of incomplete information or an error in the financial proposal, the Contracting Authority will advise the team evaluating the mandatory and rated sections that the proposal is not compliant and should no longer be considered. The concurrent evaluation of the financial proposal does not in any way construe compliance in Steps 1 and 2 despite the statement "All bids meeting the minimum thresholds in Step 2 will proceed to Step 3".

Bids will be ranked in accordance with the Selection Methodology.

Step 1 – Evaluation against Mandatory Criteria

All bids will be evaluated to determine if the mandatory requirements detailed in Appendix 1 "Mandatory Criteria" have been met. Only those bids meeting ALL mandatory requirements will then be evaluated in accordance with Step 2 below.



Step 2 – Evaluation against Point-Rated Criteria

All bids meeting the criteria from Step 1 will be evaluated and scored, in accordance with the point-rated criteria detailed in Appendix 2 “Point-Rated Criteria”, to determine the Bidder’s Total Technical Merit Score. Bids will then be evaluated in accordance with Step 3 below.

Step 3 – Evaluation of Financial Proposals

Only technically compliant bids meeting all of the requirements detailed in Steps 1 and 2 will be considered at this point.

Prices submitted will be evaluated to determine the bid evaluation price as defined in Appendix 3: “Financial Proposal”. Once the bid evaluation prices are determined under Step 3, the proposals will proceed to Step 4.

Bidders must provide a price, percentage, or weight, as applicable, for each item identified in the format specified in Appendix 3: Financial Proposal. Ranges (e.g., \$10-\$13) are not acceptable.

Step 4 – Basis of Selection

BASIS OF SELECTION - HIGHEST COMBINED RATING OF TECHNICAL MERIT AND PRICE

1. To be declared responsive, a bid must:
 - a. comply with all the requirements of the bid solicitation; and
 - b. meet all mandatory criteria; and
2. Bids not meeting (a) or (b) will be declared non-responsive.
3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be **60%** for the technical merit and **40%** for the price.
4. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of 60%.
5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 40%.
6. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
7. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.
8. In situations where two or more bidders achieve the same total combined rating of technical merit and price score, the bidder recommended for award of the contract will be the compliant bidder with the lowest priced bid.



Example of combined rating of technical merit and price score. Values are only for example.

Bidder	Technical Points out of 1000	Technical Score (X) (60%)	Merit	Bid Price	Price Score (Y) (40%)	Total Combined Rating (X+Y)
1	620	$620/1000 \times 60 = 37.2$		\$500,000*	$500,000/500,000 \times 40 = 40$	77.20
2	650	$650/1000 \times 60 = 39.0$		\$520,000	$500,000/520,000 \times 40 = 38.46$	77.46
3	720	$720/1000 \times 60 = 43.2$		\$580,000	$500,000/580,000 \times 40 = 34.48$	77.68***
4	790	$790/1000 \times 60 = 47.4$		\$700,000	$500,000/700,000 \times 40 = 28.57$	75.97
5	960**	$960/1000 \times 60 = 57.6$		\$2,000,000	$500,000/2,000,000 \times 40 = 10.00$	67.60

* Lowest priced *technically compliant proposal (Bidder 1)

**Highest scoring technically compliant proposal (Bidder 5)

***Winning proposal (Bidder 4)

Step 5 – Basis of Selection – Proof of Synergy Compliance (PoSC)

The highest ranked responsive Bidder will be subject to Proof of Synergy Compliance testing (PoSC) as described in Appendix 1 to Annex A: Synergy Solution prior to contract award. The CRA reserves the right to test the proposed solution in whole or in part against all of the PoSC test requirements set out in Appendix 1 to Annex A.

Claims of future compliance with CRA’s Synergy requirements in software and/or hardware releases will not be considered during the evaluation of the Bidder’s proposal.

Step 6 – Conditions Precedent to Contract Award

The Bidder(s) recommended for award of a Contract must meet the requirements provided in Part 5 “Certifications and Additional Information” and Part 6 “Security, Financial and Other Requirements” of this RFP.

Step 7 – Contract Entry

The Bidder(s) with the highest ranked responsive bid and meeting all the requirements listed above will be recommended for award of a contract.



Part 5 Certifications and Additional Information

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

The certifications provided by bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default in carrying out any of its obligations under the Contract, if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.

The Contracting Authority will have the right to ask for additional information to verify the Bidder's certifications. Failure to comply and to cooperate with any request or requirement imposed by the Contracting Authority may render the bid non-responsive or constitute a default under the Contract.

The Certifications listed at 5.1 must be completed and submitted with the bid. Failure to submit the Certifications listed at 5.1 will render the bid non-responsive and the bid will receive no further consideration.

5.1 Certifications Required To Be Submitted At Time of Bid Closing

5.1.1 Joint Venture Certification

Only complete this certification if a joint venture is being proposed

The Bidder represents and warrants the following:

(a) The bidding entity is a contractual joint venture in accordance with the following definition. A "contractual joint venture" is an association of two or more parties who have entered into a written contract in which they have set out the terms under which they have agreed to combine their money, property, knowledge, skills, time or other resources in a joint business enterprise, sharing the profits and the losses and each having some degree of control over the enterprise.

(b) The name of the joint venture is: _____(if applicable).

(c) The members of the contractual joint venture are (the Bidder is to add lines to accommodate the names of all members of the joint venture, as necessary):

(d) The Business Numbers (BN) of each member of the contractual joint venture are as follows (the Bidder is to add lines for additional BNs, as necessary):

(e) The effective date of formation of the joint venture is: _____



(f) Each member of the joint venture has appointed and granted full authority to _____ (the "Lead Member") to act on behalf of all members as its representative for the purposes of executing documentation relating to the solicitation and any resulting contract.

(g) The joint venture is in effect as of the date of bid submission.

This Joint Venture Certification must be signed by each member of the joint venture.

The Joint Venture Certification shall be effective throughout the entire period of the Contract, including any exercised option period, if exercised.

The CRA has the right to request documentation from the Bidder evidencing the existence of the contractual joint venture.

Signature of an authorized representative of each member of the joint venture

(the Bidder is to add signatory lines as necessary):

_____	_____	_____	_____
Signature of Duly Authorized Representative	Name of Individual (Please Print)	Legal Name of Business Entity	Date

_____	_____	_____	_____
Signature of Duly Authorized Representative	Name of Individual (Please Print)	Legal Name of Business Entity	Date



5.2 Certifications Precedent to Contract Award and Associated Information

The certifications listed below should be completed and submitted with the bid but may be submitted afterwards. If any of these required certifications is not completed and submitted as requested, the Contracting Authority will inform the Bidder of a time frame within which to provide the information. Failure to comply with the request of the Contracting Authority and to provide the certification within the time frame provided will render the bid non responsive and the bid will receive no further consideration.

5.2.1 Integrity Provisions – Associated Information

By submitting a bid, the Bidder certifies that the Bidder and its Affiliates are in compliance with the provisions as stated in Section 01 Integrity Provisions - Bid of Standard Instructions 2003. The associated information required within the Integrity Provisions will assist Canada in confirming that the certifications are true.

5.2.2 Employment Equity

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "[FCP Limited Eligibility to Bid](#)" list (http://www.labour.gc.ca/eng/standards_equity/eq/emp/fcp/list/inelig.shtml) available from [Employment and Social Development Canada \(ESDC\)-Labour's](#) website

Canada will have the right to declare a bid non-responsive if the Bidder, or any member of the Bidder if the Bidder is a Joint Venture, appears on the "[FCP Limited Eligibility to Bid](#)" list at the time of contract award.

5.2.3 Former Public Servant

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

Definitions:

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

- a. an individual;
- b. an individual who has incorporated;
- c. a partnership made of former public servants; or
- d. a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.



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

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

Former Public Servant in Receipt of a Pension

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

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

- a. name of former public servant;
- b. date of termination of employment or retirement from the Public Service.

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

Work Force Adjustment Directive

Is the Bidder a FPS who received a lump sum payment pursuant to the terms of the Work Force Adjustment Directive?

YES () NO ()

If so, the Bidder must provide the following information:

- (a) name of former public servant;
- (b) conditions of the lump sum payment incentive;
- (c) date of termination of employment;
- (d) amount of lump sum payment;
- (e) rate of pay on which lump sum payment is based;
- (f) period of lump sum payment including start date, end date and number of weeks;
- (g) number and amount (professional fees) of other contracts subject to the restrictions of a work force adjustment program.



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

5.2.4 Vendor Reporting Information

The following information should be provided to enable CRA compliance with paragraph 221(1)(d) of the Income Tax Act, R.S.C. 1985, c.1 (5th Supp.) and report payments made to contractors under applicable services contracts (including contracts involving a mix of goods and services) on a T1204 Government Service Contract Payments slip.

For the purpose of this clause:

“Legal Name” means the name of the company, corporation or other entity constituted as a legal person under which this person exercises its rights and performs its obligations.

“Operating Name” means the name that is legally protected and used in the course of its business by a company, corporation or other entity legally constituted as a legal person, or by the individual.

The Bidder is requested to provide the following:

Legal Name: _____

Operating Name: _____

Address: _____

Payment/T1204 Address (if different) Payment address is same as above

City: _____

Province: _____

Postal Code: _____

Telephone: _____

Fax: _____



Type of Business (Select only one)

- Corporation
- Partnership
- Sole Proprietor
- Non-Profit Organization
- US or International Co.

All registered companies (excluding Non-Profit organizations and US or International companies) must provide their Goods and Services Tax (GST) or Business Number (BN). Additional details on how to obtain a BN can be found at: <http://www.cra-arc.gc.ca/tx/bsnss/tpcs/bn-ne/menu-eng.html>

If the services will be rendered by an individual, please provide the Social Insurance Number (SIN).

Goods and Services Tax (GST)
Number: _____

Business Number (BN): _____

If a SIN number is being provided, the information should be placed in a sealed envelope marked "Protected".

Social Insurance Number (SIN): _____

N/A Reason: _____

Note: If you select "N/A", then you must give a reason.

Date: _____

Name: _____

Signature: _____

(Signature of duly authorized representative of business)

Title: _____

(Title of duly authorized representative of business)



Part 6 Security, Financial and Other Requirements

6.1 Security Requirements

1. Before award of a contract, the following conditions must be met:
 - (a) the Bidder must hold a valid organization security clearance as indicated in Part 7 - Model Contract;
 - (b) the Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work site(s) must meet the security requirements as indicated in Part 7 - Model Contract;
 - (c) the Bidder must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites;

2. Bidders are reminded to obtain the required security clearance promptly. Any delay in the award of a contract to allow the successful Bidder to obtain the required clearance will be at the entire discretion of the Contracting Authority.



Appendices

Appendix 1: Mandatory Criteria

Evaluation Procedures

Bids will be evaluated in accordance with the process outlined in Part 4 Evaluation and Selection and all the mandatory evaluation criteria detailed below. Bids failing to demonstrate compliance to ALL mandatory requirements will be considered non-responsive and the bid will receive no further consideration.

In responding to this RFP, the Bidder may opt to submit a proposal for one (1) or more of the following streams:

Stream 1: Internet Tests for Staffing of Entry Level Positions

Stream 2: Internet Tests for Management Development

Stream 3: Internet Test for Management Readiness

Stream 4: Internet Tests for Staffing of Management Position

If submitting a proposal for more than one stream, the Bidder must submit a proposal for each stream separately and must meet all of the Mandatory Criteria for each stream.

Canada will evaluate the bid only on the documentation provided as part of the bid. References in a bid to additional information not submitted with the bid, such as website addresses where additional information can be found or technical manuals or brochures not submitted with the bid **will not be considered in the evaluation of the bid.**

The Bidder must identify which Streams they are submitting a bid for in Table M.1

Table M.1

Streams	Bid	No Bid
Stream 1		
Stream 2		
Stream 3		
Stream 4		



1.1 Stream 1 - Internet Tests for Staffing of Entry Level Positions

MT #	Mandatory Reference Requirements	Met/ Not Met	Response Support (Bidders must indicate where support for response can be found in proposal)
M1	<p>TEST OFFER: The Bidder must demonstrate that it provides:</p> <p>i. A minimum of four (4) Internet Tests for Staffing of Entry Level Positions as described in Annex A Statement of Work (SOW), including a minimum of one test from each of the categories:</p> <p>A. Cognitive Ability Test; B. Behavioural Assessment; and C. Other Skills.</p> <p>To demonstrate compliance with M1 i, the Bidder must complete and provide Table 1.1</p> <p style="text-align: center;">-OR-</p> <p>ii. At least one tailored test that assesses a minimum of 4 test aspects, as described in Annex A Statement of Work (SOW), including one from each of the categories:</p> <p>A. Cognitive Ability Test; B. Behavioural Assessment; and C. Other Skills.</p> <p>To demonstrate compliance with M1 ii, the Bidder must complete and provide Table 1.2.</p> <p>In completing Table 1.2, the Bidder must indicate the test aspects by indicating a checkmark in the appropriate box.</p>		
M2	<p>Bidder's Qualifications and Experience</p> <p>The Bidder must have had provided a minimum of 500 Internet Tests in the stream Staffing of Entry Level Positions as described in Annex A Statement of Work (SOW).</p> <p>At least one (1) of the client organizations must have a minimum of 3,000 employees. The Bidder must provide the following information for a minimum of two (2) client organizations under Table 1.1 or Table 2.1 as applicable:</p> <ul style="list-style-type: none"> • the name of the client organization; • the name, title and email addresses for two contacts in the client organizations; • the name and quantity of tests provided to the client organizations. 		



