



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

Quebec

K1A0S5

Bid Fax: (819) 997-9776

**SOLICITATION AMENDMENT
MODIFICATION DE L'INVITATION**

The referenced document is hereby revised; unless otherwise indicated, all other terms and conditions of the Solicitation remain the same.

Ce document est par la présente révisé; sauf indication contraire, les modalités de l'invitation demeurent les mêmes.

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

Terrasses de la Chaudière 4th Floor

10 Wellington Street

Gatineau

Quebec

K1A0S5

Title - Sujet ADS-ITSM Delivery and Support PS	
Solicitation No. - N° de l'invitation W8485-195127/A	Amendment No. - N° modif. 002
Client Reference No. - N° de référence du client W8485-195127	Date 2019-05-02
GETS Reference No. - N° de référence de SEAG PW-\$IPS-009-34975	
File No. - N° de dossier 009ips.W8485-195127	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2019-05-10	
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: Kaliningondo, Bikina	Buyer Id - Id de l'acheteur 009ips
Telephone No. - N° de téléphone (613) 858-9365 ()	FAX No. - N° de FAX () -
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction:	

Instructions: See Herein

Instructions: Voir aux présentes

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

SOLICITATION AMENDMENT 002

This solicitation amendment is raised to:

1. Revise the Request for Proposal and
2. Provide answers to Bidders questions in relation to this solicitation.

Note to Bidders:

In accordance with Article 2.3 (a), the deadline for submitting questions and enquiries has expired.

1. Revision 2

1. The Solicitation Amendment 002 is issued to extend Solicitation period to May 10th, 2019.

At Page one of the Solicitation:

Delete: **Solicitation closes - L'invitation prend fin**
at - à 02:00 PM
on - le 2019-05-06

Insert: **Solicitation closes - L'invitation prend fin**
at - à 02:00 PM
on - le 2019-05-10

2. The Solicitation Amendment 002 is issued to revise the RFP as follow:

At Attachment 4.1 - Mandatory Technical Criteria;

Delete: Attachment 4.1 - Mandatory Technical Criteria in its entirety

Replace by: Attachment 4.1 - Mandatory Technical Criteria in its entirety *(as revised May 2nd, 2019)*

All other Terms and Conditions remain unchanged.

=====

2. Questions and Answers

Question #1

I would like to submit the following question to DND-AF on behalf of [*Interested Supplier*], and in regard to RFP # W8485-195127/A for Axios Assyst (ITSM) services:

Specifically, as requirement M-16 for the Database Analyst on page 74 requests that "the proposed resource must have a minimum of three (3) years of demonstrated experience in the integration and configuration **of Definitive Software Library (DSL) processes** and maintenance activities associated with and ITIL-based Configuration Management Database (CMDB) using Axios assist." However, the Definitive Software Library (DSL) component and related processes have been decommissioned as legacy function by Axios, and thus its applicability and function is no longer in use within the Axios assyst ITSM Toolset at DND AFITSM or elsewhere.

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For this reason, it is our suggestion to remove requirement M-16 from the RFP. Or, revise it to encompass new software technology, in this case we would propose: "the proposed resource must have a minimum of three (3) years of demonstrated experience in the integration and configuration of Software Asset Management processes and/or maintenance activities associated with and ITIL-based Configuration Management Database (CMDB) using Axios assist."

Answer #1

Canada agrees to revise M-16 criteria. Please refer to item 2 of Revision 2 above.

Question #2

On behalf of [*Interested Supplier*], we would like to a request for an extension of 4 business days to the solicitation # W8485-195127/A, to Friday May 10th as we await further response from our previous question in order to finalize our bid and begin production printing. Moreover, as we face operational constraints with a number of our team members being affected by the floods throughout the National Capital Region over the past week.

Answer #2

Canada agrees to extend the Solicitation Period to May 10, 2019. Please refer to Item 1 of Revision 2 above.

Question #3

On page 72 of the RFP, the Business Systems Analyst requirement matrix calls for a University Degree or College Certificate within M-19; however, many ideal resource candidates for the role cannot comply. While they hold the subsequent experience for the specific requirements (R-13, and R-14); they do not however possess a post-secondary degree, despite having been engaged in the delivery of similar services with DND for the past 10+ years. The ideal candidates who hold the requisite experience in R-13 and R-14, which defines the niche expertise required within Air Defense (AD) Operations, and services as a Business Systems Analyst within the Department of National Defense do not typically have post-secondary degrees.

In consideration of the sum of these requirements, and in consideration of not limiting highly qualified individuals available to DND-AD within the niche domain of Air Defence, we request a revision of M-19 to also allow for the substantiation through equivalent experience, for example: "OR, by demonstration of 10+ years of professional experience in delivering similar Information Technology (IT) services"

Answer #2

Canada agrees to revise M-19 criteria. Please refer to item 2 of Revision 2 above.

Question #4

On page 73 of the RFP, the Help Desk Specialist requirement matrix calls for a University Degree or College Certificate within M-23; however, many ideal resource candidates for the role cannot comply. While they hold the subsequent experience for the specific requirements (R-18, and R-19); they do not however possess a post-secondary degree, despite having been engaged in the delivery of similar services with DND for the past 10+ years. The ideal candidates who hold the requisite experience in R-18 and R-19, which defines the niche expertise required within Air Defense (AD) Operations, and services as a Help Desk Specialist within the Department of National Defense do not typically have post-secondary degrees.

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In consideration of the sum of these requirements, and in consideration of not limiting highly qualified individuals available to DND-AF within the niche domain of Air Defence support, we request a revision of M-23 to also allow for the substantiation through an equivalent experience, for example: "OR, by demonstration of 10+ years of professional experience in delivering similar Information Technology (IT) services"

Answer #4

Canada agrees to revise M-23. Please refer to item 2 of Revision 2 above.

