



**RETURN BIDS TO:
RETOURNER LES SOUMISSIONS À:**

**Bid Receiving - PWGSC / Réception des
soumissions - TPSGC**

11 Laurier St. / 11, rue Laurier

Place du Portage, Phase III

Core 0B2 / Noyau 0B2

Gatineau

Québec

K1A 0S5

Bid Fax: (819) 997-9776

**REQUEST FOR PROPOSAL
DEMANDE DE PROPOSITION**

**Proposal To: Public Works and Government
Services Canada**

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

**Proposition aux: Travaux Publics et Services
Gouvernementaux Canada**

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

Comments - Commentaires

Vendor/Firm Name and Address

Raison sociale et adresse du

fournisseur/de l'entrepreneur

Issuing Office - Bureau de distribution

Informatics Professional Services Division / Division des
services professionnels en informatique

Les Terrasses de la Chaudière

10, rue Wellington, 4ième

étage/Floor

Gatineau

Québec

K1A 0S5

| | | |
|---|--|--|
| Title - Sujet TBIPS SetAside | | |
| Solicitation No. - N° de l'invitation A0414-145931/A | Date 2019-04-05 | |
| Client Reference No. - N° de référence du client A0414-145931 | | |
| GETS Reference No. - N° de référence de SEAG PW-\$\$ZM-613-34966 | | |
| File No. - N° de dossier 613zm.A0414-145931 | CCC No./N° CCC - FMS No./N° VME | |
| Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2019-04-29 | | Time Zone Fuseau horaire Eastern Daylight Saving Time EDT |
| F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input type="checkbox"/> Other-Autre: <input type="checkbox"/> | | |
| Address Enquiries to: - Adresser toutes questions à: Pierre, Anoule | | Buyer Id - Id de l'acheteur 613zm |
| Telephone No. - N° de téléphone (613) 858-8317 () | | FAX No. - N° de FAX (819) 956-2675 |
| Destination - of Goods, Services, and Construction: Destination - des biens, services et construction: ABORIGINAL AFFAIRS & NORTHERN DEVELOPMENT CANADA RM 701 10 WELLINGTON ST Gatineau Quebec K1A0H4 Canada | | |

Instructions: See Herein

Instructions: Voir aux présentes

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

**BID SOLICITATION
FOR CONTRACT(S) AGAINST A SUPPLY ARRANGEMENT FOR TASK- BASED INFORMATICS
PROFESSIONAL SERVICES (TBIPS)
RESOURCE CATEGORY - LEVEL 1, 2 AND 3
FOR
ABORIGINAL AFFAIRS AND NORTHERN DEVELOPMENT CANADA (DIAND)**

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-Form 1 – Bid Submission Form

**BID SOLICITATION
FOR CONTRACT(S) AGAINST A SUPPLY ARRANGEMENT FOR TASK- BASED INFORMATICS
PROFESSIONAL SERVICES (TBIPS)
RESOURCE CATEGORY - LEVEL 1, 2 AND 3
FOR
ABORIGINAL AFFAIRS AND NORTHERN DEVELOPMENT CANADA (DIAND)**

PART 1 - GENERAL INFORMATION

1.1 Introduction

This document states terms and conditions that apply to this bid solicitation. It is divided into seven parts plus attachments and annexes, as follows:

- Part 1 General Information: provides a general description of the requirement;
- Part 2 Bidder Instructions: provides the instructions, clauses and conditions applicable to the bid solicitation and states that the Bidder agrees to be bound by the clauses and conditions contained in all parts of the bid solicitation;
- Part 3 Bid Preparation Instructions: provides Bidders with instructions on how to prepare their bid;
- Part 4 Evaluation Procedures and Basis of Selection: indicates how the evaluation will be conducted, the evaluation criteria that must be addressed in the bid, if applicable, and the basis of selection;
- Part 5 Certifications and Additional Information: includes the certifications and additional information to be provided;
- Part 6 Security, Financial and Other Requirements: includes specific requirements that must be addressed by Bidders; and,
- Part 7 Resulting Contract Clauses: includes the clauses and conditions that will apply to any resulting contract.

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

1.2 Summary

- (a) This bid solicitation is being issued to satisfy the requirement of Department of Indian Affairs and Northern Development Canada (DIAND) (the "**Client**") for Task-Based Informatics Professional Services (TBIPS) under the TBIPS Supply Arrangement (SA) method of supply.
- (b) The Phased Bid Compliance Process applies to this requirement ONLY if Canada receives 4 or fewer Bids for each workstream, by the bid solicitation closing date. Bidders must refer to Part 4 of the bid solicitation for further information.
- (c) It is intended to result in the award of up to two contracts in Workstream A – Oracle Administration and Support Services, up to three contracts in Workstream B – Project Management and Business Analysis Services; and up to three contracts in Workstream C – Web Application Development and Support Services, with each contract purchasing Work from only one Workstream. Each contract will be for three years plus two one-year irrevocable options allowing Canada to extend the term of the contract. Bidders do not have to submit a bid for each Workstream. In the event that a Bidder wants to bid on more than one Workstream, a separate technical bid should be submitted for each Workstream if the Bidder chooses to submit its bid in hard copies.
- (d) There are security requirement associated with this requirement. For additional information, consult Part 6 - Security, Financial and Other Requirements, and Part 7 – Resulting Contract Clauses. For more

information on personnel and organization security screening or security clauses, Bidders should refer to the Contract Security Program of Public Works and Government Services Canada (<http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>) website.

- (e) This procurement is set aside under the federal government Procurement Strategy for Aboriginal Business. For more information on Aboriginal business requirements of the Set-aside Program for Aboriginal Business, refer to Annex 9.4 of the Supply manual.
- (f) This procurement is set aside from the international trade agreements under the provision each has for measures with respect to Aboriginal peoples or for set-asides for small and minority businesses.
- (g) Further to Article 800 of the Canadian Free Trade Agreement (CFTA), CFTA does not apply to this procurement.”
- (h) The Federal Contractor's Program (FCP) for employment equity applies to this procurement; see Part 5 – Certifications and Additional Information, Part 7 – Resulting Contract Clauses and the attachment titled “Federal Contractors Program for Employment Equity – Certification.”
- (i) Only TBIPS SA Holders currently holding a TBIPS SA for Tier 2 in the National Capital Area (NCA) under the EN578-170432 series of SAs are eligible to compete. The terms and conditions of the TBIPS SA EN578-170432 series are incorporated by reference and forms part of this bid solicitation, as though expressly set out in it, subject to any express terms and conditions contained in this bid solicitation. The capitalized terms not defined in this bid solicitation have the meaning given to them in the TBIPS SA.
- (j) SA Holders that are invited to compete as a joint venture must submit a bid as that joint venture SA Holder, forming no other joint venture to bid. Any joint venture must be already qualified under the SA EN578-170432 series as that joint venture at the time of bid closing in order to submit a bid.
- (k) For each Workstream, the Resource Categories described below are required on an as and when requested basis in accordance with the TBIPS SA Annex “A”.

WORKSTREAM A: ORACLE DATABASE ADMINISTRATOR AND SUPPORT SERVICES

| RESOURCE CATEGORY | LEVEL OF EXPERTISE | ESTIMATED NUMBER OF RESOURCES REQUIRED PER YEAR |
|--|--------------------|---|
| Database Administrator | LEVEL 2 | 1 |
| Database Administrator (Evaluated) | LEVEL 3 | 1 |
| Data Modeler | LEVEL 2 | 1 |
| Data Modeler (Evaluated) | LEVEL 3 | 1 |
| Database Analyst/ IM Administrator | LEVEL 1 | 1 |
| Database Analyst/ IM Administrator (Evaluated) | LEVEL 2 | 1 |
| Database Analyst/ IM Administrator (Evaluated) | LEVEL 3 | 1 |

WORKSTREAM B: PROJECT MANAGEMENT AND BUSINESS ANALYSIS

| RESOURCE CATEGORY | LEVEL OF EXPERTISE | ESTIMATED NUMBER OF RESOURCES REQUIRED PER YEAR |
|------------------------------|--------------------|---|
| Project Manager | LEVEL 2 | 2 |
| Project Manager (Evaluated) | LEVEL 3 | 2 |
| Business Analyst | LEVEL 2 | 2 |
| Business Analyst (Evaluated) | LEVEL 3 | 3 |

WORKSTREAM C: WEB APPLICATION DEVELOPMENT AND SUPPORT SERVICES

| RESOURCE CATEGORY | LEVEL OF EXPERTISE | ESTIMATED NUMBER OF RESOURCES REQUIRED PER YEAR |
|---|--------------------|---|
| Business Transformation Architect | LEVEL 2 | 1 |
| Business Transformation Architect (Evaluated) | LEVEL 3 | 2 |
| Web Developer | LEVEL 2 | 6 |
| Web Developer (Evaluated) | LEVEL 3 | 6 |
| Tester (Evaluated) | LEVEL 2 | 3 |

1.3 Debriefings

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

PART 2 - BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

- (a) All instructions, clauses and conditions identified in the bid solicitation by number, date and title are set out in the Standard Acquisition Clauses and Conditions Manual (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.
- (b) Bidders who submit a bid agree to be bound by the instructions, clauses and conditions of the bid solicitation and accept the clauses and conditions of the resulting contract(s).
- (c) The 2003 (2018-05-22) Standard Instructions - Goods or Services - Competitive Requirements are incorporated by reference into and form part of the bid solicitation. If there is a conflict between the provisions of 2003 and this document, this document prevails.
- (d) Subsection 3.a. of Section 01, Integrity provisions - bid of Standard Instructions 2003 incorporated by reference above is deleted in its entirety and replaced with the following:
 - a. at the time of submitting an arrangement under the Request for Supply Arrangement (RFSA), the Bidder has already provided a list of names, as requested under the *Ineligibility and Suspension Policy*. During this procurement process, the Bidder must immediately inform Canada in writing of any changes affecting the list of names.
- (e) Subsection 4 of Section 05, Submission of bids of Standard Instructions 2003 incorporated by reference above, is amended as follows:

Delete: 60 days

Insert: 180 days
- (f) Subsection 1 of Section 08, Transmission by facsimile or by epost Connect of Standard Instructions 2003 incorporated by reference above, is deleted and replaced by the following:
 - 1. Facsimile
 - Due to the nature of the bid solicitation, bids transmitted by facsimile or electronic mail to PWGSC will not be accepted.
- (g) Subsection 2 of Section 08, Transmission by facsimile or by epost Connect of Standard Instructions 2003 incorporated by reference above, is deleted and replaced by the following:
 - 2. epost Connect
 - a. Unless specified otherwise in the bid solicitation, bids may be submitted by using the [epost Connect service](#) provided by Canada Post Corporation.
 - i. PWGSC, National Capital Region: The only acceptable email address to use with epost Connect for responses to bid solicitations issued by PWGSC headquarters is:

tpsgc.dgareceptiondessoumissions-abbidreceiving.pwgsc@tpsgc-pwgsc.gc.ca

or, if applicable, the email address identified in the bid solicitation.
 - ii. PWGSC regional offices: The only acceptable email address to use with epost Connect for responses to bid solicitations issued by PWGSC regional offices is identified in the bid solicitation.
 - b. To submit a bid using epost Connect service, the Bidder must either:
 - i. send directly its bid only to the specified PWGSC Bid Receiving Unit, using its own licensing agreement for epost Connect provided by Canada Post Corporation; or

- ii. send as early as possible, and in any case, at least six business days prior to the solicitation closing date and time, (in order to ensure a response), an email that includes the bid solicitation number to the specified PWGSC Bid Receiving Unit requesting to open an epost Connect conversation. Requests to open an epost Connect conversation received after that time may not be answered.
- c. If the Bidder sends an email requesting epost Connect service to the specified Bid Receiving Unit in the bid solicitation, an officer of the Bid Receiving Unit will then initiate an epost Connect conversation. The epost Connect conversation will create an email notification from Canada Post Corporation prompting the Bidder to access and action the message within the conversation. The Bidder will then be able to transmit its bid afterward at any time prior to the solicitation closing date and time.
- d. If the Bidder is using its own licensing agreement to send its bid, the Bidder must keep the epost Connect conversation open until at least 30 business days after the solicitation closing date and time.
- e. The bid solicitation number should be identified in the epost Connect message field of all electronic transfers.
- f. It should be noted that the use of epost Connect service requires a Canadian mailing address. Should a bidder not have a Canadian mailing address, they may use the Bid Receiving Unit address specified in the solicitation in order to register for the epost Connect service.
- g. For bids transmitted by epost Connect service, Canada will not be responsible for any failure attributable to the transmission or receipt of the bid including, but not limited to, the following:
 - i. receipt of a garbled, corrupted or incomplete bid;
 - ii. availability or condition of the epost Connect service;
 - iii. incompatibility between the sending and receiving equipment;
 - iv. delay in transmission or receipt of the bid;
 - v. failure of the Bidder to properly identify the bid;
 - vi. illegibility of the bid;
 - vii. security of bid data; or,
 - viii. inability to create an electronic conversation through the epost Connect service.
- h. The Bid Receiving Unit will send an acknowledgement of the receipt of bid document(s) via the epost Connect conversation, regardless of whether the conversation was initiated by the supplier using its own license or the Bid Receiving Unit. This acknowledgement will confirm only the receipt of bid document(s) and will not confirm if the attachments may be opened nor if the content is readable.
- i. Bidders must ensure that they are using the correct email address for the Bid Receiving Unit when initiating a conversation in epost Connect or communicating with the Bid Receiving Unit and should not rely on the accuracy of copying and pasting the email address into the epost Connect system.

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

2.2 Submission of Bids

- (a) Bids must be submitted only to the Public Works and Government Services Canada (PWGSC) Bid Receiving Unit by the date, time and at the PWGSC address indicated on page one of the bid solicitation.

Note: For bidders choosing to submit using epost Connect for bids closing at the Bid Receiving Unit in the National Capital Region (NCR) the email address is:

tpsgc.dgareceptiondessoumissions-abbidreceiving.pwgsc@tpsgc-pwgsc.gc.ca

Note: Bids will not be accepted if emailed directly to this email address. This email address is to be used to open an epost Connect conversation, as detailed in Standard Instructions 2003, or to send bids through an epost Connect message if the bidder is using its own licensing agreement for epost Connect.

- (b) Due to the nature of the bid solicitation, bids transmitted by facsimile or electronic mail to PWGSC will not be accepted.

2.3 Enquiries - Bid Solicitation

- (a) All enquiries must be submitted in writing to the Contracting Authority no later than 10 calendar days before the bid closing date. Enquiries received after that time may not be answered.
- (b) Bidders should reference as accurately as possible the numbered item of the bid solicitation to which the enquiry relates. Care should be taken by Bidders to explain each question in sufficient detail in order to enable Canada to provide an accurate answer. Technical enquiries that are of a proprietary nature must be clearly marked "proprietary" at each relevant item. Items identified as "proprietary" will be treated as such except where Canada determines that the enquiry is not of a proprietary nature. Canada may edit the question(s) or may request that the Bidder do so, so that the proprietary nature of the question(s) is eliminated, and the enquiry can be answered with copies to all Bidders. Enquiries not submitted in a form that can be distributed to all Bidders may not be answered by Canada.

2.4 Former Public Servant

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

(b) Definitions

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

- (i) an individual;
- (ii) an individual who has incorporated;
- (iii) a partnership made of former public servants; or
- (iv) a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.

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

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

(c) Former Public Servant in Receipt of a Pension

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

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

- (i) name of former public servant;
- (ii) date of termination of employment or retirement from the Public Service.

By providing this information, Bidders agree that the successful Bidder's status, with respect to being a former public servant in receipt of a pension, will be reported on departmental websites as part of the published proactive disclosure reports in accordance with [Contracting Policy Notice: 2012-2](#) and the [Guidelines on the Proactive Disclosure of Contracts](#).

(d) Work Force Adjustment Directive

Is the Bidder a FPS who received a lump sum payment pursuant to the terms of the Work Force Adjustment Directive? **Yes () No ()**

If so, the Bidder must provide the following information:

- (i) name of former public servant;
- (ii) conditions of the lump sum payment incentive;
- (iii) date of termination of employment;
- (iv) amount of lump sum payment;
- (v) rate of pay on which lump sum payment is based;
- (vi) period of lump sum payment including start date, end date and number of weeks;
- (vii) number and amount (professional fees) of other contracts subject to the restrictions of a work force adjustment program.

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

2.5 Applicable Laws

- (a) Any resulting contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario.

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

2.6 Volumetric Data

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

PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

(a) Epost Connect Bid Submission

- (i) If the Bidder chooses to submit its bid electronically, Canada requests that the Bidder submits its bid in accordance with section 08 of the 2003 Standard Instructions. Bidders are required to provide their bid in a single transmission. The epost Connect service has the capacity to receive multiple documents, up to 1GB per individual attachment.
- (ii) The bid must be gathered per section and separated as follows:
 - (A) Section I: Technical Bid
 - (B) Section II: Financial Bid
 - (C) Section III: Certifications
 - (D) Section IV: Additional Information
- (iii) For further information please refer to article 08 - Transmission by facsimile or by epost Connect at <https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual/1/2003/23#transmission-by-facsimile>.

(b) Soft Copy Bid Submission (CD or USB key)

- (i) If the Bidder chooses to submit its bid in soft copy via the PWGSC Bid Receiving Unit, Canada requests that the Bidder submits its bid in separate sections as follows:
 - (A) Section I: Technical Bid – One soft copy on a CD or USB key
 - (B) Section II: Financial Bid – One soft copy on a SEPARATE CD or USB key
 - (C) Section III: Certifications – One soft copy on a CD or USB key
- (c) Section IV: Additional Information - One soft copy on a CD or USB key. If the Bidder is simultaneously providing an epost Connect copy and soft copy of the bid and if there is a discrepancy between the wording of the epost Connect copy and soft copy, the wording of the epost Connect copy will have priority over the wording of the soft copy.
- (d) Canada is not requesting a hard copy of the bid. However, if the Bidder submits a hard copy of its bid, and if there is a discrepancy between the wording of the soft or epost Connect copy and the hard copy, the wording of the soft or epost Connect copy will have priority over the wording of the hard copy.
- (e) Prices must appear in the financial bid only. No prices must be indicated in any other section of the bid.
- (f) **Format for Bid:** Canada requests that Bidders follow the format instructions described below in the preparation of their bid:
 - (i) use 8.5 x 11 inch (216 mm x 279 mm) page size;
 - (ii) use a numbering system that corresponds to the bid solicitation;
 - (iii) include a title page at the front of each volume of the bid that includes the title, date, bid solicitation number, bidder's name and address and contact information of its representative; and,
 - (iv) include a table of contents.

(g) **Canada's Policy on Green Procurement:** In April 2006, Canada issued a policy directing federal departments and agencies to take the necessary steps to incorporate environmental considerations into the procurement process. See the Policy on Green Procurement (<http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html>). To assist Canada in reaching its objectives, Bidders should:

- (i) use paper containing fibre certified as originating from a sustainably-managed forest and/or containing a minimum of 30% recycled content; and
- (ii) use an environmentally-preferable format including black and white printing instead of colour printing, printing double sided/duplex, and using staples or clips instead of cerlox, duotangs or binders.

(h) **Submission of Only One Bid:**

- (i) A Bidder, including related entities, will be permitted to submit only one bid in response to this bid solicitation. If a Bidder or any related entities participate in more than one bid (participating means being part of the Bidder, not being a subcontractor), Canada will provide those Bidders with 2 working days to identify the single bid to be considered by Canada. Failure to meet this deadline will result in all the affected bids being disqualified. A single bid may contain bids to be awarded a contract in one or more Workstreams. However, a bid may not contain a bid from the Bidder and its related entities to be awarded more than one contract in any given Workstream.
- (ii) For the purposes of this Article, regardless of the jurisdiction where any of the entities concerned is incorporated or otherwise formed as a matter of law (whether that entity is a natural person, corporation, partnership, etc), an entity will be considered to be "**related**" to a Bidder if:
 - (A) they are the same legal entity (i.e., the same natural person, corporation, partnership, limited liability partnership, etc.);
 - (B) they are "related persons" or "affiliated persons" according to the Canada Income Tax Act;
 - (C) the entities have now or in the two years before bid closing had a fiduciary relationship with one another (either as a result of an agency arrangement or any other form of fiduciary relationship); or
 - (D) the entities otherwise do not deal with one another at arm's length, or each of them does not deal at arm's length with the same third party.
- (iii) Individual members of a joint venture cannot participate in another bid, either by submitting a bid alone or by participating in another joint venture.

(i) **Joint Venture Experience:**

- i. Where the Bidder is a joint venture with existing experience as that joint venture, it may submit the experience that it has obtained as that joint venture.

Example: A bidder is a joint venture consisting of members L and O. A bid solicitation requires that the bidder demonstrate experience providing maintenance and help desk services for a period of 24 months to a customer with at least 10,000 users. As a joint venture (consisting of members L and O), the bidder has previously done the work. This bidder can use this experience to meet the requirement. If member L obtained this experience while in a joint venture with a third party N, however, that experience cannot be used because the third party N is not part of the joint venture that is bidding.
- ii. A joint venture bidder may rely on the experience of one of its members to meet any given technical criterion of this bid solicitation.

Example: A bidder is a joint venture consisting of members X, Y and Z. If a solicitation requires: (a) that the bidder have 3 years of experience providing maintenance service, and (b) that the bidder have 2 years of experience integrating hardware with complex networks, then each of these two requirements can be met by a different member of the joint venture. However, for a single criterion, such as the requirement for 3 years of experience providing maintenance services, the bidder cannot indicate that each of members X, Y and Z has one year of experience, totaling 3 years. Such a response would be declared non-responsive.

- iii. Joint venture members cannot pool their abilities with other joint venture members to satisfy a single technical criterion of this bid solicitation. However, a joint venture member can pool its individual experience with the experience of the joint venture itself. Wherever substantiation of a criterion is required, the Bidder is requested to indicate which joint venture member satisfies the requirement. If the Bidder has not identified which joint venture member satisfies the requirement, the Contracting Authority will provide an opportunity to the Bidder to submit this information during the evaluation period. If the Bidder does not submit this information within the period set by the Contracting Authority, its bid will be declared non-responsive.

Example: A bidder is a joint venture consisting of members A and B. If a bid solicitation requires that the bidder demonstrate experience providing resources for a minimum number of 100 billable days, the bidder may demonstrate that experience by submitting either:

- Contracts all signed by A; or
- Contracts all signed by B; or
- Contracts all signed by A and B in joint venture, or
- Contracts signed by A and contracts signed by A and B in joint venture, or
- Contracts signed by B and contracts signed by A and B in joint venture.

That show in total 100 billable days.

- iv. Any Bidder with questions regarding the way in which a joint venture bid will be evaluated should raise such questions through the Enquiries process as early as possible during the bid solicitation period.

3.2 Section I: Technical Bid

- (a) The technical bid consists of the following:

- (i) **Bid Submission Form:** Bidders are requested to include the Bid Submission Form – Form 1, with their bids. It provides a common form in which Bidders can provide information required for evaluation and contract award, such as a contact name and the Bidder's Procurement Business Number, etc. Using the form to provide this information is not mandatory, but it is recommended. If Canada determines that the information required by the Bid Submission Form is incomplete or requires correction, Canada will provide the Bidder with an opportunity to do so.
- (ii) **Security Clearance:** Bidders are requested to submit the following security information for each of the proposed resources with their bids on or before the bid closing date:

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

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

(iii) **Substantiation of Technical Compliance:**

- (A) **Mandatory Technical Criteria:** The technical bid must substantiate the compliance with the specific articles of Attachment 4.1, which is the requested format for providing the substantiation. The substantiation must not simply be a repetition of the requirement(s), but must explain and demonstrate how the Bidder will meet the requirements and carry out the required Work. Simply stating that the Bidder or its proposed solution or resources comply is not sufficient. Where Canada determines that the substantiation is not complete, the Bidder will be considered non-responsive and disqualified. The substantiation may refer to additional documentation submitted with the bid - this information can be referenced in the "Bidder's Response" column of Attachment 4.1, where Bidders are requested to indicate where in the bid the reference material can be found, including the title of the document, and the page and paragraph numbers; where the reference is not sufficiently precise, Canada may request that the Bidder direct Canada to the appropriate location in the documentation.
- (B) **Point-Rated Technical Criteria:** The technical bid must substantiate the compliance with the specific articles of Attachment 4.2, which is the requested format for providing the substantiation. The substantiation must not simply be a repetition of the requirement(s), but must explain and demonstrate how the Bidder will meet the requirements and carry out the required Work. Simply stating that the Bidder or its proposed solution or resources comply is not sufficient. Where Canada determines that the substantiation is not complete, the Bidder will be rated accordingly. The substantiation may refer to additional documentation submitted with the bid - this information can be referenced in the "Bidder's Response" column of Attachment 4.2, where Bidders are requested to indicate where in the bid the reference material can be found, including the title of the document, and the page and paragraph numbers; where the reference is not sufficiently precise, Canada may request that the Bidder direct Canada to the appropriate location in the documentation.

- (iv) **Previous Similar Projects:** Where the bid must include a description of previous similar projects: (i) a project must have been completed by the Bidder itself (and cannot include the experience of any proposed subcontractor or any affiliate of the Bidder); (ii) a project must have been completed by the bid closing date; (iii) each project description must include, at minimum, the name and either the telephone number or e-mail address of a customer reference; and (iv) if more similar projects are provided than requested, Canada will decide in its discretion which projects will be evaluated. A project will be considered "similar" to the Work to be performed under any resulting contract if the project was for the performance of work that closely matches the TBIPS descriptions of the Resource Categories identified in Annex A. Work will be considered to "closely match" if the work in the provided project is described in at least 50% of the points of responsibility listed in the description of the given Resource Category.

- (v) **For Proposed Resources:** The technical bid must include the number of résumés, per Resource Category, as identified in Attachments "4.1 & 4.2". The same individual must not be proposed for more than one Resource Category or more than one Workstream. The Technical bid must demonstrate that each proposed individual meets the qualification requirements described (including any educational requirements, work experience requirements, and professional designation or membership requirements). With respect to the proposed resources:

- (A) Proposed resources may be employees of the Bidder or employees of a subcontractor, or these individuals may be independent contractors to whom the Bidder would subcontract a portion of the Work (refer to Part 5, Certifications).

- (B) For educational requirements for a particular degree, designation or certificate, PWGSC will only consider educational programs that were successfully completed by the resource by the time of bid posting. If the degree, designation or certification was issued by an educational institution outside of Canada, the Bidder must provide a copy of the results of the academic credential assessment and qualification recognition service issued by an agency or organization recognized by the Canadian Information Centre for International Credentials (CICIC). If the Bidder has not included the copy of the results in its bid, the Contracting Authority will provide an opportunity to the Bidder to submit it during the evaluation period. If the Bidder has not submitted the copy of the results within 2 working days of the request by the Contracting Authority, its bid will be declared non-responsive.
- (C) For requirements relating to professional designation or membership, the resource must have the required designation or membership by the time of bid posting and must continue, where applicable, to be a member in good standing of the profession or membership throughout the evaluation period and Contract Period. Where the designation or membership must be demonstrated through a certification, diploma or degree, such document must be current, valid and issued by the entity specified in this solicitation. If the entity is not specified, the issuer must have been an accredited or otherwise recognized body, institution or entity at the time the document was issued. If the degree, diploma or certification was issued by an educational institution outside of Canada, the Bidder must provide a copy of the results of the academic credential assessment and qualification recognition service issued by an agency or organization recognized by the Canadian Information Centre for International Credentials (CICIC). If the Bidder has not included the copy of the results in its bid, the Contracting Authority will provide an opportunity to the Bidder to submit it during the evaluation period. If the Bidder has not submitted the copy of the results within 2 working days of the request by the Contracting Authority, its bid will be declared non-responsive.
- (D) For work experience, PWGSC will not consider experience gained as part of an educational program, except for experience gained through a formal co-operative program at a post-secondary institution.
- (E) For any requirements that specify a particular time period (e.g., 2 years) of work experience, PWGSC will disregard any information about experience if the technical bid does not include the relevant dates (month and year) for the experience claimed (i.e., the start date and end date). Canada will evaluate only the duration that the resource actually worked on a project or projects (from his or her start date to end date), instead of the overall start and end date of a project or a combination of projects in which a resource has participated.
- (F) For work experience to be considered by Canada, the technical bid must not simply indicate the title of the individual's position, but must demonstrate that the resource has the required work experience by explaining the responsibilities and work performed by the individual while in that position. Only listing experience without providing any supporting data to describe responsibilities, duties and relevance to the requirement, or reusing the same wording as the qualification requirements, will not be considered "demonstrated" for the purposes of the assessment. The Contractor should provide complete details as to where, when, month and year, and how, through which activities/responsibilities, the stated qualifications / experience were obtained. In situations in which a proposed resource worked at the same time on more than one project, the duration of any overlapping time period will be counted only once toward any requirements that relate to the individual's length of experience.

(vi) **Customer Reference Contact Information:**

- (A) The Bidder must provide customer references. The customer reference must each confirm, if requested by PWGSC, the facts identified in the Bidder's bid, as required by Attachment 4.1 and 4.2.
- (B) The form of question to be used to request confirmation from customer references is as follows:
- Has [the bidder] provided your organization with [description of the services, resource category and time frame within which those services must have been provided as per the cited project]?"*
- ___ Yes, the Bidder has provided my organization with the resource category described, performing the services described within this time period.*
- ___ No, the Bidder has not provided my organization with the resource category described, performing the services described within this time period.*
- ___ I am unwilling or unable to provide any information about the services described above.*
- (C) For each customer reference, the Bidder must, at a minimum, provide the name and either the telephone number or e-mail address for a contact person. If only the telephone number is provided, it will be used to call to request the e-mail address and the reference check will be done by e-mail.
- Bidders are also requested to include the title of the contact person. It is the sole responsibility of the Bidder to ensure that it provides a contact who is knowledgeable about the services the Bidder has provided to its customer and who is willing to act as a customer reference. Crown references will be accepted.

3.3 Section II: Financial Bid

- (a) **Pricing:** Bidders must submit their financial bid in accordance with the Pricing Schedule provided in Attachment 4.3. The total amount of Applicable Taxes must be shown separately, if applicable. Unless otherwise indicated, Bidders must include a single, firm, all-inclusive per diem rate quoted in Canadian dollars in each cell requiring an entry in the pricing tables.
- (b) **Variation in Resource Rates By Time Period:** For any given resource category, where the financial tables provided by Canada allow different firm rates to be charged for a resource category during different time periods:
- (i) the rate bid must not increase by more than 5% from one time period to the next; and,
- (ii) the rate bid for the same resource category during any subsequent time period must not be lower than the rate bid for the time period that includes the first month of the Initial Contract Period.
- (c) **All Costs to be Included:** The financial bid must include all costs for the requirement described in the bid solicitation for the entire Contract Period, including any option periods. The identification of all necessary equipment, software, peripherals, cabling and components required to meet the requirements of the bid solicitation and the associated costs of these items is the sole responsibility of the Bidder.
- (d) **Blank Prices:** Bidders are requested to insert "\$0.00" for any item for which it does not intend to charge or for items that are already included in other prices set out in the tables. If the Bidder leaves any price blank, Canada will treat the price as "\$0.00" for evaluation purposes and may request that the Bidder confirm that the price is, in fact, \$0.00. No Bidder will be permitted to add or change a price as part of this confirmation. Any Bidder who does not confirm that the price for a blank item is \$0.00 will be declared non-responsive.