	<p>The Bidder's experience is subject to verification by Canada during the bid evaluation period (before award of a contract). The client organization's contact provided by the Bidder may be contacted by Canada via e-mail to verify the information included in the bid. Canada will only consider verifications provided by email.</p> <p>The bid will be declared non-responsive if the information provided in the proposal cannot be validated by the client organization's contact, and if experience submitted by the Bidder are untrue, whether made knowingly or unknowingly.</p>		
M3	<p>TESTS REQUIREMENTS: All tests proposed by the Bidder must meet the Test Requirements described in Attachment 1 - Test Requirements to Appendix 1 Evaluation Criteria.</p> <p>The Bidder must provide supporting documentation to demonstrate how the tests proposed meet the 3 requirements described in the Test Requirements.</p>		
M4	<p>ONLINE PLATFORM: The online platform used to administer the tests must meet all requirements described in Attachment 2 – Online Platform Requirements to Appendix 1 Evaluation Criteria.</p> <p>The Bidder must provide supporting documentation to demonstrate how their platform meets the 10 requirements described in Attachment 2 Online Platform.</p>		



TABLE 1.1 - Internet Tests for Staffing of Entry Level Positions						
Test Categories	Tests/Aspects	Mandatory tests Test Name (can be more than one test per aspects) (Bidders must indicate where support for response can be found in proposal)	Quantity of Tests Provided to Client Organization	Name of Client Organization	Client Organization Contact Information (names (2), title and email)	Client Organization Size
A. Cognitive Ability Test	Cognitive Ability Test					
B. Behavioral Assessment	Values, ethics and integrity					
	Interpersonal Skills					
	Dependability, reliability					
	Personality tests for job/organizational fit					
C. Other Skills	Call Centre					
	Client Service Orientation					
	Administrative support					
	Learning potential					
	Situational Judgment					
	Language tests including reading, writing and oral proficiency in English/French as a first language					
Knowledge of Microsoft Office suite of tools						



TABLE 1.2 - Internet Tests for Staffing of Entry Level Positions – Tailored Test

Test Categories	Tests Aspects	Mandatory tests Test Name (can be more than one test per aspects) (Bidders must indicate where support for response can be found in proposal)	Quantity of Tests Provided to Client Organization	Name of Client Organization	Client Organization Contact Information (names (2), title and email)	Client Organization Size
A. Cognitive Ability Test	Cognitive Ability Test					
B. Behavioral Assessment	Values, ethics and integrity					
	Interpersonal Skills					
	Dependability, reliability					
	Personality tests for job/organizational fit					
C. Other Skills	Call Centre					
	Client Service Orientation					
	Administrative support					
	Learning potential					
	Situational Judgment					
	Language tests including reading, writing and oral proficiency in English/French as a first language					
	Knowledge of Microsoft Office suite of tools					



1.2 Stream 2 - Internet Tests for Management Development

MT #	Mandatory Technical Requirements	Met/ Not Met	Response Support (Bidders must indicate where support for response can be found in proposal)
M1	<p>Bidder's Qualifications and Experience</p> <p>The Bidder must have had provided a minimum of 250 Internet Tests in the stream Management Development as described in Annex A Statement of Work (SOW).</p> <p>To demonstrate compliance the bidder must provide the names of client organizations as well as the number of test provided.</p> <p>At least one (1) of the client organizations must have a minimum of 3,000 employees. The Bidder must provide the following information for a minimum of two (2) client organizations under Table 2.1:</p> <ul style="list-style-type: none"> • the name of the client organization; • the name, title and email addresses for two contacts in the client organizations; • the name and quantity of tests provided to the client organizations. • The description of the test provided. <p>The Bidder's experience is subject to verification by Canada during the bid evaluation period (before award of a contract). The client organization's contact provided by the Bidder maybe contacted by Canada via e-mail to verify the information included in the bid. Canada will only consider verifications provided by email.</p> <p>The bid will be declared non-responsive if the information provided in the proposal cannot be validated by the client organization's contact, and if experience submitted by the Bidder are untrue, whether made knowingly or unknowingly.</p>		
M2	<p>TEST OFFER: The Bidder must demonstrate that it provides a minimum three (3) Internet tests for management development as described in Annex A Statement of Work (SOW), including one test from each of the categories: A. 360-degree feedback tool assessing leadership competencies and B. Leadership,</p> <p>To demonstrate compliance with M2 the Bidder MUST complete and provide Table 2.1.</p>		
M3	<p>TESTS REQUIREMENTS: All tests proposed by the Bidder must meet the Test Requirements described in Attachment 1 - Test Requirements to Appendix 1 Evaluation Criteria.</p>		



	The Bidder must provide supporting documentation to demonstrate how the tests proposed meet the 3 requirements described in the Test Requirements.		
M4	ONLINE PLATFORM: The online platform used to administer the tests must meet all requirements described in Attachment 2 – Online Platform Requirements to Appendix 1 Evaluation Criteria. The Bidder must provide supporting documentation to demonstrate how their platform meets the 10 requirements described in Attachment 2 Online Platform.		



TABLE 2.1 - Internet Tests for Management Development						
Test Categories	Aspects	Mandatory tests Test Name (can be more than one test per aspects) (Bidders must indicate where support for response can be found in proposal)	Quantity of Tests Provided to Client Organization	Name of Client Organization	Client Organization Contact Information (names (2), title and email)	Client Organization Size
A. 360-degree feedback	Assessing leadership competencies					
B. Leadership	Interest in management role					
	Potential for leadership (soft skills)					
	General management readiness					
	Talent management					
	Personality, drivers and traits					
	Emotional intelligence assessment					
	High potential identification					



1.3 Stream 3 - Internet Test for Management Readiness

MT #	Mandatory Technical Requirements	Met/ Not Met	Response Support (Bidders must indicate where support for response can be found in proposal)
M1	<p>Bidder's Qualifications and Experience</p> <p>The Bidder must have had provided a minimum of 250 Internet Test in the stream Management Readiness as described in Annex A Statement of Work (SOW).</p> <p>To demonstrate compliance the bidder must provide the names of client organizations as well as the number of test provided.</p> <p>At least one (1) of the client organizations must have a minimum of 3,000 employees. The Bidder must provide the following information for a minimum of two (2) client organizations under Table 3.1:</p> <ul style="list-style-type: none"> • the name of the client organization; • the name, title and email addresses for two contacts in the client organizations; • the name and quantity of tests provided to the client organizations. • The description of the test provided. <p>The Bidder's experience is subject to verification by Canada during the bid evaluation period (before award of a contract). The client organization's contact provided by the Bidder maybe contacted by Canada via e-mail to verify the information included in the bid. Canada will only consider verifications provided by email.</p> <p>The bid will be declared non-responsive if the information provided in the proposal cannot be validated by the client organization's contact, and if experience submitted by the Bidder are untrue, whether made knowingly or unknowingly.</p>		
M2	<p>TEST OFFER: The Bidder must demonstrate that it provides a minimum of one (1) Internet Test for Management Readiness as described in Annex A Statement of Work (SOW).</p> <p>To demonstrate compliance with M2, the Bidder MUST complete and provide Table 3.1.</p>		
M3	<p>TESTS REQUIREMENTS: All tests proposed by the Bidder must meet the Test Requirements described in Attachment 1 - Test Requirements to Appendix 1 Evaluation Criteria.</p> <p>The Bidder must provide supporting documentation to demonstrate how the tests proposed meet the 3 requirements described in the Test Requirements.</p>		



M4	<p>ONLINE PLATFORM: The online platform used to administer the tests must meet all requirements described in Attachment 2 – Online Platform Requirements to Appendix 1 Evaluation Criteria.</p> <p>The Bidder must provide supporting documentation to demonstrate how their platform meets the 10 requirements described in Attachment 2 Online Platform.</p>		
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TABLE 3.1 - Internet Test for Management Readiness					
Aspects	Mandatory tests Test Name (Bidders must indicate where support for response can be found in proposal)	Quantity of Tests Provided to Client Organization	Name of Client Organization	Client Organization Contact Information (names (2), title and email)	Client Organization Size
Potential for leadership (soft skills)					
General management readiness					
Judgment					
Planning and organization					



1.4 Stream 4 - Internet Tests for Staffing of Management Position

MT #	Mandatory Technical Requirements	Met/ Not Met	Response Support (Bidders must indicate where support for response can be found in proposal)
M1	<p>Bidder's Qualifications and Experience</p> <p>The Bidder must have had provided a minimum of 250 Internet Tests in the stream Staffing of Management position as described in Annex A Statement of Work (SOW).</p> <p>To demonstrate compliance the bidder must provide the names of client organizations as well as the number of test provided.</p> <p>At least one (1) of the client organizations must have a minimum of 3,000 employees. The Bidder must provide the following information for a minimum of two (2) client organization under Table 4.1:</p> <ul style="list-style-type: none"> • the name of the client organization; • the name, title and email addresses for two contacts in the client organizations; • the name and quantity of tests provided to the client organizations. • The description of the test provided. <p>The Bidder's experience is subject to verification by Canada during the bid evaluation period (before award of a contract). The client organization's contact provided by the Bidder maybe contacted by Canada via e-mail to verify the information included in the bid. Canada will only consider verifications provided by email.</p> <p>The bid will be declared non-responsive if the information provided in the proposal cannot be validated by the client organization's contact, and if experience submitted by the Bidder are untrue, whether made knowingly or unknowingly.</p>		
M2	<p>TEST OFFER: The Bidder must demonstrate that it provides a minimum three (3) Internet Tests for Staffing of Management Position as described in Annex A Statement of Work (SOW). The proposed tests must assess different aspects from the list provided, and must include a test of Cognitive Ability.</p> <p>To demonstrate compliance with M2 the Bidder MUST complete and provide Table 4.1.</p>		
M3	<p>TESTS REQUIREMENTS: All tests proposed by the Bidder must meet the Test Requirements described in Attachment 1 - Test Requirements to Appendix 1 Evaluation Criteria.</p>		



	The Bidder must provide supporting documentation to demonstrate how the tests proposed meet the 3 requirements described in the Test Requirements.		
M4	ONLINE PLATFORM: The online platform used to administer the tests must meet all requirements described in Attachment 2 – Online Platform Requirements to Appendix 1 Evaluation Criteria. The Bidder must provide supporting documentation to demonstrate how their platform meets the 10 requirements described in Attachment 2 Online Platform.		



TABLE 4.1 - Internet Tests for Staffing of Management Position					
Tests Aspects	Mandatory tests Test Name (can be more than one test per aspects) (Bidders must indicate where support for response can be found in proposal)	Quantity of Tests Provided to Client Organization	Name of Client Organization	Client Organization Contact Information (names (2), title and email)	Client Organization Size
Cognitive ability					
Personality test for job/organizational fit					
Personality, drivers and traits					
Emotional intelligence					
Planning and organizing, such as on-line In-Basket Exercises (for first and second level of management)					
Situational judgment test (1 or 2 levels of management)					
Leadership competencies					
Executive leadership assessment					
Other tests for management staffing					



Canada Revenue
Agency

Agence du revenu du
Canada

Solicitation NO. 1000331261/A



Attachment 1 - Test Requirements:

The following Test Requirements are hereby inserted for evaluation purposes. Any proposed Tests by the Bidder must:

Criteria	Example of supporting documentation
1. Be available in English and French, exempt of expressions and local references.	<ul style="list-style-type: none">• Sample questions from the test in English and French
2. Be accompanied by a document showing tests characteristics such as validity and reliability, showing a reliability coefficient that is no less than 0.70. Be accompanied by guidelines that recommend pass marks for different pass rates or instruction on how to read test results.	<ul style="list-style-type: none">• Portion of the technical manual• Sample of guidelines or information that can be provided on test results.
3. Produce a test report that can be interpreted, such as a pass/fail result, a numeric mark, or an individual qualitative report. Qualitative reports must be available in English and French.	<ul style="list-style-type: none">• Sample/parts of test report in English and French• Sample/parts of test session reports showing test results



Attachment 2: Online Platform Requirements

The following Online Platform requirements are hereby inserted for evaluation purposes. Any Online Platform proposed by the Bidder must:

Criteria	Example of supporting documentation
1. Is available to the Project Authority, and to candidates 24 hours a day, 7 days a week, except for planned maintenance. Planned maintenance must not be more than 2 hours per week.	<ul style="list-style-type: none"> • Sample of screen showing platform availability • Maintenance schedule
2. Allows candidates to complete any test in either English or French, exempt of expressions and local references.	<ul style="list-style-type: none"> • Sample questions from the tests in English and French
3. Has a function available to ensure candidates are only able to write the test during the period specified by the CRA. The time period will be communicated with each test order.	<ul style="list-style-type: none"> • Sample message from platform that indicates that a test is not accessible to a candidate at a given time.
4. Has a function available to ensure candidates are only able to write the test during the period specified by the CRA. The time period will be communicated with each test order.	<ul style="list-style-type: none"> • Sample message from platform that indicates that a test is not accessible to a candidate at a given time.
5. Has a function available to ensure candidates do not write a test more than once for the same staffing process.	<ul style="list-style-type: none"> • Sample message from platform that indicates that a test is not accessible to a candidate because he/she has already written the test.
6. Makes available the Test Instructions in both French and English before candidates starts the test.	<ul style="list-style-type: none"> • Sample of the screen showing test instruction in English and French
7. Provides a notification asking candidates, before they write the test, to complete a questionnaire collecting their demographic information (such as gender, region, education level, Visible Minority status, Person with a Disability status, and Indigenous Person status).	<ul style="list-style-type: none"> • Sample of the screen on which candidates are asked for demographic data
8. Stores the individual candidate's test results for a minimum of two (2) years from the date the test was administered. The online platform must also provide a candidate existing results if available when requested by the CRA.	<ul style="list-style-type: none"> • Data storage information or procedures • Copy for service standards
9. Makes Completed Test Report available to the CRA within 72 hours of candidates completing a test.	<ul style="list-style-type: none"> • Copy of Service standards
10. Have data import and export functionalities.	<ul style="list-style-type: none"> • Sample of administrator screen showing data functionalities.