ATTACHMENT 4.1- MANDATORY TECHNICAL CRITERIA

(As Revised May 02nd, 2019)

1. The Bidder is advised that only listing experience without providing any supporting data to describe where and how such experience was obtained will not constitute "demonstrated" for the purpose of the evaluation.
2. Experience must be demonstrated by project summaries. For all mandatory criteria, the Bidder must submit at a minimum, the following:
 - a. Name of the client organization;
 - b. Project start and end dates (month/year to month/year); and
 - c. Description of the roles and responsibilities of the Bidder or the Bidder's Proposed Resource in the project.
3. In the case where the timelines of two or more projects overlap, the duration of time common to each project will not be counted more than once.
4. It is recommended that the Bidder include a grid in their proposals, cross-referencing statements of compliance with the supporting data and resume evidence contained in their proposals. Note: the compliance grid, by and of itself does not constitute demonstrated evidence.
5. Education must have been obtained from a recognized Canadian university, college or high school, or the equivalent as established by a recognized* Canadian academic credentials assessment service, if obtained outside Canada.

*The list of recognized Canadian academic credentials assessment service providers can be found under the Canadian Information Centre for International Credentials website, at the following Internet link:
<http://www.cicic.ca/indexe.stm>.
6. Canada reserves the right to request and contact Client references to validate information in the proposal.
7. For the mandatory technical criteria below, when a diploma, degree, certification, etc. is requested, the Bidder must provide it with the Bid. If it is not provided with the Bid, the Contracting Authority may request that the Bidder provide the document within a specified time frame. If the document is not provided within this time frame, the Bid will be considered non-responsive.

CORPORATE MANDATORY TECHNICAL CRITERIA

#	<i>Corporate Mandatory Criteria</i>	<i>Met (Yes/No)</i>	<i>Cross Reference to bid</i>
M-1	<p>The Bidder must have completed at least two (2) Information Management and Information Technology Service Management (IM/ITSM) project implementations at Government of Canada organizations or Crown Corporations. One of the two (2) implementations must be for government of Canada organization that delivers Web-based real-time reporting services in support of operational users. At least one (1) implementation must have covered a full project lifecycle (project initiation, requirements gathering, design, build, test, training and rollout.)</p> <p>To demonstrate this experience for each project, the Bidder must provide the following:</p> <ul style="list-style-type: none"> a) names of client organizations; b) name of client; c) client's title; d) client's telephone number and e-mail address; and e) description of the projects; and f) project start and end date <p>The information listed above should be submitted with the bid using <u>Form 1 – Customer Reference Contact Information Form</u>. If any of the information is not submitted, the Contracting Authority will inform the Bidder of a time-frame within which to provide the information. Failure to provide the information listed above within the time-frame provided will render the bid non-responsive.</p> <p>It is the Bidder's responsibility to ensure that any information divulged is accurate.</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. For example, Z (customer) contracted with Y for services. Y, in turn, entered into a contract with X to provide all or part of these services to Z. In this example, Y is a prime contractor and X is a subcontractor.</p> <p>Bidders are reminded that a Supply Arrangement or Standing Offer is not a contract and therefore any reference to this type of document will not be accepted for the purpose of evaluating contract experience. For example if the Bidder references it's TBIPS SA number such as EN578-055605/XXX/EL for the purpose of demonstrating experience under the evaluation criteria, Canada will disregard this experience because it does not relate to a specific contract.</p>		

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M-2	The Bidder must be a certified Axios assyst Service Provider partner with resources qualified to provide Axios assyst training that is certified by Axios Systems. A copy of the Axios Systems Qualification document must be provided with the bid.		
M-3	The Bidder must provide a Contract Management Plan (CMP) that will address the following: 1) The Bidder's proposed approach to assure the overall efficient sustainability and supportability ITSM capabilities. The CMP must reflect the Bidder's experience in having implemented a ITSM project; 2) High-Level (Tier 1 / 2 Work Breakdown Structure (WBS)); 3) Conflict Management, Resource Management and Responsibility Assessment; 4) Acquisition of new capabilities through the project Life-Cycle; 5) Task Authorization and Administration; 6) Organization Interfaces; 7) Risk Management Plan; and 8) Quality Assurance		

RESOURCES MANDATORY TECHNICAL CRITERIA

I.10 TECHNICAL ARCHITECT – LEVEL 3			
#	Resource Mandatory Criteria	Met (Yes/No)	Cross Reference to bid
M-4	The proposed resource must hold an undergraduate degree from a recognized university or a College Certificate in computer science. A copy of the degree must be provided with the bid.		
M-5	The proposed resource must have a minimum of ten (10) years of demonstrated experience as a Technical Architect.		
M-6	The proposed resource must have a minimum of five (5) years of experience within the last seven (7) years as the Technical Architect for the implementation of an Oracle Portal / Oracle WebCenter solution.		
M-7	The proposed resource must have worked in at least one (1) project performing the role of Technical Architect for the integration of Oracle Portal / Oracle WebCenter with Google Earth and Axios assyst.		

A.1 APPLICATION / SOFTWARE ARCHITECT – LEVEL 3			
#	Resource Mandatory Criteria	Met (Yes/No)	Cross Reference to bid
M-8	The proposed resource must hold an undergraduate degree from a recognized university or a college certificate in IT. A copy of the degree must be provided with the bid.		
M-9	The proposed resource must have ten (10) years of demonstrated experience as an Application/Software Architect.		
M-10	The proposed resource must have five (5) years of demonstrated experience within the last ten (10) years working as an Axios assyst architect.		
M-11	The proposed resource must have at least five (5) years of experience using Microsoft SQL Server.		
M-12	The proposed resource must have a current Axios assyst Silver certification. A copy of the certificate must be provided with the bid.		
M-13	The proposed resource must hold an ITIL Foundations Certificate. A copy of the certification must be provided with the bid.		