- (e) **Variation in Resource Rates By Level:** Where the financial tables provided by Canada allow different firm rates to be charged for different levels of experience within the same resource category and time period, for any such resource category and time period:

- (i) the rate bid for level three must be the same or higher than that bid for level two, and
- (ii) the rate bid for level two must be the same or higher than the rate bid for level one.

3.4 Section III: Certifications

It is a requirement that bidders submit the certifications and additional information identified under Part 5.

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

- (a) Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria. There are several steps in the evaluation process, which are described below. Even though the evaluation and selection will be conducted in steps, the fact that Canada has proceeded to a later step does not mean that Canada has conclusively determined that the Bidder has successfully passed all the previous steps. Canada may conduct steps of the evaluation in parallel.
- (b) An evaluation team composed of representatives of the Client and PWGSC will evaluate the bids on behalf of Canada. Canada may hire any independent consultant, or use any Government resources, to evaluate any bid. Not all members of the evaluation team will necessarily participate in all aspects of the evaluation.
- (c) In addition to any other time periods established in the bid solicitation:
 - (i) **Requests for Clarifications:** If Canada seeks clarification or verification from the Bidder about its bid, the Bidder will have 2 working days (or a longer period if specified in writing by the Contracting Authority) to provide the necessary information to Canada. Failure to meet this deadline will result in the bid being declared non-responsive.
 - (ii) **Requests for Further Information:** If Canada requires additional information in order to do any of the following pursuant to the Section entitled "Conduct of Evaluation" in 2003, Standard Instructions - Goods or Services - Competitive Requirements:
 - (A) verify any or all information provided by the Bidder in its bid; or
 - (B) contact any or all references supplied by the Bidder (e.g., references named in the résumés of individual resources) to verify and validate any information submitted by the Bidder,the Bidder must provide the information requested by Canada within 3 working days of a request by the Contracting Authority.
 - (iii) **Extension of Time:** If additional time is required by the Bidder, the Contracting Authority may grant an extension in his or her sole discretion.

4.1.1 Phased Bid Compliance Process

4.1.1.1 General

- (a) Canada will conduct the Phased Bid Compliance Process (PBCP) described below for this requirement ONLY if Canada receives 4 or fewer Bids for each workstream, by the bid solicitation closing date.
- (b) Notwithstanding any review by Canada at Phase I or II of the PBCP, Bidders are and will remain solely responsible for the accuracy, consistency and completeness of their Bids and Canada does not undertake, by reason of this review, any obligations or responsibility for identifying any or all errors or omissions in Bids or in responses by a Bidder to any communication from Canada.

THE BIDDER ACKNOWLEDGES THAT THE REVIEWS IN PHASE I AND II OF THIS PBCP ARE PRELIMINARY AND DO NOT PRECLUDE A FINDING IN PHASE III THAT THE BID IS NON-RESPONSIVE, EVEN FOR MANDATORY REQUIREMENTS WHICH WERE SUBJECT TO REVIEW IN PHASE I OR II AND NOTWITHSTANDING THAT THE BID HAD BEEN FOUND RESPONSIVE IN SUCH EARLIER PHASE. CANADA MAY DEEM A BID TO BE NON-RESPONSIVE TO A MANDATORY REQUIREMENT AT ANY PHASE. THE BIDDER ALSO ACKNOWLEDGES THAT ITS RESPONSE TO A NOTICE OR A COMPLIANCE ASSESSMENT REPORT (CAR) (EACH DEFINED BELOW) IN PHASE I OR II MAY NOT BE SUCCESSFUL IN RENDERING ITS BID RESPONSIVE TO THE MANDATORY REQUIREMENTS THAT ARE THE SUBJECT OF THE NOTICE OR CAR, AND

MAY RENDER ITS BID NON-RESPONSIVE TO OTHER MANDATORY REQUIREMENTS.

- (c) Canada may, in its discretion, request and accept at any time from a Bidder and consider as part of the Bid, any information to correct errors or deficiencies in the Bid that are clerical or administrative, such as, without limitation, failure to sign the Bid or any part or to checkmark a box in a form, or other failure of format or form or failure to acknowledge; failure to provide a procurement business number or contact information such as names, addresses and telephone numbers; inadvertent errors in numbers or calculations that do not change the amount the Bidder has specified as the price or of any component thereof that is subject to evaluation. This shall not limit Canada's right to request or accept any information after the bid solicitation closing in circumstances where the bid solicitation expressly provides for this right. The Bidder will have the time period specified in writing by Canada to provide the necessary documentation. Failure to meet this deadline will result in the Bid being declared non-responsive.
- (d) The PBCP does not limit Canada's rights under Standard Acquisition Clauses and Conditions (SACC) 2003 (2018-05-22) Standard Instructions – Goods or Services – Competitive Requirements nor Canada's right to request or accept any information during the solicitation period or after bid solicitation closing in circumstances where the bid solicitation expressly provides for this right, or in the circumstances described in subsection (c).
- (e) Canada will send any Notice or CAR by any method Canada chooses, in its absolute discretion. The Bidder must submit its response by the method stipulated in the Notice or CAR. Responses are deemed to be received by Canada at the date and time they are delivered to Canada by the method and at the address specified in the Notice or CAR. An email response permitted by the Notice or CAR is deemed received by Canada on the date and time it is received in Canada's email inbox at Canada's email address specified in the Notice or CAR. A Notice or CAR sent by Canada to the Bidder at any address provided by the Bidder in or pursuant to the Bid is deemed received by the Bidder on the date it is sent by Canada. Canada is not responsible for late receipt by Canada of a response, however caused.

4.1.1.2

Phase I: Financial Bid

- (a) After the closing date and time of this bid solicitation, Canada will examine the Bid to determine whether it includes a Financial Bid and whether any Financial Bid includes all information required by the solicitation. Canada's review in Phase I will be limited to identifying whether any information that is required under the bid solicitation to be included in the Financial Bid is missing from the Financial Bid. This review will not assess whether the Financial Bid meets any standard or is responsive to all solicitation requirements
- (b) Canada's review in Phase I will be performed by officials of the Department of Public Works and Government Services.
- (c) If Canada determines, in its absolute discretion that there is no Financial Bid or that the Financial Bid is missing all of the information required by the bid solicitation to be included in the Financial Bid, then the Bid will be considered non-responsive and will be given no further consideration.
- (d) For Bids other than those described in c), Canada will send a written notice to the Bidder ("Notice") identifying where the Financial Bid is missing information. A Bidder, whose Financial Bid has been found responsive to the requirements that are reviewed at Phase I, will not receive a Notice. Such Bidders shall not be entitled to submit any additional information in respect of their Financial Bid.

- (e) The Bidders who have been sent a Notice shall have the time period specified in the Notice (the "Remedy Period") to remedy the matters identified in the Notice by providing to Canada, in writing, additional information or clarification in response to the Notice. Responses received after the end of the Remedy Period will not be considered by Canada, except in circumstances and on terms expressly provided for in the Notice.
- (f) In its response to the Notice, the Bidder will be entitled to remedy only that part of its Financial Bid which is identified in the Notice. For instance, where the Notice states that a required line item has been left blank, only the missing information may be added to the Financial Bid, except that, in those instances where the addition of such information will necessarily result in a change to other calculations previously submitted in its Financial Bid, (for example, the calculation to determine a total price), such necessary adjustments shall be identified by the Bidder and only these adjustments shall be made. All submitted information must comply with the requirements of this solicitation.
- (g) Any other changes to the Financial Bid submitted by the Bidder will be considered to be new information and will be disregarded. There will be no change permitted to any other Section of the Bidder's Bid. Information submitted in accordance with the requirements of this solicitation in response to the Notice will replace, in full, **only** that part of the original Financial Bid as is permitted above, and will be used for the remainder of the bid evaluation process.
- (h) Canada will determine whether the Financial Bid is responsive to the requirements reviewed at Phase I, considering such additional information or clarification as may have been provided by the Bidder in accordance with this Section. If the Financial Bid is not found responsive for the requirements reviewed at Phase I to the satisfaction of Canada, then the Bid shall be considered non-responsive and will receive no further consideration.
- (i) Only Bids found responsive to the requirements reviewed in Phase I to the satisfaction of Canada, will receive a Phase II review.

4.1.1.3 Phase II: Technical Bid

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

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

4.1.1.4 Phase III: Final Evaluation of the Bid

- (a) In Phase III, Canada will complete the evaluation of all Bids found responsive to the requirements reviewed at Phase II. Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria.
- (b) A Bid is non-responsive and will receive no further consideration if it does not meet all mandatory evaluation criteria of the solicitation.

4.2 Technical Evaluation

A separate technical evaluation will be conducted for each Workstream.

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

- (iii) If the Phased Bid Compliance Process applies, it will apply only to mandatory technical criteria identified by the superscript ^(PB). Mandatory technical criteria not identified by the superscript ^(PB) will not be subject to the Phased Bid Compliance Process.

| (PB) | |
|--------------|--|
| WORKSTREAM A | M1 ^(PB) , M2 ^(PB) , M3 ^(PB) , M4 ^(PB) , and M5 ^(PB) |
| WORKSTREAM B | M1 ^(PB) , M2 ^(PB) , M3 ^(PB) , M4 ^(PB) , and M5 ^(PB) |
| WORKSTREAM C | M1 ^(PB) , M2 ^(PB) , M3 ^(PB) , M4 ^(PB) , and M5 ^(PB) |

(b) **Point-Rated Technical Criteria:**

- (i) Each bid will be rated by assigning a score to the rated requirements, which are identified in the bid solicitation by the word "rated" or by reference to a score. Bidders who fail to submit complete bids with all the information requested by this bid solicitation will be rated accordingly.
- (ii) The rated requirements are described in Attachment 4.2.

- (c) **Number of Resources Evaluated:** Only a certain number of resources per Resource Category will be evaluated as part of this bid solicitation as identified in Annex B and attachment 4.1 and 4.2. Additional Resources will only be assessed after contract award once specific tasks are requested of the Contractor. After contract award, the Task Authorization process will be in accordance with Part 7 – Resulting Contract Clauses, the Article titled "Task Authorization". When a Task Authorization Form (TA Form) is issued, the Contractor will be requested to propose a resource to satisfy the specific requirement based on the TA Form's Statement of Work. The proposed resource will then be assessed against the criteria identified in the Contract's Statement of Work in accordance with Appendix C of Annex A.

(d) **Reference Checks:**

- (i) Whether or not to conduct reference checks is discretionary. However, if PWGSC chooses to conduct reference checks for any given rated or mandatory requirement, it will check the references for that requirement for all bidders to be recommended for contract award.
- (ii) For reference checks, Canada will conduct the reference check in writing by email. Canada will send all email reference check requests to contacts supplied by all the Bidders within a 48-hour period using the email address provided in the bid. Canada will not award any points and/or a bidder will not meet the mandatory experience requirement (as applicable) unless the response is received within five working days of the date that Canada's email was sent.
- (iii) On the third working day after sending out the reference check request, if Canada has not received a response, Canada will notify the Bidder by email, to allow the Bidder to contact its reference directly to ensure that it responds to Canada within 5 working days. If the individual named by a Bidder is unavailable when required during the evaluation period, the Bidder may provide the name and email address of an alternate contact person from the same customer. Bidders will only be provided with this opportunity once for each customer, and only if the originally named individual is unavailable to respond (i.e., the Bidder will not be provided with an opportunity to submit the name of an alternate contact person if the original contact person indicates that he or she is unwilling or unable to respond). The 5 working days will not be extended to provide additional time for the new contact to respond.
- (iv) Wherever information provided by a reference differs from the information supplied by the Bidder, the information supplied by the reference will be the information evaluated.
- (v) Points will not be allocated and/or a bidder will not meet the mandatory experience requirement (as applicable) if (1) the reference customer states he or she is unable or unwilling to provide the information requested, or (2) the customer reference is not a customer of the Bidder itself (for

example, the customer cannot be the customer of an affiliate of the Bidder instead of being a customer of the Bidder itself). Nor will points be allocated or a mandatory met if the customer is itself an affiliate or other entity that does not deal at arm's length with the Bidder.

4.3 Financial Evaluation – Highest Responsive Combined Rating of Technical Merit and Price

- (a) The financial evaluation will be conducted using the firm per diem rates provided by the responsive bid(s). A separate financial evaluation will be conducted for each Workstream.
- (b) There are two possible financial evaluation methods for this requirement. The first method will be used if three or more bids are determined responsive (see (c) Financial Evaluation - Method A below). The second method will be used if fewer than three bids are determined responsive (see (d) Financial Evaluation - Method B below).
- (c) **Financial Evaluation - Method A:** The following financial evaluation method will be used if three or more bids are determined responsive:
- (i) **STEP 1 - ESTABLISHING THE LOWER AND UPPER MEDIAN BAND LIMITS FOR EACH PERIOD AND EACH RESOURCE CATEGORY:** The Contracting Authority will establish, for each period and each Resource Category of each Workstream, the median band limits based on the firm per diem rates provided by the technically responsive bids. For each such Resource Category the median will be calculated using the median function in Microsoft Excel and will represent a range that encompasses any rate to a value of minus (-) 15% of the median, and an upper median rate to a value of plus (+) 30% of the median. When an even number of technically responsive bids have been determined, an average of the middle two rates will be used to calculate the median band limits and for an odd number of technically responsive bids, the middle rate will be used.
- (ii) **STEP 2 - POINTS ALLOCATION:** For each period and each Resource Category of each Workstream points will be allocated as follows:
- (A) A Bidder's proposed firm per diem rate that is either lower than the established lower median band limit or higher than the established upper median band limit for that period and Resource Category will be allocated 0 points.
- (B) A Bidder's proposed firm per diem rate falling within the upper and lower median band limits, for that period and Resource Category, will be allocated points using the following calculation, which will be rounded to two decimal places:
- $$\frac{\text{Lowest proposed firm per diem rate within the median band limits}}{\text{Bidder's proposed firm per diem rate within the median band limits}} \times \text{Maximum Points Assigned at Table 1 below}$$
- (C) A Bidder's proposed firm per diem rate falling within the established median band limits which is the lowest proposed firm per diem rate will be allocated the applicable maximum points assigned at Table 1 below.

| TABLE 1 - MAXIMUM POINTS ASSIGNED WORKSTREAM "A" | | | | |
|--|--|--------------------|--------------------|-----------------|
| RESOURCE CATEGORIES | INITIAL (3 YEARS) CONTRACT PERIOD | OPTION PERIOD 1 | OPTION PERIOD 2 | TOTAL POINTS |
| Database Administrator(s), Level 2 | 120 | 40 | 40 | 200 |
| Database Administrator, L3 (Evaluated) | 300 | 100 | 100 | 500 |

| | | | | |
|--|-------------|------------|------------|-------------|
| Data Modeler, L2 | 120 | 40 | 40 | 200 |
| Data Modeler (Evaluated), L3 | 150 | 50 | 50 | 250 |
| Database Analyst/ IM Administrator, L1 | 90 | 30 | 30 | 150 |
| Database Analyst/ IM Administrator, L2 | 180 | 60 | 60 | 300 |
| Database Analyst/ IM Administrator (Evaluated), L3 | 300 | 100 | 100 | 500 |
| TOTAL | 1260 | 420 | 420 | 2100 |

| TABLE 1 - MAXIMUM POINTS ASSIGNED STREAM "B" | | | | |
|---|--|--------------------|--------------------|-----------------|
| RESOURCE CATEGORIES | INITIAL (3 YEARS) CONTRACT PERIOD | OPTION PERIOD 1 | OPTION PERIOD 2 | TOTAL POINTS |
| Project Manager, L2 | 150 | 50 | 50 | 250 |
| Project Manager (Evaluated), L3 | 300 | 100 | 100 | 500 |
| Business Analyst, L2 | 150 | 50 | 50 | 250 |
| Business Analyst (Evaluated), L3 | 225 | 75 | 75 | 375 |
| TOTAL | 825 | 275 | 275 | 1375 |

| TABLE 1 - MAXIMUM POINTS ASSIGNED STREAM "C" | | | | |
|---|--|--------------------|--------------------|-----------------|
| RESOURCE CATEGORIES | INITIAL (3 YEARS) CONTRACT PERIOD | OPTION PERIOD 1 | OPTION PERIOD 2 | TOTAL POINTS |
| Business Transformation Architect, L2 | 150 | 50 | 50 | 250 |
| Business Transformation Architect (Evaluated), L3 | 300 | 100 | 100 | 500 |
| Web Developer, L2 | 150 | 50 | 50 | 250 |
| Web Developer (Evaluated), L3 | 300 | 100 | 100 | 500 |
| Tester (Evaluated), L2 | 150 | 50 | 50 | 250 |

| | | | | |
|-------|------|-----|-----|------|
| TOTAL | 1050 | 350 | 350 | 1750 |
|-------|------|-----|-----|------|

- (iii) **STEP 3 - FINANCIAL SCORE:** Points allocated under STEP 2 for each period and Resource Category of each Workstream will be added together and rounded to two decimal places to produce the Financial Score. Bidders will find below an example of a financial evaluation using Method A.

(iv) **EXAMPLE OF A FINANCIAL EVALUATION USING METHOD A**

| TABLE 2 - EXAMPLE OF A FINANCIAL EVALUATION USING METHOD A: | | | | | | | |
|---|---|---|----------|----------|----------|----------|----------|
| Resource Category | Max. Points | Bidder 1 | | Bidder 2 | | Bidder 3 | |
| | | Year 1 | Year 2 | Year 1 | Year 2 | Year 1 | Year 2 |
| Programmer | 150 (75 pts. per year) | \$400.00 | \$400.00 | \$420.00 | \$450.00 | \$450.00 | \$450.00 |
| Business Analyst | 100 (50 pts. per year) | \$600.00 | \$600.00 | \$600.00 | \$620.00 | \$650.00 | \$820.00 |
| Project Manager | 50 (25 pts. per year) | \$555.00 | \$900.00 | \$750.00 | \$800.00 | \$700.00 | \$800.00 |
| TOTAL | 300 | | | | | | |
| STEP 1 - Establishing the lower and upper median band limits for each year and each resource category | | | | | | | |
| (Median 1) | For the Programmer Resource Category, the year 1 median would be \$420.00. The lower median band limit would be \$336.00 and higher median band limit would be \$546.00. | | | | | | |
| (Median 2) | For the Programmer Resource Category, the year 2 median would be \$450.00. The lower median band limit would be \$360.00 and higher median band limit would be \$585.00. | | | | | | |
| (Median 3) | For the Business Analyst Resource Category, the year 1 median would be \$600.00. The lower median band limit would be \$480.00 and higher median band limit would be \$780.00. | | | | | | |
| (Median 4) | For the Business Analyst Resource Category, the year 2 median would be \$620.00. The lower median band limit would be \$496.00 and higher median band limit would be \$806.00. | | | | | | |
| (Median 5) | For the Project Manager Resource Category, the year 1 median would be \$700.00. The lower median band limit would be \$560.00 and higher median band limit would be \$910.00. | | | | | | |
| (Median 6) | For the Project Manager Resource Category, the year 2 median would be \$800.00. The lower median band limit would be \$640.00 and higher median band limit would be \$1,040.00. | | | | | | |
| STEP 2 - Points Allocation: | | | | | | | |
| Bidder 1: | | | | | | | |
| Programmer Year 1 = | | 75 points (lowest rate within the lower and upper median band limits) | | | | | |
| Programmer Year 2 = | | 75 points (lowest rate within the lower and upper median band limits) | | | | | |
| Business Analyst Year 1 = | | 50 points (lowest rate within the lower and upper median band limits) | | | | | |
| Business Analyst Year 2 = | | 50 points (lowest rate within the lower and upper median band limits) | | | | | |
| Project Manager Year 1 = | | 0 points (outside the lower and higher median band limits) | | | | | |
| Project Manager Year 2 = | | 22.22 points (based on the following calculation = (Lowest rate of \$800.00 / Bidder's proposed rate of \$900.00) Multiplied by 25 pts) | | | | | |
| Bidder 2: | | | | | | | |

| | |
|----------------------------------|---|
| Programmer Year 1 = | 71.43 points (based on the following calculation = (Lowest rate of \$400.00 / Bidder's proposed rate of \$420.00) Multiplied by 75 pts) |
| Programmer Year 2 = | 66.67 points (based on the following calculation = (Lowest rate of \$400.00 / Bidder's proposed rate of \$450.00) Multiplied by 75 pts) |
| Business Analyst Year 1 = | 50 points (lowest price within the lower and upper median band limits) |
| Business Analyst Year 2 = | 48.39 points (based on the following calculation = (Lowest rate of \$600.00 / Bidder's proposed rate of \$620.00) Multiplied by 50 pts) |
| Project Manager Year 1 = | 23.33 points (based on the following calculation = (Lowest rate of \$700.00 / Bidder's proposed rate of \$750.00) Multiplied by 25 pts) |
| Project Manager Year 2 = | 25 points (lowest price within the lower and upper median band limits) |
| Bidder 3: | |
| Programmer Year 1 = | 66.67 points (based on the following calculation = (Lowest rate of \$400.00 / Bidder's proposed rate of \$450.00) Multiplied by 75 pts) |
| Programmer Year 2 = | 66.67 points (based on the following calculation = (Lowest rate of \$400.00 / Bidder's proposed rate of \$450.00) Multiplied by 75 pts) |
| Business Analyst Year 1 = | 46.15 points (based on the following calculation = (Lowest rate of \$600.00 / Bidder's proposed rate of \$650.00) Multiplied by 75 pts) |
| Business Analyst Year 2 = | 0 points (outside the lower and higher median band limits) |
| Project Manager Year 1 = | 25 points (lowest price within the lower and upper median band limits) |
| Project Manager Year 2 = | 25 points (lowest price within the lower and upper median band limits) |
| STEP 3 - Financial Score: | |
| Bidder 1: | 75 + 75 + 50 + 50 + 0 + 22.22 = Total Financial Score of 272.22 points out of a possible 300 points |
| Bidder 2: | 71.43 + 67.67 + 50 + 48.39 + 23.33 + 25 = Total Financial Score of 284.82 points out of a possible 300 points |
| Bidder 3: | 66.67 + 66.67 + 46.15 + 0 + 25 + 25 = Total Financial Score of 229.49 points out of a possible 300 points |

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

(i) **STEP 1 - POINTS ALLOCATION:** For each period and each Resource Category of each Workstream points will be allocated as follows:

(A) Points will be established based on the following calculation, with points rounded to two decimal places:

$$\frac{\text{Lowest proposed firm per diem rate}}{\text{Bidder's proposed firm per diem rate}} \times \text{Maximum Points Assigned at Table 3 below}$$

The Bidder with the lowest proposed firm per diem rate will be allocated the applicable maximum points assigned at Table 3 below.

| TABLE 3 - MAXIMUM POINTS ASSIGNED STREAM "A" | | | | |
|--|--|--|--|--|
| | | | | |

| RESOURCE CATEGORIES | INITIAL (3 YEARS) CONTRACT PERIOD | OPTION PERIOD 1 | OPTION PERIOD 2 | TOTAL POINTS |
|--|-----------------------------------|-----------------|-----------------|--------------|
| Database Administrator(s), L 2 | 120 | 40 | 40 | 200 |
| Database Administrator, L3 (Evaluated) | 300 | 100 | 100 | 500 |
| Data Modeler, L2 | 120 | 40 | 40 | 200 |
| Data Modeler (Evaluated), L3 | 150 | 50 | 50 | 250 |
| Database Analyst/ IM Administrator, L1 | 90 | 30 | 30 | 150 |
| Database Analyst/ IM Administrator, L2 (Evaluated) | 180 | 60 | 60 | 300 |
| Database Analyst/ IM Administrator (Evaluated), L3 | 300 | 100 | 100 | 500 |
| TOTAL | 1260 | 420 | 420 | 2100 |

TABLE 3 - MAXIMUM POINTS ASSIGNED STREAM "B"

| RESOURCE CATEGORIES | INITIAL (3 YEARS) CONTRACT PERIOD | OPTION PERIOD 1 | OPTION PERIOD 2 | TOTAL POINTS |
|----------------------------------|-----------------------------------|-----------------|-----------------|--------------|
| Project Manager, L2 | 150 | 50 | 50 | 250 |
| Project Manager (Evaluated), L3 | 300 | 100 | 100 | 500 |
| Business Analyst, L2 | 150 | 50 | 50 | 250 |
| Business Analyst (Evaluated), L3 | 225 | 75 | 75 | 375 |
| TOTAL | 825 | 275 | 275 | 1375 |

TABLE 3 - MAXIMUM POINTS ASSIGNED STREAM "C"

| RESOURCE CATEGORIES | INITIAL (3 YEARS) CONTRACT PERIOD | OPTION PERIOD 1 | OPTION PERIOD 2 | TOTAL POINTS |
|---|-----------------------------------|-----------------|-----------------|--------------|
| Business Transformation Architect, L2 | 150 | 50 | 50 | 250 |
| Business Transformation Architect (Evaluated), L3 | 300 | 100 | 100 | 500 |

| | | | | |
|-------------------------------|-------------|------------|------------|-------------|
| Web Developer, L2 | 150 | 50 | 50 | 250 |
| Web Developer (Evaluated), L3 | 300 | 100 | 100 | 500 |
| Tester (Evaluated), L2 | 150 | 50 | 50 | 250 |
| TOTAL | 1050 | 350 | 350 | 1750 |

- (ii) **STEP 2 - FINANCIAL SCORE:** Points allocated under STEP 1, for each period and each Resource Category, will be added together and rounded to two decimal places to produce the Financial Score.

(e) Substantiation of Professional Services Rates

In Canada's experience, bidders will from time to time propose rates at the time of bidding for one or more categories of resources that they later refuse to honour, on the basis that these rates do not allow them to recover their own costs and/or make a profit. When evaluating the rates bid for professional services, Canada may, but will have no obligation to, require price support in accordance with this Article. If Canada requests price support, it will be requested from all otherwise responsive bidders who have proposed a rate that is at least 15% lower than the median rate bid by all responsive bidders for the relevant resource category or categories. If Canada requests price support, the Bidder must provide the following information:

- (i) an invoice (referencing a contract serial number or other unique contract identifier) that shows that the Bidder has provided and invoiced a customer (with whom the Bidder deals at arm's length) for services performed for that customer similar to the services that would be provided in the relevant resource category, where those services were provided for at least three months within the eighteen months before the bid solicitation closing date, and the fees charged were equal to or less than the rate offered to Canada;
- (ii) in relation to the invoice in (i), evidence from the Bidder's customer that the services identified in the invoice include at least 50% of the tasks listed in the Statement of Work for the category of resource being assessed for an unreasonably low rate. This evidence must consist of either a copy of the contract (which must describe the services to be provided and demonstrate that at least 50% of the tasks to be performed are the same as those to be performed under the Statement of Work in this bid solicitation) or the customer's signed certification that the services subject to the charges in the invoice included at least 50% of the same tasks to be performed under the Statement of Work in this bid solicitation; and
- (iii) in respect of each contract for which an invoice is submitted as substantiation, a résumé for the resource that provided the services under that contract that demonstrates that, in relation to the resource category for which the rates are being substantiated, the resource would meet the mandatory requirements and achieve any required pass mark for any rated criteria; and
- (iv) the name, telephone number and, if available, e-mail address of a contact person at the customer who received each invoice submitted under (i), so that Canada may verify any information provided by the Bidder.

Once Canada requests substantiation of the rates bid for any resource category, it is the sole responsibility of the Bidder to submit information (as described above and as otherwise may be requested by Canada, including information that would allow Canada to verify information with the resource proposed) that will allow Canada to determine whether it can rely, with confidence, on the Bidder's ability to provide the required services at the rates bid. If Canada determines that the information provided by the Bidder does not adequately substantiate the unreasonably low rates, the bid will be declared non-responsive.

(f) Formulae in Pricing Tables

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

4.4 Basis of Selection

Note to Bidders: *if a bidder is selected for award of more than one Workstream, Canada reserves the right to award one contract for all the Workstreams awarded to that bidder.*

(a) Evaluation of Bid – Multiple Contracts Awarded for Multiple Workstreams

Selection Process: The following selection process will be conducted **for each Workstream**:

- (i) A bid must comply with the requirements of the bid solicitation, meet all mandatory evaluation criteria and obtain the required pass marks for the point rated criteria identified in this bid solicitation to be declared responsive.
- (ii) The responsive bid that obtains the highest Total Bidder Score will be recommended for award of a contract. For any given Bidder, the greatest possible Total Technical Score is 60 while the greatest possible Total Financial Score is 40.
 - (A) Calculation of Total Technical Score: **For each Workstream** the Total Technical Score will be computed for each responsive bid by converting the Technical Score obtained for the point-rated technical criteria using the following formula, rounded to two decimal places:
$$\frac{\text{Technical Score}}{\text{Maximum Technical Points (Bidders, please refer to the maximum technical points for each Workstream at Attachment 4.1)}} \times 60 = \text{Total Technical Score}$$
 - (B) Calculation of Total Financial Score: **For each Workstream** the Total Financial Score will be computed for each responsive bid by converting the Financial Score obtained for the financial evaluation using the following formula rounded to two decimal places:
$$\frac{\text{Financial Score}}{\text{Total Maximum Points Assigned (Bidders, please refer to the total maximum points assigned for each Workstream)}} \times 40 = \text{Total Financial Score}$$
 - (C) Calculation of the Total Bidder Score: **For each Workstream** the Total Bidder Score will be computed for each responsive bid in accordance with the following formula:
$$\text{Total Technical Score} + \text{Total Financial Score} = \text{Total Bidder Score}$$
- (iii) In the event of identical Total Bidder Scores occurring within **a given Workstream**, then the bid with the highest Total Technical Score will become the top-ranked bidder.
- (iv) A maximum of eight contracts may be awarded in total as a result of this solicitation.

(b) Contract Funding Allocation: Where for a Workstream more than one contract is awarded, each contract issued for that particular Workstream will be issued with an amount of funding specified in the article titled "Limitation of Expenditure" calculated based on the following:

- (i) when one contract is awarded, the amount of the Limitation of Expenditure will be determined at Canada's discretion;
- (ii) where two contracts are awarded, the amount of the Limitation of Expenditure of each contract will be determined in accordance with the following:

-
- (A) the Bidder with the highest Total Bidder Score will receive 55% of the funding initially allocated to that Workstream; and,
 - (B) the Bidder with the next highest Total Bidder Score will receive 45% of the funding initially allocated for that Workstream.
 - (iii) where three contracts are awarded, the amount of the Limitation of Expenditure of each contract will be determined in accordance with the following:
 - (A) the Bidder with the highest Total Bidder Score will receive 45% of the funding initially allocated to that Workstream;
 - (B) the Bidder with the next highest Total Bidder Score will receive 30% of the funding initially allocated for that Workstream; and
 - (C) the Bidder with the next highest Total Bidder Score will receive 25% of the funding initially allocated for that Workstream.
 - (c) Bidders should note that all contract awards are subject to Canada's internal approvals process, which includes a requirement to approve funding in the amount of any proposed contract. Despite the fact that the Bidder may have been recommended for contract award, a contract will only be awarded if internal approval is granted according to Canada's internal policies. If approval is not granted, no contract will be awarded.

PART 5 – CERTIFICATIONS

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

The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Unless specified otherwise, Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.

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

5.1 Certifications Required with Bid

Bidders must submit the following duly completed certification(s) as part of their bid.

(a) Set-aside for Aboriginal Business

- (i) This procurement is set aside for Aboriginal business under the federal government Set-aside Program for Aboriginal Business. Bidders must complete and sign the certification entitled "Certification Requirements for the Set-aside Program for Aboriginal Business" attached as Attachment 5.2 Set-Aside for Aboriginal Business - Certification.
- (ii) By executing the certification, the Bidder warrants that it is an Aboriginal business as defined in the Set-aside Program for Aboriginal Business.
- (iii) SACC Manual clause A3001T (2014-11-27).