Appendix 2: Point Rated Criteria

Technical bids will be assessed separately against the evaluation criteria identified below. Point-rated criteria not addressed in the bid will result in a score of zero being assigned against that particular criterion.

Point rated criteria

In responding to this RFP, the Bidder may opt to submit a proposal for one (1) or more of the five (5) streams as described in the Statement of Work. If submitting a proposal for more than one stream, the Bidder must submit a proposal for each stream separately and must consider the point rated Criteria for each stream.

Stream 1 - Internet Tests for Staffing of Entry Level Positions (licence)

	Rated criteria	Scoring	Maximum points
R1.1	<p>TEST OFFERING</p> <p>The Bidder should demonstrate the number of test available to CRA in Stream 1 - Internet Tests for Staffing of Entry Level Positions.</p> <p>1.1 The Bidder will be awarded points for each Internet Tests for Staffing of Entry Level Positions from categories A, B, or C, proposed over and above what is required on M1-1.1 up to a maximum of eight (8) tests.</p> <p style="text-align: center;">-OR-</p> <p>1.2 The Bidder will be awarded points for each aspects assessed from categories A, B, or C, over and above what is required on M1-1.2 up to a maximum of eight (8) aspects assessed in a tailored test.</p>	<p>4 tests/aspects assessed = 0 points 5 tests/aspects assessed = 20 points 6 tests/aspects assessed = 30 points 7 tests/aspects assessed = 40 points 8 tests/aspects assessed = 50 points</p>	50 Points
R1.2	<p>COGNITIVE ABILITY TEST</p> <p>The Bidder should describe how its proposed cognitive ability test is administered using a computerized adaptive technology.</p> <p>The Bidder will be awarded points if the proposed cognitive ability test is administered using a computerized adaptive technology.</p>	<p>Test administered without computerized adaptive technology = 0 points</p> <p>Test administered using computerized adaptive technology =20 points</p>	20 Points



	<p>Computerized Adaptive Technology: A technological testing feature which adjusts the questions' level of difficulty in response to the candidates' demonstrated ability as the test progresses.</p>		
	Total Points		/ 70 Points

Stream 2 - Internet Tests for Management Development (licence)

	Rated criteria	Scoring	Maximum points
R2.1	<p>NUMBER OF PROPOSED TESTS IN THE LICENCE</p> <p>The Bidder should demonstrate the number of tests available to CRA in Stream 2 - Internet Tests for Management Development.</p> <p>The Bidder will be awarded points for each Test for Management Development from categories A, or B, proposed over and above what is required on M2.</p> <p>Categories</p> <p>A.360-degree feedback tool assessing leadership competencies</p> <p>B. Leadership</p> <ul style="list-style-type: none"> • Interest in a leadership role • Potential for leadership (soft skills) • General management readiness • Talent management • Personality, drivers and traits • Emotional intelligence assessment • Interest in management role • High potential identification 	<p>3 tests = 0 pts 4 tests = 20 pts 5 tests = 30 pts 6 tests = 40 points</p>	40 Points



R2.2	<p>CATEGORY A. 360-DEGREE FEEDBACK - TAILORED ASSESSMENT</p> <p>The Bidder should describe how the 360-Degree Feedback assessment proposed can be tailored to assess CRA leadership competencies.</p> <p>The Bidder will be awarded points if the proposed 360 assessment can be tailored to assess CRA's leadership competencies:</p> <ul style="list-style-type: none"> • Uphold Integrity and Respect • Create Vision and Strategy • Mobilize People • Collaborate with Partners and Stakeholders • Promote Innovation and Guide Change • Achieve Results <p>The assessment tailoring options should include the possibility to choose the competencies that will be assessed, or to choose the statements that will be used for the assessment.</p>	<p>360 cannot be tailored= 0 points 360 can be tailored =20 points</p>	20 Points
R2.3	<p>CATEGORY B. LEADERSHIP - TAILORED ASSESSMENT</p> <p>The Bidder should describe how the Leadership test or assessment proposed can be tailored to CRA leadership competencies:</p> <p>The Bidder will be awarded points if it proposes tests or assessments that can be tailored to CRA leadership competencies.</p>	<p>1 tailored tests = 10 pts 2 tailored tests = 20 pts 3 tailored tests = 30 pts</p>	30 Points
	Total Points		/ 90 pts



Stream - 3 Internet Tests for Management Readiness (licence)

	Rated criteria	Scoring	Maximum Points
R3.1	<p>TAILORED ASSESSMENT – Job Profile</p> <p>The Bidder should describe how the test or assessment proposed can be tailored to a CRA leadership competencies :</p> <ul style="list-style-type: none">• Uphold Integrity and Respect• Create Vision and Strategy• Mobilize People• Collaborate with Partners and Stakeholders• Promote Innovation and Guide Change• Achieve Results <p>The Bidder will be awarded points if it proposes test or assessments that can be tailored to a CRA leadership competencies.</p>	<p>Test cannot be tailored = 0 pts Test can be tailored = 20 pts</p>	20 Points
	Total Points		/ 20 Points



Stream 4 - Internet Tests for Staffing of Management Position

	Rated criteria	Scoring	Maximum Points
R4.1	<p>NUMBER OF PROPOSED TESTS</p> <p>The Bidder should demonstrate the number of tests available to CRA in Stream 4 - Internet Tests for Staffing of Management Position</p> <p>The Bidder will be awarded points for each Internet Tests for Staffing of Management Position over and above the minimum of three (3) tests required in M2.</p> <p>Proposed list of tests:</p> <ul style="list-style-type: none"> a) Cognitive ability b) Personality test for job/organizational fit. c) Planning and organizing, such as on-line In-Basket Exercises (1 or 2 levels of management) d) Situational judgement test (1 or 2 levels of management) e) Leadership competencies f) Emotional intelligence g) Management readiness h) Executive leadership assessment <p>*For the proposed tests over and above the minimum of three (3), the bidder may propose tests that are not included in this list but measure leadership.</p>	<p>3 tests = 0 pts 4 tests = 10 pts 5 tests = 15 pts 6 tests = 20 points 7 tests = 25 points 8 tests = 30 points 9 tests = 35 points 10 tests = 40 points</p>	40 Points



<p>R4.2</p>	<p>COGNITIVE ABILITY TEST</p> <p>The Bidder will be awarded points if the proposed cognitive ability test is administered using a computerized adaptive technology.</p> <p>The Bidder shall describe how the Cognitive Ability Test proposed in M2 is administered using Computerized Adaptive Technology.</p> <p>Computerized Adaptive Technology: <i>A technological testing feature which adjusts the questions' level of difficulty in response to the candidates' demonstrated ability as the test progresses.</i></p>	<p>Test administered without computerized adaptive technology = 0 points</p> <p>Test administered using computerized adaptive technology =20 points</p>	<p>20 Points</p>
<p>R4.3</p>	<p>TAILORED ASSESSMENT</p> <p>The Bidder will be awarded points if it proposes tests or assessments that can be tailored to CRA's Job Profiles.</p> <p>The Bidder shall describe how the proposed test or assessment proposed can be tailored to CRA's job profile.</p>	<p>1 tailored tests = 10 pts 2 tailored tests = 20 pts 3 tailored tests = 30 pts</p>	<p>30 Points</p>
	<p>Total Points</p>		<p>/ 90 pts</p>



Appendix 3: Financial Proposal

Bidders must quote firm all-inclusive prices in Canadian funds, HST extra as applicable, for the provision of Standardized Internet Tests for Staffing and Development services outlined in Appendix A “Statement of Work”, for each Stream for which the Bidder is submitting a proposal.

The Bidder **MUST** submit their financial bid in accordance with the “Financial Bid Presentation Sheet” detailed herein.

Stream 1 - Internet Tests for Staffing of Entry Level Positions

Bidders **MUST** quote a **firm all-inclusive** lot price for an unlimited license for **Internet Tests for Staffing of Entry Level Positions** as outlined in Appendix A: “Statement of Work”, for the entire contract period, including any optional extensions. All prices must be in Canadian funds, HST extra, as applicable

The Bidder **MUST** complete and submit the following table:

Licence for Internet tests for staffing of entry level positions	Unit of Issue	Unit Price
Firm Contract Year 1 (A)	Lot	\$
Firm Contract Year 2 (B)	Lot	\$
Contract Option Year 1 (C)	Lot	\$
Contract Option Year 2 (D)	Lot	\$
Contract Option Year 3 (E)	Lot	\$
Total Bid Evaluation Price (A+B+C+D+E)		\$

All payments are subject to Government audit.



Stream 2 - Internet Tests for Management Development

Bidders **MUST** quote a **firm all-inclusive** lotprice for an unlimited license for **Internet Tests for Management Development** as outlined in Appendix A: "Statement of Work", for the entire contract period, including any optional extensions. All prices must be in Canadian funds, HST extra, as applicable

The Bidder **MUST** complete and submit the following table:

Licence for Internet Tests for Management Development	Unit of Issue	Unit Price
Firm Contract Year 1 (A)	Lot	\$
Firm Contract Year 2 (B)	Lot	\$
Contract Option Year 1 (C)	Lot	\$
Contract Option Year 2 (D)	Lot	\$
Contract Option Year 3 (E)	Lot	\$
Total Bid Evaluation Price (A+B+C+D+E)		\$

All payments are subject to Government audit.



Stream 3 - Internet Test for Management Readiness

Bidders **MUST** quote a **firm all-inclusive** lot price for an unlimited license for **Internet Tests for Management Readiness** as outlined in Appendix A: "Statement of Work", for the entire contract period, including any optional extensions. All prices must be in Canadian funds, HST extra, as applicable

The Bidder **MUST** complete and submit the following table:

Internet Test for Management Readiness	Unit of Issue	Unit Price
Firm Contract Year 1 (A)	Lot	\$
Firm Contract Year 2 (B)	Lot	\$
Contract Option Year 1 (C)	Lot	\$
Contract Option Year 2 (D)	Lot	\$
Contract Option Year 3 (E)	Lot	\$
Total Bid Evaluation Price (A+B+C+D+E)		\$

All payments are subject to Government audit.



Stream 4 - Internet Tests for Staffing of Management Position

Bidders **MUST** quote a **firm all-inclusive** unit price for **Internet Tests for Staffing of Management Position** as outlined in Appendix A: "Statement of Work", for the entire contract period, including any optional extensions. All prices must be in Canadian funds, HST extra, as applicable

The Bidder **MUST** complete and submit the following table:

Internet tests for staffing of management position	Price per test (A)	Estimated Usage (B)	Total Cost (A x B)
Firm Contract Year 1 (A)	\$	2000 Tests	\$
Firm Contract Year 2 (B)	\$	2000 Tests	\$
Contract Option Year 1 (C)	\$	2000 Tests	\$
Contract Option Year 2 (D)	\$	2000 Tests	\$
Contract Option Year 3 (E)	\$	2000 Tests	\$
Total Bid Evaluation Price (A+B+C+D+E)			\$

All payments are subject to Government audit.



Part 7 Model Contract

THIS DOCUMENT CONTAINS A SECURITY REQUIREMENT

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

7.1 Revision of Departmental Name

Reference to the Minister of Public Works and Government Services or to Public Works and Government Services Canada contained in any term, condition or clause of the contract shall be interpreted as a reference to the Commissioner of Revenue or the Canada Revenue Agency, as the case may be, with the exception of the following clauses:

- a) Standard Clauses and Conditions; and
- b) Security Requirements.