I.3 DATA ANALYST / IM ADMINISTRATOR - LEVEL 3

#	Resource Mandatory Criteria	Met (Yes/No)	Cross Reference to bid
M-14	The proposed resource must hold an undergraduate degree from a recognized university or a college certificate in IT. A copy of the degree must be provided with the bid.		
M-15	The proposed resource must have ten (10) years of demonstrated experience as a Data Analyst/IM Administrator.		
M-16	The proposed resource must have a minimum of three (3) years of demonstrated experience in the integration and configuration of Definitive Software Library (DSL) processes and maintenance activities associated with and ITIL-based Configuration Management Database (CMDB) using Axios assist.		
M-17	The proposed resource must hold a minimum of an ITIL Foundations Certificate. A copy of the certification must be provided with the bid.		
M-18	The proposed resource must have a minimum of three (3) years of demonstrated experience within the last ten (10) years in the deployment of ITIL based Configuration Management processes and procedures using the Axios 'assyst' toolset.		

B.6 BUSINESS SYSTEM ANALYST – LEVEL 3

#	Resource Mandatory Criteria	Met (Yes/No)	Cross Reference to bid
M-19	The proposed resource must: - Hold an undergraduate degree from a recognized university or a college certificate in IT (<i>A copy of the degree must be provided with the bid.</i>) , or - Demonstrate a minimum of ten (10) years of experience delivering Information Technology (IT) services.		
M-20	The proposed resource must have ten (10) years of demonstrated experience as a Business Systems Analyst.		
M-21	The proposed resource must have a minimum of three (3) years of demonstrated experience within the last ten (10) years in working with Air Defence and North Warning Systems with Axios Assyst and Oracle Portal.		
M-22	The proposed resource must hold an ITIL Foundations Certificate. A copy of the certification must be provided with the bid.		

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B.10 HELP DESK SPECIALIST – LEVEL 2

#	Resource Mandatory Criteria	Met (Yes/No)	Cross Reference to bid
M-23	The proposed resource must: <ul style="list-style-type: none"> - Hold an undergraduate degree from a recognized university or a college certificate in an IT. <i>(A copy of the degree must be provided with the bid), or</i> - Demonstrate a minimum of ten (10) years of experience delivering Information Technology (IT) services. 		
M-24	The proposed resource must have five (5) years of demonstrated experience as a Help Desk Specialist.		
M-25	The proposed resource must have a minimum of three (3) years of demonstrated experience within the last ten (10) years in working with Axios Assyst.		
M-26	The proposed resource must hold an ITIL Foundations Certificate. A copy of the certification must be provided with the bid.		

ATTACHMENT 4.2- POINT-RATED TECHNICAL CRITERIA

I.10 TECHNICAL ARCHITECT – LEVEL 3					
#	Resource Point-Rated Criteria	Point Allocation	Score	Max. Points	Cross reference to bid
R-1	Demonstrated experience in performing the role of Technical Architect for the integration of Microsoft Reporting Services and Oracle Portal / Webcenter and Google Earth.	1 project = 1 pt. 2 or more projects = 2 pts		2	
R-2	Demonstrated experience in working within a Defence Weapons Project on a Department of National Defence classified network	1 project = 1 pt. 2 or more projects = 2 pts		2	
R-3	Demonstrated experience with Service Oriented Architecture (SOA) implementations.	1 project = 1 pt. 2 or more projects = 2 pts		2	
R-4	Demonstrated experience with WebLogic.	1 project = 1 pt. 2 or more projects = 2 pts		2	
Maximum Points				/8	
Minimum Points				/5	

A.1 APPLICATION SOFTWARE ARCHITECT – LEVEL 3					
#	Resource Point-Rated Criteria	Point Allocation	Score	Max. Points	Cross reference to bid
R-5	Demonstrated experience in working in Air Defence (AD) operations.	1 project=1 pt.		1	
R-6	Demonstrated experience in the development of reports using MS Reporting Services.	1 project = 1 pt. 2 or more projects = 2 pts		2	
R-7	Demonstrated experience in developing solutions that included all components of the ITSM framework architecture (Axios 'assyst', SQL Reporting Services).	1 project = 1 pt. 2 or more projects = 2 pts		2	
R-8	Demonstrated experience in implementing ITIL Service Support using Axios 'assyst'.	1 project = 1 pt. 2 or more projects = 2 pts		2	
Maximum Points				/7	
Minimum Points				/4	

I.3 DATA ANALYST / IM ADMINISTRATOR – LEVEL 3					
#	Resource Point-Rated Criteria	Point Allocation	Score	Max. Points	Cross reference to bid
R-9	Demonstrated experience in implementing IT Projects within a government defence operational environment.	1 project = 1 pt. 2 or more projects = 2 pts		2	
R-10	Demonstrated experience in the development of processes covering the implementation of an ITSM solution based on the Axios 'assyst' toolset.	1 project = 1 pt. 2 or more projects = 2 pts		2	
R-11	Demonstrated experience in the development and fielding of ITIL-based processes.	1 project = 1 pt. 2 or more projects = 2 pts		2	
R-12	Demonstrated experience on project facilitating and documenting ITIL-based process design workshop.	1 project = 1 pts 2 or more projects = 2 pts		2	
Maximum Points				/8	
Minimum Points				/5	

B.6 BUSINESS SYSTEM ANALYST - LEVEL 3					
#	Resource Point-Rated Criteria	Point Allocation	Score	Max. Points	Cross reference to bid
R-13	Demonstrated experience in working in Air Defence (AD) operations.	1 Project = 1 pt.		1	
R-14	Demonstrated experience as a Systems Analyst in the Department of National Defence.	1 project = 1 pt. 2 or more projects = 2 pts		2	
R-15	Demonstrated experience in implementing ITIL Service Support using Axios 'assyst'.	1 project = 1 pt. 2 or more projects = 2 pts		2	
R-16	The proposed resource has demonstrated experience implementing IT projects within a government defence operational environment.	1 project = 1 pt. 2 or more projects = 2 pts		2	
R-17	Demonstrated experience as a business analyst on an ITSM solution implementation based on Axios 'assyst' integration with Oracle Portal and Google Earth.	1 project = 1 pt. 2 or more projects = 2 pts		2	
Maximum Points				/9	
Minimum Points				/5	