5.2 Certifications Precedent to Contract Award and Additional Information

The certifications and additional information listed below should be submitted with the bid, but may be submitted afterwards. If any of these required certifications or additional information is not completed and submitted as requested, the Contracting Authority will inform the Bidder of a time frame within which to provide the information. Failure to provide the certifications or the additional information listed below within the time frame provided will render the bid non-responsive.

(a) Federal Contractors Program for Employment Equity - Bid Certification

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "[FCP Limited Eligibility to Bid](https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html)" list available at the bottom of the page of the Employment and Social Development Canada (ESDC) - Labour's website. (<https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html>).

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

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

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

(b) Additional Certifications Precedent to Contract Award

(c) Professional Services Resources

- (i) By submitting a bid, the Bidder certifies that, if it is awarded a contract as a result of the bid solicitation, every individual proposed in its bid will be available to perform the Work as required by Canada's representatives and at the time specified in the bid solicitation or agreed to with Canada's representatives.
- (ii) By submitting a bid, the Bidder certifies that all the information provided in the résumés and supporting material submitted with its bid, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Bidder to be true and accurate. Furthermore, the Bidder warrants that every individual proposed by the Bidder for the requirement is capable of performing the Work described in the resulting contract.
- (iii) If a Bidder has proposed any individual who is not an employee of the Bidder, by submitting a bid, the Bidder certifies that it has the permission from that individual to propose his/her services in relation to the Work to be performed and to submit his/her résumé to Canada. The Bidder must, upon request from the Contracting Authority, provide a written confirmation, signed by the individual, of the permission given to the Bidder and of his/her availability. Failure to comply with the request may result in the bid being declared non-responsive.

(d) Certification of Language - English Essential

By submitting a bid, the Bidder certifies that, should it be awarded a contract as result of the bid solicitation, every individual proposed in its bid will be fluent in English. The individual(s) proposed must be able to communicate orally and in writing in English without any assistance and with minimal errors.

(e) Submission of Only One Bid

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

PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS

6.1 Security Requirement

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

6.2 Financial Capability

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

PART 7 - RESULTING CONTRACT CLAUSES

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

7.1 Requirement

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

7.2 Task Authorization

- (a) **As-and-when-requested Task Authorizations:** The Work or a portion of the Work to be performed under the Contract will be on an "as and when requested basis" using a Task Authorization (TA). The Work described in the TA must be in accordance with the scope of the Contract. The Contractor must not commence work until a validly issued TA has been issued by Canada and received by the Contractor. The Contractor acknowledges that any work performed before such issuance and receipt will be done at the Contractor's own risk.
- (b) **Allocation of Task Authorizations – Rotation based on remaining funding:** More than one contract has been awarded for this requirement. As a result, the Task Authorizations issued under this series of contracts will be allocated in accordance with the following:
 - (i) At the time this series of contracts was awarded, each contractor was allocated an amount of funding as specified in the Limitation of Expenditure in respect of Task Authorizations based on the evaluation process described in the bid solicitation that resulted in the award of this series of Contracts.
 - (ii) Canada will use a rotational method to allocate the draft Task Authorizations, where the rotation is based on the amount of funding remaining under each of the respective contracts.
 - (iii) Canada will send the first draft Task Authorization to the contractor with the greatest value of funding under its contract. If more than one contractor has the same value, it will be assigned to the contractor ranked first as determined under the evaluation process in the bid solicitation that resulted in the award of this series of contracts.
 - (iv) The contractor sent a draft TA will have the time set out further below under the sub-paragraph entitled "Contractor's Response to Draft Task Authorization" to respond to the Contracting Authority .

- (v) If the contractor to whom the draft TA is first sent either fails to respond on time or confirms in writing that it refuses to perform the task, the draft TA will then be forwarded to the contractor with the next-greatest balance remaining of allocated funding. In the event that Canada determines the proposed resource(s) does not meet the minimum experience or other requirements of the categories identified in the draft TA, Canada will send the draft TA to the contractor with the next-greatest balance remaining of allocation funding. In the event that Canada determines the proposed resource(s) does not meet the minimum experience or other requirements of the categories identified in the draft TA, Canada "will" or "may", at its entire discretion") request that the contractor propose another resource and the contractor will have the time set out in the subparagraph "Contractor's Response to Draft Task Authorization" to respond. If the contractor fails to respond on time or Canada determines that the proposed resource(s) does not meet the minimum experience or other requirements of the categories identified in the draft TA, the draft TA will be forwarded to the contractor with the next-greatest balance remaining of allocation funding.
- (vi) The process of sending out a draft TA to the contractor with the greatest balance remaining will continue until Canada either cancels the requirement for the task or it has been validly issued to one of the contractors. If none of the contractors can perform the task (in accordance with all the terms and conditions of this series of contracts), Canada may acquire the required Work by other means.
- (vii) Once the Task Authorization is issued, for the purposes of calculations for the allocation of Task Authorizations, the value of that Task Authorization (and the value of any subsequent amendment to that TA) will be subtracted from the funding allocated to that contractor.
- (viii) When the next requirement to perform a task is identified, it will be sent to the contractor with the greatest balance remaining of allocated funding. If more than one contractor has the greatest balance remaining of allocated funds (i.e., several contractors have equal amounts of allocated funding), the draft TA will be sent to the contractor among them that ranked highest under the bid solicitation evaluation process. If any contract in this series of contracts is amended to add funding for Task Authorizations, all the remaining contracts (i.e., all contracts that have not previously been terminated) will be amended to add funding in amounts proportionate to the funding initially provided under each contract for Task Authorizations (e.g., if three contracts were awarded with \$2M, \$1M and \$750,000 in funding for Task Authorizations respectively, and \$200,000 is added to the first contract, then \$100,000 will be added to the second contract and \$75,000 will be added to the third).
- (c) **Assessment of Resources Proposed at TA Stage:** Processes for issuing, responding to and assessing Task Authorizations are further detailed in Appendices A, B, C and D of Annex A.
- (d) **Form and Content of draft Task Authorization:**
 - (i) The Technical Authority will provide the Contractor with a description of the task in a draft Task Authorization (TA) using the form specified in Appendix B to Annex A.
 - (ii) The draft TA will contain the details of the activities to be performed, and must also contain the following information:
 - (A) the task number;
 - (B) The date by which the Contractor's response must be received (which will appear in the draft Task Authorization, but not the issued Task Authorization);
 - (C) the categories of resources and the number required;
 - (D) a description of the work for the task outlining the activities to be performed and identifying any deliverables (such as reports);
 - (E) the start and completion dates;
 - (F) any option(s) to extend initial end date (if applicable);

- (G) milestone dates for deliverables and payments (if applicable);
 - (H) the number of person-days of effort required;
 - (I) whether the work requires on-site activities and the location;
 - (J) the language profile of the resources required;
 - (K) the level of security clearance required of resources;
 - (L) the price payable to the Contractor for performing the task, with an indication of whether it is a firm price or a maximum TA price (and, for maximum price task authorizations, the TA must indicate how the final amount payable will be determined; where the TA does not indicate how the final amount payable will be determined, the amount payable is the amount, up to the maximum, that the Contractor demonstrates was actually worked on the project, by submitting time sheets filled in at the time of the work by the individual resources to support the charges); and
 - (M) any other constraints that might affect the completion of the task.
- (e) **Contractor's Response to Draft Task Authorization:** The Contractor must provide to the Technical Authority, within three working days of receiving the draft Task Authorization (or within any longer time period specified in the draft TA), the proposed total price for performing the task and a breakdown of that cost, established in accordance with the Basis of Payment specified in the Contract. The Contractor's quotation must be based on the rates set out in the Contract. The Contractor will not be paid for preparing or providing its response or for providing other information required to prepare and validly issue the TA.
- (f) **Task Authorization Limit and Authorities for Validly Issuing Task Authorizations:**
 - (i) To be validly issued, a TA must include the following signatures:
 - (A) for any TA, inclusive of revisions, with a value less than or equal to \$200,000 (excluding Applicable Taxes), the TA must be signed by:
 - (1) the Technical Authority; and
 - (2) a representative from the Contractor; and
 - (B) for any TA, inclusive of revisions, with a value greater than this amount, a TA must include the following signatures:
 - (1) the Technical Authority; and
 - (2) a representative from the Contractor; and
 - (3) the Contracting Authority.

Any TA that does not bear the appropriate signatures is not validly issued by Canada. Any work performed by the Contractor without receiving a validly issued TA is done at the Contractor's own risk. If the Contractor receives a TA that is not appropriately signed, the Contractor must notify the Contracting Authority. By providing written notice to the Contractor, the Contracting Authority may suspend the Client's ability to issue TA's at any time, or reduce the dollar value threshold described in subarticle (A) above; any suspension or reduction notice is effective upon receipt.
- (g) **Periodic Usage Reports:**
 - (i) The Contractor must compile and maintain records on its provision of services to the federal government under Task Authorizations validly issued under the Contract. The Contractor must provide this data to Canada in accordance with the reporting requirements detailed below. If some data is not available, the reason must be indicated. If services are not provided during a given period, the Contractor must still provide a "NIL" report. The data must be submitted on

quarterly basis to the Contracting Authority. From time to time, the Contracting Authority may also require an interim report during a reporting period.

(ii) The quarterly periods are defined as follows:

- (A) 1st quarter: April 1 to June 30;
- (B) 2nd quarter: July 1 to September 30;
- (C) 3rd quarter: October 1 to December 31; and
- (D) 4th quarter: January 1 to March 31.

The data must be submitted to the Contracting Authority no later than 15 calendar days after the end of the reporting period.

(iii) Each report must contain the following information for each validly issued TA (as amended):

- (A) the Task Authorization number and the Task Authorization Revision number(s), if applicable;
- (B) a title or a brief description of each authorized task;
- (C) the name, Resource category and level and level of each resource involved in performing the TA, as applicable;
- (D) the total estimated cost specified in the validly issued TA of each task, exclusive of Applicable Taxes;
- (E) the total amount, exclusive of Applicable Taxes, expended to date against each authorized task;
- (F) the start and completion date for each authorized task; and
- (G) the active status of each authorized task, as applicable (e.g., indicate whether work is in progress or if Canada has cancelled or suspended the TA, etc.).

(iv) Each report must also contain the following cumulative information for all the validly issued TA's (as amended):

- (A) the amount, exclusive of Applicable Taxes, specified in the Contract (as last amended, as applicable) as Canada's total liability to the Contractor for all validly issued TA's; and
- (B) the total amount, exclusive of Applicable Taxes, expended to date against all validly issued TA's.

(h) **Refusal of Task Authorizations or Submission of a Response which is not valid:** The Contractor is not required to submit a response to every draft TA sent to it by Canada. However, in addition to Canada's other rights to terminate the Contract, Canada may immediately, and without further notice, terminate the Contract for default in accordance with the General Conditions if the Contractor in at least three instances has either not responded or has not submitted a valid response when sent a draft TA. For greater clarity, each draft TA, which is identifiable by its task number, will only count as one instance. A valid response is one that is submitted within the required time period and meets all requirements of the draft TA issued, including proposing the required number of resources who each meet the minimum experience and other requirements of the categories identified in the draft TA at pricing not exceeding the rates set out in Annex B. Each time the Contractor does not submit a valid response, the Contractor agrees Canada may at its option decrease the Minimum Contract Value in the clause titled "Minimum Work Guarantee" by 1%. This decrease will be evidenced for administrative purposes only through a contract amendment issued by the Contracting Authority (which does not require the agreement of the Contractor). In the case where the Minimum Contract Value was reduced to 0% and the Contractor does not submit a valid response yet again, the Contractor agrees Canada may at its option terminate the Contract for default. This termination will be evidenced through a 'Stop Work Order' followed by a

contract termination notice issued by the Contracting Authority (which does not require the agreement of the Contractor).

- (i) **Consolidation of TA's for Administrative Purposes:** The Contract may be amended from time to time to reflect all validly issued Task Authorizations to date, to document the Work performed under those TA's for administrative purposes.

7.3 Minimum Work Guarantee

- (a) In this clause,
- (i) **"Maximum Contract Value"** means the amount specified in the **"Limitation of Expenditure"** clause set out in the Contract ; and
- (ii) **"Minimum Contract Value"** means \$20,000.00 (excluding Applicable Taxes).
- (b) Canada's obligation under the Contract is to request Work in the amount of the Minimum Contract Value or, at Canada's option, to pay the Contractor at the end of the Contract in accordance with sub article (c), subject to sub article (d). In consideration of such obligation, the Contractor agrees to stand in readiness throughout the Contract Period to perform the Work described in the Contract. Canada's maximum liability for work performed under the Contract must not exceed the Maximum Contract Value, unless an increase is authorized in writing by the Contracting Authority.
- (c) In the event that Canada does not request work in the amount of the Minimum Contract Value during the Contract Period, Canada must pay the Contractor the difference between the Minimum Contract Value and the total cost of the Work requested.
- (d) Canada will have no obligation to the Contractor under this article if Canada terminates the entire Contract
- (i) for default;
- (ii) for convenience as a result of any decision or recommendation of a tribunal or court that the contract be cancelled, re-tendered or awarded to another supplier or as a result of an evaluation error; or
- (iii) for convenience within ten business days of Contract award.

7.4 Standard Clauses and Conditions

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

- (a) **General Conditions:**
- (i) 2035 (2018-06-21), General Conditions - Higher Complexity - Services, apply to and form part of the Contract.

With respect to Section 30 - Termination for Convenience, of General Conditions 2035, Subsection 04 is deleted and replaced with the following Subsections 04, 05 and 06:

4. The total of the amounts, to which the Contractor is entitled to be paid under this section, together with any amounts paid, due or becoming due to the Contractor must not exceed the Contract Price.
5. Where the Contracting Authority terminates the entire Contract and the Articles of Agreement include a Minimum Work Guarantee, the total amount to be paid to the Contractor under the Contract will not exceed the greater of:
- (a) the total amount the Contractor may be paid under this section, together with any amounts paid, becoming due other than payable under the Minimum Work Guarantee, or due to the Contractor as of the date of termination, or

- (b) the amount payable under the Minimum Work Guarantee, less any amounts paid, due or otherwise becoming due to the Contractor as of the date of termination.

- 6. The Contractor will have no claim for damages, compensation, loss of profit, allowance arising out of any termination notice given by Canada under this section except to the extent that this section expressly provides. The Contractor agrees to repay immediately to Canada the portion of any advance payment that is unliquidated at the date of the termination.

(b) **Supplemental General Conditions:**

The following Supplemental General Conditions will apply to Contracts for Stream C – Web Application Development and Support Services:

- (i) 4006 (2010-08-16), Supplemental General Conditions - Contractor to Own Intellectual Property Rights in Foreground Information;

apply to and form part of the Contract.

7.5 Security Requirement

The following security requirement (SRCL #6 and related clauses provided by the Contract Security Program) as set out under Annex "B" to the Supply Arrangement, applies to and forms part of the Contract.

- (a) The Contractor must, at all times during the performance of the Contract, hold a valid Designated Organization Screening (DOS), issued by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC).
- (b) The Contractor personnel requiring access to PROTECTED information, assets or sensitive work site(s) must EACH hold a valid **RELIABILITY STATUS**, granted or approved by CISD/PWGSC.
- (c) The Contractor MUST NOT remove any PROTECTED information or assets from the identified work site(s), and the Contractor must ensure that its personnel are made aware of and comply with this restriction.
- (d) Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of CISD/PWGSC.
- (e) The Contractor must comply with the provisions of the:
 - a. Security Requirements Check List and security guide (if applicable), attached at Annex C;
 - b. *Industrial Security Manual* (Latest Edition)

7.6 Contract Period

- (a) **Contract Period:** The "**Contract Period**" is the entire period of time during which the Contractor is obliged to perform the Work, which includes:
 - (i) The "**Initial Contract Period**", which begins on the date the Contract is awarded and ends three years later; and,
 - (ii) The period during which the Contract is extended, if Canada chooses to exercise any options set out in the Contract.
- (b) **Option to Extend the Contract:**
 - (i) The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to two additional one-year periods under the same terms and conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions set out in the Basis of Payment.

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

7.7 Authorities

(a) Contracting Authority

The Contracting Authority for the Contract is:

Name: Anoule Pierre
Title: Supply Specialist
Public Works and Government Services Canada
Acquisitions Branch
Directorate: Professional Services Procurement Directorate
Address: 10, rue Wellington, Gatineau, Quebec
E-mail: Anoule.pierre@tpsgc-pwgsc.gc.ca

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

(b) Technical Authority

The Technical Authority for the Contract is:

Name: _____
Title: _____
Organization: _____
Address: _____
Telephone: _____
E-mail address: _____

The Technical 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 Technical Authority; however, the Technical Authority has no authority to authorize changes to the scope of the Work. Changes to the scope of the Work can only be made through a contract amendment issued by the Contracting Authority.

(c) Contractor's Representative

Name: _____
Title: _____
Address: _____
Telephone: _____
E-mail address: _____

7.8 Proactive Disclosure of Contracts with Former Public Servants

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

7.9 Payment

(a) Basis of Payment

- (i) **Professional Services provided under a Task Authorization with a Maximum Price:** For professional services requested by Canada, in accordance with a validly issued Task

Authorization, Canada will pay the Contractor, in arrears, up to the Maximum Price for the TA, for actual time worked and any resulting deliverables in accordance with the firm all-inclusive per diem rates set out in Annex B, Basis of Payment, Applicable Taxes extra. Partial days will be prorated based on actual hours worked based on a 7.5-hour workday.

- (ii) **Travel and Living Expenses – National Joint Council Travel Directive:** The Contractor will be reimbursed its authorized travel and living expenses reasonably and properly incurred in the performance of the Work, at cost, without any allowance for profit and/or administrative overhead, in accordance with the meal, and private vehicle expenses provided in Appendices B, C and D of the [National Joint Council Travel Directive](#) and with the other provisions of the directive referring to “travellers”, rather than those referring to “employees”. All travel must have the prior authorization of the Technical Authority. Travel requests will only be considered for a work location which is located more than 100 kilometers National Capital Region. The Contractor will be paid for actual time spent travelling at half the hourly rate. The hourly rate will be determined by dividing the firm per diem rate set out in Annex B by 7.5 hours. All payments are subject to government audit.
- (iii) **Competitive Award:** The Contractor acknowledges that the Contract has been awarded as a result of a competitive process. No additional charges will be allowed to compensate for errors, oversights, misconceptions or underestimates made by the Contractor when bidding for the Contract.
- (iv) **Contractor's Firm Per Diem Rates:** The Contractor agrees that the rates set out in Annex B remain firm throughout the Contract Period, except as may be provided for in the express terms of the contract. In reference to Article 18(1) of SACC General Conditions 2035, the Contractor acknowledges that its obligation to provide services in accordance with the firm rates set out in Annex B is unaffected by the application of any existing law or any new law which may come into effect during the Contract Period.
- (v) **Professional Services Rates:** In Canada's experience, bidders from time to time propose rates at the time of bidding for one or more Resource Categories that they later refuse to honour, on the basis that these rates do not allow them to recover their own costs and/or make a profit. This denies Canada of the benefit of the awarded contract. If the Contractor does not respond or refuses to provide an individual with the qualifications described in the Contract within the time described in the Contract (or proposes instead to provide someone from an alternate category at a different rate), whether or not Canada terminates the Contract as a whole or in part or chooses to exercise any of the rights provided to it under the general conditions, Canada may impose sanctions or take other measures in accordance with the PWGSC Vendor Performance Corrective Measure Policy (or equivalent) then in effect, which measures may include an assessment that results in conditions applied against the Contractor to be fulfilled before doing further business with Canada, or full debarment of the Contractor from bidding on future requirements

(b) **Limitation of Expenditure – Cumulative Total of all Task Authorizations**

- (i) Canada's total liability to the Contractor under the Contract for all validly issued Task Authorizations (TAs), inclusive of any revisions, must not exceed the amount set out on page 1 of the Contract, less any Applicable taxes. With respect to the amount set out on page 1 of the Contract, Customs duties are included and Applicable Taxes are included.
- (ii) No increase in the total liability of Canada will be authorized or paid to the Contractor unless an increase has been approved, in writing, by the Contracting Authority.
- (iii) The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:
 - (A) when it is 75 percent committed, or
 - (B) 4 months before the contract expiry date, or

- (C) As soon as the Contractor considers that the sum is inadequate for the completion of the Work required in all authorized TAs, inclusive of any revisions, whichever comes first.
- (iv) If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority a written estimate for the additional funds required. Providing this information does not increase Canada's liability...
- (c) **Method of Payment for Task Authorizations with a Maximum Price:** For each Task Authorization validly issued under the Contract that contains a maximum price:
- (i) Canada will pay the Contractor no more frequently than once a month in accordance with the Basis of Payment. The Contractor must submit time sheets for each resource showing the days and hours worked to support the charges claimed in the invoice.
- (ii) Once Canada has paid the maximum TA price, Canada will not be required to make any further payment, but the Contractor must complete all the work described in the TA, all of which is required to be performed for the maximum TA price. If the work described in the TA is completed in less time than anticipated, and the actual time worked (as supported by the time sheets) at the rates set out in the Contract is less than the maximum TA price, Canada is only required to pay for the time spent performing the work related to that TA.
- (d) **Time Verification**
- Time charged and the accuracy of the Contractor's time recording system are subject to verification by Canada, before or after payment is made to the Contractor. If verification is done after payment, the Contractor must repay any overpayment, at Canada's request.
- (e) **Payment Credits**
- (i) **Failure to Provide Resource:**
- (A) If the Contractor does not provide a required professional services resource that has all the required qualifications within the time prescribed by the Contract, the Contractor must credit to Canada an amount equal to the per diem rate (based on a 7.5-hour workday) of the required resource for each day (or partial day) of delay in providing the resource, up to a maximum of 10 days.
- (B) **Corrective Measures:** If credits are payable under this Article for two consecutive months or for three months in any 12-month period, the Contractor must submit a written action plan describing measures it will implement or actions it will undertake to eliminate the recurrence of the problem. The Contractor will have five working days to deliver the action plan to the Client and the Contracting Authority and 20 working days to rectify the underlying problem.
- (C) **Termination for Failure to Meet Availability Level:** In addition to any other rights it has under the Contract, Canada may terminate the Contract for default in accordance with the General Conditions by giving the Contractor three months' written notice of its intent, if any of the following apply:
- (1) the total amount of credits for a given monthly billing cycle reach a level of 10% of the total billing for that month; or
- (2) the corrective measures required of the Contractor described above are not met.
- This termination will be effective when the three month notice period expires, unless Canada determines that the Contractor has implemented the corrective measures to Canada's satisfaction during those three months.
- (ii) **Credits Apply during Entire Contract Period:** The Parties agree that the credits apply throughout the Contract Period.

- (iii) **Credits represent Liquidated Damages:** The Parties agree that the credits are liquidated damages and represent their best pre-estimate of the loss to Canada in the event of the applicable failure. No credit is intended to be, nor will it be construed as, a penalty.
- (iv) **Canada's Right to Obtain Payment:** The Parties agree that these credits are a liquidated debt. To collect the credits, Canada has the right to hold back, draw back, deduct or set off from and against any money Canada owes to the Contractor from time to time.
- (v) **Canada's Rights & Remedies not Limited:** The Parties agree that nothing in this Article limits any other rights or remedies to which Canada is entitled under the Contract (including the right to terminate the Contract for default) or under the law generally.
- (vi) **Audit Rights:** The Contractor's calculation of credits under the Contract is subject to verification by government audit, at the Contracting Authority's discretion, before or after payment is made to the Contractor. The Contractor must cooperate fully with Canada during the conduct of any audit by providing Canada with access to any records and systems that Canada considers necessary to ensure that all credits have been accurately credited to Canada in the Contractor's invoices. If an audit demonstrates that past invoices contained errors in the calculation of the credits, the Contractor must pay to Canada the amount the audit reveals was required to be credited to Canada, plus interest, from the date Canada remitted the excess payment until the date of the refund (the interest rate is the Bank of Canada's discount annual rate of interest in effect on the date the credit was first owed to Canada, plus 1.25% per year). If, as a result of conducting an audit, Canada determines that the Contractor's records or systems for identifying, calculating or recording the credits are inadequate, the Contractor must implement any additional measures required by the Contracting Authority.
- (f) **No Responsibility to Pay for Work not performed due to Closure of Government Offices**
 - (i) Where the Contractor, its employees, subcontractors, or agents are providing services on government premises under the Contract and those premises are inaccessible because of the evacuation or closure of government offices, and as a result no work is performed, Canada is not responsible for paying the Contractor for work that otherwise would have been performed if there had been no evacuation or closure.
 - (ii) If, as a result of any strike or lock-out, the Contractor or its employees, subcontractors or agents cannot obtain access to government premises and, as a result, no work is performed, Canada is not responsible for paying the Contractor for work that otherwise would have been performed if the Contractor had been able to gain access to the premises

7.10 Invoicing Instructions

- (a) The Contractor must submit invoices in accordance with the information required in the General Conditions.
- (b) The Contractor's invoice must include a separate line item for each subparagraph in the Basis of Payment provision, and must show all applicable Task Authorization numbers.
- (c) By submitting invoices, the Contractor is certifying that the goods and services have been delivered and that all charges are in accordance with the Basis of Payment provision of the Contract, including any charges for work performed by subcontractors.
- (d) The Contractor must provide the original and two copies of each invoice to the Technical Authority, and a copy to the Contracting Authority.

7.11 Certifications and Additional Information

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

(b) **SACC Manual Clauses**

SACC clause A3000C (2014/11/27), Aboriginal Business Certification.

7.12 Federal Contractors Program for Employment Equity - Default by Contractor

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

7.13 Applicable Laws

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

7.14 Priority of Documents

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

- (a) these Articles of Agreement, including any individual SACC clauses incorporated by reference in these Articles of Agreement;
- (b) 4006 (2010-08-16), Supplemental General Conditions - Contractor to Own Intellectual Property Rights in Foreground Information;
- (c) General Conditions 2035 (2018-06-21);
- (d) Annex A, Statement of Work, including its Appendices as follows:
 - (i) Appendix A to Annex A - Tasking Assessment Procedure;
 - (ii) Appendix B to Annex A - Task Authorization (TA) Form;
 - (iii) Appendix C to Annex A - Resource Assessment Criteria and Response Table;
 - (iv) Appendix D to Annex A - Certifications at the TA stage;
- (e) Annex B, Basis of Payment;
- (f) Annex C, Security Requirements Check List;
- (g) the validly issued Task Authorizations and any required certifications (including all of their annexes, if any); and
- (h) the Contractor's bid dated _____, as clarified on "or" as amended on _____.

7.15 Foreign Nationals (Canadian Contractor)

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

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

7.16 Foreign Nationals (Foreign Contractor)

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

7.17 Insurance Requirements

- (a) **Compliance with Insurance Requirements**

- (i) The Contractor must comply with the insurance requirements specified in this Article. The Contractor must maintain the required insurance coverage for the duration of the Contract. Compliance with the insurance requirements does not release the Contractor from or reduce its liability under the Contract.
 - (ii) The Contractor is responsible for deciding if additional insurance coverage is necessary to fulfill its obligation under the Contract and to ensure compliance with any applicable law. Any additional insurance coverage is at the Contractor's expense, and for its own benefit and protection.
 - (iii) The Contractor should forward to the Contracting Authority within ten days after the date of award of the Contract a Certificate of Insurance evidencing the insurance coverage. Coverage must be placed with an Insurer licensed to carry out business in Canada and the Certificate of Insurance must confirm that the insurance policy complying with the requirements is in force. If the Certificate of Insurance has not been completed and submitted as requested, the Contracting Authority will so inform the Contractor and provide the Contractor with a time frame within which to meet the requirement. Failure to comply with the request of the Contracting Authority and meet the requirement within the time period will constitute a default under the General Conditions. The Contractor must, if requested by the Contracting Authority, forward to Canada a certified true copy of all applicable insurance policies.
- (b) Commercial General Liability Insurance**
- (i) The Contractor must obtain Commercial General Liability Insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature, but for not less than \$2,000,000 per accident or occurrence and in the annual aggregate.
 - (ii) The Commercial General Liability policy must include the following:
 - (A) Additional Insured: Canada is added as an additional insured, but only with respect to liability arising out of the Contractor's performance of the Contract. The interest of Canada should read as follows: Canada, as represented by Public Works and Government Services Canada.



- (B) Bodily Injury and Property Damage to third parties arising out of the operations of the Contractor.
- (C) Products and Completed Operations: Coverage for bodily injury or property damage arising out of goods or products manufactured, sold, handled, or distributed by the Contractor and/or arising out of operations that have been completed by the Contractor.
- (D) Personal Injury: While not limited to, the coverage must include Violation of Privacy, Libel and Slander, False Arrest, Detention or Imprisonment and Defamation of Character.
- (E) Cross Liability/Separation of Insureds: Without increasing the limit of liability, the policy must protect all insured parties to the full extent of coverage provided. Further, the policy must apply to each Insured in the same manner and to the same extent as if a separate policy had been issued to each.
- (F) Blanket Contractual Liability: The policy must, on a blanket basis or by specific reference to the Contract, extend to assumed liabilities with respect to contractual provisions.
- (G) Employees and, if applicable, Volunteers must be included as Additional Insured.
- (H) Employers' Liability (or confirmation that all employees are covered by Worker's compensation (WSIB) or similar program)
- (I) Broad Form Property Damage including Completed Operations: Expands the Property Damage coverage to include certain losses that would otherwise be excluded by the standard care, custody or control exclusion found in a standard policy.
- (J) Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of policy cancellation.
- (K) If the policy is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.
- (L) Owners' or Contractors' Protective Liability: Covers the damages that the Contractor becomes legally obligated to pay arising out of the operations of a subcontractor.
- (M) Advertising Injury: While not limited to, the endorsement must include coverage for piracy or misappropriation of ideas, or infringement of copyright, trademark, title or slogan.

(c) Errors and Omissions Liability Insurance

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

Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of cancellation

7.18 Limitation of Liability - Information Management/Information Technology

- (a) This section applies despite any other provision of the Contract and replaces the section of the general conditions entitled "Liability". Any reference in this section to damages caused by the Contractor also includes damages caused by its employees, as well as its subcontractors, agents, and representatives, and any of their



employees. This section applies regardless of whether the claim is based in contract, tort, or another cause of action. The Contractor is not liable to Canada with respect to the performance of or failure to perform the Contract, except as described in this section and in any section of the Contract pre-establishing any liquidated damages. The Contractor is only liable for indirect, special or consequential damages to the extent described in this Article, even if it has been made aware of the potential for those damages.

(b) First Party Liability:

- (i) The Contractor is fully liable for all damages to Canada, including indirect, special or consequential damages, caused by the Contractor's performance or failure to perform the Contract that relate to:
 - (A) any infringement of intellectual property rights to the extent the Contractor breaches the section of the General Conditions entitled "Intellectual Property Infringement and Royalties";
 - (B) physical injury, including death.
- (ii) The Contractor is liable for all direct damages caused by the Contractor's performance or failure to perform the Contract affecting real or tangible personal property owned, possessed, or occupied by Canada.
- (iii) Each of the Parties is liable for all direct damages resulting from any breach of confidentiality under the Contract. Each of the Parties is also liable for all indirect, special or consequential damages in respect of any unauthorized disclosure of the other Party's trade secrets (or trade secrets of a third party provided by one Party to another under the Contract) relating to information technology.
- (iv) The Contractor is liable for all direct damages relating to any encumbrance or claim relating to any portion of the Work for which Canada has made any payment. This does not apply to encumbrances or claims relating to intellectual property rights, which are addressed under (i)(A) above.
- (v) The Contractor is also liable for any other direct damages to Canada caused by the Contractor's performance or failure to perform the Contract that relate to:
 - (A) any breach of the warranty obligations under the Contract, up to the total amount paid by Canada (including any applicable taxes) for the goods and services affected by the breach of warranty; and
 - (B) Any other direct damages, including all identifiable direct costs to Canada associated with re-procuring the Work from another party if the Contract is terminated either in whole or in part for default, up to an aggregate maximum for this subparagraph (B) of the greater of .75 times the total estimated cost (meaning the dollar amount shown on the first page of the Contract in the cell titled "Total Estimated Cost" or shown on each call-up, purchase order or other document used to order goods or services under this instrument), or \$1,000,000.00.