7.2 Agency Restructuring

In cases where the Contracting Authority's department or agency is being reconfigured, absorbed by another government department or agency, or disbanded entirely, the Commissioner may, by giving notice to the Contractor, designate another Contracting Authority for all or part of the Contract.

7.3 Requirement

The Contractor must perform the Work in accordance with the Statement of Work (SOW) at Annex A, attached hereto and forming part of the Contract

7.3.1 Period of Contract

The period of the Contract is from date of contract award to inclusive.

7.3.2 Option to Extend the Contract

The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to three (3) additional one (1) year periods under the same conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions as set out in the Basis of Payment.

The option may only be exercised by the Contracting Authority and will be evidenced, for administrative purposes only, through a contract amendment. The Contracting Authority may exercise an option at any time before the expiry of the Contract by sending a written notice to the Contractor.

7.3.3 Option to Purchase Additional Quantities of the Goods, Services or Both

The Contractor grants to Canada the irrevocable option to acquire the additional quantities of the goods, services or both described at Annex A: Statement of Work of the Contract under the same terms and conditions and at the prices and/or rates stated in the Contract.



The option may only be exercised by the Contracting Authority and will be evidenced, for administrative purposes only, through a contract amendment. The Contracting Authority may exercise an option at any time before the expiry of the Contract by sending a written notice to the Contractor.

7.3.4 Requirement to implement CRA E-Procurement Solution (If Applicable)

The Canada Revenue Agency’s (CRA) intends to implement and use an e-procurement solution to expedite the ordering, receiving and reconciling goods and services under any resulting contract. This end-to-end e-procurement system is based on the Ariba suite of products and has been branded internally as “Synergy”.

7.3.5 Option to Implement Synergy (If Applicable)

The Contractor grants to Canada the irrevocable option to implement and use the CRA's end-to-end e-procurement solution branded internally as “Synergy” for ordering, receiving and reconciling goods and services. The Synergy Solution is explained at **Appendix 1 to Annex A** herein.

The option may only be exercised by the Contracting Authority and will be evidenced, for administrative purposes only, through a contract amendment. The Contracting Authority may exercise an option at any time before the expiry of the Contract by sending a written notice to the Contractor

7.4 Standard Clauses and Conditions

All clauses and conditions identified in the Contract by number, date and title are set out in the Standard Acquisition Clauses and Conditions Manual issued by Public Works and Government Services Canada (PWGSC).

The Manual is available on the PWGSC Website: <https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>

The following Clauses are incorporated by reference:

SACC Reference	Clause Title	Date
A2000C Or A2001C	Foreign Nationals (Canadian Contractor) Foreign Nationals (Foreign Contractor)	2006-06-16 2006-06-16
A3015C	Certifications	2014-06-26
A9065C	Identification Badge	2006-06-16
A9068C	Site Regulations	2010-01-11
A9113C	Handling of Personal Information	2014-11-27
A9117C	T1204 – Direct Request by Customer Department	2007-11-30
B9028C	Access to Facilities and Equipment	2007-05-25
C6000C	Limitation of Price	2011-05-16
C0711C	Time Verification	2008-05-12



C2000C	Taxes-Foreign-based Contractor	2007-11-30
C2605C	Canadian Customs Duties & Sales Tax –Foreign-based Contractor	2008-05-12
G1005C	Insurance	2008-05-12
H1001C	Multiple Payments	2008-05-12
H3028C	Advance Payment	2010-01-11

7.5 General Conditions

2035 (2016-04-04) General Conditions – Higher Complexity - Services, apply to and form part of the Contract.

Section 01 titled “Interpretation” the definition of "Canada", "Crown", "Her Majesty" or "the Government" is hereby amended to read: "Canada", "Crown", "Her Majesty" or "the Government" means Her Majesty the Queen in right of Canada as represented by the Canada Revenue Agency (CRA).

Section 02 titled “Standard Clauses and Conditions” is hereby amended to delete the phrase “Pursuant to the Department of Public Works and Government Services Act, S.C. 1996, c. 16,” The remainder of Section 02 remains unchanged.

Section 22 titled “Confidentiality”,

Subsection 5 is hereby amended to delete Public Works and Government Services (PWGSC) and insert Canada Revenue Agency (CRA).

Subsection 6 is hereby amended to delete “PWGSC Industrial Security Manual and its supplements”, and insert “Security Requirements for the Protection of Sensitive Information” issued by the CRA, Security and Internal Affairs Directorate (SIAD). The remainder of Section 22 remains unchanged.

Section 41 titled “Integrity Provisions- Contract” is hereby deleted in its entirety and replaced with:

The Supplier Integrity Directive (SID) incorporated by reference into the bid solicitation is incorporated into, and forms a binding part of the Contract. The Contractor must comply with the provisions of the SID, which can be found on the Canada Revenue Agency’s website at <https://www.canada.ca/en/revenue-agency/corporate/about-canada-revenue-agency-cra/procurement-cra/supplier-integrity-directive.html>

Section 45 titled “Code of Conduct for Procurement—Contract” is hereby deleted in its entirety.

7.6 Security Requirements

Contractor personnel must be escorted at all times while on CRA premises



7.7 Authorities

7.7.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: Steve Gilroy

Telephone Number: 613-218-3991

Fax Number: 613-948-2459

E-mail address: steve.gilroy@cra-arc.gc.ca

The Contracting Authority is responsible for the management of the Contract, and any changes to the Contract must be authorized in writing by the Contracting Authority. The Contractor must not perform work in excess of or outside the scope of the Contract based on verbal or written requests or instructions from anybody other than the Contracting Authority.

7.7.2 CRA ACQUISITION SERVICE DESK

The CRA Acquisition Service Desk provides national support to CRA Purchasers, the CRA Contracting Authority and the Contractor:

Telephone Number:

Fax Number:

E-mail address:

7.7.3 Project Authority

To be completed at the time of Contract award.

Name: _____

Address: _____

Telephone Number: _____

Fax Number: _____

E-mail Address: _____

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



7.7.4 Contractor's Representative

To be completed at the time of Contract award.

Name: _____

Address: _____

Telephone Number: _____

Fax Number: _____

E-mail Address: _____

7.8 Contractor Identification Protocol

The Contractor must be responsible for ensuring that each of its employees, officers, directors, agents, and subcontractors (hereinafter referred to as "Contractor Representative") complies with the following self-identification requirements:

A Contractor Representative who attends a Government of Canada meeting whether internal or external must identify themselves as being a representative of the Contractor prior to the commencement of the meeting to ensure that each meeting participant is aware of the fact that the individual is not a government employee;

During the performance of any Work at a Government of Canada site, each Contractor Representative must be clearly identified at all times as being a Contractor Representative; and

If a Contractor Representative requires the use of the Government of Canada's e-mail system in the performance of the Work, then the individual must clearly identify themselves as a non-government employee in all electronic mail in the signature block as well as under "Properties".

This identification protocol must also be used in all other correspondence, communication and documentation.

7.9 Travel and Living Expenses

The CRA will not cover any travel and living expenses.

7.10 Delivery

Deliverables must be received by the Project Authority at the place and time specified herein.

7.11 Work Location

The work location will be at the Contractor's premises.

7.12 Inspection and Acceptance

All deliverables under the Contract shall be subject to inspection and acceptance by the Project Authority at destination.



7.13 Basis of Payment

The Contractor will be paid firm all-inclusive unit prices for the services described at Annex A: Statement of Work, in accordance with the schedule of payment provided at Annex B: Basis of Payment

7.14 Payment Process

At Canada's discretion the Contractor will be paid using direct deposit, credit card or cheque. All communications regarding the specific method of payment, including changes thereto, will be in writing via email as it's not Canada's desire to formally amend the Contract if the payment method is changed.

At its sole discretion Canada may change the method of payment at any time during the period of the Contract, including any extension thereto, to one of the other two payment methods stated above.

It is the sole responsibility of the Contractor to ensure that their organization is entitled to receive payment from the Government of Canada.

7.14.1 Payment by Direct Deposit

The Contractor shall accept Direct Deposit for payment of the goods and services described herein. Payments by direct deposit will be subject to Article 16 – Payment Period and Article 17 - Interest on Overdue Accounts, set out in 2035 General Conditions (2016-04-04) forming part of the Contract.

To complete or amend a direct deposit registration, the Contractor must complete the Vendor Electronic Payment Registration form accessible at: <http://www.cra-arc.gc.ca/E/pbg/tf/rc231/rc231-14e.pdf>

It is the sole responsibility of the Contractor to ensure that the information and account number submitted to Canada via their Vendor Electronic Payment Registration form is up to date. Should the Contractor's information within the Vendor Electronic Payment Registration form not be accurate or up to date, the provisions identified herein under Article 16 – Payment Period and Article 17 - Interest on Overdue Accounts, set out in 2035 General Conditions (2016-04-04) forming part of the Contract will not apply, until the Contractor corrects the matter.

7.14.2 Payment by Credit Card

The Contractor shall accept Government of Canada Acquisition Cards (credit cards) for payment of the goods and/or services described herein. Payments by credit card will not be subject to Article 16 – Payment Period and Article 17 - Interest on Overdue Accounts, set out in 2035 General Conditions (2016-04-04) forming part of the Contract.

The CRA Acquisition Card is currently a MasterCard provided by Bank of Montreal. At any time during the period of the Contract, including any exercised option period(s), the CRA reserves the right to change its acquisition card type or provider.



7.14.3 Payment by Cheque

The Contractor shall accept Government of Canada cheques for the payment of goods and services described herein.

7.15 Synergy Non-Compliance (If Applicable)

Failure to respect the delivery timelines as per the Contract or the problem resolution timelines set out under Appendix 1 to Annex A paragraph 3.5 Support, Table 1: Technical Support Response Definitions will result in an escalation by the CRA Contracting Authority with the Contractor. In that event, the Contractor agrees to pay to the CRA, liquidated damages for each hour of delay, or any part thereof, for the time spent by the CRA addressing any issues that occur due to the failure of the Contractor to meet the CRA's Synergy requirements, based on the following calculation:

Hourly rate based on the current salary of a SP-06, Increment 4 and a 20% premium representing benefits. The annual salary for this occupation group is found at <http://www.cra-arc.gc.ca/crrs/wrkng/pyrts/sp-eng.html>.

The total amount of the liquidated damages must not exceed 10% of the Contract's value.

The CRA and the Contractor agree that the amount stated above is their best pre-estimate of the loss to the CRA in the event of such a failure, and that it is not intended to be, nor is it to be interpreted as a penalty.

The CRA will have the right to hold back, drawback, deduct or set off from and against the amounts of any monies owing at any time by CRA to the Contractor, any liquidated damages owing and unpaid under this section

Nothing in this section must be interpreted as limiting the rights and remedies which CRA may otherwise have under the Contract

7.16 Certifications

The continuous compliance with the certifications provided by the Contractor in its bid and the ongoing cooperation in providing associated information are conditions of the Contract. Certifications are subject to verification by Canada during the entire period of the contract. If the Contractor does not comply with any certification, fails to provide the associated information, or it is determined that any certification made by the Contractor in its bid is untrue, whether made knowingly or unknowingly, Canada has the right, pursuant to the default provision of the Contract, to terminate the Contract for default.

7.16.1 Federal Contractors Program for Employment Equity - Default by the Contractor

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



7.17 Joint Venture (NOTE to bidders: to be deleted at contract award if not applicable)

If the Contract is awarded to a joint venture, all members of the joint venture will be jointly and severally or solidarily liable for the performance of the Contract.

In the case of a contractual joint venture, no dispute, claim or action for damages, whether based in contract, or in tort, or any other theory of law, howsoever arising from the Request for Proposal, Contract, or any other related or subsequently issued documents including without limitation Task Authorizations, Contract Amendments, may be commenced, or brought against the CRA, including without limitation any of its officers, employees or agents unless each member of the joint venture is a party to such dispute, claim, or action (as the case may be).

The Contractor shall obtain the prior written approval of the Contracting Authority to any change in the membership of a contractual joint venture after Contract Award. Any change in the membership of a contractual joint venture after Contract Award without the prior written approval of the Contracting Authority shall be deemed to be default under the Contract.

The joint venture represents and warrants that it has appointed and granted full authority to (name to be inserted at Contract Award), the "Lead Member", to act on behalf of all members as its representative for the purposes of executing documentation relating to the Contract, including but not limited to Contract Amendments and Task Authorizations.

In the event of a contractual joint venture, all payments due and owing to the joint venture shall be made by the Canada Revenue Agency to the Lead Member of the joint venture. Any such payment to the Lead Member of the joint venture shall be deemed to be payment to the joint venture and shall act as a release from all the members of the joint venture.

By giving notice to the Lead Member the Canada Revenue Agency will be deemed to have given notice to all the members of the joint venture.

7.18 Proactive Disclosure of Contracts with Former Public Servants

By providing information on its status, with respect to being a former public servant in receipt of a [Public Service Superannuation Act](#) (PSSA) pension, the Contractor has agreed that this information will be reported on departmental websites as part of the published proactive disclosure reports.