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B.10 HELP DESK SPECIALIST – LEVEL 2					
#	Resource Point-Rated Criteria	Point Allocation	Score	Max. Points	Cross reference to bid
R-18	Demonstrated experience in working in Air Defence (AD) operations.	1 Project = 1 pt.		2 pts	
R-19	Demonstrated experience as a help desk specialist in the Department of National Defence.	3 years = 1 pt. 5 years or more = 2 pts		2 pts	
R-20	Demonstrated experience in implementing IT projects within a government defence operational environment.	1 project = 1 pt. 2 or more projects = 2 pts		2 pts	
R-21	Demonstrated experience as a Help Desk Specialist on an ITSM solution implementation based on Axios 'assyst' integration.	1 project = 1 pt. 2 or more projects = 2 pts		2 pts	
Maximum Points				/8	
Minimum Points				/5	

**BID SOLICITATION
FOR A CONTRACT AGAINST A SUPPLY ARRANGEMENT FOR TASK-
BASED INFORMATICS PROFESSIONAL SERVICES (TBIPS)
RESOURCE CATEGORY - LEVEL 2 OR 3
FOR
THE DEPARTEMENT OF NATIONAL DEFENCE**

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Annex A: STATEMENT OF WORK

- Appendix A to Annex A: Tasking assessment Procedure
- Appendix B to Annex A: Task-Authorization Form
- Appendix C to Annex A: Resource Assessment Criteria and Response Table
- Appendix D to Annex A: Certifications at the TA stage

Annex B: BASIS OF PAYMENT

Annex C: SECURITY REQUIREMENTS CHECK LIST

- Appendix A to Annex C: Security Supplemental Guide

Annex D: NON-DISCLOSURE AGREEMENT

List of Attachment to Part 3 (Bid Preparation Instructions):

- ATTACHMENT 3.1: BID SUBMISSION FORM

List of Attachment to Part 4 (Evaluation Procedures and Basis of Selection):

- ATTACHMENT 4.1: MANDATORY TECHNICAL CRITERIA
- ATTACHMENT 4.2: POINT RATED CRITERIA
- ATTACHMENT 4.3: PRICING SCHEDULE

List of Attachment to Part 5 (Certifications):

- ATTACHMENT 5.1 - FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY CERTIFICATION

Forms:

- Form 1 – Customer Reference Contact information
- Form 2 - Electronic Payment Instruments

**BID SOLICITATION
FOR A CONTRACT AGAINST A SUPPLY ARRANGEMENT FOR TASK-
BASED INFORMATICS PROFESSIONAL SERVICES (TBIPS)
RESOURCE CATEGORY - LEVEL 2 OR 3
FOR
THE DEPARTEMENT OF NATIONAL DEFENCE**

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;

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 National Defence (the "**Client**") for Task-Based Informatics Professional Services (TBIPS) under the TBIPS Supply Arrangement (SA) method of supply. The Director Aerospace Equipment Program Management (Radar and Communication Systems) (DAEPM(R&CS)) of the Department of National Defence and the Canadian Armed Forces (DND/CAF) requires a variety of professional resources for the sustainment, life-cycle management and support of the Air Defence System Information Technology Services Management solution (ADS ITSM).
- (b) It is intended to result in the award of one contract for 3 years plus 1 one-year irrevocable option allowing Canada to extend the term of the contract.
- (c) There are security requirements 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.
- (d) The requirement is subject to the provisions of the World Trade Organization Agreement on Government Procurement (WTO-AGP), the North American Free Trade Agreement (NAFTA), the Canada-Chile Free Trade Agreement (CCFTA), the Canada-Peru Free Trade Agreement (CPFTA), the Canada-Colombia Free Trade Agreement (CCoIFTA), the Canada-Panama Free Trade Agreement (CPanFTA), the Canada-

European Union Comprehensive Economic and Trade Agreement (CETA), and the Canadian Free Trade Agreement (CFTA)

- (e) This procurement is subject to the Controlled Goods Program. The Defence production Act defines Canadian Controlled Goods as certain goods listed in Canada's Export Control List, a regulation made pursuant to the Export and Import Permits Act (EIPA).
- (f) 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."
- (g) This bid solicitation is to establish a contract with task authorizations for the delivery of the requirement detailed in the bid solicitation across Canada, excluding locations within Yukon, Northwest Territories, Nunavut, Quebec, and Labrador that are subject to Comprehensive Land Claims Agreements (CLCAs). Any requirement for deliveries within CLCAs areas within Yukon, Northwest Territories, Nunavut, Quebec, or Labrador will be treated as a separate procurement, outside the resulting contract.
- (h) This bid solicitation allows bidders to use the epost Connect service provided by Canada Post Corporation to transmit their bid electronically. Bidders must refer to Part 2 entitled "Bidder Instructions, and Part 3 entitled "Bid Preparation Instructions", of the bid solicitation, for further information.
- (i) Only TBIPS SA Holders currently holding a TBIPS SA for Tier 2, in all the Resource Categories and in the National Capital Region (NCR) under the EN578-170432 series of SAs are eligible to compete. The TBIPS SA EN578-170432 is 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 as that joint venture at the time of bid closing in order to submit a bid.
- (k) The Resource Categories described below are required on an as and when requested basis in accordance with the TBIPS SA Annex "A":

RESOURCE CATEGORY	LEVEL OF EXPERTISE	ESTIMATED NUMBER OF RESOURCES REQUIRED
I.10. Technical Architect	3	1
A.1. Application/Software Architect	3	1
I.3. Database Analyst/IM Administrator	3	1
B.6. Business Systems Analyst	3	1
B.10. Helpdesk Specialist	2	1

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.

1.4 Phased Bid Compliance Process

The Phased Bid Compliance Process applies to this requirement.

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.

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 or through epost Connect if the Bidder chooses to use this service.
- (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

Solicitation No. - N° de l'invitation
W8485-195127/A
Client Ref. No. - N° de réf. du client
W8485-195127/A

Amd. No. - N° de la modif.
002
File No. - N° du dossier
009ips.W8485-195127/A

Buyer ID - Id de l'acheteur
009ips
CCC No./N° CCC - FMS No./N° VME

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 numbers of days 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.