In any case, the total liability of the Contractor under subparagraph (v) will not exceed the total estimated cost (as defined above) for the Contract or \$1,000,000.00, whichever is more.
- (vi) If Canada's records or data are harmed as a result of the Contractor's negligence or willful act, the Contractor's only liability is, at the Contractor's own expense, to restore Canada's records and data using the most recent back-up kept by Canada. Canada is responsible for maintaining an adequate back-up of its records and data.

(c) Third Party Claims:

- (i) Regardless of whether a third party makes its claim against Canada or the Contractor, each Party agrees that it is liable for any damages that it causes to any third party in connection with the Contract as set out in a settlement agreement or as finally determined by a court of competent jurisdiction, where the court determines that the Parties are jointly and severally liable or that one Party is solely and directly liable to the third party. The amount of the liability will be the amount set out in the settlement agreement or determined by the court to have been the Party's portion of the damages to the third party.



No settlement agreement is binding on a Party unless its authorized representative has approved the agreement in writing.

- (ii) If Canada is required, as a result of joint and several liability or joint and solidarily liable, to pay a third party in respect of damages caused by the Contractor, the Contractor must reimburse Canada by the amount finally determined by a court of competent jurisdiction to be the Contractor's portion of the damages to the third party. However, despite Sub-article (i), with respect to special, indirect, and consequential damages of third parties covered by this Section, the Contractor is only liable for reimbursing Canada for the Contractor's portion of those damages that Canada is required by a court to pay to a third party as a result of joint and several liability that relate to the infringement of a third party's intellectual property rights; physical injury of a third party, including death; damages affecting a third party's real or tangible personal property; liens or encumbrances on any portion of the Work; or breach of confidentiality.
- (iii) The Parties are only liable to one another for damages to third parties to the extent described in this Sub-article (c).

7.19 Joint Venture Contractor

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

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

7.20 Professional Services - General

- (a) The Contractor must provide professional services on request as specified in this Contract. All resources provided by the Contractor must meet the qualifications described in the Contract (including those relating to previous experience, professional designation, education, language proficiency and security clearance) and must be competent to provide the required services by any delivery dates described in the Contract.
- (b) If the Contractor fails to deliver any deliverable (excluding delivery of a specific individual) or complete any task described in the Contract on time, in addition to any other rights or remedies available to Canada under the Contract or the law, Canada may notify the Contractor of the deficiency, in which case the Contractor must submit a written plan to the Technical Authority within ten working days detailing the actions that the Contractor



will undertake to remedy the deficiency. The Contractor must prepare and implement the plan at its own expense.

- (c) In General Conditions 2035, the Article titled "Replacement of Specific Individuals" is deleted and the following applies instead:

Replacement of Specific Individuals

- (i) If the Contractor is unable to provide the services of any specific individual identified in the Contract to perform the services, the Contractor must within five working days of the individual's departure or failure to commence Work (or, if Canada has requested the replacement, within ten working days of Canada's notice of the requirement for a replacement) provide to the Contracting Authority:
- (A) the name, qualifications and experience of a proposed replacement immediately available for Work; and
 - (B) security information on the proposed replacement as specified by Canada, if applicable.

The replacement must have qualifications and experience that meet or exceed those obtained for the original resource.

- (ii) Subject to an Excusable Delay, where Canada becomes aware that a specific individual identified under the Contract to provide services has not been provided or is not performing, the Contracting Authority may elect to:
- (A) exercise Canada's rights or remedies under the Contract or at law, including terminating the Contract in whole or in part for default under the Article titled "Default of the Contractor", or
 - (B) assess the information provided under (c) (i) above or, if it has not yet been provided, require the Contractor propose a replacement to be rated by the Technical Authority. The replacement must have qualifications and experience that meet or exceed those obtained for the original resource and be acceptable to Canada. Upon assessment of the replacement, Canada may accept the replacement, exercise the rights in (ii) (A) above, or require another replacement in accordance with this subarticle (c).

Where an Excusable Delay applies, Canada may require (c) (ii) (B) above instead of terminating under the "Excusable Delay" Article. An Excusable Delay does not include resource unavailability due to allocation of the resource to another Contract or project (including those for the Crown) being performed by the Contractor or any of its affiliates.

- (iii) The Contractor must not, in any event, allow performance of the Work by unauthorized replacement persons. The Contracting Authority may order that an original or replacement resource stop performing the Work. In such a case, the Contractor must immediately comply with the order. The fact that the Contracting Authority does not order a resource to stop performing the Work does not relieve the Contractor from its responsibility to meet the requirements of the Contract.
- (iv) The obligations in this article apply despite any changes that Canada may have made to the Client's operating environment.

7.21 Safeguarding Electronic Media

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



7.22 Representations and Warranties

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

7.23 Access to Canada's Property and Facilities

Canada's property, facilities, equipment, documentation, and personnel are not automatically available to the Contractor. If the Contractor would like access to any of these, it is responsible for making a request to the Technical Authority. Unless expressly stated in the Contract, Canada has no obligation to provide any of these to the Contractor. If Canada chooses, in its discretion, to make its property, facilities, equipment, documentation or personnel available to the Contractor to perform the Work, Canada may require an adjustment to the Basis of Payment and additional security requirements may apply.

7.24 Transition Period

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

7.25 Identification Protocol Responsibilities

The Contractor will be responsible for ensuring that each of its agents, representatives or subcontractors (hereinafter referred to as Contractor Representatives) complies with the following self-identification requirements:

- (a) Contractor Representatives who attend a Government of Canada meeting (whether internal or external to Canada's offices) must identify themselves as Contractor Representatives prior to the commencement of the meeting, to ensure that each meeting participant is aware of the fact that the individual is not an employee of the Government of Canada;
- (b) During the performance of any Work at a Government of Canada site, each Contractor Representative must be clearly identified at all times as being a Contractor Representative; and
- (c) If a Contractor Representative requires the use of the Government of Canada's e-mail system in the performance of the Work, then the individual must clearly identify him or herself as an agent or subcontractor of the Contractor in all electronic mail in the signature block as well as under "Properties." This identification protocol must also be used in all other correspondence, communication, and documentation.
- (d) If Canada determines that the Contractor is in breach of any obligation stated in this Article, upon written notice from Canada the Contractor must submit a written action plan describing corrective measures it will implement to eliminate the recurrence of the problem. The Contractor will have five working days to deliver the action plan to the Client and the Contracting Authority, and twenty working days to rectify the underlying problem.
- (e) In addition to any other rights it has under the Contract, Canada may terminate the Contract for default if the corrective measures required of the Contractor described above are not met.



ANNEX A

STATEMENT OF WORK

1. TITLE

Task Based Informatics Professional Services (TBIPS) for Oracle Database Administration and Support, Project Management, Business Analysis and other Web Application Development and Support Services.

2. BACKGROUND

The Department of Indian Affairs and Northern Development (DIAND) has the primary, but not exclusive, responsibility for meeting the federal government's constitutional, treaty, political, and legal responsibilities to First Nations, Inuit, and Northerners. Under this mandate, DIAND is responsible for the planning, design, implementation, and assessment of policies and the delivery of a variety of programs and services to First Nations, Inuit, and Northern peoples and communities. DIAND has developed many systems to support programs and service delivery. In addition to the collection and analysis of data related to these programs and services, data has been used to provide reports to meet a multitude of internal and external purposes.

In August 2017 Crown-Indigenous Relations and Northern Affairs and Indigenous Services Canada were created. Delivery of government programs is the responsibility of Indigenous Services Canada. Treaties, claims and negotiations reside with Crown-Indigenous Relations and Northern Affairs.

3. OBJECTIVE

In support of the Application Development, Data and Database Administration (ADDDA) directorate of the Department of Indian Affairs and Northern Development Canada (DIAND), professional technical services are required to maintain, support and develop the corporate web application services, manage projects and perform business analysis and to provide corporate Oracle database support services.

With ADDDA potentially providing professional technical services to two departments with separate mandates, the objective of this requirement is to meet evolving requirements of Crown-Indigenous Relations and Northern Affairs and the Indigenous Services Canada.

4. SCOPE OF THE WORK

In the provision of service to Department of Indian Affairs and Northern Development Canada (DIAND), the Contractor must provide technical professional services related to the support and maintenance of Web Application Development, Oracle database support and for Project Management and Business Analysis services.

In supplying resources, the Contractor may be required to supply:

- a single resource to work independently;
- a single resource to lead or be part of a team;
- a group of resources to act as a team;
- a group of resources to supplement a team; and/or,
- multiple resources to act in any combination of the above.

5. REQUIREMENT

5.1 TASKS



5.1.1 General:

The Contractor must:

- i. Be available for work within seven calendar days following receipt of acceptance of the Contract;
- ii. Be available for the completion of the entire tasking;
- iii. Provide quality assurance monitoring on all deliverables;
- iv. Work in conjunction and close contact with DIAND IM/IT personnel, including other project management, functional and technical resources, and any other stakeholders, as identified by the DIAND Project Authority;
- v. Confirm with the DIAND Project Authority, in writing, the receipt and successful completion of all deliverables in the Contract as they are completed; and,
- vi. Liaise with the DIAND Project Authority for meetings, project reviews and other related project management activities when required.

5.1.2 STREAM A – ORACLE DATABASE ADMINISTRATION AND SUPPORT

The following tasks describe the work required for each Resource Category in the IM/IT Services Stream. Specific tasks will be detailed in each individual TA.

A) Database Administrators – Level 2

The Database Administrators – Level 2 tasks include, but not limited to, the following:

- i. Deliver database administration services to a diverse client base;
- ii. Install, upgrade, design, develop and maintain Oracle relational database management systems;
- iii. Configure and implement Oracle relational databases in support of Custom Off The Shelf software implementations;
- iv. Develop and implement procedures that will ensure the accuracy, completeness, and timeliness of data stored in the database;
- v. Develop and implement security procedures for the database, including access and user account management;
- vi. Advise programmers, analysts and users about the efficient use of data;
- vii. Perform and/or coordinate updates to the database design;
- viii. Control and coordinate changes to the database, including the deletion of records, changes to the existing records, additions to the database;
- ix. Maintain configuration control of the database;
- x. Develop and coordinating backup and disaster recovery procedures;
- xi. Mediate and resolve conflicts among users' needs for data; customizing database conversion routines;
- xii. Define data conversion strategy, define database conversion specifications, and finalizing Conversion Strategy;
- xiii. Use Oracle 11g and/or Oracle 12c database software; and,
- xiv. Use Microsoft SQL Server version 2008 and up if required.

B) Database Administrators – Level 3

The Database Administrators – Level 3 tasks include, but is not limited to, the Database Administrator Level 2 tasks and the following:

- i. Lead, assign work packages to and mentor database resources (level 1, level 2, or both); and,
- ii. Perform large scale Oracle database software upgrades.

C) Database Modelers – Level 2

The Database Modelers – Level 2 tasks include, but not limited to, the following:

- i. Design, develop and maintain Logical Data Models;
- ii. Analyze proposed changes to databases from the context of the Logical Data Model; and,
- iii. Provide assistance to project team and business users relating to data issues and data analysis concepts.



D) Database Modelers – Level 3

The Database Modelers – Level 3 tasks include, but is not limited to, the Database Modeler Level 2 tasks and the following:

- i. Lead, assign work packages to and mentor level 2 Database Modeler resources.

E) Database Analysts/IM Administrators - Level 1

The Database Analysts/IM Administrators - Level 1 tasks include, but are not limited to, the following:

- i. Define new database structures; data conversion strategy and/or database conversion specifications;
- ii. Customize database conversion routines;
- iii. Finalize the Conversion Strategy;
- iv. Generate new databases;
- v. Work closely with the users in order to maintain and safeguard the database;
- vi. Maintain data dictionaries;
- vii. Develop and implementing procedures that will ensure the accuracy, completeness, and timeliness of data stored in the database;
- viii. Develop and implementing security procedures for the database, including access and user account management;
- ix. Advise programmers, analysts, and users about the efficient use of data;
- x. Maintain configuration control of the database;
- xi. Perform and/or coordinate updates to the database design;
- xii. Control and coordinate changes to the database, including the deletion of records, changes to the existing records, and additions to the database;
- xiii. Develop and coordinate back up, disaster recovery and virus protection procedures;
- xiv. Use Oracle 11g and/or Oracle 12c database software; and,
- xv. Use Microsoft SQL Server version 2008 and up if required

F) Database Analysts/IM Administrators - Level 2

The Database Analysts/IM Administrators - Level 2 tasks include, but are not limited to, the Database Analysts/IM Administrators Level 1 tasks and the following:

- i. Identify requirements for improvements to existing databases by determining users' information requirements, system performance and functional requirements.

G) Database Analysts/IM Administrators - Level 3

The Database Analysts/IM Administrators - Level 3 tasks include, but are not limited to, the Database Analysts/IM Administrators level 2 tasks and the following:

- i. Lead, assign work packages to and mentor level 1 Database Analyst/IM Administrators each responsible for an element of the project and its associated project team.
- ii. Provide expert advice to project managers and project leaders on database analysis and administration

5.1.3 STREAM B – PROJECT MANAGEMENT AND BUSINESS ANALYSIS SERVICE

The following tasks describe the work required for each Resource Category in the Project Management and Business Analysis Service Streams. Specific task will be detailed in each individual Task Authorization (TA).

A) Project Manager - Level 2

The Project Managers - Level 2 tasks include, but are not limited to, the following:

- i. Manage one or more resources each responsible for one or more elements of the project;
- ii. Adhere to the DIAND/TBS project gating process;



- iii. Adhere to DIAND project requirements and iterative development processes and modelling tools (Sparx Enterprise Architect) and other mandatory project standards;
- iv. Manage the project during the development, implementation and operations startup by ensuring that resources are made available and that the project is developed and is fully operational within previously agreed time, cost and performance parameters.
- v. Formulate statements of problems; establishes procedures for the development and implementation of significant, new or modified project elements to solve these problems, and obtains approval thereof;
- vi. Define and document the objectives for the project; determine budgetary requirements, the composition, roles and responsibilities and terms of reference for the project team;
- vii. Report progress of the project on an ongoing basis and at scheduled points in the life cycle;
- viii. Meets in conference with stakeholders and other project managers and states problems in a form capable of being solved;
- ix. Prepare plans, charts, tables and diagrams including risk register, issues log and WBS to assist in analyzing or displaying problems; work with a variety of project management tools; and,
- x. Project gating sign-off.

B) Project Manager - Level 3

The Project Managers - Level 3 tasks include, but are not limited to, the Project Managers Level 2 tasks above and the following:

- i. Based on operational needs, take on more than one project management assignment (typically assignments will be part-time) at a given time;
- ii. Manage complex projects at an enterprise level; and,
- iii. Manage one or more Project Leads and/or Managers, each responsible for an element of the project and its associated project team.

C) Business Analyst - Level 2

The Business Analyst - Level 2 tasks include, but are not limited to, the following:

- i. Develop and document statements of requirements;
- ii. Perform business analysis to identify information, procedure, and decision flows;
- iii. Evaluate existing procedures and methods, identifying and documenting database content, structure, and application subsystems;
- iv. Develop a data dictionary;
- v. Define and document interfaces of business processes within business domains;
- vi. Identify candidate business processes for re-design, documenting modifications, providing trade-off information and suggesting a recommended course of action;
- vii. Establish acceptance test criteria;
- viii. Use DIAND's standard iterative development processes and modelling tools (Sparx Enterprise Architect);
- ix. Elicit requirements from stakeholders;
- x. Gather requirements to identify stakeholders, define stakeholder roles and responsibilities, communication with stakeholders and how requirements will be elicited, analyzed, documented, trace and prioritized;
- xi. Develop and/or supervise change control processes for managing requirements; and,
- xii. Establish or develop business models on current or existing business practices using Business Process Model Notation (BPMN).

D) Business Analyst - Level 3

The Business Analyst - Level 3 tasks include, but are not limited to, the Business Analyst Level 2 tasks above:

5.1.4 STREAM C –WEB APPLICATION DEVELOPMENT AND SUPPORT SERVICES

The following tasks describe the work required for each Resource Category in the Web Application Development and Support Service Streams. Specific task will be detailed in each individual Task Authorizations (TA).



A) Business Transformation Architect - Level 2

The Business Transformation Architect - Level 2 tasks include, but are not limited to, the following:

- i. Provide expert advice on the key initiatives that enable enterprises to deploy high-impact web-enabled business processes that are focused, accountable and measurable, particularly about principles of leadership, governance, operational competencies and technology;
- ii. Provide expert advice in defining new requirements and opportunities for applying efficient and effective solutions; identifying and providing preliminary costs of potential options;
- iii. Provide expert advice in developing and integrating process and information models between business processes to eliminate information and process redundancies;
- iv. Identify candidate business processes for re-design, prototyping potential solutions, providing trade-off information and suggesting a recommended course of action. Identifying the modifications to automated processes;
- v. Analyze business functional requirements to identify information, procedures and decision flows;
- vi. Analyze and develop architecture requirements design, process development, process mapping and training;
- vii. Identify and recommend new processes and organizational structures;
- viii. Use DIAND's standard methodology and processes including iterative development; and,
- ix. Work on projects using an iterative Software Development Life Cycle (SDLC) methodology.

B) Business Transformation Architect - Level 3

The Business Transformation Architect - Level 3 tasks include, but are not limited, the Business Transformation Architect Level 2 tasks and to the following:

- i. Participate in change impact analysis and change management activities; and,
- ii. Participate in organizational realignment (job redesign, organizational re-structuring).

C) Web Developers - Level 2

The Web Developer – Level 2 tasks include, but are not limited to, the following:

- i. Develop, test and implement computer systems in a complex enterprise environment using DIAND's standard Application Development Framework and tools (Visual Studio 2010 and up, Oracle 11g and up);
- ii. Develop, test, implement and maintain computer systems in a complex enterprise environment using one or more of the following tools in various versions: Java, PHP, Oracle Forms, Visual Basic, ASP.Net, Microsoft Access, Lotus and others if required;
- i. Translate conceptual or logical models and associated functional requirements, specifications and class-object diagrams into source code on the Windows Visual Studio Platform;
- ii. Automate coverage, functional and performance testing, as well as defect tracking in relationship with business/functional requirements using CASE Tools (i.e. Sparx Enterprise Architect and defect tracking tools such as Test Track Pro (TTPro);
- iii. Create a system production library, testing the system using a build/versioning approach and source control tools;
- iv. Implement quality assurance standards to be used during the implementation phase;
- v. Design programs, write modules and procedures;
- vi. Perform independent verification and validation of software applications and systems function and performance;
- vii. Generate and execute test plans, procedures and scripts according to the iterative development methodology;
- viii. Perform the following iterative development activities;
- ix. Implementing components by producing source code in compliance with the design model;
- x. Performing unit tests and verifying the results;
- xi. Fixing a defect by stabilizing it, locating the fault and fixing the fault; and,
- xii. Implementing test components and subsystems.
- xiii. Developing installation artifacts by producing all the software required to install and uninstall the product quickly, easily and safely without affecting other applications or system characteristics;
- xiv. Develop requirements, feasibility, cost, design, and specification documents for systems;
- xv. Developing technical specifications for systems development, design and implementation;



- xvi. Translate business requirements into systems design and specifications;
- xvii. Analyze and recommend alternatives and options for solutions;
- xviii. Understand and analyze Use Cases and Use Case Models to model system;
- xix. Develop physical constructs (including but not limited to domain models, sequence diagrams, data models) from logical models for application developers' use;
- xx. Working on project with methods used in the Component Scalable Logical Architecture CSLA.Net framework and/or Model-View-Controller (MVC) Microsoft.NET architectural patterns;
- xxi. Use DIAND's standard process (iterative development) and modelling tools (Sparx Enterprise Architect) and use a Software Development Lifecycle Methodology (SDLC) methodology to perform tasks as requested and applicable.

D) Web Developers - Level 3

The Web Developers - Level 3 tasks include, but are not limited to, the Web Developer Level 2 tasks and the following:

- i. Lead, assign work packages to and mentor Web developers Level 2.

E) Tester - Level 2:

The Tester - Level 2 tasks include, but are not limited to, the following:

- i. Perform test planning and coordination;
- ii. Supervise testing with direct guidance from the plan;
- iii. Manage and monitor of test plans for all levels of testing;
- iv. Manage walkthroughs and reviews related to testing and implementation readiness;
- v. Prepare and submit Status reports;
- vi. Develop test scenarios and scripts;
- vii. Participate in functional and technical design reviews, performing integration/functional and system testing, and verifying test results;
- viii. Establish and maintain source and object code libraries for a multi-platform, multi-operating system environment;
- ix. Establish software testing procedures for unit, integration and regression testing with emphasis on automating the test procedures; and,
- x. Establish and operate "interoperability" test procedures to ensure that the interaction and co-existence of various software elements, which are proposed to be distributed on the common infrastructure, conform to appropriate departmental standards (including but not limited to performance and compatibility) and have no unforeseen detrimental effects on the shared infrastructure and establishing a validation and verification capability, which assumes functional and performance compliance.

6. DELIVERABLES

- 6.1 Deliverables are specified within the terms and conditions of the Contract and detailed in each Task Authorization (TA). Each TA must identify the particular deliverable(s), task(s), and other relevant areas of consideration that are required by the Contractor in the provision of the as and when requested services.
- 6.2 Specific deliverables for the resource categories listed and service requirements include, but are not limited to, any combination of the following:
 - 6.2.1 Maintenance analysis, testing and/or project management plan to support DIAND solutions;
 - 6.2.2 Written draft and final reports on the detailed technical and business requirements and data readiness, including data conversion analysis of existing databases, applications or software and the associated costs;
 - 6.2.3 Reviews of all existing procedures manuals;
 - 6.2.4 Reviews of work done previously under the Enterprise Project and client projects;
 - 6.2.5 Requirement documents that directly support the business processes, and define a minimum standard that must be met in any "to be" state;



- 6.2.6 Requirement documents for interfaces with other DIAND applications and data, and define a minimum standard that must be met in any “to be” state;
- 6.2.7 Technology constraints documents for hosting Enterprise BI solution and define a minimum standard that must be met in any “to be” state;
- 6.2.8 Evaluation and/or validation of quality of the existing data, including spatial data and definition of a minimum standard that must be met in any “to be” state;
- 6.2.9 A strategy and a data quality plan to allow the business unit to proceed to cleaning up the data, and make a decision about data quality standards required for the implementation of solutions;
- 6.2.10 Requirement documents for non-functional concerns such as performance, reliability, availability and security;
- 6.2.11 Requirement documents for new interface based on the project requirements;
- 6.2.12 Fully functional and tested reports to Information Management Branch (IMB) standards;
- 6.2.13 Fully functional and tested PL/SQL stored procedures, packages, scripts and error handling to IMB standards;
- 6.2.14 Crystal reports enhancements for those reports currently run within the system;
- 6.2.15 Unit, system and integration testing plan, analysis and report; and,
- 6.2.16 Fixes to defects and reporting.

- 6.3.3 The Contractor must submit all scheduled and requested deliverables and amendments to the DIAND Project Authority (or this person's due designate) in accordance with the timing as set out by the DIAND Project Authority as specified in the specific TA. All text deliverables must be delivered in both hard and electronic copy to the specifications of DIAND. The Contractor must attest to the veracity and accuracy of the content of all deliverables submitted.

7. REPORTING REQUIREMENTS

- 7.1 Reporting requirements will be detailed in each Task and include, but are not limited to, any of the following:

- Weekly update reports, content documented through simple minutes and agenda;
- Written progress and/or status reports relating to the delivery of specific services and completion of assigned tasks; and,
- Other related reporting as detailed in the specific TA.

- 7.2 The timing and format of any required reports will be specified by the DIAND Project Authority in each specific TA. Format can also include requirements laid out by DIAND project governance process, which will be communicated to the Contractor by the DIAND Project Authority and detailed in the TA.

8. CONSTRAINTS

8.1 Business Environment

- a) **Standard Work Day Coverage:** A standard workday is Monday to Friday from 8 a.m. to 5 p.m., exclusive of statutory holidays (“Standard Workday”). Statutory holidays are defined as follows, where applicable: New Year's Day, Good Friday, Easter Monday, Victoria Day, St. Jean Baptiste Day (Quebec only), Canada Day, Civic Holiday (Ontario only), Labour Day, Thanksgiving Day, Remembrance Day, Christmas Day and Boxing Day. Off-Hours is defined as any time outside of the Standard Workday.
- b) **Work Outside of Regular Office Hours:** All deployed Contractor personnel must be available to work outside the Standard Workday for scheduled work as required, during the duration of the Contract, at the regular per diem rates, as established in the Contract. The Project Authority will advise the Contractor for scheduled extended hours of work and/or work outside the Standard Workday at least 24 hours in advance.



8.2 Technical Environment

The Contractor must ensure that all written deliverables and services provided are in conformance with DIAND's standard desktop operating software, currently, Microsoft Office Suite 2010 (including Word, Excel, and PowerPoint) and server based environments.

- b) All deliverables and services provided by the Contractor must become integrated within DIAND's technical and operational environment.

| | | |
|--|------------------------------------|---------------------|
| Windows Server 2012, 2008, 2016 and higher versions | MS Team Foundation Server, | Crystal Enterprise, |
| Internet Information Server, | MS Web Services Enhancements (WSE) | Linux Redhat |
| Oracle Application Server (OAS) 10.1.2.3 and higher versions | | |

Additionally, the following may be included in the technical and operational environment:

| | | |
|---------------|-------------|-----------|
| Tomcat Apache | Apache HTTP | Websphere |
| JBoss | | |

| | | |
|--------------------------------|--|--|
| Oracle 11g and higher versions | | |
|--------------------------------|--|--|

| | | |
|--|---|------------------------|
| MS Visual Studio (VB.NET and C#.Net), 2010, 2012, 2015 | SAP Crystal Reports 2013 | PL/SQL |
| MS .NET Framework | Test Track Pro (Helix Issue Management) | CSLA.Net |
| Microsoft Dynamics CRM 2015 | MS Office Suite 2010 | Microsoft Dynamics 365 |

- c) The following software in various versions may be used within DIAND, in addition to any software listed in Attachment 4,1 for specific Resource Categories:

| | | |
|-------------------------------------|------------------------------------|------------------------------|
| SQL Server 2012 and higher versions | Oracle Database 8, 9i, 10g and 11g | PHP 5.3 and higher versions |
| MS Access 2010 and higher versions | Oracle Database 12c and higher | Java 1.4 and higher versions |
| Lotus Approach Database | | C, C++ 2020 |



| | | |
|---------------------------------------|-------------------------------------|----------------|
| MS Excel 2010 and higher versions | SQL Server 2000 | Visual Basic 6 |
| MySQL version 5.0 and higher versions | SQL Server 2008 | ASP.NET |
| WebSphere 6.1 | Oracle Forms 10 and higher versions | Lotus Script |
| Lotus Approach | | |

- d) All technical and other documentation gathered or produced during the course of work must be stored in DIAND's document repository, CIDM/GCDOCS, and follow the established conventions for document management.

8.3 Acts, Departmental and federal government regulations, codes, standards and policies.

The management by the Contractor of service delivery to DIAND must be undertaken in accordance with all applicable Acts, Codes, Departmental and/or federal government regulations, codes and policies include, but are not limited to, the following:

TBS Standards on Web Accessibility, Interoperability and Usability;
INAC's System Development Life Cycle (SDLC); and
INAC's Application Development Framework (ADF3 and ADF4).

8.4 Language of the work

The language of work and correspondence for this Contract will be in English.
The language of all written deliverables will be English.

9. TRAVEL

Limited travel may be required for certain resource categories for DIAND projects on as and when needed basis. Should specify that any travel requires pre-authorization to be reimbursable in accordance with Contract clause no..

10. CLIENT SUPPORT

When working on-site at DIAND, Contractor Resource(s) will be provided with:

10.1 Access to workstations with the following software:

- Windows 7 or Windows 10;
- MS Office Suite;
- MS Outlook;
- CIDM (DIAND's document repository) or GCDOCS; and,
- SAP Crystal Reports 2013 or higher versions.

As and when required, for the completion of the work, DIAND will provide:

10.2 Access to DIAND's facilities, the Project Authority and DIAND personnel for the successful provision of technical services and analysis;



- 10.3 Computer equipment, network/server/databases, Departmental intranet access and other office space to perform the work;
- 10.4 Access to relevant documentation and reference materials to which the Contractor would not otherwise have access;
- 10.5 Any security passes to DIAND facilities required for work either during normal office hours or during extended working hours,
- 10.6 Names and telephone numbers of required department/federal/provincial contacts;
- 10.7 Comments and revisions on the Contractor's draft deliverable submissions within the timeframe mutually agreed to by the Contractor and the Project Authority or as detailed in the specific Task Authorizations (TA);
- 10.8 DIAND will monitor the Contractor's ongoing service levels by conducting review meetings with the Contractor on an as-and-when-required basis, to exchange information relevant to chronic problem areas, action plans, and pending planning activity; and,
- 10.9 Other assistance and support as appropriate.

11. GLOSSARY AND ACRONYMS

Application Portfolio Management: Management at branch/CIO level of all information (technical, life cycle status, risk/health and support) for IM/IT corporate systems.

Business intelligence (BI) - The capability to perform in-depth analysis and possibly data mining, of detailed business data, providing real and significant information to business users. Business intelligence usually makes use of tools designed to easily access data warehouse data.

Business Objects/Crystal Reports: Experience will be accepted for Business Objects versions Crystal 2008 (version 12) and up. Versions prior to 2008 (version 12) will not count towards experience

Business Process Management Initiative: Predecessor to BPMN.

Business Process Model and Notation (BPMN) v2.0: A standard for business process modeling that provides a graphical notation for specifying business processes in a business process diagram. Experience in BPMN v2.0 will be counted from January 2011 when it was released by Object Management Group.

Web Applications: Corporate systems or applications used for data entry, data management and reporting.

Web Content: Static web pages created and maintained with tools such as Teamsite.

Departmental systems:

Complex: For Streams B and C, complex is defined as a project with three or more application servers, two or more databases (system databases in multiple instances i.e. Database 1 in development, Database 1 in test, etc., only count as one database) The databases may be for different systems or multiple databases for one system; a reporting solution and user access roles.

Complex: For Stream A, complex is defined as an Oracle RDBMS software in an environment consisting of a minimum of 20 databases and a minimum 5 servers on Oracle 10g and above.

Corporate systems: Corporate systems or applications used for data entry, data management and reporting.



COTS: Commercial off the shelf systems which are maintained or supported by a vendor and not by the Government of Canada or departments purchasing the software.

Cross-functional IM/IT service: Project teams composed of specialist organization staff from different functional, service and business areas.

Database optimization: Involves maximizing the speed and efficiency with which data is retrieved in order to optimize system performance.