7.19 License Terms and Conditions – Shrink-Wrap or Click-Wrap

The parties agree that only the conditions expressly set out in the Contract or incorporated by referenced in the Contract form part of the Contract. Any conditions accompanying or enclosed with the Licensed Test, if any, do not form part of the Contract and, therefore, are not part of Canada's license and do not affect the rights of the Parties in any way. The Contractor agrees that in no event will Canada or any Client or User be required to enter into any additional license agreement with respect to the Licensed Test or any portion of it. The Contractor acknowledges that any additional license agreement relating for the Licensed Test signed by anyone other than the Contracting Authority is void and of no effect



Canada is not bound by and does not accept any “shrink-wrap” or “click-wrap” conditions or any other conditions, expressed or implied, that are contained in or on the test packaging or conditions that may accompany the tests in any manner, regardless of any notification to the contrary.

7.20 Applicable Laws

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

7.21 Priority of Documents

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

1. the Articles of Agreement;
2. the general conditions 2035 (2016-04-04) General Conditions - Higher Complexity – Services
3. Annex A: Statement of Work;
4. Annex B: Basis of Payment;
5. Annex C: Security Requirements Check List (if applicable);
6. The Contractor’s proposal dated (insert date of bid), as amended on (insert date(s) of amendment(s), if applicable).

7.22 Training and Familiarization of Contractor Personnel

7.22.1 Training of Contractor Personnel

Any training required by a new or replacement resource will be the responsibility of the Contractor, including training the resource for newly implemented software. The Contractor will assume all associated costs, including training pertaining to familiarization during the start-up of the Contract and Contract period for staff replacements. Training of the resource during the start-up period must take place without a reduction in service level. Time spent on such training will not be billed to, nor paid by, CRA.

7.22.2 Familiarization Period

Prior to the completion of the Contract, it may be necessary for another resource to undertake a period of familiarization and training before the completion date. The Contractor will be required to familiarize the incoming resource according to the process described above or through the use of another approach negotiated with and acceptable to CRA.

7.23 Alternative Dispute Resolution

NEGOTIATION FOLLOWED BY MANDATORY MEDIATION, THEN, IF NECESSARY BY
ARBITRATION OR LITIGATION

The parties agree to meet, negotiate in good faith, and attempt to resolve, amicably, any dispute arising out of or related to the contract or any breach thereof.



If the parties are unable to resolve the dispute through negotiations within 10 working days, the parties agree to attempt to resolve the dispute through mediation by submitting the dispute to a sole mediator selected jointly by the parties. All costs shall be shared equally between the disputing parties.

If a dispute cannot be settled with a 15 calendar day period after the mediator has been appointed, or if the parties are unable to select a mediator within 15 calendar days of the date of provision of notice by one party to the other of the intention to proceed to mediation, or such longer period as agreed to by the parties, the parties shall have the right to resort to any remedies permitted by law, including but not limited to arbitration or litigation.

All defences based on the passage of time shall be tolled pending the termination of the mediation.

7.23.1 Office of the Procurement Ombudsman (OPO)

The parties understand that the Procurement Ombudsman appointed pursuant to Subsection 22.1 (l) of the Department of Public Works and Government Services Act will, on request and consent of the parties, participate in these meetings to resolve any such dispute, and subject to their consent to bear the cost of such process, provide to the parties a proposal for an alternative dispute resolution process to resolve their dispute. The Office of the Procurement Ombudsman may be contacted by telephone at 1-866-734-5169 or by e-mail at boa.opo@boa.opo.gc.ca.

7.23.2 Contract Administration

The parties understand that the Procurement Ombudsman appointed pursuant to Subsection 22.1 (l) of the Department of Public Works and Government Services Act will review a complaint filed by [the supplier or the contractor or the name the entity awarded the contract] respecting administration of the contract if the requirements of Subsection 22.2(1) of the Department of Public Works and Government Services Act and Sections 15 and 16 of the Procurement Ombudsman Regulations have been met, and the interpretation and application of the terms and conditions and the scope of the work of the contract are not in dispute. The Office of the Procurement Ombudsman may be contacted by telephone at 1-866-734-5169 or by e-mail at boa.opo@boa.opo.gc.ca.



Annexes

The following Annexes apply to and form part of the Contract:

ANNEX A: STATEMENT OF WORK

ANNEX B: BASIS OF PAYMENT

ANNEX C: SECURITY REQUIREMENTS CHECK LIST (SRCL)



Annex A - Statement of Work

1.0 INTRODUCTION

The Canada Revenue Agency (CRA) administers tax laws for the Government of Canada and for most provinces and territories, and administers various social and economic benefit and incentive programs delivered through the tax system.

The CRA employs over 43,000 employees across Canada in its different branches and regions. To sustain its large and qualified workforce, the CRA conducts an average of 700 staffing processes annually, which involve over 100,000 candidates. Demographics indicate that the CRA may continue to staff positions at a similar rate in the coming years. Staffing processes within the CRA are designed to identify qualified candidates for positions from the entry level to the executive level.

The CRA has determined that the use of standardized internet tests as screening tools will be an efficient means to improve the quality of hiring, to lower its turn-over rate, and to streamline large-volume staffing processes. The CRA has also identified the need to use leadership development assessments to identify the strengths and development needs of those aspiring to leadership positions within the Agency.

2.0. OBJECTIVES

The objectives of this procurement process is to increase the diversity of tools available to CRA for staffing and development to reduce cost and time to staff.

3.0 REQUIREMENTS

3.1 The Contractor shall provide standardized internet tests on an “as and when requested” basis or under a “license” as specified herein.

- “As and when requested” means that the tests will be ordered when needed and that the CRA will pay a price per unit.
- “Licence” means that the CRA will pay a fix price per year for an unlimited access to a test or series of tests.

3.2 All tests proposed by the Contractor must:

- Meet all requirements described in Attachment 2
- Be accessible through an online platform. The online platform must meet all requirements described in Attachment 3
- Include the administrative tools and support described in section 5.0 at no additional cost to the CRA.

3.3 All tests proposed by the Contractor, as well as their technical manual, must be available for the CRA psychologists for review prior to be administered to CRA employees. Should a specific item, or a test, be found inadequate, the CRA reserves the right to request that the Contractor makes the required changes. A test could be found inadequate for various reasons including, but not limited to, the following: the test



has been compromised, the language in the test is poor due to translation, the test has a low level of validity or reliability, etc.

4.0 SCOPE OF WORK

Test Streams

The CRA requires Standardized Internet Tests under four (4) different streams:

- Stream 1 - Internet tests for staffing of entry level positions
- Stream 2 - Internet tests for management development
- Stream 3 - Internet tests for management readiness
- Stream 4 - Internet tests for staffing of management position

4.1 Stream 1 - Internet tests for staffing of entry level positions (Licence)

The Contractor must provide a licence for Internet tests for staffing of entry level positions according to the following options:

License Type 1

The Contractor must provide the CRA with unlimited online access to four (4) aspects of entry level positions internet tests from the categories below. The selection must include at least one test from each of the three (3) categories below.

OR

Licence Type 2

The Contractor must provide unlimited online access to a single test that assesses four (4) aspects from the categories below. The test must include one aspects from each of the three (3) categories below.

Test categories

- A. Cognitive ability tests
- B. Behavioural assessment
 - Values, ethics and integrity
 - Interpersonal skills
 - Dependability, reliability
 - Personality tests for job/organizational fit
- C. Other skills
 - Call centre
 - Client service orientation
 - Administrative support positions
 - Learning potential
 - Situational Judgement
 - Language tests including reading, writing and oral proficiency in English/French as a First Official Language
 - Knowledge of Microsoft Office suite of tools



4.2 Stream 2 - Internet tests for management development (Licence)

The Contractor must provide an online unlimited access to three (3) of the following leadership development tests. The selection must include at least one test from each category describe below. (As proposed by the Contractor in its proposal dated (insert date) in response to solicitation 1000331261):

A. 360-degree feedback tool assessing leadership competencies

B. Leadership

- Interest in management role
- Potential for leadership (soft skills)
- General management readiness
- Talent management
- Personality, drivers and traits
- Emotional intelligence assessment
- High potential identification

4.3 Stream 3 Internet test for Management readiness (Licence)

The Contractor must provide the CRA with an online unlimited access to a test assessing management readiness. The test should measure at least two of the following aspects. (As proposed by the Contractor in its proposal dated (insert date) in response to solicitation 1000331261).

- Potential for leadership (soft skills)
- General management readiness
- Judgement
- Planning and organization

4.4 Stream 4 - Internet tests for staffing of management position (price per unit)

The Contractor must provide the CRA with an online access to a minimum of three (3) of the following tests (As proposed by the Contractor in its proposal dated (insert date) in response to solicitation 1000331261):

- Cognitive ability
- Personality test for job/organizational fit
- Personality, drivers and traits
- Emotional intelligence
- Planning and organizing, such as on-line In-Basket Exercises (for first and second level of management)
- Situational judgement test (1 or 2 levels of management)
- Leadership competencies
- Executive leadership assessment
- Other tests for management staffing



5.0 TASKS

5.1 PROCESS FOR ORDERING AND ADMINISTERING TESTS

5.1 The ordering and administration of the tests should follow a process that includes at the minimum the following steps:

- **Step 1:** For each staffing process or test session, the CRA will provide the Contractor with the following information:
 - Name of the candidate(s);
 - Candidate(s) email address;
 - Unique identification number for each staffing process or test session;
 - Unique candidate Identification Number for each candidate.

- **Step 2:** For the tests provided as and when requested with a price per unit, , the CRA will order the required number of tests through the CRA Synergy Catalogue. The Contractor will then provide the CRA with a link to access the tests. For the tests provided under a licence, the Contractor will provide the CRA with the written approval to send the link to access the tests to the candidates.

- **Step 3:** The CRA will send the information, and link to the tests, to the candidates.

- **Step 4:** The Contractor will make the test available to the candidates, and provide accommodation according to article “Accommodation Support for candidates with disabilities” when requested.

- **Step 5:** The Contractor will provide the CRA client with the results of the completed tests within 24 hours.

There are two options for the communication of information between the Contractor and the CRA: emails or download via an administration access to the Contractor’s online platform. Other options may be suggested to the CRA after contract award if they meet CRA information technology and security requirements at no extra cost to the CRA

6 ADMINISTRATIVE TOOLS AND SUPPORT

The Contractor must provide the CRA with the following administrative tools and support, at no additional cost to the CRA, for each Stream and category of the test they provide:

6.1 Training

Initial Training: within two weeks of contract award, the Contractor must provide the CRA with training. The scope of the training must include but is not limited to:

- the processes necessary to order tests;
- use of the online testing platform;
- customer service procedures; and
- report retrieval.



The training can be in the format of the Contractor's choice which may include on-site, web conferencing, or online training. The Contractor must provide training for two groups of five administrators, one in English and one in French.

6.1.2 Online training or an online guide, accessible 24 hours per day, 365 days per year to the CRA Client, on the processes necessary to order tests, use the online testing platform, and generate reports.

6.1.3 Training in regards to any changes to the processes necessary to order tests, interpret scores, use the online testing platform, and generate reports should such changes occur. The training should be provided by web-conferencing or online at minimum 2 weeks before the changes occur.

6.2 Customer Service

6.2.1 Customer support in French and English must be available to CRA and candidates, through a helpdesk or a customer service representative, accessible by a toll-free phone number and email address.

6.2.2 The helpdesk or customer support must be available, at minimum, from 9:00 AM – 17:00 PM EST, Monday to Saturday, fifty-two (52) weeks per year, excluding statutory holidays.

6.2.3 The Contractor must resolve customer service requests within twenty-four (24) hours of receipt. In exceptional cases where customer service requests cannot be resolved within twenty-four (24) hours, the Contractor must provide an estimated timeframe for the resolution of the problem. Once the customer service request is resolved, the Contractor will advise the Project Authority.

6.3 Communication about system changes and outages

6.3.1 The Contractor must notify the Project Authority and the Contracting Authority in writing of any change(s) to the appearance or functionality of the online testing platform at least thirty (30) calendar days prior to the change(s) taking effect.

6.3.2 The Contractor must provide written notice by email to the Project Authority, of any planned and unplanned system outages.

- For planned system outages, the notification must be received at least fifteen (15) calendar days prior to the outage.
- For unplanned system outages, the notification must be provided within 12 hours of the outage.
- The Contractor must limit planned outages to no more than 2 hours per week, and to off peak hours (12 am to 6 am EST). There must not be planned outages from Monday to Saturday from 8 am to 8 pm EST.

6.4 Reports on test results and usage.

The Contractor must provide the CRA with:

6.4.1 A daily report on completed Tests: This includes the information listed below formatted or compatible with a.csv file.