2.7 Basis for Canada's Ownership of Intellectual Property

The Department National Defence has determined that any intellectual property rights arising from the performance of the Work under any resulting contract will belong to Canada, on the following ground:

The Intellectual Property in Foreground information consists of material subject to copyright, with the exception of computer software and all documentation pertaining to that software.

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
- (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) Copies of Bid: Canada requests that Bidders provide their bid in separately bound sections as follows:

- (A) Section I: Technical Bid (3 hard copies) and 1 soft copy on USB key.
- (B) Section II: Financial Bid (1 soft copy) on USB key.
- (C) Section III: Certifications not included in the Technical Bid (1 soft copy) on USB key.

(c) If the Bidder is simultaneously providing an epost Connect copy and hard copy of the bid and if there is a discrepancy between the wording of the epost Connect copy and hard copy, the wording of the epost Connect copy will have priority over the wording of the hard copy. Prices must appear in the financial bid only.

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

(e) 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.

(f) 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.

(g) 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.
- (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. .

(h) 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;
- 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 - Attachment 3.1 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) **For Proposed Resources:** The technical bid must include résumés for the resources as identified in Attachment 4.1 and Attachment 4.2. The same individual must not be proposed for more than one Resource Category. 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 closing. If the degree, designation or certification was issued by an educational institution outside of Canada, the Bidder is requested to 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 closing 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 is requested to 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.
- (v) **Customer Reference Contact Information:**
- (A) The Bidder must provide customer references. The customer reference must each confirm, if requested by PWGSC, the information required in the Corporate Mandatory Criteria M-1 of Attachment 4.1
- (B) The form of question to be used to request confirmation from customer references is as follows:
- Has [the Bidder] provided your organization with the services described below?
- The Bidder must have completed at least two (2) Information Management and Information Technology Service Management (IM/ITSM) project implementations at Government of Canada organizations or Crown Corporations. One of the two (2) implementations must be for government of Canada organization that delivers Web-based real-time reporting services in support of operational users. At least one (1) implementation must have covered a full project lifecycle (project initiation, requirements gathering, design, build, test, training and rollout.)
- Yes, the Bidder has provided my organization with the services described above.*
- No, the Bidder has not provided my organization with the services described above.*
- 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 Basis of Payment provided in 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) **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.
- (d) **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.
- (e) **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.
- (f) **Electronic Payment of Invoices – Bid:** If you are willing to accept payment of invoices by Electronic Payment Instruments, complete Form 2 - Electronic Payment Instruments, to identify which ones are accepted. If Form 2 - Electronic Payment Instruments is not completed, it will be considered as if Electronic Payment Instruments are not being accepted for payment of invoices. Acceptance of Electronic Payment Instruments will not be considered as an evaluation criterion.

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) **Extension of Time:** If additional time is required by the Bidder, the Contracting Authority may grant an extension in his or her sole discretion.
- (d) Canada will use the Phased Bid Compliance Process described below:

4.1.1 Phased Bid Compliance Process (PBCP)

4.1.1.1 (2018-07-19) General

- (a) Canada will conduct the Phased Bid Compliance Process (PBCP) described below for this requirement ONLY if Canada receives 4 or fewer Bids 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 (2018-03-13) 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 (2018-03-13) 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 (2018-03-13) 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

The technical evaluation will be conducted as follows:

(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 to all mandatory technical criteria.**

(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.
- (iii) **If the Phased Bid Compliance Process applies, it will apply to all Point-Rated Technical Criteria.**

(c) **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 5 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.

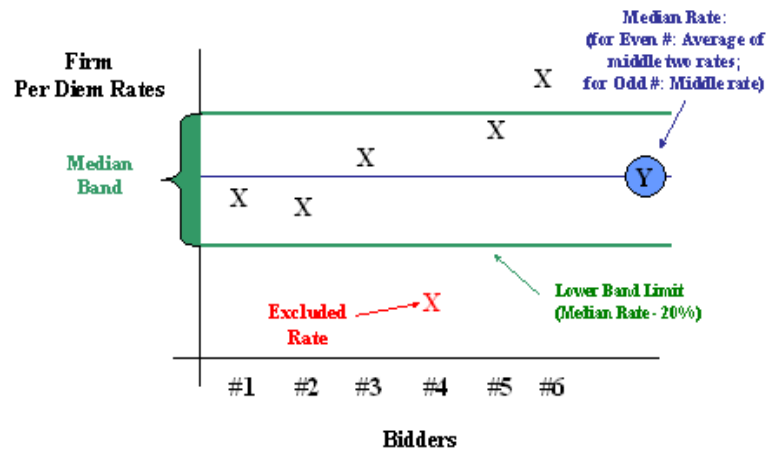
- (iv) Wherever information provided by a reference differs from the information supplied by the Bidder, the information supplied by the reference will be the information evaluated.
- (v) Points will not be allocated and/or a bidder will not meet the mandatory experience requirement (as applicable) if (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

- (a) 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 (b) Financial Evaluation - Method A below). The second method will be used if fewer than three bids are determined responsive (see (c) Financial Evaluation - Method B below).
- (b) **Financial Evaluation - Method A:** The following financial evaluation method will be used if three or more bids are determined responsive:
 - (i) **Calculation of Total Bid Price:** The financial evaluation will be conducted using the pricing tables completed by the Bidders and the Firm Per Diem Median Rate Evaluation Method explained below. A financial calculation will occur for each Bidder by multiplying its firm per diem rates, or Median Rate(s) if applicable, for the Initial Contract Period and the option period(s) with the estimated number of days of work for each period, for all the Resource Categories stated in Attachment 4.3 - Pricing Schedule. The sum of such rates will constitute the Total Bid Price for that Bidder.
 - (ii) **Firm Per Diem Median Rate Evaluation**
 - (A) **Use:** The firm per diem median rate calculation will apply to modify the rate to be assessed in the financial evaluation of a Bidder, where that Bidder submits a firm per diem rate for a resource category that is lower than the Lower Band Limit as calculated below. The firm per diem median rate calculation is for evaluation purposes only, and the actual submitted per diem rate will be used in any resulting contract in all instances.
 - (B) **Calculation for both the Initial Contract Period and the Option Period medians:** Using the per diem rate proposed for each individual Resource Category a Median Rate will be determined for each Resource Category for the Initial Contract Period, and for each of the option period(s). For each Resource Category, the Median Rate will be calculated using the median function in Microsoft Excel. A Lower Band Limit will be calculated for each Resource Category and will represent a range that encompasses the Median Rate to a value of minus (-) 20% of the Median Rate. If a Bidder bids a firm per diem rate for a Resource Category that is lower than the Lower Band Limit, that Bidder's financial evaluation will be conducted using a per diem rate equal to the Median Rate for that Resource Category.