Enterprise data model: A logical data model that incorporates all the important components of an enterprise data architecture. Components include entities, attributes, relationships (roles), rules and definitions stated in business terms. A schematic defining the data and their relationships that is applied to the whole organization. Diagram of a single non-redundant view of business data, showing how data is used by the business activities of an organization.

Enterprise Data Warehouse (EDW): A collection of data that can be defined and shared across the whole enterprise along the lines of common dimensions to be used for analysis.

Enterprise systems: Systems that support and are used by the entire enterprise

ETL: Extract/Transform/Load: This is the process of extracting data from their operational data sources or external data sources, transforming the data which includes cleansing, aggregation, summarization, integration, as well as basic transformation (1 becomes "Male" 2 becomes "Female"), and loading the data into some form of the data warehouse (ODS, enterprise data warehouse, data mart). ETL can also refer to the vendor software that performs these processes.

Federal and federal: Federal refers to the Government of Canada while federal is a federal level of government.

Government: Refers to federal, provincial, state, municipal levels of government unless otherwise stated.

Infrastructure: The architectural elements, organizational support, corporate standards, methodology, data, processes, and physical hardware/network, etc. that make up the data warehouse environment.

Interfaces: Processes where two or more systems may send, receive or exchange data, processes involving sending data to or receiving data from recipients; and business processes which work with or are dependent on other business processes in a business area.

Large private sector corporation: Corporation of more than 5,000 employees. The organizational structure will consist of three or more levels of planning approval (corporate, business and functional).

Logical data model: An abstract formal representation of the categories of data and their relationships in the form of a diagram, such as an entity-relationship diagram. A logical data model is **process independent**, which means that it is fully normalized, and therefore does **not** represent a process dependent (e.g. access-path) database schema.

Meta data: "Data about data." Usually refers to agreed-on definitions and business rules stored in a centralized repository so business users – even those across departments and systems – use common terminology for key business terms. Can include information about data's currency, ownership, source system, derivation (e.g. profit = revenues minus costs), or usage rules. Prevents data misinterpretation and poor decision making due to sketchy understanding of the true meaning and use of corporate data.

OLTP – Online transaction processing is defined as a class of information systems or software programs that facilitate and manage transaction-oriented applications (data entry and transaction processing) Examples include PeopleSoft, SAP, RDIMS, custom applications that supports daily operations (gathers input information, processes and updates existing information and reflects the changes).

Oracle: Oracle database versions 8, 9i, 10g, 11g and 12c and higher. Does not refer to versions prior to 8.



Physical Data Model: A formal representation of data and their relationships in the form of a diagram, depicting the physical placement of data in a database. A physical data model is *process dependent*, which means that it is de-normalized to provide maximum performance efficiency. It is commonly referred to as logical database design or database design schema.

Pilot project: A system implemented and used in a production environment which meets a minimum of 80 per cent of business and functional requirements. Additionally the pilot project must be intended as part of a national, Enterprise level system.

PL/SQL: PL/SQL Developer is an Integrated Development Environment (IDE) for developing stored program units in an Oracle Database.

“**Project**” and “IT project” are defined as:

- complex endeavour that will result in an information system (application) deployed in the organization, typically developed from scratch or purchased commercial off-the-shelf (COTS);
- produces several deliverables;
- often with specific milestones and goals to be met during the development cycle;
- consists of multiple stages and in some case multiple phases through a formal system development life cycle;
- managed by a project manager directing a team of technical resources working together with the Client User according to a project with deadlines and milestones;
- overseen by the office of prime interest and in many cases by a steering committee and/or Project Management Office;
- has a budget stages and deliverables that require the approval of the PM or a committee;
- a project team consists of one or more IT and client resources and one or more contracted resources; and,
- objectives are set out in a statement of work (SOW) or Task authorization (TA). The particular piece of work might be part of a larger project.

DIAND emphasizes that a project has a beginning and an end and delivers a result.

Projects cannot be subdivided into smaller projects to count for experience where scoring is by number of project. Shorter projects or work terms/assignments cannot be combined into larger projects.

The latter are not projects in Canada’s definition.

GCCASE: The Government of Canada’s Microsoft Dynamics Shared Case Management solution.

“**Team**” is defined as a unit of at least three people engaged on a project as defined above

RDBMS – Relational database management system: e.g. Oracle, SQL Server

Source data: The data from the operational or legacy systems that feed the Common/Corporate Information Repository databases.

Source system: An operational system that is used as the source or input to the corporate databases. Source systems support daily operations (gathers input information, processes and updates existing information and reflects the changes).



ANNEX B BASIS OF PAYMENT

WORKSTREAM A: ORACLE DATABASE ADMINISTRATION AND SUPPORT SERVICES

| Initial Contract Period (From _____ to _____) | | |
|---|--------------------|---|
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| Database Administrator | LEVEL 2 | <i>To be inserted upon contract award</i> |
| Database Administrator | LEVEL 3 | <i>To be inserted upon contract award</i> |
| Data Modeler | LEVEL 2 | <i>To be inserted upon contract award</i> |
| Data Modeler | LEVEL 3 | <i>To be inserted upon contract award</i> |
| Database Analyst/ IM Administrator | LEVEL 1 | <i>To be inserted upon contract award</i> |
| Database Analyst/ IM Administrator | LEVEL 2 | <i>To be inserted upon contract award</i> |
| Database Analyst/ IM Administrator | LEVEL 3 | <i>To be inserted upon contract award</i> |
| Option Period 1 (From _____ to _____) | | |
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| Database Administrator | LEVEL 2 | <i>To be inserted upon contract award</i> |
| Database Administrator | LEVEL 3 | <i>To be inserted upon contract award</i> |
| Data Modeler | LEVEL 2 | <i>To be inserted upon contract award</i> |
| Data Modeler | LEVEL 3 | <i>To be inserted upon contract award</i> |
| Database Analyst/ IM Administrator | LEVEL 1 | <i>To be inserted upon contract award</i> |
| Database Analyst/ IM Administrator | LEVEL 2 | <i>To be inserted upon contract award</i> |
| Database Analyst/ IM Administrator | LEVEL 3 | <i>To be inserted upon contract award</i> |



| Option Period 2 (From _____ to _____) | | |
|---|--------------------|---|
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| Database Administrator | LEVEL 2 | <i>To be inserted upon contract award</i> |
| Database Administrator | LEVEL 3 | <i>To be inserted upon contract award</i> |
| Data Modeler | LEVEL 2 | <i>To be inserted upon contract award</i> |
| Data Modeler | LEVEL 3 | <i>To be inserted upon contract award</i> |
| Database Analyst/ IM Administrator | LEVEL 1 | <i>To be inserted upon contract award</i> |
| Database Analyst/ IM Administrator | LEVEL 2 | <i>To be inserted upon contract award</i> |
| Database Analyst/ IM Administrator | LEVEL 3 | <i>To be inserted upon contract award</i> |

WORKSTREAM B: PROJECT MANAGEMENT AND BUSINESS ANALYSIS

| Initial Contract Period (From _____ to _____) | | |
|---|--------------------|---|
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| Project Manager | LEVEL 2 | <i>To be inserted upon contract award</i> |
| Project Manager | LEVEL 3 | <i>To be inserted upon contract award</i> |
| Business Analyst | LEVEL 2 | <i>To be inserted upon contract award</i> |
| Business Analyst | LEVEL 3 | <i>To be inserted upon contract award</i> |
| Option Period 1 (From _____ to _____) | | |
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| Project Manager | LEVEL 2 | <i>To be inserted upon contract award</i> |
| Project Manager | LEVEL 3 | <i>To be inserted upon contract award</i> |



| | | |
|---|---------------------------|---|
| Business Analyst | LEVEL 2 | <i>To be inserted upon contract award</i> |
| Business Analyst | LEVEL 3 | <i>To be inserted upon contract award</i> |
| Option Period 2 (From _____ to _____) | | |
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| Project Manager | LEVEL 2 | <i>To be inserted upon contract award</i> |
| Project Manager | LEVEL 3 | <i>To be inserted upon contract award</i> |
| Business Analyst | LEVEL 2 | <i>To be inserted upon contract award</i> |
| Business Analyst | LEVEL 3 | <i>To be inserted upon contract award</i> |

WORKSTREAM C: WEB APPLICATION DEVELOPMENT AND SUPPORT SERVICES

| | | |
|---|---------------------------|---|
| Initial Contract Period (From _____ to _____) | | |
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| Business Transformation Architect | LEVEL 2 | <i>To be inserted upon contract award</i> |
| Business Transformation Architect | LEVEL 3 | <i>To be inserted upon contract award</i> |
| Web Developer | LEVEL 2 | <i>To be inserted upon contract award</i> |
| Web Developer | LEVEL 3 | <i>To be inserted upon contract award</i> |
| Tester | LEVEL 2 | <i>To be inserted upon contract award</i> |
| Option Period 1 (From _____ to _____) | | |
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| Business Transformation Architect | LEVEL 2 | <i>To be inserted upon contract award</i> |
| Business Transformation Architect | LEVEL 3 | <i>To be inserted upon contract award</i> |



Solicitation No. - N° du l'invitation

Amd No. - N° de la modif.

Buyer ID – Id de l'acheteur

A0414-145931/A

613ZM

Client Ref. No. – N° de réf. du client

File No. – N° du dossier

A0414-145931

613zmA0414-145931

| Web Developer | LEVEL 2 | <i>To be inserted upon contract award</i> |
|---|--------------------|---|
| Web Developer | LEVEL 3 | <i>To be inserted upon contract award</i> |
| Tester | LEVEL 2 | <i>To be inserted upon contract award</i> |
| Option Period 2 (From _____ to _____) | | |
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| Business Transformation Architect | LEVEL 2 | <i>To be inserted upon contract award</i> |
| Business Transformation Architect | LEVEL 3 | <i>To be inserted upon contract award</i> |
| Web Developer | LEVEL 2 | <i>To be inserted upon contract award</i> |
| Web Developer | LEVEL 3 | <i>To be inserted upon contract award</i> |
| Tester | LEVEL 2 | <i>To be inserted upon contract award</i> |



ANNEX C
SECURITY REQUIREMENTS CHECK LIST

Attached as a separate DPF document at the end of the document.



ATTACHMENT 4.1 BID EVALUATION – MANDATORY TECHNICAL CRITERIA

All bidders must demonstrate that they meet all of the mandatory requirements in order for their bid to be considered responsive.

STREAM A: ORACLE DATABASE ADMINISTRATION AND SUPPORT

Mandatory Requirements – Corporate Experience

Experience must be in actual months worked, not a date range

| Mandatory Requirements: Corporate Experience ^(PB) | Cross Reference to Proposal | Met Y//N |
|--|-----------------------------|----------|
| <p>M1^(PB) – Corporate Capacity.</p> <p>The Bidder must provide two Contract summaries with the bid describing in detail the Bidder's current/previous experience in providing Oracle Database Support services for one or more client organizations during the past eight years.</p> <p>For each contract identified:</p> <ol style="list-style-type: none">the contract value must be at least \$2,000,000 in Canadian dollars and involve at least three resources listed in Section 5.1.2; 5.1.3 and 5.1.4 of the Statement of Work (SOW) of this bid solicitation.the Bidder must provide the following information about the specified contracts:<ol style="list-style-type: none">the contract numbers;the client;the award date;the contract values (not including option years);the Contract must have been awarded at least one year prior to the closing date of this solicitation and no later than ten years from the closing date of this solicitation;the Contract must have a duration of at least two years. (note: duration does not include option periods that have not been exercised); <p>The Bidder will be requested for copies of the contracts before Contract Award.</p> <p>Note: A Supply Arrangement or Standing Offer is neither a contract nor a project and therefore any reference to this type of document will not be accepted for the purpose of evaluating contract or project experience. For example if the Bidder references its TBIPS SA number for the purpose of demonstrating experience under the evaluation criteria, Canada will disregard this experience because it does not relate to a specific contract or project.</p> <p>The Bidder must have been the prime Contractor, rather than a subcontractor. This means that the Bidder contracted directly with the customer of the work. If the Bidder's contract was to perform work which another entity had itself first contracted to perform, the Bidder will not be considered the prime Contractor.</p> | | |



For example: A (customer) contracted with B for services. B, in turn, entered into a contract with C to provide all or part of these services to A. In this example, B is a prime contractor and C is a subcontractor.

Within each Contract Summary provided, the Bidder must clearly indicate each of the following:

1. the name of the client organization; and,
2. a brief description of the Oracle Database Support services provided, including:
 - (a) contract objectives;
 - (b) resource categories provided;
 - (c) the dates/duration of the contract; and
 - (d) the invoiced dollar value of the contract to the Bidder;

Each contract description should not exceed 2 pages.

M2^(PB) - Corporate Offices

The Bidder must have a corporate office situated in a commercial location and have at a minimum one full-time staff person working at this office and available to respond to queries from clients between 9:00 a.m. and 5:00 p.m.

The bidder must provide the address of the corporate office to demonstrate the above criterion.

M3^(PB) - Contract Summaries Billable Days

The Bidder must have been awarded, within the past five years of the posting date of this solicitation, one contract to deliver RDBMS informatics professional services where:

- a. The Bidder provided a minimum of five resources simultaneously for a minimum period of six months; and
- b. Each of the five resources must have provided informatics professional services for a minimum of 120 billable days during a six-month period.

The bidder must provide a copy of the usage report as defined below:

- (i) Each report must contain the following information for each validly issued TA (as amended):
 - (A) the Task Authorization number and the Task Authorization Revision number(s), if applicable;
 - (B) a title or a brief description of each authorized task;
 - (C) the name, Resource category and level and level of each resource involved in performing the TA, as applicable;
 - (D) the total estimated cost specified in the validly issued TA of each task, exclusive of Applicable Taxes;



| | | |
|---|--|--|
| <p>(E) the total amount, exclusive of Applicable Taxes, expended to date against each authorized task;</p> <p>(F) the start and completion date for each authorized task; and</p> <p>(G) the active status of each authorized task, as applicable (e.g., indicate whether work is in progress or if Canada has cancelled or suspended the TA, etc.).</p> <p>(ii) Each report must also contain the following cumulative information for all the validly issued TA's (as amended):</p> <p>(A) the amount, exclusive of Applicable Taxes, specified in the Contract (as last amended, as applicable) as Canada's total liability to the Contractor for all validly issued TA's; and</p> <p>(B) the total amount, exclusive of Applicable Taxes, expended to date against all validly issued TA's.</p> | | |
| <p>M4^(PB) –Billable Resource Days</p> <p>The Bidder must demonstrate minimum billable days for the resource categories listed below.</p> <p>The billable days must have occurred within the past 5 years prior to the closing date of this solicitation.</p> <p>The work billed for a given resource category must include at least 60% of the associated tasks listed in 5.1 Tasks Annex A - Statement of Work for the same resource category.</p> <p>The minimum billable days for Database Administrators level 3 should be 220 days. The minimum billable days for Database Administrators level 2 should be 220 days. The minimum billable days for Database Analysts should be 220 days. The minimum billable days for Date Modelers should be 120 days.</p> <p>The bidder must provide a usage report to demonstrate the above criterion. The bidder must provide a copy of the usage report as defined below:</p> <p>(i) Each report must contain the following information for each validly issued TA (as amended):</p> <p>(A) the Task Authorization number and the Task Authorization Revision number(s), if applicable;</p> <p>(B) a title or a brief description of each authorized task;</p> <p>(C) the name, Resource category and level and level of each resource involved in performing the TA, as applicable;</p> <p>(D) the total estimated cost specified in the validly issued TA of each task, exclusive of Applicable Taxes;</p> <p>(E) the total amount, exclusive of Applicable Taxes, expended to date against each authorized task;</p> <p>(F) the start and completion date for each authorized task; and</p> | | |



| | | |
|---|--|--|
| <p>(G) the active status of each authorized task, as applicable (e.g., indicate whether work is in progress or if Canada has cancelled or suspended the TA, etc.).</p> <p>(ii) Each report must also contain the following cumulative information for all the validly issued TA's (as amended):</p> <p>(A) the amount, exclusive of Applicable Taxes, specified in the Contract (as last amended, as applicable) as Canada's total liability to the Contractor for all validly issued TA's; and</p> <p>(B) the total amount, exclusive of Applicable Taxes, expended to date against all validly issued TA's.</p> | | |
| <p>M5(PB) – Proposed Resources (Résumé)</p> <p>The Bidder must propose a total of four resources, one for each of the following categories</p> <ol style="list-style-type: none">1. Database Administrator level 3;2. Database Administrator level 2;3. Database Modeler level 3; and,4. Database Analyst Level 3. <p>The Bidder must provide with its bid a résumé for each of the proposed resources.</p> <p>A resource must not be proposed more than once.</p> | | |

| Mandatory Evaluated (Core) Resource Category | TBIPS Category | Level of Expertise |
|--|----------------|--------------------|
| Database Administrator | I.2 | 3 |
| Database Administrator | I.2 | 2 |
| Database Modeler | I.4 | 3 |
| Database Analyst | I.3 | 3 |

Mandatory Requirements - Resource:

Note to Bidders: The minimum project duration for resources, for all levels of expertise, is 6 months full-time based on actual days worked within the definition of a project as noted in 11. Glossary and Acronyms to count towards meeting experience requirements.

Experience is in actual months based on 240 working days a year not a date range. Experience is counted from bid posting date unless otherwise specified.



| Database Administrator (I.2) – Level 3 Evaluated Resource (Core) | | Cross Reference to Proposal | Met Y/N |
|---|--|--|----------------|
| M1 | The Bidder's proposed resource must have a minimum of 120 months of experience as an Oracle Database Administrator including installing, configuring, tuning, troubleshooting and/or upgrading Oracle relational database management system (RDBMS version 8, 9i, 10g, 11g, 12c and higher versions). | | |
| M2 | The Bidder's proposed resource must have worked on a minimum of two IT projects for Government or private sector in designing, installing, upgrading and configuring Oracle RDBMS software in an environment consisting of a minimum of 20 databases and a minimum five servers on Oracle 10g and higher versions. | | |
| M3 | The Bidder's proposed resource must have a minimum of 120 months of work experience within the last 15 years (as of bid posting date) writing and evaluating SQL scripts including writing and tuning SQL and PL/SQL code for stored procedures, functions and triggers in an Oracle database (8, 9i, 10g, 11g, 12c and higher versions). | | |
| M4 | The Bidder's proposed resource must have a minimum of 120 months of experience as an Oracle Database (8, 9i, 10g, 11g, 12c and higher versions) Administrator supporting corporate databases for On-Line Transactional Processing (OLTP) application systems (custom or COTS) on a Unix/Linux or Windows operating system. | | |
| M5 | The Bidder's proposed resource must have a minimum of 60 months of experience as an Oracle Database (10g, 11g, 12c and higher versions) Administrator supporting application's database systems working on projects Government or private sector. | | |
| M6 | The Bidder's proposed resource must have a minimum of 72 months leading, assigning work packages and mentoring intermediate level Database Administrators. | | |
| Database Administrator (I.2) level 2 Evaluated Resource (Core) | | | |
| M1 | The Bidder's proposed resource must demonstrate at least 60 months of experience as an database Administrator, including installing, configuring, tuning, troubleshooting and/or upgrading one or more of the following relational database management systems (RDBMS): Oracle version 10, 11, 12 and higher versions Microsoft SQL 2008 and higher versions | | |
| M2 | The Bidder's proposed resource must have a minimum of 60 months of experience within the last five years (as of the bid posting date) writing and evaluating SQL scripts including writing and tuning SQL and | | |



| | | | |
|---|--|--|--|
| | PL/SQL code for stored procedures, functions and triggers in one or more of the following relational database management systems (RDBMS): Oracle version 10, 11, 12 and higher versions Microsoft SQL 2008 and higher versions | | |
| M3 | The Bidder's proposed resource must have a minimum of 60 months of experience(as of the bid posting date) as an Oracle Database Administrator supporting databases for On-Line Transactional Processing (OLTP) application systems (custom or COTS) on a Unix/Linux or Windows operating system. | | |
| M4 | The Bidder's proposed resource must have a minimum of 36 months leading, assigning work packages and mentoring junior level Database resources. | | |
| M5 | The Bidder's proposed resource must have a minimum of 60 months of experience as an Oracle Database (10g, 11g, 12c and higher versions) Administrator supporting application's database systems working on projects Government or private sector. | | |
| M6 | The Bidder's proposed resource must have a minimum of 72 months leading, assigning work packages and mentoring intermediate level Database Administrators. | | |
| Database Modeler (I.4) – Level 3 Evaluated Resource (Core) | | | |
| M1 | The Bidder's proposed resource must have 120 months of experience in the past 15 years designing, developing and maintaining logical and physical data models for databases with a minimum of 100 users. | | |
| M2 | The Bidder's proposed resource must have a minimum of 120 months of experience in the design, development and maintenance of data models in OLTP (on-line transaction processing) environments. | | |
| M3 | The Bidder's proposed resource must have worked on a minimum of two IT projects for Government or private sector in defining, developing, testing, and implementing data conversion/load/migration strategies and specifications. | | |
| M4 | The Bidder's proposed resource must have experience on a minimum of two IT projects for Government or private sector defining new or modifying existing logical and physical data models for applications for a minimum internal 100 users from a variety of information sources. These information sources must include: <ul style="list-style-type: none"> • use case definitions, • system specifications; and • conceptual data models. | | |



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| M5 | The Bidder's proposed resource must have a minimum of 60 months of experience designing Oracle databases (10g, 11g, 12c and higher versions) or MS SQL Server (version 2008 and higher versions) in collaboration with a software development team supporting a web application system or COTS system for Government or private sector. | | |
| M6 | The Bidder's proposed resource must have a minimum of 60 months leading, assigning work packages and mentoring junior and intermediate level Database Modelers. | | |
| M7 | The Bidder's proposed resource must have a minimum of 60 months experience writing Structured Query Language (SQL) in an Oracle database (10g, 11g, 12c and higher versions) or MS SQL Server (version 2008 and higher versions) environment. | | |
| Database Modeler (I.4) level 2 Non-evaluated Resource | | | |
| M1 | The Bidder's proposed resource must have a minimum of 60 months of experience in the past 96 months in the design, development and maintenance of data models in OLTP (on-line transaction processing) environments. | | |
| M2 | The Bidder's proposed resource must have a minimum of one IT project for Government or private sector in defining, developing, testing, and implementing data conversion/load/migration strategies and specifications. | | |
| M3 | The Bidder's proposed resource must have a minimum of 60 months of experience within the last 10 years designing, developing and maintaining logical and physical data models. | | |
| M4 | The Bidder's proposed resource must have a minimum of 36 months experience writing Structured Query Language (SQL) in an Oracle database (10g, 11g, 12c and higher versions) or MS SQL Server (version 2008 and higher versions) environment. | | |
| Database Analyst/IM Administrator (I.3) – Level 3 Evaluated Resource (Core) | | | |
| M1 | The Bidder's proposed resource must have a minimum of 120 months of experience as a Database Analyst/IM Administrator meeting at least 50% of the points of responsibility listed in this solicitation's Statement of Work for this resource category. | | |
| M2 | The Bidder's proposed resource must have a minimum of 96 months of experience in developing and designing new database structures in Oracle for large-scaled applications of over 100 end-users. | | |
| M3 | The Bidder's proposed resource must have 96 months of experience controlling, coordinating and generating changes to the database, including the addition/modification/deletion of records (DML Data Modeling Language), the addition, modification and deletion of database data structures (DDL Data Definition Language) and the creation of | | |



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| | application accounts and privileges (DCL Data Control Language) to databases in an Oracle (8, 9i, 10g, 11g, 12c and higher versions) or MS SQL Server (version 2008 and higher versions) RDBMS environment. | | |
| M4 | The Bidder's proposed resource must have a minimum of 96 months of experience creating scripts, stored procedures, packages and error handling using SQL and/or PL/SQL. | | |
| M5 | The Bidder's proposed resource must have a minimum of 96 months of experience defining and implementing database and data conversion strategies and specifications. | | |
| M6 | The Bidder's proposed resource must have a minimum of 60 months of experience identifying requirements to improve existing application's databases by determining users' information needs, system performance and functional requirements. | | |
| M7 | The Bidder's proposed resource must have a minimum of 96 months of experience controlling and coordinating changes to the database including creation, modification and deletion of tables, views, indexes, materialized views, and database links. | | |
| M8 | The Bidder's proposed resource must have a minimum of 60 months leading, assigning work packages and mentoring junior level Database Analyst/IM Administrators. | | |
| Database Analyst/IM Administrator (I.3) – Level 2 Non-evaluated Resource | | | |
| M1 | The Bidder's proposed resource must have a minimum of 60 months of experience as a Database Analyst/IM Administrator meeting at least 50% of the points of responsibility listed in this solicitation's Statement of Work (SOW) for this resource category. | | |
| M2 | The Bidder's proposed resource must have a minimum of 60 months of experience in developing and designing new database structures in Oracle for large-scaled applications of over 100 end-users. | | |
| M3 | The Bidder's proposed resource must have 60 months of experience controlling, coordinating and generating changes to the database, including the addition/modification/deletion of records (DML Data Modeling Language), the addition, modification and deletion of database data structures (DDL Data Definition Language) and the creation of application accounts and privileges (DCL Data Control Language) to databases in an Oracle (10g, 11g, 12c and higher versions) or MS SQL Server (version 2008 and higher versions) RDBMS environment. | | |
| M4 | The Bidder's proposed resource must have a minimum of 60 months of experience creating scripts, stored procedures, packages and error handling using SQL and/or PL/SQL. | | |
| M5 | The Bidder's proposed resource must have a minimum of 48 months of experience defining and implementing database and data conversion strategies and specifications. | | |
| M6 | The Bidder's proposed resource must have a minimum of 60 months of experience controlling and coordinating changes to the database | | |



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| | including creation, modification and deletion of tables, views, indexes, materialized views, and database links. | | |
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| Database Analyst/IM Administrator (I.3) level 1 Non-evaluated Resource | |
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| M1 | The Bidder's proposed resource must have a minimum of 36 months of experience as a Database Analyst/IM Administrator meeting at least 50% of the points of responsibility listed in this solicitation's Statement of Work (SOW) for this resource category. |
| M2 | The Bidder's proposed resource must have a minimum of 36 months of experience using Oracle (10g, 11g, 12c and higher versions) or MS SQL Server (version 2008 and higher versions). |
| M3 | The Bidder's proposed resource must have a minimum of 36 months of experience creating scripts, stored procedures, packages and error handling using SQL and/or PL/SQL. |



STREAM B: PROJECT MANAGEMENT & BUSINESS ANALYSIS SERVICES

Mandatory Requirements – Corporate Experience ^(PB)

Experience must be in actual months worked, not a date range

| Mandatory Requirements: Corporate Experience | Cross Reference to Proposal | Met Y//N |
|---|-----------------------------|----------|
| <p>M1^(PB) Corporate Stability</p> <p>The Bidder must provide 2 Contract Summaries describing in detail the Bidder's current/previous experience in providing Project Management and Business Analysis Services for 1 or more client organizations during the past 8 years.</p> <p>Each referenced contract must have at least the same number of resources as the number of resources in the stream being bid.</p> <p>The contract the contract value must be at least \$3,000,000 CAD;</p> <p>For each contract summary identified the Bidder must provide:</p> <ol style="list-style-type: none">the name of the client organization; and,a brief description of the Project Management and Business Analyst services provided, including:<ol style="list-style-type: none">the contract numbers;the client;the award date;the contract values (not including option years); <p>b. the Contract must have been awarded at least one year prior to the closing date of this solicitation and no later than 10 years from the closing date of this solicitation;</p> <p>c. the Contract must have a duration of at least 2 years (note: duration does not include option periods that have not been exercised);</p> <p>Note: A Supply Arrangement or Standing Offer is neither a contract nor a project and therefore any reference to this type of document will not be accepted for the purpose of evaluating contract or project experience. For example if the Bidder references its TBIPS SA number for the purpose of demonstrating experience under the evaluation criteria, Canada will disregard this experience because it does not relate to a specific contract or project.</p> <p>The bidder must have been the prime contractor, rather than a subcontractor. This means that the Bidder contracted directly with the customer of the work. If the Bidder's contract was to perform work which another entity had itself first contracted to perform, the Bidder will not be considered the prime contractor.</p> <p>For example, A (customer) contracted with B for services. B, in turn, entered into a contract with C to provide all or part of these services to A. In this example, B is a prime contractor and C is a subcontractor.</p> | | |



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| <p>Each contract description should not exceed 2 pages.</p> <p>The Bidder will be requested for copies of the contracts before Contract Award.</p> | | |
| <p>M2^(PB) Corporate Offices</p> <p>The Bidder must have a corporate office situated in a commercial location and have at a minimum 1 full-time staff person working at this site and available to respond to queries from customers between the hours of 9:00 a.m. and 5:00 p.m.</p> | | |
| <p>M3^(PB) - Contract Summaries Billable Days</p> <p>The Bidder must have been awarded, within the past five years of the posting date of this solicitation, one contract to deliver Project Management and Business Analysis informatics professional services where:</p> <p>a. The Bidder provided a minimum of five resources simultaneously for a minimum period of six months; and</p> <p>b. Each of the five resources must have provided informatics professional services for a minimum of 120 billable days during a six-month period.</p> <p>The bidder must provide a copy of the usage report as defined below:</p> <p>(i) Each report must contain the following information for each validly issued TA (as amended):</p> <p>(A) the Task Authorization number and the Task Authorization Revision number(s), if applicable;</p> <p>(B) a title or a brief description of each authorized task;</p> <p>(C) the name, Resource category and level and level of each resource involved in performing the TA, as applicable;</p> <p>(D) the total estimated cost specified in the validly issued TA of each task, exclusive of Applicable Taxes;</p> <p>(E) the total amount, exclusive of Applicable Taxes, expended to date against each authorized task;</p> <p>(F) the start and completion date for each authorized task; and</p> <p>(G) the active status of each authorized task, as applicable (e.g., indicate whether work is in progress or if Canada has cancelled or suspended the TA, etc.).</p> <p>(ii) Each report must also contain the following cumulative information for all the validly issued TA's (as amended):</p> <p>(C) the amount, exclusive of Applicable Taxes, specified in the Contract (as last amended, as applicable) as Canada's total liability to the Contractor for all validly issued TA's; and</p> <p>(D) the total amount, exclusive of Applicable Taxes, expended to date against all validly issued TA's.</p> | | |



M4^(PB) –Billable Resource Days

The Bidder must demonstrate minimum billable days for the resource categories listed below.

The billable days must have occurred within the past 5 years prior to the closing date of this solicitation.

The work billed for a given resource category must include at least 60% of the associated tasks listed in 5.1 Tasks Annex A - Statement of Work for the same resource category.

The minimum number of billable days for Project Managers should be 800.

The minimum number of billable days for Business Analysts should be 1,200.

The bidder must provide a usage report to demonstrate the above criterion.

The bidder must provide a copy of the usage report as defined below:

- (i) Each report must contain the following information for each validly issued TA (as amended):
 - (A) the Task Authorization number and the Task Authorization Revision number(s), if applicable;
 - (B) a title or a brief description of each authorized task;
 - (C) the name, Resource category and level and level of each resource involved in performing the TA, as applicable;
 - (D) the total estimated cost specified in the validly issued TA of each task, exclusive of Applicable Taxes;
 - (E) the total amount, exclusive of Applicable Taxes, expended to date against each authorized task;
 - (F) the start and completion date for each authorized task; and
 - (G) the active status of each authorized task, as applicable (e.g., indicate whether work is in progress or if Canada has cancelled or suspended the TA, etc.).
- (ii) Each report must also contain the following cumulative information for all the validly issued TA's (as amended):
 - (A) the amount, exclusive of Applicable Taxes, specified in the Contract (as last amended, as applicable) as Canada's total liability to the Contractor for all validly issued TA's; and
 - (B) the total amount, exclusive of Applicable Taxes, expended to date against all validly issued TA's.