- Which tests were completed;



- Which staffing process they were completed for;
- Candidate Identification Numbers;
- The date the test was taken;
- The candidates' scores;
- Test Language;
- Demographic information collected

6.4.2 A process test report: At a minimum this weekly report must list the number of tests ordered by CRA clients, the number written by candidates, and the number of candidates invited to take a test over a specified period or process, provided in an excel format.

6.4.3 An incident report: This monthly report provides detailed information relating to any interruptions that candidates experienced during testing (length, frequency and times of interruptions) provided in an electronic file format that is agreed upon by the CRA client. If test fraud detection measures are used, they should be reported in the incident reports or a separate report.

6.5 Accommodation Support for candidates with disabilities

6.5.1 Relevant documentation/access to test materials, including scoring keys, to enable an accurate understanding of test characteristics in order for the CRA professionals to determine which assessment accommodations candidates should receive.

6.5.2 Based on the documentation and the platform options, the CRA will determine if and what accommodation a candidate should receive and provide the Contractor with a request for accommodation. The CRA has access, and may use, alternate versions of tests for cases where candidates cannot be accommodated.

6.5.3 The Contractor must not provide test accommodations to a candidate without the approval of a CRA professional. A list of CRA professional will be provided to the Contractor after the contract is awarded.

6.6 Security of the tests

6.6.1 In the event that a test is compromised, the Contractor will inform the Project Authority within 24 hours to provide information on the situation and propose corrective measures and solutions, including but not limited to replacing a compromised test or administer new tests for a staffing process. These corrective measures must be implemented at no additional cost to the CRA.

6.7 Use of information collected

6.7.1 The Contractor must protect the candidates' personal information and the information collected through demographic questions.

6.7.2 The Contractor must not share with a third party, or use the candidates' personal information and the information collected through demographic questions, for purposes other than for statistical information.

6.8 Tests results challenge

6.8.1 In the event that a candidate challenges either a test result; the administration of the test; or the test itself, the Contractor must provide the defense of the validity, reliability, fairness, and use of the test at no additional cost to the CRA.



Attachments to Annex A:

Attachment 1: Tests

Attachment 2: Online Platform

Attachment 3: Detailed Mandatory Security Requirements

Attachment 4: Terminology

Attachment 5: Synergy Solution



Attachment 1 to Annex A: Tests

All tests provided by the Contractor must:

1. Be available on an online platform.
2. Be available in English and French, exempt of expressions and local references.
3. Have been developed and validated in accordance with the professional standards outlined in the [Standards for Testing in the Public Service](#), and the Canadian (CPA)/American (APA) Psychology Associations standards.
4. Be accompanied by a Technical Manual.
5. That include tests characteristics such as validity and reliability. Be accompanied by guidelines that recommend pass marks for different pass rates.
6. Produce a test report that can be interpreted, such as a pass/fail result, a numeric mark, or an individual qualitative report. Qualitative reports must be available in English and French.
7. Have a reliability coefficient that is not less than 0.70.



Attachment 2 to Annex A: Online Platform

The Contractor must provide an online platform that:

1. Meets or exceeds the Detailed Security Requirements described in appendix C Detailed Mandatory Security Requirements.
2. Is available to the Project Authority, and to candidates 24 hours a day, 7 days a week, except for planned maintenance. Planned maintenance must not be more than 2 hours per week.
3. Is accessible to candidates without the need of any software download.
4. Must be accessible to visually impaired users according to the [Web Content Accessibility Guidelines](#) (WCAG) 2.0 level A or higher standard OR must offer personal voice assistance Or must offer other accommodation options for candidates that are visually impaired
5. Allows candidates to complete any test in either English or French, exempt of expressions and local references.
6. Has a function available to ensure candidates are only able to write the test during the period specified by the CRA. The time period will be communicated with each test order.
7. Has a function available to ensure candidates do not write a test more than once for the same staffing process.
8. Has a function available that precludes candidates from re-writing a test within the re-test restriction period defined by the CRA.
9. Makes available the Test Instructions in both French and English before candidates starts the test.
10. Saves the candidates' test progression during testing. In the event of system or technological failure or outages during a candidate's test session, the Contractor must allow candidates to restart the test from their last question, with their progression intact, when the system or technological failure is fixed.
11. Provides a notification asking candidates, before they write the test, to complete a questionnaire collecting the candidate's demographic information (such as gender, region, education level, Visible Minority status, Person with a Disability status, and Aboriginal Person status).
12. Stores the individual candidate's test results for a minimum of two (2) years from the date the test was administered. The online platform must also provide a candidate existing results if available when requested by the CRA.
13. Protects candidate's test results and personal information, as per the Privacy Act: <http://laws-lois.justice.gc.ca/eng/acts/p-21/>
14. Makes Completed Test Report available to the CRA within 72 hours of candidates completing a test.
15. Have data import and export functionalities.



Attachment 3 to Annex A: Detailed Mandatory Security Requirements

This section lists mandatory security requirements for technical security controls. Detailed controls associated with IT Security requirements can be found in Annex 3A of the CSE Security Control Catalogue (ITSG-33): (<https://www.cse-cst.gc.ca/en/node/265/html/24869>).

All applicable technical controls from ITSG-33 are identified in square brackets, e.g. [AC-3] refers to ITSG-33 control AC-3 ACCESS ENFORCEMENT in the Access Control (AC) family. The security assessment of the implemented solution may involve additional operational and management security controls.

No.	Detailed Mandatory Security Requirement
SR-1	The provider of the proposed solution agrees to supply documentation and evidence to support a Security Assessment if requested to do so by the CRA.
SR-2	The proposed solution must limit information system access to the types of transactions and functions that authorized users are permitted to execute. [AC-2,AC-3,AC-17]
SR-3	The information system implements CSE-approved cryptography algorithms and protocols in accordance with applicable GC legislation and TBS policies, directives and standards. (https://www.cse-cst.gc.ca/en/node/1831/html/26515) [SC-13] <ul style="list-style-type: none"> • TLS 1.2 • Triple Data Encryption Algorithm (DEA) • Advanced Encryption Standard (AES)
SR-4	The proposed solution must employ cryptographic mechanisms to protect the confidentiality of remote access sessions. [AC-17(2), AC-18(1),SC-8, SC-8(1)] <ul style="list-style-type: none"> • HTTPS
SR-5	The proposed solution must limit information system access to authorized users. [AC-3, AC-3(7)]
SR-6	The proposed solution must limit information system access to the types of transactions and functions that authorized users are permitted to execute. [AC-3, AC-3(7)]



No.	Detailed Mandatory Security Requirement
SR-7	<p>The proposed solution must authenticate (or verify) the identities of those users, processes, or devices, as a prerequisite to allowing access to information systems. [IA-5(1)]</p> <p>User Password and Management Standard</p> <p>At a minimum the password provided should:</p> <ul style="list-style-type: none">○ be at least eight alphanumeric characters long○ contain a combination of digits and characters (for example, – 0-9?!#\$_)○ contain upper- and lower- case characters
SR-8	<p>The proposed solution must store and transmit only encrypted representation of passwords.</p> <p>[IA-5(1)]</p>
SR-9	<p>The proposed solution must obscure feedback of authentication information.</p> <p>[IA-6]</p>
SR-10	<p>The proposed solution must lock and/or terminate (automatically) a user session after a defined condition.</p> <p>[AC-11, AC-12, SC-23(1), IA-5(13), SI-4(7)]</p>



Attachment 4 to Annex A: Terminology

Adaptive Technology: Technology that increases the accessibility of testing materials for persons with functional limitations or disabilities, which can include, but is not limited to, text-to-voice software (e.g., Job Access with Speech [JAWS]) to assist those who have difficulty taking online tests using conventional methods.

Alternative Version: A test that is demonstrated to be equivalent to another test in difficulty, but which uses completely different test materials.

Assessment Accommodations: Considerations given to candidates who are unable to complete tests within standard parameters, (such as using some types of Adaptive Technology) as determined by the Canadian Human Rights Act and the Employment Equity Act. This includes, but may not be limited to, allowing extra time, breaks, modifications to font size, and testing in paper-and-pencil format. Candidates who must be accommodated by the Contractor may have various and/or multiple disabilities including but not limited to vision disabilities, hearing disabilities, mobility or agility related disabilities, learning disabilities, attention deficit hyperactivity disorder, mental health disabilities, chronic illnesses, temporary conditions and environmental sensitivities.

Candidates: Applicants on CRA staffing processes, also known as test takers.

Cognitive Abilities: The ability to use reasoning to solve problems. This includes, but is not be limited to, logical and analytical reasoning.

Computerized Adaptive Technology: A technological testing feature which adjusts the questions' level of difficulty in response to the candidates' demonstrated ability as the test progresses.

Computer Aptitude Test (CAT): An online, internet-based supervised standardized test that will be used to identify employees with a high aptitude for working with computerized records. Computerized records refer to electronic accounting records obtained from taxpayers relating to the businesses they operate. It will be used in recruitment of Computer Audit Specialists. The test must be valid and scientifically-backed and will be used to evaluate a person's aptitude and potential for programming and analyzing computerized business systems.

CRA Clients: CRA employees who are authorized by the CRA to implement tests in a staffing process.

Management Readiness: Situational judgment when managing teams and people. This is evaluated for entry-level management positions where no management experience is necessary.

Managerial In-basket Test (MIBT): Tests that assess the candidate's overall ability to manage through a number of competencies, which can include, but may not be limited to: analysis, action management, behavioral flexibility, communication, delegating, directing, empowering, human resources management, leadership, organizing, planning, at both the managerial (supervises supervisors) and supervisory (supervises employees) level.



Online Testing Platform: A secure online system for candidates to complete their tests. The system must be accessible at all times and compatible with the two most recent versions of the following browsers at the time of bidding: Internet Explorer, Microsoft Edge, Mozilla Firefox, Google Chrome, and Safari.

Standardized: Standardized tests are developed according to the professional standards outlined by the [Standards for Testing in the Public Service](#), with demonstrated validity and reliability. Standardized tests permit fair evaluation of candidates' knowledge, abilities, skills, and/or competencies.

Technical Manual: A manual, document, or study that indicates: how the test was developed; how the test was pretested or piloted; the test's demonstrated validity and reliability; and including, but not limited to, an adverse impact study on the on groups targeted by the *Employment Equity Act*, according to the professional standards outlined in the Standards for Testing in the Public Service.

Test Development and Accommodation Services Team: A team within the CRA composed of psychologists and psychology consultants who develop Standardized assessment tools at the CRA and provide Assessment Accommodation recommendations to CRA candidates who request and require them.

Test Instructions: Instructions that explain how candidates will provide their answers. This includes, but is not limited to: a description of the test, a description of the qualification assessed by the test, information on time limits, suggestions to write the test in a quiet environment and access to at least one example question. Test instructions must include a section dedicated to preventing fraudulent behaviours (e.g., cheating).



Attachment 5 to Annex A Synergy Solution (If Applicable)

Overview

The Canada Revenue Agency's (CRA) e-procurement solution for ordering, receiving and reconciling goods and services is an end-to-end e-procurement system based on the Ariba suite of products and has been branded internally as "Synergy".

Synergy is the primary system the CRA uses to purchase goods and services with an acquisition card, using CRA-hosted catalogues.

The Ariba Supplier Network (ASN) is an e-business solution that connects buyers and Contractors across different systems and processes. The CRA and the Contractor will use the ASN to communicate order-related information, including, and without limitation:

Purchase card orders, change orders, and cancelled orders from the CRA to the Contractor; and Order confirmation and shipping notices from the Contractor to the CRA.

Glossary of Terms

Advance ship notice	An advance ship notice is a document that the Contractor transmits using the Ariba Supplier Network to Synergy, stating that the Contractor is shipping one or more items from a Synergy purchase order.
Ariba	Ariba is the name of a suite of spend management software. The term "Ariba" is often used to refer to the software or the system running their software.
Ariba Supplier Network	Ariba Supplier Network (ASN) is the network used to communicate between users of the Ariba software and the Contractors.
ASN	See Ariba Supplier Network.
Comma Separated Value	A comma separated value (CSV) format for exchanging data files between spreadsheet software.
Contracting Authority	The Contracting Authority (CA) is identified under the "Authorities" article of the Contract (see sub-article titled " <u>Contracting Authority</u> ")
CA	See Contracting Authority
CSV	See Comma Separated Value
JPEG	A format for compressing electronic image files.
Purchase Card Order	A purchase card order (PCO) is the transaction generated by Synergy against any given catalogue.
PCO	See Purchase Card Order
Synergy	Synergy is the Canada Revenue Agency's branded implementation of the Ariba software suite. (See "Ariba" above).
UNSPSC	United Nations Standard Product and Services Classification.



Virtual acquisition card	Virtual credit card number with no associated physical copy that cannot be used for in-person point of sale (POS) transactions. It can only be used with a single merchant.
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Operational Requirements

○ Ariba Supplier Network account

The Contractor must become a member of the Ariba Supplier Network (ASN) and maintain its membership for the period of the Contract, including any option period if exercised.

The ASN is an e-business solution that connects buyers and contractors across different systems and processes. The CRA and the Contractor will use the ASN to communicate order related information:

Communication of new orders, changed orders and cancelled orders from the CRA to the Contractor.