For example, if the Median Rate (Y) is determined to be \$500 for a Resource Category, the Lower Band Limit would be minus (-) 20% of \$500, or \$400. If a Bidder proposes a firm per diem rate that is lower than \$400, the Median Rate of \$500 will be used in the Bidder's financial evaluation for that Resource Category.

Resource Category Median Band Determination (Even Number of Bidders)



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

- (i) **Calculation of Total Bid Price:** The financial evaluation will be conducted using the pricing tables completed by the Bidders. A financial calculation will occur for each Bidder by multiplying its firm per diem rates for the Initial Contract Period and the option period(s) with the estimated number of days of work for each period, for all the Resource Categories stated in Attachment 4.3 - Pricing Schedule. The sum of such rates will constitute the Total Bid Price for that Bidder.

(d) **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 20% 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

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002
File No. - N° du dossier
009ips.W8485-195127/A

Buyer ID - Id de l'acheteur
009ips
CCC No./N° CCC - FMS No./N° VME

- (iii) 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.

(e) 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

Selection Process: The following selection process will be conducted:

- (a) 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. The responsive bid with the lowest Price-Per-Point will be recommended for award of a contract. To calculate the lowest Price-Per-Point, the following formula will be used:

$$\frac{\text{Total Bid Price}}{\text{Total points obtained by the Bidder}} = \text{Price-Per-Point obtained by the Bidder}$$

- (b) One contract may be awarded in total as a result of this bid solicitation.
- (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.
- (d) If more than one Bidder is ranked first because of identical overall scores, then the Bidder with the lowest Total Bid Price will become the top-ranked Bidder.

PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

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 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) 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

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File No. - N° du dossier
009ips.W8485-195127/A

Buyer ID - Id de l'acheteur
009ips
CCC No./N° CCC - FMS No./N° VME

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.

(c) 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.

(d) 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 requirements as indicated in Part 7 - Resulting Contract Clauses; and
- (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.

6.3 Controlled Goods Requirement

- (a) SACC Manual clause A9130T (2014/11/27) Controlled Goods Program
- (b) In the case of a joint venture bidder, each member of the joint venture must meet the requirements of the Controlled Goods Program.

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) **TO BE INSERTED UPON CONTRACT AWARD** (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 Department of National Defence.
- (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) **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.
- (c) **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 using the form specified in Appendix B to Annex A.
 - (ii) The draft Task Authorization 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.
- (d) **Contractor's Response to Draft Task Authorization:** The Contractor must provide to the DND Procurement Representative, within 2 working days of receiving the draft Task Authorization (or within any longer time period specified in the draft TA), a quotation with 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, as well as its corresponding proposed resource(s) in accordance with Appendix A to Annex A of 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.
- (e) **Task Authorization Limit and Authorities for Validly Issuing Task Authorizations:**
To be validly issued, a TA must include the following signatures:
- (i) To be validly issued, a TA must be signed by 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.
- (f) **Administration of Task Authorization Process for DND:** The administration of the Task Authorization process will be carried out by DAP 2-2-3. This process includes monitoring, controlling and reporting on expenditures of the contract with task authorizations to the Contracting Authority.
- (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 a 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 10 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 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) **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

- (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:**

- (i) 4007 (2010/08/16), Supplemental General Conditions – Canada to own Intellectual Property Rights in Foreground Information

apply to and form part of the Contract.

7.5 Security Requirement

The following security requirements (Common SRCL #41) 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.

1. The Contractor/Offeror must, at all times during the performance of the Contract/Standing Offer/Supply Arrangement, hold a valid Facility Security Clearance at the level of **secret**, issued by the Canadian Industrial Security Directorate (CISD), Public Services and Procurement Canada (PSPC)
2. This contract includes access to Controlled Goods. Prior to access, the contractor must be registered in the Controlled Goods Program of PSPC
3. The Contractor/Offeror personnel requiring access to protected/classified information, assets or sensitive work site(s) must EACH hold a valid personnel security screening at the level of **secret** as required, granted or approved by CISD/PSPC
4. The Contractor/Offeror must not remove any protected/classified information from the identified work site(s), and the Contractor/Offeror must ensure that its personnel are made aware of and comply with this restriction
5. Subcontracts which contain security requirements are not to be awarded without the prior written permission of CISD/PSPC
6. The Contractor/Offeror must comply with the provisions of the:

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1. Security Requirements Check List and security guide (if applicable), attached at Annex C
2. 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 3 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 one additional one (1) year period 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:

Bikina Kaliningondo

Supply Specialist

Public Works and Government Services Canada

Acquisitions Branch

Directorate: Professional Services Procurement Directorate

Address: Les Terrasses de la Chaudière,
10, rue Wellington, 4th Floor
Gatineau, Québec K1A 0H4

Telephone: 613-858-9365

Facsimile: -

E-mail address: Bikina.Kaliningondo@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: **TO BE INSERTED UPON CONTRACT AWARD**

Name: _____

Title: _____

Organization: _____

Address: _____

Telephone: _____

Facsimile: _____

E-mail address: _____

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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) DND Procurement Representative

TO BE INSERTED UPON CONTRACT AWARD

The DND Procurement Representative 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 administrative aspects of the Work under the Contract, communication with PWGSC Contracting Authority on all matters concerning the Contract, procurement initiation authority, and providing PWGSC reports on Contract utilization. Technical matters may be discussed with the DND Procurement Representative; however, the DND Procurement Representative 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.