M5^(PB) Bidder's Resources

The Bidder must include in its Proposal one 1 CV for each of the following Resource Categories and Levels for a total of two CVs – one for the Project Manager and one for the Business Analyst.



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1. Project Manager level 3; and
2. Business Analyst level 3.

| Mandatory Resource Category | TBIPS Category | Level of Expertise |
|-----------------------------|----------------|--------------------|
| Project Manager | P.9 | 3 |
| Business Analyst | B.1 | 3 |

Mandatory Requirements - Resources

Note to Bidders: The minimum project duration for resources, for all levels of expertise, is 6 months full-time based on actual days worked within the definition of a project as noted in 11. Glossary and Acronyms to count towards meeting experience requirements.

Project Manager level 3 must have at least twelve (12) months full-time, based on actual days worked, on each project to count towards meeting experience requirements

Experience is in actual months based on 240 working days a year not a date range. Experience is counted from bid posting date unless otherwise specified.

| Project Manager (P.9) – Level 3 Evaluated Resource (Core) | | Cross Reference to Proposal | Met Y/N |
|--|--|-----------------------------|---------|
| M1 | The Bidder's proposed resource must have experience actively managing a minimum of two web application development projects in the past ten years each with a project budget in excess of \$2 million (before all applicable taxes) in Canadian dollars for a Government or large private sector corporations. One of the cited projects must have used the Microsoft Net (VB. Net or C#.Net)/Visual Studio development framework. The résumé must detail this experience. | | |
| M2 | The Bidder's proposed resource must have experience within the last ten years as a Project Manager, on a minimum of two web application development projects, for the duration of the projects from start to finish. Start may be either from project inception through to Gate 4 of the Treasury Board Secretariat project gating process or an equivalent project gating process. Finish is defined as project close-out. | | |
| M3 | The Bidder's proposed resource must have 120 months of experience in the management of IM/IT technical resources in a cross-functional IM/IT service delivery environment. | | |
| M4 | The Bidder's proposed resource must have experience as a project manager in each cited project of creating these project management documents: | | |



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| | <ul style="list-style-type: none"> • Project Charter, • Project Closure Report • Risk Management Plan/Risk Register • Project budget, • Work Breakdown Structures (WBS) or Project Schedule, • Project Management Plan | | |
| M5 | The Bidder's proposed resource must have 60 months of experience within the last 10 years as a Project Manager involved in projects with budgets in excess of \$1M CAD in the IM/IT field using Project Management Book of Knowledge (PMBOK) best practices. The CV must detail the experience. | | |
| Project Manager (P.9) level 2 Non-evaluated Resource | | | |
| M1 | The Bidder's proposed resource must have a minimum of 60 months of experience as an IT Project Manager directly managing web application development projects and teams. | | |
| M2 | The Bidder's proposed resource must have experience as a project manager managing a minimum of one web application development project using the Microsoft VB.Net for its full duration with an initial project budget of no less than \$250,000 (before all applicable taxes) in Canadian dollars for Government or large private sector corporations. | | |
| M3 | The Bidder's proposed resource must have experience as a project manager in each cited project creating these project management documents: <ul style="list-style-type: none"> • Project Charter, • Project Closure Report • Risk Management Plan/Risk Register • Project budget, • Work Breakdown Structures (WBS) or Project Schedule, • Project Management Plan | | |
| M4 | The Bidder's proposed resource must have 60 months of experience in the management of IM/IT technical resources in a cross-functional IM/IT service delivery environment. | | |
| M5 | The Bidder's proposed resource must have a minimum of 36 months of experience as a Project Manager managing IT projects using an iterative development methodology. | | |
| Business Analyst (B.1) – Level 3 Evaluated Resource (Core) | | | |
| M1 | The Bidder's proposed resource must have a minimum of 96 months of experience as a Business Analyst using an iterative development process | | |



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| | and Unified Modeling Language (UML) tools (such as Sparx Enterprise Architect). The project description must clearly explain how the resource used the methodology in terms of what documentation and deliverables were produced. | | |
| M2 | The Bidder's proposed resource must have a minimum of 120 months of experience as a Business Analyst performing business analyses of functional requirements to identify information, processes, and decision flows. | | |
| M3 | The Bidder's proposed resource must have a minimum of 96 months of experience validating and expanding existing high level requirements and documenting detailed requirements and behaviour in use case models. | | |
| M5 | The Bidder's proposed resource must have experience as a Business Analyst gathering requirements, modeling and implementing use cases in a UML modeling tool for a minimum of 2 web application development project for Government or private sector. | | |
| M6 | The Bidder's proposed resource must have a minimum of 120 months of experience eliciting and analyzing detailed requirements to create Business Requirements Documents. | | |
| Business Analyst (B.1) Level 2 Non-evaluated Resource | | | |
| M1 | The Bidder's proposed resource must have a minimum of 60 months of experience as a Business Analyst in web application projects. | | |
| M2 | The Bidder's proposed resource must have a minimum of 60 months of experience using iterative development and Unified Modeling Language (UML) tools (such as Sparx Enterprise Architect). | | |
| M3 | The Bidder's proposed resource must have a minimum of 60 months of experience validating and expanding existing high level requirements and documenting detailed requirements and behaviour in use case models. | | |
| M4 | The Bidder's proposed resource must have a minimum of 60 months of experience as a Business Analyst performing business analyses of functional requirements to identify information, processes, and decision flows. | | |
| M5 | The Bidder's proposed resource must have a minimum of 60 months of experience eliciting and analyzing detailed requirements to create Business Requirements Documents. | | |



STREAM C: WEB APPLICATION DEVELOPMENT AND SUPPORT SERVICES

Mandatory Requirements - Corporate Experience

Experience must be in actual months worked, not a date range

| Mandatory Requirements: Corporate Experience ^(PB) | Cross Reference to Proposal | Met Y//N |
|---|-----------------------------|----------|
| <p>M1^(PB) Corporate Stability</p> <p>The Bidder must provide 2 written Information Management/Information Technology (IM/IT) Contract Summaries describing in detail the Bidder's current or previous experience in providing Web Application Development and Support Services for 1 or more client organizations during the past 8 years.</p> <p>For each contract identified:</p> <ol style="list-style-type: none">the contract value must be at least \$2,000,000 CAD and involve at least 5 resources.the Bidder must provide the following information about the specified contracts:<ol style="list-style-type: none">the contract numbers;the client;the award date;the contract values (not including option years);the Contract must have been awarded at least 1 year prior to the closing date of this solicitation and no later than 10 years from the closing date of this solicitation;the Contract must have a duration of at least 1 year. (note: the duration does not include option periods that have not been exercised). <p>The Bidder will be requested for copies of the contracts before Contract Award.</p> <p>Note: A Supply Arrangement or Standing Offer is neither a contract nor a project and therefore any reference to this type of document will not be accepted for the purpose of evaluating contract or project experience. For example if the Bidder references its TBIPS SA number for the purpose of demonstrating experience under the evaluation criteria, Canada will disregard this experience because it does not relate to a specific contract or project.</p> <p>The bidder must have been the prime contractor, rather than a subcontractor. This means that the Bidder contracted directly with the customer of the work. If the Bidder's contract was to perform work which another entity had itself first contracted to perform, the Bidder will not be considered the prime contractor.</p> <p>For example, A (customer) contracted with B for services. B, in turn, entered into a contract with C to provide all or part of these services to A. In this example, B is a prime contractor and C is a subcontractor.</p> | | |



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| <p>Within each Contract Summary provided, the Bidder must clearly indicate each of the following:</p> <p>a. the name of the client organization; and, a brief description of the scope of Web Application Development and Support Services provided, including:</p> <p>(a) contract objectives; (b) resource categories provided; (c) the dates and duration of the contract ; and (d) the invoiced value of the contract to the Bidder.</p> <p>Each project description should not exceed 2 pages.</p> | | |
| <p>M2^(PB) Corporate Offices</p> <p>The Bidder must have a corporate office situated in a commercial location and have at a minimum one (1) full-time staff person working at this site and available to respond to queries from customers between the hours of 9:00 a.m. and 5:00 p.m. EST.</p> | | |
| <p>M3^(PB) - Contract Summaries Billable Days</p> <p>The Bidder must have been awarded, within the past five years of the posting date of this solicitation, one contract to deliver Web Application Development and Support Services informatics professional services where:</p> <p>a. The Bidder provided a minimum of five resources simultaneously for a minimum period of six months; and b. Each of the five resources must have provided informatics professional services for a minimum of 120 billable days during a six-month period.</p> <p>The bidder must provide a copy of the usage report as defined below:</p> <p>(i) Each report must contain the following information for each validly issued TA (as amended):</p> <p>(H) the Task Authorization number and the Task Authorization Revision number(s), if applicable;</p> <p>(I) a title or a brief description of each authorized task;</p> <p>(J) the name, Resource category and level and level of each resource involved in performing the TA, as applicable;</p> <p>(K) the total estimated cost specified in the validly issued TA of each task, exclusive of Applicable Taxes;</p> <p>(L) the total amount, exclusive of Applicable Taxes, expended to date against each authorized task;</p> <p>(M) the start and completion date for each authorized task; and (N) the active status of each authorized task, as applicable (e.g., indicate whether work is in progress or if Canada has cancelled or suspended the TA, etc.).</p> | | |



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| <p>(ii) Each report must also contain the following cumulative information for all the validly issued TA's (as amended):</p> <p>(C) the amount, exclusive of Applicable Taxes, specified in the Contract (as last amended, as applicable) as Canada's total liability to the Contractor for all validly issued TA's; and</p> <p>(D) the total amount, exclusive of Applicable Taxes, expended to date against all validly issued TA's.</p> | | |
| <p>M4^(PB) –Billable Resource Days</p> <p>The Bidder must demonstrate minimum billable days for the resource categories listed below.</p> <p>The billable days must have occurred within the past 5 years prior to the closing date of this solicitation.</p> <p>The work billed for a given resource category must include at least 60% of the associated tasks listed in 5.1 Tasks Annex A - Statement of Work for the same resource category.</p> <p>The billable days must have been provided under identified Contracts in M1 Contract Summaries</p> <p>The minimum number of billable days for Business Transformation Architects should be 800.</p> <p>The minimum number of billable days for Web Developers should be 1,200.</p> <p>The minimum number of billable days for Testers should be 800.</p> <p>The bidder must provide a usage report to demonstrate the above criterion. The bidder must provide a copy of the usage report as defined below:</p> <p>(i) Each report must contain the following information for each validly issued TA (as amended):</p> <p>(A) the Task Authorization number and the Task Authorization Revision number(s), if applicable;</p> <p>(B) a title or a brief description of each authorized task;</p> <p>(C) the name, Resource category and level and level of each resource involved in performing the TA, as applicable;</p> <p>(D) the total estimated cost specified in the validly issued TA of each task, exclusive of Applicable Taxes;</p> <p>(E) the total amount, exclusive of Applicable Taxes, expended to date against each authorized task;</p> <p>(F) the start and completion date for each authorized task; and</p> <p>(G) the active status of each authorized task, as applicable (e.g., indicate whether work is in progress or if Canada has cancelled or suspended the TA, etc.).</p> | | |



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| (ii) Each report must also contain the following cumulative information for all the validly issued TA's (as amended): (A) the amount, exclusive of Applicable Taxes, specified in the Contract (as last amended, as applicable) as Canada's total liability to the Contractor for all validly issued TA's; and (B) the total amount, exclusive of Applicable Taxes, expended to date against all validly issued TA's. | | |
| M5^(PB) Bidder Resources The Bidder must include in its Proposal 1 CV for each of the following Resource Categories and Levels for a total of 3 CVs. 1. Business Transformation Architect (B.7), level 3 2. Web Developer (A.14), level 3 3. Tester (A.11), level 2 | | |

| Mandatory Resource Category (Core) | TBIPS Category | Level of Expertise |
|------------------------------------|----------------|--------------------|
| Business Transformation Architect | B.7 | 3 |
| Web Developer | A.14 | 3 |
| Tester | A.11 | 2 |

Mandatory Requirements – Resources

Note to Bidders: The minimum project duration for resources, for all levels of expertise, is 6 months full-time based on actual days worked within the definition of a project as noted in 11. Glossary and Acronyms to count towards meeting experience requirements.

Experience is in actual months based on 240 working days a year not a date range. Experience is counted as of bid posting date unless otherwise specified.

| Business Transformation Architect (B.7) – Level 3 Evaluated Resource (Core) | | Cross Reference to Proposal | Met Y/N |
|--|--|--------------------------------------|------------|
| M1 | The Bidder's proposed resource must have a minimum of 120 months of experience as a Business Transformation Architect on IM/IT system development projects contributing to the system architecture, requirements, and analysis activities. | | |
| M2 | The Bidder's proposed resource must have a minimum of 120 months of experience performing options analysis, mapping business processes for solution options and identifying and providing preliminary option costs. | | |



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| M3 | The Bidder's proposed resource must have a minimum of 120 months of experience on system integration projects performing gap analysis, process improvement recommendations and change and impact analysis documents. | | |
| M4 | The Bidder's proposed resource must have a minimum of 120 months of experience developing migration strategies and plans for IM/IT systems. | | |
| M5 | The Bidder's proposed resource must have a minimum of 120 months of experience conducting consultations with senior Government officials or senior executives of large private sector corporations to provide expert advice on the development, acquisition and modification of IM/IT systems. | | |
| Business Transformation Architect (B.7) level 2 Non Evaluated Resource | | | |
| M1 | The Bidder's proposed resource must have a minimum of 60 months of experience as a Business Transformation Architect on IM/IT system development projects contributing to the system architecture, requirements, and analysis activities. | | |
| M2 | The Bidder's proposed resource must have a minimum of 60 months of experience as a Business Transformation Architect performing options analysis, mapping business processes for solution options, and identifying and providing preliminary option costs. | | |
| M3 | The Bidder's proposed resource must have a minimum of 60 months of experience on system integration projects performing gap analysis, process improvement recommendations and change and impact analysis documents. | | |
| Web Developer (A.14) – Level 3 Evaluated Resource (Core) | | Cross Reference to Proposal | Met Y/N |
| M1 | The Bidder's proposed resource must have a minimum of 120 months of experience within the last 15 years using Microsoft Net (VB.Net or C#.Net) or The Bidder's proposed resource must have a minimum of 120 months of experience using Java within the last 15 years. | | |
| M2 | The Bidder's proposed resource must have a minimum of 36 months of experience within the last eight years on web application project using : Oracle (versions 10g, 11g, 12c and higher versions). | | |
| M3 | The Bidder's proposed resource must have experience developing web applications using Microsoft Net (VB.Net or C#.Net) or Java for a minimum of two web application development projects for government or private sector. | | |
| M4 | The Bidder's proposed resource must have a minimum of 120 months of experience as a Web Developer performing unit, load, performance, integration and system testing and documenting defects and change requests in defect tracking tools | | |



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| M5 | The Bidder's proposed resource must have a minimum of 120 months of system design experience creating models, including domain models (class diagrams), sequence diagrams and data models. The project descriptions must clearly explain the work performed by the resource. | | |
| M6 | The Bidder's proposed resource must have a minimum of 60 months of experience within the last eight years writing PL/SQL and/or SQL triggers, stored procedures, packages and views in one Oracle (versions 10g, 11g, 12c and higher versions). | | |
| M7 | The Bidder's proposed resource must have a minimum of 36 months of experience within the last five years designing and developing reports with Business Objects versions Crystal 2008 (version 12) and higher versions. | | |
| Web Developer (A.14) level 2 Non evaluated | | | |
| M1 | The Bidder's proposed resource must have a minimum of 60 months of experience within the last eight years using Microsoft .Net(VB.Net or C#.Net) or The Bidder's proposed resource must have a minimum of 60 months of experience of Java within the last eight years. | | |
| M2 | The Bidder's proposed resource must have a minimum of 36 months of experience within the last eight years on web application project using Oracle (versions 10g, 11g, 12c and higher versions). | | |
| M3 | The Bidder's proposed resource must have experience as a Web Developer using Microsoft Net (VB.Net or C#.Net) or Java for a minimum of two web application development projects for government or private sector. | | |
| M4 | The Bidder's proposed resource must have a minimum of 36 months of experience within the last eight years writing PL/SQL or SQL triggers, stored procedures, packages and views in Oracle (versions 10g, 11g, 12c and higher versions). | | |
| M5 | The Bidder's proposed resource must have experience from minimum of 60 months of experience within the last eight years building web application source code from conceptual or logical models; Use Case specifications; and from associated functional requirements, specifications, class diagrams and object diagrams. | | |
| Tester (A.11) – Level 2 Evaluated resource (Core) | | | |
| M1 | The Bidder's proposed resource must have a minimum of 60 months within the last eight years of experience as a Tester in web application development projects. | | |



| | | | |
|----|--|--|--|
| | | | |
| M2 | The Bidder's proposed resource must have 36 months of experience within the last five years creating, testing and debugging PL/SQL scripts, stored procedures, packages and error handling for testing purposes. | | |
| M3 | The Bidder's proposed resource must have a minimum of 60 months within the last eight years of experience in management of walkthroughs and reviews for testing and implementation readiness. | | |
| M4 | The Bidder's proposed resource must have experience as a Tester conducting system, integration and regression tests for a minimum of three web application development projects or COTS implementation projects. | | |
| M5 | The Bidder's proposed resource must have experience as a Tester on a minimum of 3 web application development project developing test scenarios and scripts for web-based applications which are required to meet Government of Canada standards and guidelines including "TBS Standards on Web Accessibility, Interoperability and Usability" (http://www.tbs-sct.gc.ca/ws-nw/index-eng.asp) or equivalent government and private sector standards | | |
| M6 | The Bidder's proposed resource must have experience as a Tester using Defect Tracking Tools such as Test Track Pro (TTPro). | | |



ATTACHMENT 4.2 BID EVALUATION – POINT RATED TECHNICAL CRITERIA

Rated Requirements – Resources – STREAM A: ORACLE DATABASE ADMINISTRATION AND SUPPORT

Note to Bidders: The minimum project duration for resources, for all levels of expertise, is 6 months full-time based on actual days worked within the definition of a project as noted in 11. Glossary and Acronyms to count towards meeting experience requirements.

Experience is in actual months based on 240 working days a year not a date range. Experience is counted from bid posting date unless otherwise specified.

| Database Administrator (I.2) – Level 3 Evaluated Resource (Core) | | | |
|---|--|----|--|
| R1 | <p>The Bidder's proposed resource should have experience as an Oracle (8, 9i, 10g, 11g, 12c and higher versions) database administrator including the installation, configuration, troubleshooting, version upgrades, developing and implementing backup and recovery strategies on Oracle RDBMS running on Windows v2003 or above servers or linux/unix.</p> <p>Over 120 months up to and including 136 months = 6 points Over 136 months up to and including 144 months = 7 points Over 144 months up to and including 160 months = 8 points Over 160 months up to and including 172 months = 9 points Over 172 months = 10 points</p> | 10 | |
| R2 | <p>The Bidder's proposed resource should have experience applying performance monitoring / tuning techniques and procedures, and job management in an Oracle RDBMS (10g, 11g, 12c and higher versions) environment using Oracle Grid Control 10g or above.</p> <p>24 months up to and including 36 months = 1 point Over 36 months up to and including 48 months = 2 points Over 48 months up to and including 60 months = 3 points Over 60 months up to and including 72 months = 4 points Over 72 months = 5 points</p> | 5 | |
| R3 | <p>The Bidder's proposed resource should have experience administering Oracle databases (10g, 11g, 12c and higher versions) in VMWare virtual environments.</p> <p>24 months up to and including 36 months = 1 point Over 36 months up to and including 48 months = 2 points Over 48 months up to and including 60 months = 3 points Over 60 months up to and including 72 months = 4 points Over 72 months = 5 points</p> | 5 | |



| | | | |
|----|---|----|--|
| R4 | <p>The Bidder's proposed resource should have experience in the administration of Oracle Data Guard.</p> <p>24 months up to including 36 months = 7 points Over 36 months up to and including 48 months = 8 points Over 48 months up to and including 60 months = 9 points Over 60 months = 10 points</p> | 10 | |
| R5 | <p>The Bidder's proposed resource should have experience writing and tuning SQL and/or PL/SQL (triggers, stored procedures, packages, views) in an Oracle (8, 9i, 10g, 11g, 12c and higher versions) environment.</p> <p>120 months up to and including 136 months = 6 points Over 136 months up to and including 144 months = 7 points Over 144 months up to and including 160 months = 8 points Over 160 months up to and including 172 months = 9 points Over 172 months = 10 points</p> | 10 | |
| R6 | <p>The Bidder's proposed resource should have experience with the design, installation and configuration of Oracle (8, 9i, 10g, 11g, 12c and higher versions) in an environment consisting of a minimum of 20 databases and a minimum of 5 servers for government or private sector.</p> <p>72 months up to and including 84 months = 6 points Over 84 months up to and including 96 months = 7 points Over 96 months up to and including 108 months = 8 points Over 108 months up to and including 120 months = 9 points Over 120 months = 10 points</p> | 10 | |
| R7 | <p>The Bidder's proposed resource should have experience developing backup and recovery strategies, implementing and performing backup and recovery as required in an Oracle (10g, 11g, 12c and higher versions) RDBMS environment using RMAN.</p> <p>24 months up to and including 36 months = 1 point Over 36 months up to and including 48 months = 2 points Over 48 months up to and including 60 months = 3 points Over 60 months up to and including 72 months = 4 points Over 72 months of experience = 5 points</p> | 5 | |
| R8 | <p>The Bidder's proposed resource should have experience with writing shell scripts in unix or linux to perform database administration tasks including backups, data pumps and data loads.</p> <p>48 months up to and including 60 months = 2 points Over 60 months up to and including 72 months = 3 points Over 72 months up to and including 84 months = 4 points Over 84 months up to and including 96 months = 5 points Over 96 months up to and including 108 months = 6 points Over 108 months = 7 points</p> | 7 | |
| R9 | <p>The Bidder's proposed resource should have experience in installing, configuring and upgrading Oracle Grid Control 10g and higher versions.</p> | 8 | |



| | | | |
|---|--|---------------------------|--|
| | <p>2 projects = 5 points 3 projects = 6 points 4 projects = 7 points Over 4 projects = 8 points</p> | | |
| R10 | <p>The Bidder's proposed resource should have experience supporting Oracle production databases (10g, 11g, 12c and higher versions) in an organization with more than 1,000 internal users within the past five years(as of the bid posting date).</p> <p>24 or more months of experience = 5 points</p> | 5 | |
| R11 | <p>The Bidder's proposed resource should have Oracle 10g or higher versions Certified Professional (OCP).</p> <p>A copy of the certification must be provided with the bid at bid posting to be awarded the allocated points.</p> | 5 | |
| MAXIMUM AVAILABLE POINTS | | 80 | |
| Minimum Points Required 75 % | | 60 | |
| Database Administrator (I.2) – Level 2 Evaluated Resource (Core) | | Maximum Points | Cross reference to Proposal |
| R1 | <p>The Bidder's proposed resource should have experience as an Oracle (8, 9i, 10g, 11g, 12c and higher versions) database administrator including the installation, configuration, troubleshooting, version upgrades, developing and implementing backup and recovery strategies on Oracle RDBMS running on Windows v2003 or above servers or linux/unix.</p> <p>Over 60 months up to and including 72 months = 1 point Over 72 months up to and including 84 months =2 points Over 84 months up to and including 96 months = 3 points Over 96 months = 4 points</p> | | |
| R2 | <p>The Bidder's proposed resource should have experience administering Oracle databases (8, 9i, 10g, 11g, 12c and higher versions) in VMWare virtual environments.</p> <p>12 months up to and including 24 months = 1 point</p> <p>Over 24 months = 2 points</p> | | |
| R3 | <p>The Bidder's proposed resource should have experience writing and tuning SQL and PL/SQL (triggers, stored procedures, packages, views) in an Oracle (8, 9i, 10g, 11g, 12c and higher versions) environment.</p> <p>72 months up to and including 84 months = 2 points Over 84 months up to and including 96 months = 3 points Over 96 months up to and including 108 months = 4points Over 108 months = 5 points</p> | | |



| | | | |
|---|---|-----------|--|
| R4 | <p>The Bidder's proposed resource should have experience with the design, installation and configuration of Oracle (8, 9i, 10g, 11g, 12c and higher versions) in an environment consisting of a minimum of 20 databases and a minimum of five servers for government or private sector.</p> <p>36 months up to and including 48 months = 2 points Over 48 months up to and including 60 months = 3 points Over 60 months up to and including 72 months = 4 points Over 72 months = 5 points</p> | | |
| R5 | <p>The Bidder's proposed resource should have experience with writing shell scripts in unix or linux to perform database administration tasks including backups, data pumps and data loads.</p> <p>24 months up to including 36 months = 1 point Over 36 months = 2 points</p> | | |
| R6 | <p>The Bidder's proposed resource should have experience supporting Oracle production databases (10g, 11g, 12c and higher versions) in an organization with more than 1000 internal users within the past five years (as of bid posting date).</p> <p>24 or more months of experience = 2 points</p> | | |
| | MAXIMUM AVAILABLE POINTS | 20 | |
| | Minimum Points Required 75 % | 15 | |
| | | | |
| Database Modeler (I.4) – Level 3 Evaluated Resource (Core) | | | |
| R1 | <p>The Bidder's proposed resource should have experience analyzing and transforming business requirements into data modelling requirements, which resulted in the implementation of logical or physical models or both for solution(s).</p> <p>5 projects = 4 points 6 projects = 5 points 7 projects = 6 points 8 projects = 7 points Over 8 projects = 8 points</p> | 8 | |
| R2 | <p>The Bidder's proposed resource should have experience controlling, coordinating and generating changes to the database, including the addition/modification/deletion of records (DML Data Modeling Language), the addition, modification and deletion of database data structures (DDL Data Definition Language) and the creation of application accounts and privileges (DCL Data Control Language) to databases in an Oracle (8, 9i, 10g, 11g, 12c and higher versions) RDBMS environment.</p> <p>60 months up to and including 72 months = 4 points</p> | 8 | |



| | | | |
|----|---|---|--|
| | Over 72 months up to and including 84 months = 5 points Over 84 months up to and including 96 months = 6 points Over 108 months up to and including 108 months = 7 points Over 120 months = 8 points | | |
| R3 | The Bidder's proposed resource should have experience writing Structured Query Language (SQL) in an Oracle database (8, 9i, 10g, 11g, 12c and higher versions) environment. 72 months up to and including 84 months = 3 points Over 84 months up to and including 96 months = 4 points Over 96 months up to and including 108 months = 5 points Over 108 months up to and including 120 months = 6 points Over 120 months = 7 points | 7 | |
| R4 | The Bidder's proposed resource should have worked as a Data Modeler in Oracle database (8, 9i, 10g, 11g, 12c and higher versions) or MS SQL Server environments 5 projects = 1 point 6 projects = 2 points 7 projects = 3 points 8 projects = 4 points Over 8 projects = 5 points | 5 | |
| R6 | The Bidder's proposed resource should have experience defining data conversion strategies and database conversion specifications for government or private sector. 3 projects = 1 point 4 projects = 2 points 5 projects = 3 points 6 projects = 4 points Over 6 projects = 5 points | 5 | |
| R7 | The Bidder's proposed resource should have experience recommending and developing Corporate data modeling standards and best practices. 24 months up to and including 36 months = 2 points Over 36 months up to and including 48 months = 3 points Over 48 months up to and including 60 months = 4 points Over 60 months = 5 points | 5 | |
| R8 | The Bidder proposed resource should have hands-on experience conducting data analysis using tools such as PL/SQL Developer 24 or more months of experience = 5 points | 5 | |
| R9 | The Bidder's proposed resource should have experience in developing logical and physical data models using (up to a maximum 7 points): Sparx Enterprise Architect – 3 points | 7 | |



| | | | |
|--|--|-----------|--|
| | Oracle Designer – 4 points ERwin.- 7 points | | |
| | | | |
| | MAXIMUM AVAILABLE POINTS | 50 | |
| | Minimum Points Required 75 % | 37.5 | |
| | | | |
| Database Modeler (I.4) – Level 2 Non-evaluated Resource | | | |
| R1 | <p>The Bidder's proposed resource should have experience analyzing and transforming business requirements into data modelling requirements, which resulted in the implementation of logical or physical models or both for solution(s).</p> <p>2 projects = 1 point 3 projects = 2 points 4 projects = 3 points 5 projects = 4 points Over 5 projects = 5 points</p> | | |
| R2 | <p>The Bidder's proposed resource should have experience controlling, coordinating and generating changes to the database, including the addition/modification/deletion of records (DML Data Modeling Language), the addition, modification and deletion of database data structures (DDL Data Definition Language) and the creation of application accounts and privileges (DCL Data Control Language) to databases in an Oracle (8, 9i, 10g, 11g, 12c and higher versions) RDBMS environment.</p> <p>36 months up to and including 48 months = 1 point Over 48 months up to and including 60 months = 2 points Over 60 months up to and including 72 months = 3 points Over 72 months up to and including 84 months = 4 points Over 84 months = 5 points</p> | | |
| R3 | <p>The Bidder's proposed resource should have experience writing Structured Query Language (SQL) in an Oracle database (8, 9i, 10g, 11g, 12c and higher versions) environment.</p> <p>36 months up to and including 48 months = 1 point Over 48 months up to and including 60 months = 2 points Over 60 months up to and including 72 months = 3 points Over 72 months up to and including 84 months = 4 points Over 84 months = 5 points</p> | | |
| R5 | <p>The Bidder's proposed resource should have worked as a Data Modeler in Oracle (8, 9i, 10g, 11g, 12c and higher versions) or MS SQL Server database (version 2008 and higher versions) environments.</p> <p>3 projects = 1 point 4 projects = 2 points 5 projects = 3 points 6 projects = 4 points Over 7 projects = 5 points</p> | | |
| | | | |
| | MAXIMUM AVAILABLE POINTS | 20 | |



| | | | |
|---|---|----|--|
| | Minimum Points Required 75 % | 15 | |
| Database Analyst (I.3) – Level 3 Evaluated Resource (Core) | | | |
| R1 | <p>The Bidder's proposed resource should have experience controlling, coordinating and generating changes to the database, including the addition/modification/deletion of records (DML Data Modeling Language), the addition, modification and deletion of database data structures (DDL Data Definition Language) and the creation of application accounts and privileges (DCL Data Control Language) to databases in an Oracle (8, 9i, 10g, 11g, 12c and higher versions) RDBMS environment.</p> <p>Over 96 months up to and including 108 months= 7 points Over 108 months up to and including 120 months= 8 points Over 120 months up to and including 132 months = 9 points Over 132 months = 10 points</p> | 10 | |
| R2 | <p>The Bidder's proposed resource should have experience writing and optimizing SQL in an Oracle database (8, 9i, 10g, 11g, 12c and higher versions) environment.</p> <p>Over 96 months up to and including 108 months= 6 points Over 108 months up to and including 120 months= 7 points Over 120 months= 8 points</p> | 8 | |
| R3 | <p>The Bidder's proposed resource should have experience as a Database Analyst in Oracle (10g, 11g, 12c and higher versions) performing database optimization including but not limited to application code, SQL, or PL/SQL.</p> <p>Over 96 months up to and including 108 months= 7 points Over 108 months up to and including 120 months= 8 points Over 120 months up to and including 132 months = 9 points Over 132 months = 10 points</p> | 10 | |
| R4 | <p>The Bidder's proposed resource should have experience in developing and maintaining stored procedures, packages with error handling in PL/SQL for an Oracle (8, 9i, 10g, 11g, 12c and higher versions) RDBMS environment. .</p> <p>Over 96 months up to and including 108 months= 7 points Over 108 months up to and including 120 months= 8 points Over 120 months up to and including 132 months = 9 points Over 132 months = 10 points</p> | 10 | |
| R5 | <p>The Bidder's proposed resource should have experience defining data conversion strategies and database conversion specifications.</p> <p>60 months up to and including 72 months = 2 point 72 months up to and including 84 months = 3 points 84 months up to and including 96 months = 4 points 96 months up to and including 108 months = 5 points Over 108 months = 6 points</p> | 6 | |



| | | | |
|---|--|----|--|
| | | | |
| R6 | <p>The Bidder's proposed resource should have experience working with database data pump imports and exports and performing database refreshes from different sources using RMAN, data pump and/or SQL *Loader.</p> <p>84 months up to and including 96 months = 2 points Over 96 months up to and including 108 months = 3 points Over 108 months up to and including 120 months= 4 points Over 120 months up to and including 132 months = 5 points Over 132 months= 6 points</p> | 6 | |
| R7 | <p>The Bidder proposed resource should have experience with Oracle (8, 9i, 10g, 11g, 12c and higher versions) schema objects including tables, indexes, views, materialized views, and database links.</p> <p>Over 96 month sup to and including 108 months= 3 points Over 108 months up to and including 120 months= 4 points Over 120 months= 5 points</p> | 5 | |
| R8 | <p>The Bidder's proposed resource should have hands-on experience conducting data analysis using tools such as PL/SQL Developer.</p> <p>60 or more months experience = 5 points</p> | 5 | |
| | | | |
| | MAXIMUM AVAILABLE POINTS | 60 | |
| | Minimum Points Required 75 % | 45 | |
| | | | |
| Database Analyst (I.3) – Level 2 Evaluated Resource (Core) | | | |
| R1 | <p>The Bidder's proposed resource should have experience controlling, coordinating and generating changes to the database, including the addition/modification/deletion of records (DML Data Modeling Language), the addition, modification and deletion of database data structures (DDL Data Definition Language) and the creation of application accounts and privileges (DCL Data Control Language) to databases in an Oracle (8, 9i, 10g, 11g, 12c and higher versions) RDBMS environment.</p> <p>Over 60months up to and including 72 months = 7 points Over 72months up to and including 84 months = 8 points Over 84 months up to and including 96 months = 9 points</p> <p>Over 96 months = 10 points</p> | 10 | |
| R2 | <p>The Bidder's proposed resource should have experience writing and optimizing SQL in an Oracle database (8, 9i, 10g,11g, 12c and higher versions) environment.</p> | 8 | |



| | | | |
|----|---|---|--|
| | Over 60 months up to and including 72 months = 6 points Over 72 months up to and including 84 months = 7 points Over 84 months = 8 points | | |
| R3 | The Bidder's proposed resource should have experience as a Database Analyst in Oracle (10g, 11g, 12c and higher versions) performing database optimization including but not limited to application code, SQL, or PL/SQL. Over 36 months up and including 48 months = 3 points Over 48 months up to and including 60 months = 4 points Over 60 months = 5 points | 5 | |
| R4 | The Bidder's proposed resource should have experience in developing and maintaining stored procedures, packages with error handling in PL/SQL for an Oracle (8, 9i, 10g, 11g, 12c and higher versions) RDBMS environment. . Over 60 months up to and including 72 months = 4 points Over 72 months up to and including 84 months = 5 points Over 84 months up to and including 96 months = 6 points Over 96 months = 7 points | 7 | |
| R5 | The Bidder's proposed resource should have experience defining data conversion strategies and database conversion specifications. Over 48 months up and including 60 months = 2 points Over 60 months up and including 72 months = 3 points Over 72 months up to and including 84 months = 4 points Over 84 months = 5 points | 5 | |
| R6 | The Bidder's proposed resource should have experience working with database data pump imports and exports and performing database refreshes from different sources using RMAN, data pump and/or SQL *Loader. 36 months up to and including 48 months = 1 point Over 48 months up to and including 60 months = 2 points Over 60 months up to and including 72 months = 3 points Over 72 months = 4 points | 4 | |
| R7 | The Bidder's proposed resource should have experience with Oracle (8, 9i, 10g, 11g, 12c and higher versions) schema objects including tables, indexes, views, materialized views, and database links. Over 60 months up to and including 72 months = 2 points Over 72 months up to and including 84 months = 3 points Over 84 months = 4 points | 4 | |
| R8 | The Bidder's proposed resource should have hands-on experience conducting data analysis using tools such as PL/SQL Developer. 24 or more months of experience = 5 points | 5 | |
| | | | |