Communication of additional order information and comments.

Communication of order confirmation and shipping notices from the Contractor to the CRA.

The Contractor must establish a minimum of 1 production and 1 test account.

○ Synergy catalogue

The Contractor must provide the CRA with a catalogue in a CSV format as defined under [section 4 Technical Requirements](#) below. The catalogue must include all goods and services as identified in the Annex "A" SOW and in accordance with the terms of the Contract.

The catalogue must include:

The product names and descriptions in both official languages (English and French). Goods/services must be available for the duration of the Contract as well as any exercised option period(s) or be replaced with agreed upon substitutions.

An image file for each good under the Contract.

The Contractor must notify the CRA via email, within one (1) business day, when a product becomes discontinued or otherwise unavailable, or is backordered for longer than five (5) business days.

The CA must approve the catalogue before it will be made available in Synergy. All catalogue updates, scheduled or otherwise, will only go into effect after the CRA approves, tests and loads the revised catalogue.

○ Acquisition card

The CRA will create a Synergy profile and link a Master Card virtual credit card number.

Synergy orders must be charged to the virtual card number provided by the CRA (see [section 4.3](#) below).

The CRA acquisition card is currently a MasterCard provided by Bank of Montreal. The CRA reserves the right to change its acquisition card type or provider at any time during the period of the Contract, including any exercised option period(s).

It is the Contractor's responsibility to have a mechanism in place (usually through a third party provider) to transmit charges to the Bank of Montreal.

○ Processing requirements

The Contractor must:

Validate the contents of each order to ensure accuracy.

Error/discrepancy handling capability - In the case of a discrepancy between the CRA order information and the Contractor, the Contractor shall notify the CRA within thirty (30) minutes of occurrence and resolve the issue as per the timelines for Severity 3 in section 7 below.



Send an order confirmation within 30 minutes of receiving a purchase card order, a change or cancellation from the CRA and a shipping notice with the invoice attached when goods are shipped or services are rendered.

Charge the CRA virtual card issued for the Contract; partial orders may be charged, only for the goods that have been shipped and/or the services that have been rendered.

Obtain written authorization from the CRA before substituting items or rejecting an order.

Virus-scan attachments sent over the ASN, if any.

For goods: Include a packing slip with each shipment.

For services: Provide an invoice with the details of the services provided.

Both the packing slip and invoice must specify the Contractor's name, address, and GST registration number, as well as the Synergy PCO number, CRA Purchaser, date the goods were shipped or services delivered, description of the goods and/or services, cost (before tax), applicable taxes, and total amount to be charged to the CRA.

o Support

The Contractor must provide CRA with support:

Through a single point of contact to report issues regarding maintenance and support of the catalogue, problem reporting and problem resolution updates.

Coverage from 8:00AM to 5:00PM Eastern Time, Monday to Friday, excluding statutory holidays.

For all incidents identified by either the Contractor or the CRA, the Contractor must adhere to the response time requirements detailed below. Incidents are assigned a tracking number, which will be communicated via email to the Contractor. Upon resolution, the Contractor must reply to the initial email with problem resolution details.

Table 1: Response time requirements		
Severity level	Description	Response and resolution times
Severity 1	System outage - The Contractor can neither accept nor process orders.	The Contractor must immediately notify the CRA Contracting Authority. The Contractor must also issue progress reports and maintain communication (verbal and email) with the CRA every two (2) hours until problem resolution, within business hours (8AM to 5PM Eastern Time, Monday to Friday, excluding Government of Canada holidays). The Contractor must make every attempt to resolve the issue within 24 hours.
Severity 2	The system is operational, but with severely restricted functionality or degradation. For example, the Contractor cannot process acquisition card charges.	The Contractor must notify the CRA Contracting Authority within thirty (30) minutes of occurrence. The Contractor must also issue a verbal and email progress report and maintain communication with the CRA every business day until problem resolution. The Contractor must make every attempt to resolve the issue within 48 hours.
Severity 3	The system is operational, but with functional limitations or restriction not critical to the overall operations. Examples include billing errors or spelling mistakes in item descriptions.	The Contractor must notify the CRA Contracting Authority within thirty (30) minutes of occurrence. The Contractor must also issue an email progress report and maintain communication when requested by the CRA. The Contractor must make every attempt to resolve the issue within 5 business days.



- Contractor's automated interface

The Contractor may automate their interface to the ASN. If they do, the Contractor must:

Notify the CRA Contracting Authority of any changes to their interface system(s) a minimum of forty (40) business days in advance to allow the CRA to assess their impact on Synergy.

Retest the ordering process and transmission of Level 2 credit card transaction data against the requirements set out in the Contract and successfully complete a new PoSC test before implementing the system changes.



Technical Requirements

○ Catalogue format

The catalogue must be created in a CSV format.

- The CRA requires that all catalogues be bilingual. The Contractor is required to enter two lines in their catalogue for each unique product: the first line will contain descriptions in English; the second line will contain descriptions in French.
- The Contractor should provide an image file for each unique product (if applicable). The image file must be in jpeg format with a maximum size of 1MB – 250X250 pixels. The image file must be named with the exact name and case as stated in the Image field of the catalogue format file.
- The Contractor must email the catalogue to the CA in CSV format along with the jpeg files for the pictures (if applicable).

○ Catalogue content

The following table details the fields required from the Contractor in the catalogue.

Please note:

- Some content is case sensitive, as indicated.
- These fields form one line in the file. Each product must appear twice, one for the English descriptions and another for the French descriptions.

Table 2 – Catalogue technical requirements				
Field name	To be filled by	Maximum field size	Field type	Description
Contractor ID	CRA			Leave this field blank.
Contractor Part ID	Contractor	128	Characters, case-sensitive	The Contractor's part number. Special characters such as but not limited to , * ? and } are not supported.
Manufacturer Part ID	Contractor	128	Characters	The manufacturer's part number.
Item Description	Contractor	2,000	Characters	The product's long description in English or French; the language used must correspond to the language indicated in the Language field.
SPSC Code	Contractor	8	Integer number	The product commodity code in an eight digit UNSPSC format. For more information on UNSPSC codes and to search for UNSPSC code that best suits the product, refer to http://www.unspsc.org/ .
Unit Price	Contractor	10	Number with 2 decimal points	The CRA price for the product as per the contract.
Units of Measure	Contractor	2	Characters, case-sensitive	UN or ANSI X.12 standard unit of measure; the product's UOM (for example, BX for box and EA for each).
Lead Time	Contractor	3	Integer number	The number of business days between receipt of the order and delivery to purchaser.



Table 2 – Catalogue technical requirements				
Field name	To be filled by	Maximum field size	Field type	Description
Manufacturer Name	Contractor	50	Characters	Contractor's name or name of manufacturer.
Contractor URL	Contractor	100	Characters	Contractor's website address, in the format http://...
Manufacturer URL	Contractor	100	Characters	Contractor's manufacturer's website address, in the format http://...
Market Price	Contractor	10	Number with 2 decimal points	The list price or suggested retail price.
Short Name	Contractor	50	Characters	The product's short name in English or French; the language used must correspond to the language indicated in the Language field.
Expiration Date	CRA			Leave this field blank.
Effective Date	CRA			Leave this field blank.
Language	Contractor	5	Characters, case-sensitive	Use exactly: - en_CA if the line is for an English product description or - fr_CA for lines for a French product description.
Contractor Part Auxiliary ID	Contractor	5	Characters, case-sensitive	Use exactly: - en_CA if the line is for an English product description or - fr_CA for lines for a French product description.
Image	Contractor	50	Characters, case-sensitive	Name of the image file with jpeg extension. It may not contain special characters such as but not limited to , * ? and }. <i>Note: The image file sent to the CRA with the catalogue file must be named with the exact name stated in this column.</i>
Delete	CRA			Leave this field blank.
WHMIS	Contractor	3	Characters, case-sensitive	Identify hazardous materials. Use exactly: - Yes or No for English product descriptions or - Oui or Non for French product descriptions.
Green procurement	Contractor	3	Characters, case-sensitive	Identify product is certified Ecologo, is green or is an environmentally preferred product identified with a label. Use exactly: - Yes or No for English product descriptions or - Oui or Non for French product descriptions.
Strategically sourced				Leave this field blank.

- Acquisition card format

Synergy uses a unique virtual acquisition card for all orders under the Contract.



The acquisition card charge must include level 2 transaction details. Level 2 details the CRA requires are:

- PCO Number, which is passed by the CRA to the Contractor through the ASN, maximum of 25 characters.
- GST/HST amount. Note: The Contractor must not charge PST in applicable provinces, as the federal government is PST exempt.
- The value charge must use “Actual” rather than “Estimated” tax.

Your third party service provider who transmits charges to financial institutions on your behalf will assist you in doing level 2 data transactions using their automated systems.



Proof of Synergy compliance test (PoSC)

A Proof of Synergy Compliance test (PoSC) must be completed following written notification by the Contracting Authority to validate that the Synergy requirements outlined in this Appendix 1 to Annex A are met. The PoSC test will be requested in accordance with any RFP prior to contract award or during the contract period, at CRAs discretion by exercising its irrevocable option to implement Synergy, as applicable.

The PoSC test must commence within five (5) business days of the written notification and must be successfully finalized twenty (20) business days thereafter. The testing period may be extended at the CRA's sole discretion.

The PoSC test will validate the mandatory ASN relationship set-up, catalogue creation, order processing and charge transactions.

The CRA will appoint a coordinator as the Contractor's point of contact for the duration of the test. Detailed procedures, timelines and a description of roles and responsibilities will be provided to the Contractor at the onset of the PoSC test.

○ Preparation for PoSC test

The Contractor must meet the following prerequisites to initiate the PoSC:

- Be a member of the ASN and have an ASN account.
- Be able to process level 2 acquisition card debits and credits.
- Identify a single point of contact for the duration of the test.

○ Testing of Synergy solution

The following table outlines step-by-step events and milestones for the PoSC test.

Table 3: Step-by-step process			
Event	Description	Owner	Participants
Kick-off meeting	Meeting to discuss PoSC requirements and timelines.	Contracting Authority	Contractor Coordinator
Step 1: Register on the Ariba Supplier Network (ASN)			
ASN relationship	The CRA establishes a relationship with the Contractor in ASN.	Coordinator	Contractor
ASN test account	The Contractor creates a test account on ASN.	Contractor	Ariba technical support
Step 2: Prepare the catalogue			
Catalogue build	The Contractor provides a catalogue and pictures if applicable in the required format.	Contractor	Contracting Authority
Catalogue finalization	The CRA reviews catalogue to ensure it respects contracting terms and adds custom CRA data aspects/aspects.	Contracting Authority	Coordinator
Step 3: Process a test order			
Acquisition card number	The CRA assigns a virtual card number to use during testing.	Coordinator	Contractor
Order testing	The CRA places a test order. Participants confirm notifications received.	Coordinator	Contractor



Table 3: Step-by-step process			
Event	Description	Owner	Participants
Step 4: Test charging purchases			
Charge testing	The Contractor charges for test order using Level 2 data	Contractor	Coordinator
Step 5: Test crediting purchases			
Credit testing	The Contractor credits the charge once confirmation of charging is sent.	Contractor	Coordinator
Step 6: Confirm completion of the test			
PoS Testing Confirmation	Confirmation of success or failure of Contractor enablement.	Contracting Authority	Contractor Coordinator

- **Step 1 - Register on ASN**

An ASN test account must be created to proceed with the PoSC test. Instructions to complete this step can be found at: <http://Contractor.ariba.com>.

Note: It is recommended that the test account be created with a user name based on the production user name prefixed with "test-".

- **Step 2 – Prepare catalogue**

The Contractor must create the catalogue in a CSV format, as per section 4 [Technical Requirements](#) above. The catalogue must contain all the products and services under the Contract. For each good in the catalogue, an image in a JPEG format must be provided.

The Contractor must provide the catalogue and the image files to the CRA Contracting Authority by email or on USB.

The CRA will confirm:

- The catalogue can be loaded in Synergy.
- Descriptions and images comply with the format requested.

- **Step 3 – Process a test order**

The CRA will create and send test orders using the provided catalogue, through the ASN to the Contractor. The CRA Coordinator will be available to assist with questions that arise during the following processing steps:

- Contractor is receiving notifications of new orders.
- Contractor is able to send order confirmations upon receipt of orders, change orders or cancel orders from the CRA.
- Contractor is able to send a shipping notice with attached invoice.

If collaboration for a proposal is involved before an order is complete, the following will also be tested:

- Contractor is able to view request for proposal.
- Contractor is able ask questions regarding the request for proposal.
- Contractor is able to complete the proposal by adding or deleting items (if required).
- Contractor is able to submit a proposal to the CRA.



- **Step 4: Test charging purchases**

The Contractor must charge for the test order completed in the above test. For this test:

- PCO Number is PCOX123.
- GST/HST is \$0.13.
- Value charge is \$1.