(d) Contractor's Representative TO BE INSERTED UPON CONTRACT AWARD

Name: _____
Title: _____
Organization: _____
Address: _____
Telephone: _____
Facsimile: _____
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 from 101 Colonel by Drive, Ottawa, Ontario K1A 0K2.

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.

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(i) 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) **Electronic Payment of Invoices – Contract**

The Contractor accepts to be paid using any of the following Electronic Payment Instrument(s):

- (i) Visa Acquisition Card;
- (ii) MasterCard Acquisition Card;
- (iii) Direct Deposit (Domestic and International);
- (iv) Electronic Data Interchange (EDI);
- (v) Wire Transfer (International Only);
- (vi) Large Value Transfer System (LVTS) (Over \$25M)

Note to Bidders: If applicable, the Electronic Payment Instrument(s) indicated by the Bidder in Form 2 will be included in any resulting contract.

(e) **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.

(f) **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.

(g) **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.

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- (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 via email copies of each invoice to the Technical Authority and DND Procurement Authority and a copy to the Contracting Authority.
- (e) The Contractor must email copies of each invoice at the following address:
WGM.DAP2_INVOICES_DOA2_RECU@FORCES.GC.CA

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.

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) Supplemental General Conditions, in the following order:
 - (i) 4007 (2010/08/16), Supplemental General Conditions - Canada to Own Intellectual Property Rights in Foreground Information;
- (c) General Conditions 2035 (2016/04/04), Higher Complexity - Services;
- (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;
 - (i) Appendix A to Annex C – Security Supplemental Guide;
- (g) Annex D, Non-Disclosure Agreement;

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- (h) the validly issued Task Authorizations and any required certifications (including all of their annexes, if any); and
- (i) the Contractor's bid dated **TO BE INSERTED UPON AWARD**, as clarified on "or" as amended **TO BE INSERTED UPON AWARD** (if applicable).

7.15 Defence Contract

- (a) SACC Manual clause A9006C(2012/07/16) Defence Contract

7.16 Canadian Forces Site Regulation

- (a) SACC Manual clause A9062C(2011/05/16) Canadian Forces Site Regulation

7.17 Foreign Nationals (Canadian Contractor)

- (a) SACC Manual clause A2000C (2012/07/16) 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.*

7.17 Foreign Nationals (Foreign Contractor)

- (a) SACC Manual clause A2001C (2012/07/16) Foreign Nationals (Foreign Contractor)

7.18 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 (10) 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.

7.19 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 its breach of confidentiality under the Contract. Each of the Parties is also liable for all indirect, special or consequential damages in respect of its 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).

7.20 Controlled Goods Program

- (a) SACC Manual clause A9131C (2014/11/27), Controlled Goods Program - Contract.
(b) SACC Manual clause B4060C (2011/05/16), Controlled Goods

7.21 Joint Venture Contractor

- (a) The Contractor confirms that the name of the joint venture is _____ and that it is comprised of the following members: **[BIDDERS MUST LIST ALL THE JOINT VENTURE MEMBERS NAMED IN THE CONTRACTOR'S ORIGINAL BID].**
- (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.

7.22 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 having this knowledge, 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 to propose a replacement to be rated by the Technical Authority. The replacement must have qualifications and experience that are similar 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 sub-article (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.

7.23 Non-Disclosure Agreement

The Contractor must obtain from its employee(s) or subcontractor(s) the completed and signed non-disclosure agreement, attached at Annex D, and provide it to the Technical Authority before they are given access to information by or on behalf of Canada in connection with the Work.

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W8485-195127/A

Amd. No. - N° de la modif.
002
File No. - N° du dossier
009ips.W8485-195127/A

Buyer ID - Id de l'acheteur
009ips
CCC No./N° CCC - FMS No./N° VME

7.24 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.

7.25 Reporting Requirements

The Contractor must provide the reports as detailed in the Annex A - Statement of Work.

7.26 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 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.

7.27 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.

7.28 Implementation of Professional Services

If similar professional services are currently being provided by another supplier or by Canada's own personnel, the Contractor is responsible for ensuring that the transition to the professional services it provides under the Contract is completed in a way that does not disrupt Canada's operations or users, and does not result in any interim degradation to the timeliness or quality of service. The Contractor is solely responsible for any additional training required by its resources to perform the Work, and time spent by resources on that training or becoming familiar with the Client's environment must not be charged to Canada. The transition will be considered complete once the Contractor has demonstrated, to the satisfaction of the Technical Authority that it is ready and able to carry out the Work. The transition must be complete by no later than 10 working days after the Contract is awarded. All costs associated with establishing itself to provide the professional services are the responsibility of the Contractor.

7.29 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

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- (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
FOR
THE AIR DEFENSE SYSTEM (ADS)
INFORMATION TECHNOLOGY SERVICE MANAGEMENT (ITSM)
DELIVERY AND SUPPORT – PROFESSIONAL SERVICES**

1.0 SCOPE

1.1 General

1.1.1 This Statement of Work (SOW) describes the work and associated deliverables for the Director Aerospace Equipment Program Management (Radar and Communication Systems) (DAEPM(R&CS)) to perform life cycle sustainment. The scope of this SOW builds upon the existing functionality of the Air Force Information Technology Service Management (AF ITSM) solution for the Air Defense System (ADS) to support its integration and continued functionality and operability in the Department of National Defence (DND) classified domain. Throughout the document, ADS includes North Warning Systems.

1.2 Background

1.2.1 The North American Air Defence (NORAD) Agreement was first signed by the Government of Canada (GoC) and the Government of the United States of America (USA) in 1958, and last ratified in 2006. Under the NORAD Agreement, Canada is jointly responsible for the defence of North America, and has primary responsibility for Canadian airspace, referred to as the Canadian NORAD Region (CANR), which is comprised of a single sector, the Canadian Air Defence Sector (CADS). The United States Air Force (USAF) is responsible for Continental United States NORAD Region (CONR), comprised of the Eastern Air Defense Sector (EADS), the Western Air Defense Sector (WADS), the Alaska Region Air Operations Center (AKRAOC), and the Hawaii Region Air Operations Center (HIRAOC).