Solicitation No. - N° du l'invitation

Amd No. - N° de la modif.

Buyer ID – Id de l'acheteur

A0414-145931/A

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Client Ref. No. – N° de réf. du client

File No. – N° du dossier

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| | | | |
|---|---------------------------------|-------------|--|
| | MAXIMUM AVAILABLE POINTS | 48 | |
| | Minimum Points Required 75 % | 36 | |
| | | | |
| STREAM A | | | |
| TOTAL EVALUATED RESOURCE-RATED SCORE | | /238 | |



STREAM B: PROJECT MANAGEMENT & BUSINESS ANALYSIS SERVICES

Rated Requirements – Resources

Note to Bidders: The minimum project duration for resources, for all levels of expertise, is 6 months full-time based on actual days worked within the definition of a project as noted in 11. Glossary and Acronyms to count towards meeting experience requirements.

Project Manager level 3 must have at least twelve (12) months full-time, based on actual days worked, on each project to count towards meeting experience requirements

Experience is in actual months based on 240 working days a year not a date range. Experience is counted from bid posting date unless otherwise specified.

| Project Manager (P.9), Level 3 Evaluated Resource (Core) | | | |
|---|---|----|--|
| R1 | The Bidder's proposed resource should have experience as a project manager in the past 15 years leading multi-disciplinary project teams (ex. a team of web developers, database administrators, testers, etc.) of five or more resources reporting directly to the project manager. Over 84 months up to and including 96 months = 5 points Over 96 months up to and including 108 months = 6 points Over 108 months up to and including 120 months = 7 points Over 120 months up to and including 132 months = 8 points Over 132 months up to and including 144 months = 9 points Over 144 months = 10 points | 10 | |
| R2 | The Bidder's proposed resource should have experience managing Project Managers or Project Leaders (Project Leader as defined in TBIPS Annex A SO/SA Requirements for Services, Stream 5), each responsible for an element of the project and its associated project team. 1 project = 1 point 2 projects = 2 points 3 projects = 3 points 4 projects = 4 points Over 4 projects = 5 points | 5 | |
| R3 | The Bidder's proposed resource should have experience within the last 15 years managing projects involving Oracle RDBMS (versions 8, 9i, 10g, 11g, 12c) custom application development. 48 months up to and including 60 months = 1 point Over 60 months = 2 points | 2 | |
| R4 | The Bidder's proposed resource should have experience within the last ten years developing documentation, briefing notes and presentations to steering committees and to senior management (directors and above). 1 projects = 1 point 2 projects = 2 points 3 projects = 3 points | 5 | |



| | | | |
|----|---|----|--|
| | 4 projects = 4 points Over 4 projects = 5 points. | | |
| R5 | <p>The Bidder's proposed resource should have experience as an IT project manager working on Enterprise-level IT projects (minimum \$250K for each project) for Government or large private sector corporations.</p> <p>Over 60 months up to and including 72 months = 5 points 72 months up to and including 84 months = 6 points Over 84 months up to and including 96 months=7 points Over 96 months = 8 points</p> | 8 | |
| R6 | <p>The Bidder's proposed resource should have experience as a Project Manager on projects which use an iterative development process. The résumé must detail the experience to be allocated the points.</p> <p>Over 60 months up to and including 72 months = 1 point Over 72 months up to and including 84 months = 2 points Over 84 months up to and including 96 months = 3 points Over 96 months up to and including 108 months = 4 points Over 108 months = 5 points</p> | 5 | |
| R7 | <p>The proposed resource should have planned and managed, in the role of Project Manager, a departmental or multi-department-wide IT solution(s).</p> <p>100 to 200 internal users = 3 points Over 200 internal users up to and including 350 internal users = 5 points Over 350 internal users up to and including 500 internal users = 7 points Over 500 internal users = 10 points</p> <p>The CV must detail the solution(s) to be allocated the points.</p> | 10 | |
| R8 | <p>The Bidder's proposed resource should have experience as a Project Manager managing adhering to the Treasury Board Secretariat or an equivalent project gating process</p> <p>The CV must detail the experience to be allocated the points.</p> <p>2 projects = 2 points 3 projects = 3 points 4 projects = 4 points Over 4 projects = 5 points</p> | 5 | |
| R9 | <p>The Bidder's proposed resource should demonstrate completion of at least two (2) <u>different</u> projects in the past eight (8) years each demonstrating the Resource's experience in:</p> <p>Implementation of an IT (VB.Net, C#.Net or Java) solution with RDBMS database and a reporting solution with a budget in excess of \$250,000 CAD for Government or large private sector corporations.</p> | 5 | |



| | | | |
|-----|---|-----------|--|
| | <p>Implementation of an IT solution with RDBMS database and a reporting solution with a budget in excess of \$250,000 CAD for Government or large private sector corporations. The mandate of the project is the integration of two or more IT systems to meet business requirements.*</p> <p>Up to 2.5 points for each project</p> <p>Bidders must provide a maximum one page detailed example for each project. Cited projects must have started within the last 10 years.</p> <p>* Integration example: Government department A's system sends to and updates data in department B's system.</p> | | |
| R11 | <p>The Bidder's proposed resource should have an ITIL certification or a minimum of 132 months of Project Management experience.</p> <p>No certification = 0 points ITIL certification or 132 months of Project Management experience= 2 points</p> <p>A copy of the ITIL certification must be provided with the bid to be allocated the points.</p> | 2 | |
| R12 | <p>The Bidder's proposed resource should have experience in the planning, development and implementation of a Case Management (CM) software solution.</p> <p>1 project = 1 point 2 projects = 2 points Over 2 projects = 3 points.</p> | 3 | |
| | | | |
| | MAXIMUM AVAILABLE POINTS | 60 | |
| | Minimum Points Required 75 % | 45 | |

| Project Manager (P.9), Level 2 Non-evaluated Resource | | Points | Cross Reference to Proposal |
|--|--|---------------|--|
| R1 | <p>The Bidder's proposed resource should have experience as a project manager in the past 12 years leading multi-disciplinary project teams (ex. a team of web developers, database administrators, testers, etc.) of 5 or more resources.</p> <p>Over 36 months up to and including 48 months = 5 points Over 48 months up to and including 60 months = 6 points Over 60 months up to and including 72 months = 7 points Over 72 months up to and including 84 months = 8 points Over 84 months up to and including 96 months = 9 points Over 96 months = 10 points</p> | | |
| R2 | <p>The Bidder's proposed resource should have experience within the last ten years developing documentation, briefing notes and presentations to steering committees and to senior management (directors and above).</p> <p>3 projects = 1 point</p> | | |



| | |
|----|---|
| | 4 projects = 2 points Over 4 projects = 3 points |
| R3 | <p>The Bidder's proposed resource should have experience as an IT project manager working on Enterprise-level IT projects (minimum \$250K for each project) for Government or large private sector corporations.</p> <p>24 months up to and including 36 months = 1 point Over 36 months up to and including 48 months = 2 points Over 48 months up to and including 60 months = 3 points Over 60 months = 4 points</p> |
| R4 | <p>The Bidder's proposed resource should have experience in the planning, development and implementation of a Case Management software solution.</p> <p>1 project = 1 point Over 1 project = 2 points</p> |
| R5 | <p>The Bidder's proposed resource should have experience as a Project Manager on projects which use an iterative development process. The résumé must detail the experience to be allocated the points.</p> <p>Over 36 months and including up to 48 months = 2 points Over 48 months and including up to 60 months = 3 points Over 60 months and including up to 72 months = 4 points Over 72 months = 5 points</p> |
| R6 | <p>The Bidder's proposed resource should have that they have planned and managed, in the role of Project Manager, a departmental or multi-department wide IT solution(s).</p> <p>50-100 users = 1 point 101 – 200 users = 2 points 201 – 300 users = 3 points 301- 400 users = 4 points Over 400 users = 5 points</p> <p>The résumé must detail the solution(s) to be allocated the points.</p> |
| R7 | <p>The Bidder's proposed resource should have experience as a Project Manager managing projects adhering to the Treasury Board Secretariat or an equivalent project gating process. The CV must detail the experience to be allocated the points.</p> <p>2 projects = 2 points 3 projects = 3 points 4 projects = 4 points Over 4 projects = 5 points</p> |
| R8 | <p>The Bidder's proposed resource should demonstrate completion of at least two <u>different</u> projects in the past eight years each demonstrating the Resource's experience in:</p> <p>Implementation of an IT (VB.Net, C#.Net or Java) solution with RDBMS database and a reporting solution with a budget in excess of \$250,000 CAD for Government or large private sector corporations</p> |



| | | | |
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| | <p>Implementation of an IT solution with RDBMS database and a reporting solution with a budget in excess of \$250,000 CAD for Government or large private sector corporations. The mandate of the project is the integration of two or more IT systems to meet business requirements.*</p> <p>2 points for each project to a maximum of 4 points</p> <p>Bidders must provide a maximum one page detailed example for each project.</p> <p>* Integration example: Government department A's system sends to and updates data in department B's system.</p> | | |
| R9 | <p>The Bidder's proposed resource should have an ITIL certification or a minimum of 96 months of Project Management experience.</p> <p>No certification = 0 points ITIL certification or 96 months of Project Management experience= 2 points.</p> <p>A copy of the ITIL certification with the submission of a Task Authorization proposal will be required.</p> | | |
| | | | |
| | MAXIMUM AVAILABLE POINTS | 40 | |
| | Minimum Points Required 75 % | 30 | |
| | | | |
| Business Analyst (B1), Level 3 Evaluated Resource (Core) | | Points | Cross Reference to Proposal |
| R1 | <p>The Bidder's proposed resource should have experience creating use case model surveys and turning the model into fully described use cases.</p> <p>60 months up to and including 72 months = 5 points Over 72 months up to and including 84 months = 6 points Over 84 months up to and including 84 months = 7 points Over 96 months = 8 points</p> | 8 | |
| R2 | <p>The Bidder's proposed resource should have experience creating user interface mock-ups.</p> <p>72 months up to and including 84 months = 1 point Over 84 months up to and including 96 months = 2 points Over 96 months up to and including 108 months = 3 points Over 108 months up to and including 120 months = 4 points Over 120 months = 5 points</p> | 5 | |
| R3 | <p>The Bidder's proposed resource should have experience mapping requirements to use cases.</p> <p>84 months up to and including 96 months = 1 point Over 96 months up to and including 108 months = 2 points Over 108 months up to and including 120 months = 3 points Over 120 months up to and including 132 months = 4 points Over 132 months = 5 points</p> | 5 | |



| | | | |
|----|---|---|--|
| R4 | <p>The Bidder's proposed resource should have experience as a Business Analyst on web application development projects for Government or private sector.</p> <p>48 months up to and including 60 months = 1 point Over 60 months up to and including 72 months = 2 points Over 72 months up to and including 84 months = 3 points Over 84 months = 4 points</p> | 4 | |
| R5 | <p>The bidder's proposed resource should experience creating and maintaining traceability between business solution decisions and the implementation of the decisions.</p> <p>The résumé must detail the experience.</p> <p>Over 72 months up to and including 84 months = 1 point Over 84 months up to and including 96 months = 2 points Over 96 months up to and including 108 months = 3 points Over 108 up to and including 120 months = 4 points Over 120 months = 5 points</p> | 5 | |
| R6 | <p>The Bidder's proposed resource should have a current Certified Business Analysis Professional (CBAP) or Masters Certificate in Business Analysis.</p> <p>Note: A copy of the CBAP or Masters Certificate in Business Analysis is required with the submission of the proposal.</p> | 2 | |
| R7 | <p>The Bidder's proposed resource should have experience as a Business Analyst in performing and documenting fit-gap analysis and requirements elicitation for business process redesign projects.</p> <p>Over 84 months up to and including 96 months – 1 point Over 96 months up to and including 108 months = 2 points Over 108 months up to and including 120 months = 3 points Over 120 months up to and including 132 months = 4 points Over 132 months up to and including 144 months = 5 points Over 144 = 6 points</p> | 6 | |
| R8 | <p>The bidder's proposed resource should have hands-on experience in information and data inventories for Open Government Implementation Plans.</p> <p>12 months up to and including 24 months = 1 point Over 24 months = 2 points</p> | 2 | |
| R8 | <p>The Bidder's proposed resource should have experience as a Business Analyst defining and documenting interfaces of business processes within business domains.</p> <p>Over 84 months up to and including 96 months – 1 point Over 96 months up to and including 108 months = 2 points Over 108 months up to and including 120 months = 3 points</p> | 3 | |



| | | | |
|--|--|-----------|--|
| R9 | The Bidder's proposed resource should have experience The Bidder's proposed resource should have experience creating options analyses, business opportunity proposals and for IM/IT solutions. 2 projects = 1 points 3 projects = 2 points 4 projects = 3 points 5 projects = 4 points Over 5 projects = 5 points | 5 | |
| R10 | The Bidder's proposed resource should have experience using Sparx Enterprise Architect to create and maintain Use Case models, detailed system requirements and application documentation. 2 projects = 1 point 3 projects = 2 points Over 3 projects = 3 points | 3 | |
| | | | |
| | MAXIMUM AVAILABLE POINTS | 48 | |
| | Minimum Points Required 75 % | 36 | |
| | | | |
| Business Analyst (B1), Level 2 Non-evaluated Resource | | | |
| R1 | The Bidder's proposed resource should have experience creating use case model surveys and turning the model into fully described use cases. 48 months up to and including 60 months = 1 points Over 60 months up to and including 72 months = 2 points Over 72 months up to and including 84 months = 3 points Over 84 months up to and including 96 months = 4 points Over 96 months up to and including 108 months = 5 points | | |
| R2 | The Bidder's proposed resource should have experience mapping requirements to use cases. 48 months up to and including 60 months = 1 point Over 60 months up to and including 72 months = 2 points Over 72 months up to and including 84 months = 3 points Over 84 months up to and including 96 months = 4 points Over 96 months = 5 points | | |
| R3 | The Bidder's proposed resource should have experience as a Business Analyst on web application development projects for government or private sector. 36 months up to and including 48 months = 1 point Over 48 months = 2 points | | |
| R4 | The Bidder's proposed resource should have experience as a Business Analyst on web application development projects creating and maintaining traceability between business solution decisions and the implementation of the decisions. | | |



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| | 36 months up to and including 48 months = 2 points Over 48 months up to and including 60 months = 3 points Over 60 months up to and including 72 months = 4 points Over 72 months = 5 points | | |
| R5 | The Bidder's proposed resource should have experience as a Business Analyst in eliciting and documenting requirements for business process redesign projects. Over 60 months up to and including 72 months = 4 points Over 72 months up to and including 84 months = 5 points Over 84 months = 6 points | | |
| R6 | The Bidder's proposed resource should have experience as a Business Analyst defining and documenting interfaces of business processes within business domains. 60 months up to and including 72 months = 1 point Over 72 months up to and including 84 months = 2 points Over 84 months up to and including 96 months = 3 points Over 96 months up to and including 108 months = 4 points Over 108 months = 5 points | | |
| R7 | The Bidder's proposed resource should have experience creating options analyses, business opportunity proposals and for IM/IT solutions. 3 projects = 1 point 4 projects = 2 points Over 4 projects = 3 points | | |
| R8 | The Bidder's proposed resource should have experience using Sparx Enterprise Architect to create and maintain Use Case models, requirements and application documentation. 2 projects = 1 point 3 projects = 2 points Over 3 projects = 3 points | | |
| R9 | The Bidder's proposed resource should have a current Certified Business Analysis Professional (CBAP) or Masters Certificate in Business Analysis. Note: A copy of the CBAP or Masters Certificate in Business Analysis is required with the submission of the proposal. 2 points | | |
| | | | |
| | MAXIMUM AVAILABLE POINTS | 36 | |
| | Minimum Points Required 75 % | 27 | |
| | | | |
| STREAM B TOTAL EVALUATED RESOURCE-RATED SCORE | | /108 | |



STREAM C: WEB APPLICATION DEVELOPMENT AND SUPPORT SERVICES

Rated Requirements – Resources

Note to Bidders: The minimum project duration for resources, for all levels of expertise, is 6 months full-time based on actual days worked within the definition of a project as noted in 11. Glossary and Acronyms to count towards meeting experience requirements.

Experience is in actual months based on 240 working days a year not a date range. Experience is counted from bid posting date unless otherwise specified.

| Business Transformation Architect (B.1), Level 3 Evaluated Resource (Core) | | | |
|---|---|---|--|
| R1 | <p>The Bidder's proposed resource should have experience as a Business Transformation Architect on projects for integration and data exchange between systems across Government Departments, Crown Corporations, Organizations, Agencies or large private sector corporations</p> <p>The résumé must detail the experience to be allocated the points.</p> <p>60 months up to and including 72 months = 1 point Over 72 months up to and including 84 months = 2 points Over 84 months up to and including 96 months = 3 points Over 96 months up to and including 108 months = 4 points Over 108 months = 5 points</p> | 5 | |
| | <p>Provide example(s) wherein the Bidder's proposed resource had responsibility on a project for integration and data exchange between systems across government Departments, Crown Corporations, Organizations, Agencies or large private sector corporations. Detail the systems, their level of importance and activity and the proposed resource's specific work in relation to them.</p> <p>Each example should be a maximum of one page.</p> <p>1 Example = 1 Point 2 Examples = 2 Points 3 Examples = 3 Points</p> | 3 | |
| R2 | <p>The Bidder's proposed resource should have experience as a Business Transformation Architect working on IT development projects or COTS implementations with government or private sector</p> <p>72 months up to and including 84 months = 3 points Over 84 months up to and including 96 months = 4 points Over 96 months up to and including 108 months = 5 points Over 108 months up to and including 120 months = 6 points Over 120 months = 7 points</p> | 7 | |
| R3 | <p>The Bidder's proposed resource should have experience leading and participating in multidisciplinary teams and committees to address IM/IT issues at the Portfolio level.</p> | 5 | |



| | | | |
|----|--|----|--|
| | <p>Over 48 Months up to and including 60 Months = 1 Point Over 60 Months up to and including 72 Months = 2 Points Over 72 Months up to and including 84 Months = 3 Points Over 84 Months up to and including 96 Months = 4 Points Over 96 Months = 5 Points</p> | | |
| | <p>Provide example(s) wherein the Bidder's proposed resource had responsibility leading and participating in multidisciplinary teams and committees to address IM/IT issues at the Portfolio level. Detail the systems, their level of importance and activity and the proposed resource's specific work in relation to them.</p> <p>Each example should be a maximum of one page.</p> <p>1 Example = 1 Point 2 Examples = 2 Points 3 Examples = 3 points</p> | 3 | |
| R4 | <p>The Bidder's proposed resource should have experience as a Business Transformation Architect in analyzing and documenting commonalities and potential commonalities in business processes specifically for the purpose of system integration. The résumé must detail the experience to be allocated the points.</p> <p>72 months up to and including 84 months = 6 points Over 84 months up to and including 96 months = 7 points Over 96 months up to and including 108 months = 8 points Over 108 months up to and including 120 months = 9 points Over 120 months = 10 points</p> | 10 | |
| R5 | <p>The Bidder's proposed resource should have experience as a Business Transformation Architect analyzing and providing options for data management.</p> <p>2 projects = 1 point 3 projects = 2 points 4 projects = 3 points 5 projects = 4 points Over 5 projects = 5 points</p> | 5 | |
| R6 | <p>The Bidder's proposed resource should have experience as a Business Transformation Architect in Identifying business requirements, and working with clients to confirm and document the target business vision to meet the identified business requirements.</p> <p>The résumé must detail the experience to be allocated the points.</p> <p>Over 72 months up to and including 84 months = 3 points Over 84 months up to and including 96 months = 4 points Over 96 months up to and including 108 months = 5 points Over 108 months up to and including 108 = 6 points Over 120 months = 7 points</p> | 7 | |



| | | | |
|--|---|----|--|
| | <p>Provide example(s) wherein the Bidder's proposed resource had responsibility on a project Identifying business requirements, and working with clients to confirm and document the target business vision to meet the identified business requirements. Detail the systems, their level of importance and activity and the proposed resource's specific work in relation to them.</p> <p>Each example should be a maximum of one page.</p> <p>1 Example = 1 Point</p> <p>2 Examples = 2 Points</p> <p>3 Examples = 3 Points</p> | 3 | |
| R7 | <p>a) The Bidder's proposed resource should have government or large private sector corporate experience in the integration of client portfolio IM/IT plans into a national IM/IT plan.</p> <p>Over 12 Months up to and including 24 Months = 1 Point</p> <p>Over 24 Months up to and including 36 Months = 2 Points</p> <p>Over 36 Months up to and including 48 Months = 3 Points</p> <p>Over 48 Months up to and including 60 Months = 4 Points</p> <p>Over 60 Months = 5 Points</p> | 5 | |
| | <p>b) Provide example(s) wherein the Bidder's proposed resource had government or large private sector corporate responsibility for integrating a client portfolio IM/IT plan into a national IM/IT plan over a 5 year period. Detail the systems, their level of importance and activity and the proposed resource's specific work in relation to them.</p> <p>Each example should be a maximum of one page</p> <p>1 Example = 1 Point</p> <p>2 Examples = 2 Points</p> <p>3 Examples = 3 Points</p> | 3 | |
| R8 | <p>The Bidder's proposed resource should have experience within the last 15 years working as a Business Transformation Architect supporting business transformation and IM/IT initiatives with budgets of \$300K CAD or more.</p> <p>Over 60 months up to and including 72 months = 1 point</p> <p>Over 72 months up to and including 84 months = 2 points</p> <p>Over 84 months up to and including 96 months = 3 points</p> <p>Over 96 months = 4 points</p> | 4 | |
| | | | |
| | MAXIMUM AVAILABLE POINTS | 60 | |
| | Minimum Points Required 75 % | 45 | |
| | | | |
| Business Transformation Architect (B.7), Level 2 Non Evaluated Resource | | | |



| | |
|----|---|
| R1 | <p>The Bidder's proposed resource should have experience as a Business Transformation Architect on projects for integration and data exchange between systems across Government or large private sector corporations.</p> <p>The résumé must detail the experience to be allocated the points. 24 months = 1 point Over 24 months up to and including 36 months = 2 points Over 36 months = 3 points</p> <p>Provide example(s) wherein the Bidder's proposed resource had responsibility on a project for integration and data exchange between systems across Government or large private sector corporations. Detail the systems, their level of importance and activity and the proposed resource's specific work in relation to them.</p> <p>Each example should be a maximum of one page.</p> <p>1 Example = 1 Point 2 Examples = 2 Points</p> |
| R2 | <p>The Bidder's proposed resource should experience leading and participating in multidisciplinary teams and committees to address IM/IT issues at the Application Portfolio Management level.</p> <p>24 months = 1 point Over 24 months up to and including 36 months = 2 points Over 36 months up to and including 48 months = 3 points Over 48 months up to and including 60 months = 3 points Over 60 months = 5 points</p> |
| R3 | <p>The Bidder's proposed resource should have Government or large private sector corporate experience in the integration of client portfolio IM/IT plans into a national IM/IT plan.</p> <p>Over 12 Months up to and including 24 Months = 1 Point Over 24 Months up to and including 36 Months = 2 Points Over 36 Months up to and including 48 Months = 3 Points Over 48 Months up to and including 60 Months = 4 Points Over 60 Months = 5 Points</p> |
| R4 | <p>The Bidder's proposed resource should have experience as a Business Transformation Architect in analyzing and documenting commonalities and potential commonalities in business processes specifically for the purpose of system integration. The résumé must detail the experience to be allocated the points.</p> <p>48 months up to and including 60 months = 1 point Over 60 months up to and including 72 months = 2 points Over 72 months = 3 points</p> |
| R5 | <p>The Bidder's proposed resource should have experience Identifying business requirements, and working with clients to confirm and document the target business vision to meet the identified business requirements</p> <p>The résumé must detail the experience to be allocated the points.</p> <p>Over 48 Months up to and including 60 Months = 3 Points Over 60 Months up to and including 72 Months = 4 Points Over 72 Months = 5 Points</p> |



| | | | |
|--|--|----|--|
| R6 | <p>The Bidder's proposed resource should have experience leading and participating in multidisciplinary teams and committees to address IM/IT issues at the Portfolio level.</p> <p>Over 12 Months up to and including 24 Months = 1 Point Over 24 Months up to and including 36 Months = 2 Points Over 36 Months up to and including 48 Months = 3 Points Over 48 Months = 4 Points</p> <p>Provide example(s) wherein the Bidder's proposed resource had responsibility leading and participating in multidisciplinary teams and committees to address IM/IT issues at the Portfolio level. Detail the systems, their level of importance and activity and the proposed resource's specific work in relation to them.</p> <p>Each example should be a maximum of one page.</p> <p>1 Example = 1 Point 2 Examples = 2 Points</p> | | |
| R7 | <p>The Bidder's proposed resource should have a minimum of 24 months of experience within the last 10 years working as a Business Transformation Architect supporting business transformation and IM/IT initiatives with budgets of \$200K CAD or more.</p> <p>24 months up to and including 36 months = 1 point Over 36 months up to and including 48 months years = 2 points Over 48 months = 3 points</p> | | |
| | | | |
| | MAXIMUM AVAILABLE POINTS | 32 | |
| | Minimum Points required 75% | 24 | |
| | | | |
| Web Developer (A.14), Level 3 Evaluated Resource (Core) | | | |
| R1 | <p>The Bidder's proposed resource should have experience developing work estimates from system requirements specifications (SRS) and/or business requirements documents (BRD).</p> <p>Over 72 months up to and including 84 months = 1 point Over 84 months up to and including 96 months = 2 points Over 96 months up to and including 108 months = 3 points Over 108 months up to and including 120 months = 4 points Over 120 months = 5 points</p> | 5 | |
| R2 | <p>The Bidder's proposed resource should have experience as a web developer producing code, objects and classes from Use Cases, sequence diagrams, class diagrams and models.</p> <p>Over 60 months up to and including 72 months = 5 points Over 72 months up to and including 84 months = 6 points Over 84 months up to and including 96 months = 7 points Over 96 months = 8 points</p> | 8 | |