- **Step 5: Test crediting purchases**

Once the debit charge above has been received, the CRA Coordinator will inform the Contractor to proceed with the credit. The credit will reverse the above charge. The same information is required but dollar values are negative:

- PCO Number is PCOX123.
- GST/HST is - \$0.13.
- Value charge is - \$1.

- **Step 6: Confirm completion of the test**

The CA will inform the Contractor of the PoSC test result



Annex B - Basis of Payment

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid a **firm all-inclusive price** as specified below. Customs duties are included, and Applicable Taxes are extra.

Canada will not pay the Contractor for any design changes, modifications or interpretations of the Work, unless they have been approved, in writing, by the Contracting Authority before their incorporation into the Work.

Stream 1 - Internet tests for staffing of entry level positions

Contract Award to **(date to be inserted at Contract Award)**

Licence for Internet tests for staffing of entry level positions	Annual Fee
Firm Contract Year 1 (TBD)	\$XX.xx
Firm Contract Year 2 (TBD)	\$XX.xx
Total	\$XX.xx

Option Periods

Licence for Internet tests for staffing of entry level positions	Annual Fee
Contract Option Year 1 (TBD)	\$XX.xx
Contract Option Year 2 (TBD)	\$XX.xx
Contract Option Year 3 (TBD)	\$XX.xx



Stream 2 - Internet tests for management development

Contract Award to (date to be inserted at Contract Award)

Licence for Internet tests for management development	Annual Fee
Firm Contract Year 1 (TBD)	\$XX.xx
Firm Contract Year 2 (TBD)	\$XX.xx
Total	\$XX.xx

Option Periods

Licence for Internet tests for management development	Annual Fee
Contract Option Year 1 (TBD)	\$XX.xx
Contract Option Year 2 (TBD)	\$XX.xx
Contract Option Year 3 (TBD)	\$XX.xx



Stream 3 - Internet tests for management readiness

Contract Award to (date to be inserted at Contract Award)

Licence for Internet tests for management readiness	Annual Fee
Firm Contract Year 1 (TBD)	\$XX.xx
Firm Contract Year 2 (TBD)	\$XX.xx
Total	\$XX.xx

Option Periods

Licence for Internet tests for management readiness	Annual Fee
Contract Option Year 1 (TBD)	\$XX.xx
Contract Option Year 2 (TBD)	\$XX.xx
Contract Option Year 3 (TBD)	\$XX.xx



Stream 4 - Internet tests for staffing of management position

Contract Award to (date to be inserted at Contract Award)

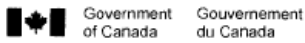
Internet tests for staffing of management position	Price per test (A)
Firm Contract Year 1 (TBD)	\$XX.xx
Firm Contract Year 2 (TBD)	\$XX.xx

Option Periods

Internet tests for staffing of management position	Price per test (A)
Contract Option Year 1 (TBD)	\$XX.xx
Contract Option Year 2 (TBD)	\$XX.xx
Contract Option Year 3 (TBD)	\$XX.xx



Annex C - Security Requirements Check List (SRCL)



Contract Number / Numéro du contrat 1000331261
Security Classification / Classification de sécurité UNCLASSIFIED

**SECURITY REQUIREMENTS CHECK LIST (SRCL)
LISTE DE VÉRIFICATION DES EXIGENCES RELATIVES À LA SÉCURITÉ (LVERS)**

PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE		
1. Originating Government Department or Organization Ministère ou organisme gouvernemental d'origine Canada Revenue Agency	2. Branch or Directorate / Direction générale ou Direction Human Resources Branch	
3. a) Subcontract Number / Numéro du contrat de sous-traitance	3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant	
4. Brief Description of Work - Brève description du travail Standardized Internet Tests for staffing at the CRA. The CRA is seeking a contractor to provide and administer online test and assessment services.		
5. a) Will the supplier require access to Controlled Goods? Le fournisseur aura-t-il accès à des marchandises contrôlées?	<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui	
5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques?	<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui	
6. Indicate the type of access required - Indiquer le type d'accès requis		
6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? (Specify the level of access using the chart in Question 7. c.) (Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c.)	<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui	
6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. Le fournisseur et ses employés (p.ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé.	<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui	
6. c) Is this a commercial courier or delivery requirement with no overnight storage? S'agit-il d'un contrat de messagerie ou de livraison commerciales sans entreposage de nuit?	<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui	
7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès		
Canada <input type="checkbox"/>	NATO / OTAN <input type="checkbox"/>	
Foreign / Etranger <input type="checkbox"/>		
7. b) Release restrictions / Restrictions relatives à la diffusion		
No release restrictions Aucune restriction relative à la diffusion <input type="checkbox"/>	All NATO countries Tous les pays de l'OTAN <input type="checkbox"/>	
Not releasable À ne pas diffuser <input type="checkbox"/>	No release restrictions Aucune restriction relative à la diffusion <input type="checkbox"/>	
Restricted to: / Limité à: <input type="checkbox"/>	Restricted to: / Limité à: <input type="checkbox"/>	
Specify country(ies): / Préciser le(s) pays:	Specify country(ies): / Préciser le(s) pays:	
7. c) Level of information / Niveau d'information		
PROTECTED A PROTÉGÉ A <input type="checkbox"/>	NATO UNCLASSIFIED NATO NON CLASSIFIÉ <input type="checkbox"/>	PROTECTED A PROTÉGÉ A <input type="checkbox"/>
PROTECTED B PROTÉGÉ B <input type="checkbox"/>	NATO RESTRICTED NATO DIFFUSION RESTREINTE <input type="checkbox"/>	PROTECTED B PROTÉGÉ B <input type="checkbox"/>
PROTECTED C PROTÉGÉ C <input type="checkbox"/>	NATO CONFIDENTIAL NATO CONFIDENTIEL <input type="checkbox"/>	PROTECTED C PROTÉGÉ C <input type="checkbox"/>
CONFIDENTIAL CONFIDENTIEL <input type="checkbox"/>	NATO SECRET NATO SECRET <input type="checkbox"/>	CONFIDENTIAL CONFIDENTIEL <input type="checkbox"/>
SECRET SECRET <input type="checkbox"/>	COSMIC TOP SECRET COSMIC TRÈS SECRET <input type="checkbox"/>	SECRET SECRET <input type="checkbox"/>
TOP SECRET TRÈS SECRET <input type="checkbox"/>		TOP SECRET TRÈS SECRET <input type="checkbox"/>
TOP SECRET (SIGINT) TRÈS SECRET (SIGINT) <input type="checkbox"/>		TOP SECRET (SIGINT) TRÈS SECRET (SIGINT) <input type="checkbox"/>

Security Classification / Classification de sécurité UNCLASSIFIED
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Contract Number / Numéro du contrat 1000331261
Security Classification / Classification de sécurité UNCLASSIFIED

PART A (continued) / PARTIE A (suite)

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

9. Will the supplier require access to extremely sensitive INFOSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate?
Short Title(s) of material / Titre(s) abrégé(s) du matériel : No / Non Yes / Oui
Document Number / Numéro du document :

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

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

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

Special comments:
Commentaires spéciaux : _____

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

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

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

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

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

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

PRODUCTION

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

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

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

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

Security Classification / Classification de sécurité UNCLASSIFIED
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PART C (continued) / PARTIE C (suite)

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

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

SUMMARY CHART / TABLEAU RÉCAPITULATIF

Category Catégorie	PROTECTED PROTÉGÉ			CLASSIFIED CLASSIFIÉ			NATO				COMSEC					
	A	B	C	Confidential Confidentiel	Secret	Top Secret Très Secret	NATO Restricted NATO Diffusion Restreinte	NATO Confidential NATO Confidentiel	NATO Secret	COSMIC Top Secret COSMIC Très Secret	Protected Protégé			Confidential Confidentiel	Secret	Top Secret Très Secret
											A	B	C			
Information / Assets Renseignements / Biens	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Production	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IT Media Support TI	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IT Link Lien électronique	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED?
La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE? No / Non Yes / Oui
- If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification".**
Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée.
12. b) Will the document attached to this SRCL be PROTECTED and/or CLASSIFIED?
La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE? No / Non Yes / Oui
- If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification" and indicate with attachments (e.g. SECRET with Attachments).**
Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire et indiquer qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).

Security Classification / Classification de sécurité UNCLASSIFIED
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Government of Canada / Gouvernement du Canada

Contract Number / Numéro du contrat [Redacted]
Security Classification / Classification de sécurité [Redacted]

PART D - AUTHORIZATION / PARTIE D - AUTORISATION

13. Organization Project Authority / Chargé de projet de l'organisme			
Name (print) - Nom (en lettres moulées)		Title - Titre	Signature
[Redacted]		[Redacted]	[Redacted]
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date
[Redacted]	[Redacted]	[Redacted]	[Redacted]
14. Organization Security Authority / Responsable de la sécurité de l'organisme			
Name (print) - Nom (en lettres moulées)		Title - Titre	Signature
[Redacted]		[Redacted]	[Redacted]
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date
[Redacted]	[Redacted]	[Redacted]	[Redacted]
15. Are there additional instructions (e.g. Security Guide, Security Classification Guide) attached? Des instructions supplémentaires (p. ex. Guide de sécurité, Guide de classification de la sécurité) sont-elles jointes? <input type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui			
16. Procurement Officer / Agent d'approvisionnement			
Name (print) - Nom (en lettres moulées)		Title - Titre	Signature
[Redacted]		[Redacted]	[Redacted]
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date
[Redacted]	[Redacted]	[Redacted]	[Redacted]
17. Contracting Security Authority / Autorité contractante en matière de sécurité			
Name (print) - Nom (en lettres moulées)		Title - Titre	Signature
[Redacted]		[Redacted]	[Redacted]
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date
[Redacted]	[Redacted]	[Redacted]	[Redacted]

Security Classification / Classification de sécurité [Redacted]
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Information Security Requirements

The Contractor must abide by the following Information Security Requirements:

- Access to CRA Protected information and systems containing CRA Protected information is to be provided to appropriately cleared personnel and on a need to know basis only;
- Protected CRA information is not to be stored on cloud based systems;
- Use of standalone dedicated equipment (such as laptop) is required to store and perform work on CRA Protected information (including Expert Witness' opinions);
- Equipment handling CRA Protected information is to be fully encrypted (MS BitLocker is the CRA standard to fully encrypt hard drive of the standalone equipment);
- Equipment must be built with appropriate anti-virus, anti-malware, anti-spyware, etc. security safeguards;
- Equipment handling CRA Protected information must be set with access control (As a minimum UserID and Password are to be used);
- Screen savers are to pop-up after 10 to 15 minutes of session inactivity and requires passwords to continue the session;
- CRA Protected information may be stored on encrypted USB removable media (MS BitLocker to Go is CRA standard to encrypt USB devices);
- USB devices may not contain a mixed of CRA and Non-CRA data;
- Protected information sent via email is to be contained in encrypted attachments (WinZip is one of CRA standard to encrypt attachments – see below for additional security rules for using WinZip);
- All CRA Protected information is to be deleted/destroyed at the end of the contract (Hard drives requires to be wiped, USB devices need to be re-formatted/destroyed, paper documents are to be shredded).

Additional security rules for sending zipped (WinZip) files via email:

- The email's subject line must never contain any Protected information;
- Protected data must not be in the body text (description) of the email but within attached Zipped and Encrypted documents (in MS Word, Excel, or PowerPoint);
- The name of the Zipped file is not to contain any Protected information;
- The encryption method is to be set to 256-bit AES;
- Password must not be a word of the dictionary or a name;
- The minimum password length must be 8 characters long;
- The password must contain:
 - at least one lower case character (a-z),
 - at least one upper character (A-Z),
 - at least one numeric character (0-9), and
 - at least one symbol character (!, @, #, \$, %, ^, &, ...).
- The one time password must be provided either via the telephone or within a second email message but only sent after receiving confirmation of reception of the message containing the Zipped/Encrypted file;
- The email must be sent to one destination only (one email address).



Physical Security Requirements

- Outside Consultants (OCs) are to store CRA protected information in a locked container located in a locked room when not in use.
- OCs are to store CRA protected waste in a locked container until it is returned to CRA to be destroyed.
- OCs must report immediately any actual or suspected loss, or unauthorized disclosure of information to CRA security official
- OCs must report immediately any theft of CRA asset (laptop) to the National Incident Reporting Centre (NIRC) of the Security and Internal Affairs Directorate at 1-866-362-0192 and to the functional authority for the contract.

IN TRANSIT

- OCs should as a general rule, exercise good judgment and ensure that every reasonable effort has been made to minimize the risk to CRA protected information or asset (laptop) at all times.
 - OCs are to secure CRA protected information and asset (laptop) in a locked briefcase when transporting the information. The briefcase must be tagged with a forwarding or return address and phone number of the OCs' office. While travelling by vehicle, the briefcase must be placed in a locked trunk, or out of sight in a locked vehicle.
- While on public transit systems, OCs are to maintain control of the briefcase containing CRA protected information and are not to expose the material to others.