| | | | |
|----|--|----|--|
| R3 | <p>The Bidder's proposed resource should have experience as a web developer on projects using the Microsoft .Net (VB.Net or C#.Net) or Java for Government or private sector within the last 15 years.</p> <p>Over 60 months up to and including 72 months = 5 points Over 72 months up to and including 84 months = 6 points Over 84 months up to and including 96 months = 7 points Over 96 months up to and including 108 months = 8 points Over 108 months up to and including 120 months = 9 points Over 120 months = 10 points</p> | 10 | |
| R4 | <p>The Bidder's proposed resource should have experience directly working with methods and standards in CSLA.Net or Model-View-Controller (MVC) Microsoft.NET architectural patterns on web application development projects.</p> <p>Over 12 months up to and including 24 months = 1 point Over 24 months up to and including 36 months = 2 points Over 36 months = 3 points</p> | 3 | |
| R5 | <p>The Bidder's proposed resource should have experience coding and implementing XML or Json for data transfer.</p> <p>Over 12 months up to and including 24 months = 1 point Over 24 months up to and including 36 months = 2 points Over 36 months = 3 points</p> | 3 | |
| R6 | <p>The Bidder's proposed resource should have experience coding HTML5.</p> <p>Over 12 months up to 24 months = 1 point Over 24 months up to and including 36 months = 2 points Over 36 months = 3 points</p> | 3 | |
| R7 | <p>The Bidder's proposed resource should have experience developing, testing and implementing PL/SQL or SQL scripts for data querying, data modifications and uploads to and exports from Oracle databases (10g, 11, 12c and higher versions)</p> <p>Over 36 months up to and including 48 months = 3 points Over 48 months up to and including 60 months = 4 points Over 60 months up to and including 72 months = 5 points Over 72 months up to and including 84 months = 6 points Over 84 months = 7 points</p> | 7 | |
| R8 | <p>The Bidder's proposed resource should have experience coding and using Web Services.</p> <p>Over 24 months up to and including 36 months = 1 point Over 36 months up to and including 48 months = 2 points Over 48 months = 3 points</p> | 3 | |
| R9 | <p>The Bidder's proposed resource should have experience using JQuery and/or javascript.</p> <p>Over 48 months up to and including 60 months = 1 point</p> | 3 | |



| | | | |
|---|--|----|--|
| | Over 60 months up to and including 72 months =2 points Over 72 months = 3 points | | |
| R10 | The Bidder's proposed resource should have recent experience applying WCAG standards to new web applications or upgrades of existing web applications. 1 project = 1 point 2 projects = 2 points Over 2 projects = 3 points | 3 | |
| | | | |
| | MAXIMUM AVAILABLE POINTS | 48 | |
| | Minimum Points Required 75 % | 36 | |
| | | | |
| Web Developer (A.14), Level 2 Non Evaluated Resource | | | |
| R1 | The Bidder's proposed resource should have experience developing estimates from system requirements specifications (SRS) and business requirements documents (BRD). Over 60 months up to and including 72 months = 1 point Over 72 months up to and including 84 months = 2 points Over 84 months up to and including 96 months = 3 points Over 96 months = 4 points. | | |
| R2 | The Bidder's proposed resource should have experience as a web developer producing code, objects and classes from Use Cases, sequence diagrams, class diagrams and models. Over 60 months up to and including 72 months = 1 point Over 72 months up to and including 84 months = 2 points Over 84 months up to and including 96 months = 3 points Over 96 months up to and including 108 months = 4 points Over 108 months = 5 points | | |
| R3 | The Bidder's proposed resource should have experience directly working with methods and standards in CSLA.Net or Model-View-Controller (MVC) Microsoft.NET architectural patterns on web application development projects. Over 12 months up to and including 24months = 1 point Over 24 months up to and including 36 months = 2 points Over 36 months = 3 points | | |
| R4 | The Bidder's proposed resource should have experience as a web developer on projects using the Microsoft .Net (VB.Net, C#.Net) or Java for Government or private sector within the last ten years. Over 60 months up to and including 72 months = 1 point Over 72 months up to and including 84 months = 2 points Over 84 months up to and including 96 months = 3 points Over 96 months up to and including 108 months = 4 points Over 108 months = 5 points | | |
| R5 | The Bidder's proposed resource should have experience coding HTML5. | | |



| | | | |
|---|--|----|--|
| | Over 12 months up to 24 months = 1 point Over 24 months = 2 points | | |
| R6 | The Bidder's proposed resource should have experience developing, testing and implementing PL/SQL or SQL scripts for data querying, data modifications and uploads to and exports from Oracle databases (10g, 11, 12c and higher versions) Over 24 months up to and including 36 months = 1 point Over 36 months up to and including 48 months = 2 points Over 48 months up to and including 60 months = 3 points Over 60 months up to and including 72 months = 4 points Over 72 months = 5 points | | |
| R7 | The Bidder's proposed resource should have experience coding and implementing XML or Json for data transfer. Over 24 months up to and including 36 months = 1 point Over 36 months = 2 points | | |
| R8 | The Bidder's proposed resource should have experience coding and using web services. Over 36 months up to and including 48 months = 1 point Over 48 months = 2 points | | |
| R9 | The Bidder's proposed resource should have recent experience applying WCAG standards to new web applications or upgrades of existing web applications. 1 project = 1 point Over 1 project = 2 points | | |
| | | | |
| | MAXIMUM AVAILABLE POINTS | 32 | |
| | Minimum Points Required | 24 | |
| | | | |
| Tester (A.11), Level 2 Evaluated Resource (Core) | | | |
| R1 | The Bidder's proposed resource should have experience conducting system testing, integration testing and regression testing for Microsoft .Net (VB.Net, C#.Net) or Java application development projects. Over 36 months up to and including 48 months = 7 points Over 48 months up to and including 60 months = 8 points Over 60 months up to and including 72 months = 9 points Over 72 months = 10 points | 10 | |
| R2 | The Bidder's proposed resource should have experience developing test scripts and test cases from system use cases. 60 months up to and including 72 months = 6 points Over 72 months up to and including 84 months = 7 points Over 84 months up to and including 96 months = 8 points | 10 | |



| | | | |
|--|--|-------------|--|
| | Over 96 months up to and including 108 months = 9 points Over 108 months = 10 points | | |
| R3 | The Bidder's proposed resource should have experience establishing software testing procedures for unit test, integration testing and regression testing. 60 months up to and including 72 months = 6 points Over 72 months up to and including 84 months = 7 points Over 84 months up to and including 96 months = 8 points Over 96 months up to and including 108 months = 9 points Over 108 months = 10 points | 10 | |
| R4 | The Bidder's proposed resource should have experience developing user testing manuals or guides. 5 projects = 2 points 6 projects = 3 points 7 projects = 4 points Over 7 projects = 5 points | 5 | |
| R5 | The Bidder's proposed resource should have experience as a Tester conducting system, integration and regression tests on COTS (corporate IT systems) implementation projects for Government or large private sector corporations. 1 projects = 1 point 2 projects = 2 points 3 projects = 3 points 4 projects = 4 points Over 4 projects = 5 points | 5 | |
| | | | |
| | MAXIMUM AVAILABLE POINTS | 40 | |
| | Minimum Points Required 75 % | 30 | |
| | | | |
| STREAM C TOTAL EVALUATED RESOURCE-RATED SCORE | | /148 | |



ATTACHMENT 4.3 PRICING SCHEDULE

STREAM A: ORACLE DATABASE ADMINISTRATION AND SUPPORT SERVICES

| Initial Contract Period (3 years) | | |
|------------------------------------|--------------------|--------------------|
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| Database Administrator | LEVEL 2 | |
| Database Administrator | LEVEL 3 | |
| Data Modeler | LEVEL 2 | |
| Data Modeler | LEVEL 3 | |
| Database Analyst/ IM Administrator | LEVEL 1 | |
| Database Analyst/ IM Administrator | LEVEL 2 | |
| Database Analyst/ IM Administrator | LEVEL 3 | |

| Option Period 1 (1 year) | | |
|------------------------------------|--------------------|--------------------|
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| Database Administrator | LEVEL 2 | |
| Database Administrator | LEVEL 3 | |
| Data Modeler | LEVEL 2 | |
| Data Modeler | LEVEL 3 | |
| Database Analyst/ IM Administrator | LEVEL 1 | |
| Database Analyst/ IM Administrator | LEVEL 2 | |
| Database Analyst/ IM Administrator | LEVEL 3 | |

| Option Period 2 (1 year) |
|--------------------------|
|--------------------------|



Solicitation No. - N° du l'invitation

Amd No. - N° de la modif.

Buyer ID – Id de l'acheteur

A0414-145931/A

613ZM

Client Ref. No. – N° de réf. du client

File No. – N° du dossier

A0414-145931

613zmA0414-145931

| Resource Category | Level of Expertise | Firm Per Diem Rate |
|------------------------------------|--------------------|--------------------|
| Database Administrator | LEVEL 2 | |
| Database Administrator | LEVEL 3 | |
| Data Modeler | LEVEL 2 | |
| Data Modeler | LEVEL 3 | |
| Database Analyst/ IM Administrator | LEVEL 1 | |
| Database Analyst/ IM Administrator | LEVEL 2 | |
| Database Analyst/ IM Administrator | LEVEL 3 | |



STREAM B: PROJECT MANAGEMENT AND BUSINESS ANALYSIS SERVICES

| Initial Contract Period (3 years) | | |
|-----------------------------------|--------------------|--------------------|
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| Project Manager | LEVEL 2 | |
| Project Manager | LEVEL 3 | |
| Business Analyst | LEVEL 2 | |
| Business Analyst | LEVEL 3 | |

| Option Period 1 (1 year) | | |
|--------------------------|---------|--|
| Project Manager | LEVEL 2 | |
| Project Manager | LEVEL 3 | |
| Business Analyst | LEVEL 2 | |
| Business Analyst | LEVEL 3 | |

| Option Period 2 (1 year) | | |
|--------------------------|--------------------|--------------------|
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| Project Manager | LEVEL 2 | |
| Project Manager | LEVEL 3 | |
| Business Analyst | LEVEL 2 | |
| Business Analyst | LEVEL 3 | |



STREAM C: WEB APPLICATION DEVELOPMENT AND SUPPORT SERVICES

| Initial Contract Period (3 years) | | |
|-----------------------------------|--------------------|--------------------|
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| Business Transformation | LEVEL 2 | |
| Business Transformation | LEVEL 3 | |
| Web Developer | LEVEL 2 | |
| Web Developer | LEVEL 3 | |
| Tester | LEVEL 2 | |

| Option Period 1 (1 year) | | |
|--------------------------|--------------------|--------------------|
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| Business Transformation | LEVEL 2 | |
| Business Transformation | LEVEL 3 | |
| Web Developer | LEVEL 2 | |
| Web Developer | LEVEL 3 | |
| Tester | LEVEL 2 | |

| Option Period 2 (1 year) | | |
|--------------------------|--------------------|--------------------|
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| Business Transformation | LEVEL 2 | |
| Business Transformation | LEVEL 3 | |
| Web Developer | LEVEL 2 | |
| Web Developer | LEVEL 3 | |
| Tester | LEVEL 2 | |



APPENDIX A TO ANNEX A

TASKING ASSESSMENT PROCEDURE

1. Where a requirement for a specific resource and task is identified, a draft Task Authorization Form (TA Form) as attached at Appendix B to Annex A will be provided to the Contractor [in accordance with the allocation methodology stated in the Contract Article titled "Allocation of Task Authorizations."] Once a draft TA Form is received, the Contractor must submit to the Technical Authority a quotation of rates to supply the requested Resource based on the information identified in the TA Form. The quotation must be signed and submitted to Canada within the time for response identified in the TA Form. The Contractor will be given a minimum of 48 hours turnaround time to submit a quotation.
2. For each proposed resource the Contractor must supply a résumé, the requested security clearance information and must complete the Response Tables at Appendix C of Annex A applicable to the Resource Categories identified in the draft TA. The same individual must not be proposed for more than one Resource Category. The résumés must demonstrate that each proposed individual meets the qualification requirements described (including any educational requirements, work experience requirements, and professional designation or membership requirements). With respect to the proposed resources:
 - (i) Proposed resources may be employees of the Contractor or employees of a subcontractor, or these individuals may be independent contractors to whom the Contractor would subcontract a portion of the Work. (Refer to Appendix D to Annex A, Certifications).
 - (ii) For educational requirements for a particular degree, designation or certificate, Canada will only consider educational programmes that were successfully completed by the resource before the date the draft TA was first issued to the Contractor.
 - (iii) For requirements relating to professional designation or membership, the resource must have the required designation or membership by the time of draft TA issuance and must continue, where applicable, to be a member in good standing of the profession or membership throughout the assessment period and Contract Period. Where the designation or membership must be demonstrated through a certification, diploma or degree, such document must be current, valid and issued by the entity specified in this Contract or if the entity is not specified, the issuer must have been an accredited or otherwise recognized body, institution or entity at the time the document was issued.
 - (iv) For work experience, Canada will not consider experience gained as part of an educational programme, except for experience gained through a formal co-operative programme at a post-secondary institution.
 - (v) For any requirements that specify a particular time period (e.g., 2 years) of work experience, Canada will disregard any information about experience if the résumé does not include the relevant dates (month and year) for the experience claimed (i.e., the start date and end date). Canada will evaluate only the duration that the resource actually worked on a project or projects (from his or her start date to end date), instead of the overall start and end date of a project or a combination of projects in which a resource has participated.
 - (vi) A résumé must not simply indicate the title of the individual's position, but must demonstrate that the resource has the required work experience by explaining the responsibilities and work performed by the individual while in that position. Only listing experience without providing any supporting data to describe responsibilities, duties and relevance to the requirement, or reusing the same wording as the TA Form, will not be considered "demonstrated" for the purposes of the assessment. The Contractor should provide complete details as to where, when, month and year, and how, through which activities/responsibilities, the stated qualifications / experience were obtained. In situations in which a proposed resource worked at the same time on more than one project, the duration of any overlapping time period will be counted only once toward any requirements that relate to the individual's length of experience.
3. The qualifications and experience of the proposed resources will be assessed against the requirements set out in Appendix C to Annex A to determine each proposed resource's compliance with the mandatory and rated



criteria. Canada may request proof of successful completion of formal training, as well as reference information. Canada may conduct reference checks to verify the accuracy of the information provided. If reference checks are done, they will be conducted in writing by e-mail (unless the contact at the reference is only available by telephone). Canada will not assess any points or consider a mandatory criterion met unless the response is received within 5 working days. On the third working day after sending out the e-mails, if Canada has not received a response, Canada will notify the Contractor by e-mail, to allow the Contractor to contact its reference directly to ensure that it responds to Canada within 5 working days. Wherever information provided by a reference differs from the information supplied by the Contractor, the information supplied by the reference will be the information assessed. Points will not be allocated or a mandatory criteria considered as met if the reference customer is not a customer of the Contractor itself (for example, the customer cannot be the customer of an affiliate of the Contractor). Nor will points be allocated or a mandatory criteria considered as met if the customer is itself an affiliate or other entity that does not deal at arm's length with the Contractor. Crown references will be accepted.

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

Solicitation No. - N° du l'invitation

Amd No. - N° de la modif.

Buyer ID – Id de l'acheteur

A0414-145931/A

Client Ref. No. – N° de réf. du client

File No. – N° du dossier

613ZM

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APPENDIX B TO ANNEX A TASK AUTHORIZATION (TA) FORM

| TASK AUTHORIZATION (TA) FORM | | | | |
|---|---------------------------------|---|---------------------|------------|
| Contractor: | | Contract Number: | | |
| Commitment Number: | | Client reference number (if required) : | | |
| Task Number (Amendment): | | Financial Coding: | | |
| Issue Date: | | Response required by: | | |
| 1. STATEMENT OF WORK (WORK ACTIVITIES, CERTIFICATIONS AND DELIVERABLES) | | | | |
| Description of the Project / Work Required: | | | | |
| | | | | |
| 2. PERIOD OF SERVICES | | FROM (DATE): | TO (DATE): | |
| 3. Work Location: | | | | |
| 4. Invoice sent to: | | | | |
| 5. Travel Requirements: | | | | |
| 6. Language Requirements: | | | | |
| 7. Other Conditions / Constraints: | | | | |
| 8. Level of Security Clearance Required for the Contractor Personnel: | | | | |
| 9. Contractor's Response: | | | | |
| Category and Name of Proposed Resource | PWGSC Security File Number | Firm Per Diem Rate | Estimated # of Days | Total cost |
| | | | | |
| | Estimated Cost (A): | | | |
| | Applicable Taxes (B): | | | |
| | Total Labour Cost (C= A + B): | | | |
| | Total Travel & Living Cost (D): | | | |
| | Maximum TA Price (E = C + D) | | | |
| Please note that consultants must not exceed the maximum number of days allocated in the TA. | | | | |
| 9. Contractor's Signature | | | | |
| Name, Title and Signature of Individual Authorized to Sign on Behalf of Contractor (type or print) | | Signature: _____ | | |
| | | Date: _____ | | |
| 10. Approval – Signing Authority | | | | |
| Signatures (Client) | | | | |



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| | |
|---|-----------------------------------|
| Name, Title and Signature of Technical Authority to Sign on Behalf of (type or print) | Signature: _____ Date: _____ |
| TASK AUTHORIZATION (TA) FORM | |
| | |
| Signatures (PWGSC) | |
| Name, Title and Signature of *Contracting Authority to Sign on Behalf of Public Works and Government Services Canada (type or print) | Signature: _ Date: _____ _____ |
| *Signature required for projects valued at \$200,000.00 or more, Applicable Taxes included. | |
| You are requested to sell to her Majesty the Queen in Right of Canada, in accordance with the terms and conditions set out herein, referred to herein, or attached hereto, the services listed herein and in any attached sheets at the price set out there of. | |



APPENDIX C TO ANNEX A

RESOURCES ASSESSMENT CRITERIA AND RESPONSE TABLE

To facilitate resource assessment, Contractors must prepare and submit a response to a draft Task Authorization using the tables provided in this Annex. When completing the resource grids, the specific information which demonstrates the requested criteria and reference to the page number of the résumé should be incorporated so that Canada can verify this information. The tables should not contain all the project information from the resume. Only the specific answer should be provided.

| |
|--|
| <p>Note to Bidders: Attachment 4.1 and 4.2 – Bid Evaluation Criteria to be inserted and will form part of the resulting Contract.</p> |
|--|



APPENDIX D TO ANNEX A CERTIFICATIONS AT THE TA STAGE

The following Certifications are to be used, as applicable. If they apply, they must be signed and attached to the Contractor's quotation when it is submitted to Canada.

1. CERTIFICATION OF EDUCATION AND EXPERIENCE

The Contractor certifies that all the information provided in the résumés and supporting material proposed for completing the subject work, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Contractor to be true and accurate. Furthermore, the Contractor warrants that every individual proposed by the Contractor for the requirement is capable of performing the Work described in the Task Authorization.

Print name of authorized individual & sign above

Date

2. CERTIFICATION OF AVAILABILITY OF PERSONNEL

The Contractor certifies that, should it be authorized to provide services under this Task Authorization, the persons proposed in the quotation will be available to commence performance of the work within a reasonable time from the date of issuance of the valid Task Authorization, or within the time specified in the TA Form, and will remain available to perform the work in relation to the fulfillment of the requirement.

Print name of authorized individual & sign above

Date

3. CERTIFICATION OF STATUS OF PERSONNEL

If the Contractor has proposed any individual who is not an employee of the Contractor, the Contractor certifies that it has permission from that individual to propose his/her services in relation to the Work to be performed under this TA and to submit his/her résumé to Canada. At any time during the Contract Period the Contractor must, upon request from the Contracting Authority, provide the written confirmation, signed by the individual, of the permission that was given to the Contractor of his/her availability. Failure to comply with the request may result in a default under the Contract in accordance with the General Conditions.

Print name of authorized individual & sign above

Date

4. CERTIFICATION OF LANGUAGE

The Contractor certifies that the proposed resource(s) in response to this draft Task Authorization is/are fluent in English. The individual(s) proposed must be able to communicate orally and in writing in English without any assistance and with minimal errors.

Print name of authorized individual & sign above

Date



ATTACHMENT 5.1

FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY - CERTIFICATION

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

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

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

Complete both A and B.

A. Check only one of the following:

() A1. The Bidder certifies having no work force in Canada.

() A2. The Bidder certifies being a public sector employer.

() A3. The Bidder certifies being a federally regulated employer being subject to the [Employment Equity Act](#).

() A4. The Bidder certifies having a combined work force in Canada of less than 100 permanent full-time and/or permanent part-time employees.

A5. The Bidder has a combined workforce in Canada of 100 or more employees; and

() A5.1 The Bidder certifies already having a valid and current [Agreement to Implement Employment Equity](#) (AIEE) in place with ESDC-Labour.

OR

() A5.2 The Bidder certifies having submitted the Agreement to Implement Employment Equity (LAB1168) to ESDC-Labour. As this is a condition to contract award, proceed to completing the form Agreement to Implement Employment Equity (LAB1168), duly signing it, and transmit it to ESDC-Labour.

B. Check only one of the following:

() B1. The Bidder is not a Joint Venture.

OR

The Bidder is a Joint venture and each member of the Joint Venture must provide the Contracting Authority with a completed annex Federal Contractors Program for Employment Equity - Certification. (Refer to the Joint Venture section of the Standard Instructions).



ATTACHMENT 5.2 SET-ASIDE FOR ABORIGINAL BUSINESS – CERTIFICATION

1. This procurement is set aside under the federal government Procurement Strategy for Aboriginal Business. For more information on Aboriginal business requirements of the Set-aside Program for Aboriginal Business, see Annex 9.4, Supply Manual.
2. The Bidder:
 - i. certifies that it meets, and will continue to meet throughout the duration of any resulting contract, the requirements described in the above-mentioned annex;
 - ii. agrees that any subcontractor it engages under any resulting contract must satisfy the requirements described in the above-mentioned annex; and
 - iii. agrees to provide to Canada, immediately upon request, evidence supporting any subcontractor's compliance with the requirements described in the above-mentioned annex.
3. The Bidder must check the applicable box below:
 - i. ☐ The Bidder is an Aboriginal business that is a sole proprietorship, band, limited company, cooperative, partnership or not-for-profit organization.

OR

 - ii. ☐ The Bidder is either a joint venture consisting of two or more Aboriginal businesses or a joint venture between an Aboriginal business and a non-Aboriginal business.
4. The Bidder must check the applicable box below:
 - i. ☐ The Aboriginal business has fewer than six full-time employees.

OR

 - ii. ☐ The Aboriginal business has six or more full-time employees.
5. The Bidder must, upon request by Canada, provide all information and evidence supporting this certification. The Bidder must ensure that this evidence will be available for audit during normal business hours by a representative of Canada, who may make copies and take extracts from the evidence. The Bidder must provide all reasonably required facilities for any audits.
6. By submitting a bid, the Bidder certifies that the information submitted by the Bidder in response to the above requirements is accurate and complete.

I, _____ am an owner and/or full-time employee of _____
(NAME) (NAME OF BUSINESS)

Signature

Date



Solicitation No. - N° du l'invitation

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FORM 1 BID SUBMISSION FORM

| BID SUBMISSION FORM | | |
|--|---|--|
| Bidder's full legal name | | |
| Authorized Representative of Bidder for evaluation purposes (e.g., clarifications) | Name | |
| | Title | |
| | Address | |
| | Telephone # | |
| | Fax # | |
| | Email | |
| Number of the Supply Arrangement (SA): <i>[Note to Bidders: Please ensure to provide your Supply Arrangement number].</i> | | |
| Bidder's Procurement Business Number (PBN) [see the Standard Instructions 2003] <i>[Note to Bidders: Please ensure that the PBN you provide matches the legal name under which you have submitted your bid. If it does not, the Bidder will be determined based on the legal name provided, not based on the PBN, and the Bidder will be required to submit the PBN that matches the legal name of the Bidder.]</i> | | |
| Jurisdiction of Contract: Province or territory in Canada the Bidder wishes to be the legal jurisdiction applicable to any resulting contract (if other than as specified in solicitation). | | |
| Former Public Servants See the Article in Part 2 of the bid solicitation entitled "Former Public Servant for a definition of "Former Public Servant". | Is the Bidder a FPS in receipt of a pension as defined in the bid solicitation? Yes ____ No ____ If yes, provide the information required by the Article in Part 2 entitled "Former Public Servant" | |
| | Is the Bidder a FPS who received a lump sum payment under the terms of the Work Force Adjustment Directive? Yes ____ No ____ If yes, provide the information required by the Article in Part 2 entitled "Former Public Servant" | |
| Security Clearance Level of Bidder: (Include both the level and the date it was granted) <i>[Note to Bidders: Please ensure that the security clearance matches the legal name of the Bidder. If it does not, the security clearance is not valid for the Bidder].</i> | Level: _____ Date granted: _____ | |



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

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

Signature of Authorized Representative of Bidder



Government of Canada
Gouvernement du Canada

Contract Number / Numéro du contrat

A0414-145931

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 | | 2. Branch or Directorate / Direction générale ou Direction | |
| DIAND | | ADDDA | |
| 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 | | | |
| Managing Projects, Performing business analysis and Providing Corporate Oracle database support 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 type="checkbox"/> No Non <input checked="" type="checkbox"/> Yes Oui | |
| 6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé. | | <input checked="" type="checkbox"/> No Non <input type="checkbox"/> Yes Oui | |
| 6. c) Is this a commercial courier or delivery requirement with no overnight storage? S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit? | | <input checked="" type="checkbox"/> No Non <input type="checkbox"/> Yes Oui | |
| 7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès | | | |
| Canada <input checked="" type="checkbox"/> | NATO / OTAN <input type="checkbox"/> | Foreign / Étranger <input type="checkbox"/> | |
| 7. b) Release restrictions / Restrictions relatives à la diffusion | | | |
| No release restrictions Aucune restriction relative à la diffusion <input checked="" type="checkbox"/> | All NATO countries Tous les pays de l'OTAN <input type="checkbox"/> | No release restrictions Aucune restriction relative à la diffusion <input type="checkbox"/> | |
| Not releasable À ne pas diffuser <input type="checkbox"/> | | | |
| Restricted to: / Limité à: <input type="checkbox"/> | Restricted to: / Limité à: <input type="checkbox"/> | Restricted to: / Limité à: <input type="checkbox"/> | |
| Specify country(ies): / Préciser le(s) pays: | Specify country(ies): / Préciser le(s) pays: | Specify country(ies): / Préciser le(s) pays: | |
| 7. c) Level of information / Niveau d'information | | | |
| PROTECTED A PROTÉGÉ A <input checked="" type="checkbox"/> | NATO UNCLASSIFIED <input type="checkbox"/> | PROTECTED A PROTÉGÉ A <input type="checkbox"/> | |
| PROTECTED B PROTÉGÉ B <input checked="" type="checkbox"/> | NATO NON CLASSIFIÉ <input type="checkbox"/> | PROTECTED B PROTÉGÉ B <input type="checkbox"/> | |
| PROTECTED C PROTÉGÉ C <input type="checkbox"/> | NATO RESTRICTED <input type="checkbox"/> | PROTECTED C PROTÉGÉ C <input type="checkbox"/> | |
| CONFIDENTIAL CONFIDENTIEL <input type="checkbox"/> | NATO DIFFUSION RESTREINTE <input type="checkbox"/> | CONFIDENTIAL CONFIDENTIEL <input type="checkbox"/> | |
| SECRET SECRET <input type="checkbox"/> | NATO CONFIDENTIAL <input type="checkbox"/> | SECRET SECRET <input type="checkbox"/> | |
| TOP SECRET TRÈS SECRET <input type="checkbox"/> | NATO CONFIDENTIEL <input type="checkbox"/> | TOP SECRET TRÈS SECRET <input type="checkbox"/> | |
| TOP SECRET (SIGINT) TRÈS SECRET (SIGINT) <input type="checkbox"/> | NATO SECRET <input type="checkbox"/> | TOP SECRET (SIGINT) TRÈS SECRET (SIGINT) <input type="checkbox"/> | |
| | NATO SECRET <input type="checkbox"/> | | |
| | COSMIC TOP SECRET <input type="checkbox"/> | | |
| | COSMIC TRÈS SECRET <input type="checkbox"/> | | |



Government of Canada
Gouvernement du Canada

COMMON-PS-SRCL#6

Contract Number / Numéro du contrat

A0914-145931

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? ☒ No ☐ Yes
Non ☐ Oui
If Yes, indicate the level of sensitivity:
Dans l'affirmative, indiquer le niveau de sensibilité :

9. Will the supplier require access to extremely sensitive INFOSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate? ☒ No ☐ Yes
Non ☐ Oui

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

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

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

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

Special comments:

Commentaires spéciaux : _____

NOTE: If multiple levels of screening are identified, a Security Classification Guide must be provided.

REMARQUE : Si plusieurs niveaux de contrôle de sécurité sont requis, un guide de classification de la sécurité doit être fourni.

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

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

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

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

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

PRODUCTION

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

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

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

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

Government
of CanadaGouvernement
du Canada

Contract Number / Numéro du contrat

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Security Classification / Classification de sécurité

UNCLASSIFIED

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

For users completing the form **manually** use the summary chart below to indicate the category(ies) and level(s) of safeguarding required at the supplier's site(s) or premises.

Les utilisateurs qui remplissent le formulaire **manuellement** doivent utiliser le tableau récapitulatif ci-dessous pour indiquer, pour chaque catégorie, les niveaux de sauvegarde requis aux installations du fournisseur.

For users completing the form **online** (via the Internet), the summary chart is automatically populated by your responses to previous questions.

Dans le cas des utilisateurs qui remplissent le formulaire **en ligne** (par Internet), les réponses aux questions précédentes sont automatiquement saisies dans le tableau récapitulatif.

SUMMARY CHART / TABLEAU RÉCAPITULATIF

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

12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED?

La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE?

☒ No ☐ Yes
Non Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification".

Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire.

12. b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED?

La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE?

☒ No ☐ Yes
Non 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).



Government of Canada
Gouvernement du Canada

Contract Number / Numéro du contrat

A0414-145931

Security Classification / Classification de sécurité
UNCLASSIFIED

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 |
|---|---------------|-----------|

| | | | |
|---------------------------------|-----------------------------------|-----------------------------------|------|
| Telephone No. - N° de téléphone | Facsimile No. - N° de télécopieur | E-mail address - Adresse courriel | Date |
|---------------------------------|-----------------------------------|-----------------------------------|------|

14. Organization Security Authority / Responsable de la sécurité de l'organisme

| | | |
|---|---------------|-----------|
| Name (print) - Nom (en lettres moulées) | Title - Titre | Signature |
|---|---------------|-----------|

| | | | |
|---------------------------------|-----------------------------------|-----------------------------------|------|
| Telephone No. - N° de téléphone | Facsimile No. - N° de télécopieur | E-mail address - Adresse courriel | Date |
|---------------------------------|-----------------------------------|-----------------------------------|------|

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?

☐ No / Non ☐ Yes / Oui

16. Procurement Officer / Agent d'approvisionnement

| | | |
|---|---------------|-----------|
| Name (print) - Nom (en lettres moulées) | Title - Titre | Signature |
|---|---------------|-----------|

| | | | |
|---------------------------------|-----------------------------------|-----------------------------------|------|
| Telephone No. - N° de téléphone | Facsimile No. - N° de télécopieur | E-mail address - Adresse courriel | Date |
|---------------------------------|-----------------------------------|-----------------------------------|------|

17. Contracting Security Authority / Autorité contractante en matière de sécurité

| | | |
|---|---------------|-----------|
| Name (print) - Nom (en lettres moulées) | Title - Titre | Signature |
|---|---------------|-----------|

| | | | |
|---------------------------------|-----------------------------------|-----------------------------------|------|
| Telephone No. - N° de téléphone | Facsimile No. - N° de télécopieur | E-mail address - Adresse courriel | Date |
|---------------------------------|-----------------------------------|-----------------------------------|------|

Jacques Saumur
Contract Security Officer
Contracts Security Division | Division des contrats sécurité /
Contract Security Program | Programme de sécurité des contrats /
Public Services and Procurement Canada | Services publics et Approvisionnement Canada
Jacques.Saumur@tpsgc-pwgsc.gc.ca
Telephone | Téléphone 613-948-1732
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Digitally signed by Saumur, Jacques O
DN: c=CA, o=GC, ou=PWGSC-TPSGC,
cn=Saumur, Jacques O
Date: 2017.02.02 11:46:22 -05'00'