1.2.2 In order for the DND and CAF to fulfil their commitment to defend Canada and North America in accordance with the NORAD Agreement the CADS must be fully interoperable with other NORAD air defense sectors. The CADS Upgrade project was established to fulfill that requirement, through the use of equipment common to all NORAD air defence sectors.

1.2.3 In October 2004, the Royal Canadian Air Force (RCAF) commissioned the Air Force Information Technology Service Management project to establish and align its ITSM processes with the widely recognized Information Technology Infrastructure Library (ITIL) best practices and standards, in an effort to facilitate the integration of NORAD systems, thereby strengthening Canada's defense. The Axios ASSYST toolset was selected to deliver this capability.

1.2.4 In 2005, the ITSM capability was successfully deployed across all Air Force Wings and Units and based on the initial success, the RCAF decided to extend the scope of its ITSM capability to all its systems (IT and non-IT) in the classified domain. The Phase II of the project was initiated to embark on the RCAF expansion effort.

1.2.5 At project closeout, all developed capabilities were transitioned to sustainment and require reliable in service support activities to ensure continued delivery. For the Canadian Air Defence Sector, this sustainment of the Air Defence Systems Configuration Management Data Base (CMDB), the Situational Awareness Portal Mapping Display and the continued support of the Information Technology Service Management Toolset are critical.

1.3 Acronym List

ADS	Air Defense System
AF ITSM	Air Force Information Technology Service Management
AFCCIS	Air Force Command and Control Information System
AKRAOC	Alaska Region Air Operations Center
C2IS	Command & Control Information Systems
CADS	Canadian Air Defence Sector
CAF	Canadian Armed Forces
CANR	Canadian NORAD Region
CI	Configuration Items
CM	Configuration Management
ConOps	Concept of Operations
CSNI	Consolidated Secret Network Infrastructure
DAEPM (R&CS)	Director Aerospace Equipment Program Management (Radar and Communication Systems)
DND	Department of National Defence
DRMIS	Defence Resource Management Information System
DSL	Definitive Software Library
EADS	Eastern Air Defense Sector
ERP	Enterprise Resource Planning
GoC	Government of Canada
HIRAOC	Hawaii Region Air Operations Center
HTML	HyperText Markup Language
ISS	In-Service-Support
ITI	Information Technology Infrastructure
ITIL	Information Technology Infrastructure Library
LAN	Local Area Network
LCMM	Life Cycle Material Manager
LDAP	Lightweight Directory Access Protocol
NCR	National Capital Region
NORAD	The North American Air Defence
OEM	Original Equipment Manufacturer
OLA	Operational Level Agreement
RCAF	Royal Canadian Air Force
SDA	Service Desk Agent
SLA	Service Level Agreement
SLM	Service Level Management
SME	Subject Matter Expert
SOA	Service Oriented Architecture
SOR	Statements of Requirements
SOW	Statement of Work
SQL	Structured Query Language
SRCL	Security Requirements Check List
TA	Technical Authority

UAT	User Acceptance Testing
USA	United States of America
USAF	United States Air Force
VB	Visual Basic
WADS	Western Air Defense Sector
WBS	Work Breakdown Structure

2.0 APPLICABLE DOCUMENTS

2.1 Upon contract award, DND will make available to the Contractor all necessary documentation relevant to this SOW. This includes the following documents:

- AF-ITSM – SOR Version 1.0 dated 22 Nov 04 (Phase I);
- AF-ITSM – SOR Version 2.0 dated 20 Oct 05 (Phase II);
- AF-ITSM – SOR Version 1.0 dated 15 Nov 11 (Phase III); and
- AF-ITSM – Concept of Operations (ConOps) Version 2.0 dated 01 Nov 13.

3.0 CONSTRAINTS

3.1 Constraints are categorised as decisions that might influence the completion of the work, and are expected to remain unchanged for the duration of the CADS and ADS ITSM. These constraints are:

- a) The maturity of the ADS CMDB will be sufficiently reliable to support system configuration changes, provide reliable data, and safeguard the integrity of Configuration Items (CI);
- b) DND will host the Development and Integration Test environments;
- c) All Activities and Contract Deliverables are subject to review and approval by the TA;
- d) The Contractor's resource should be available on-site five (5) days for 7.5 hours each day per week covering core hours of operations. Core hours of operation are defined as 9:00 am to 3:00 pm, Monday to Friday.
- e) Although the Contractor's resource may work outside of these core hours, a significant volume of work occurs principally during core business hours. Furthermore, access to DND facilities that are controlled and monitored, and access to DND resources outside of the core hours may be limited.
- f) DND is responsible to provide all the necessary Hardware, Software and licenses to support development, testing and release; and
- g) The TA is responsible for Requirements Definition and directing work;

4.0 REQUIREMENTS

4.1 Scope of Work

4.1.1 **General.** The delivery, sustainability and supportability of the ADS ITSM will be assured through the provision of professional services outlined herein. The Contractor must provide professional services for the sustainment and life-cycling of ADS ITSM, and ongoing maintenance software, release, as required. The Contractor must provide services along two categories of requirements: (1) Life Cycle recurring requirements associated with the capability already delivered and currently in service; (2) non-recurring activities to be implemented within expansion effort or to meet technical requirements.

4.1.2 The Contractor is to provide support to the Technical Authorities (TAs), Life Cycle Material Managers (LCMMs) and all other ADS ASSYST and Portal users or any DND personnel that are responsible for the Development and Testing Environments in support of pre-production testing

4.1.3 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.

4.1.4 **Life Cycling.** This aims to ensure the supportability, sustainability and robustness of the ADS ITSM capability throughout its normal Life Cycle, which will continue throughout the period of this Contract and beyond. Specifically, the life cycle objectives will:

- a. Support configuration management activities in Axios ASSYST and carry out Configuration Management as well as Configuration Librarian activities in support of the AF ITSM capability to include the maintenance of the CMDB;
- b. Provide training in support of the overall AF ITSM framework;
- c. Provide application maintenance and support of the current AF ITSM solution;
- d. Provide Subject Matter Expert (SME) guidance to the TA, LCMMs and all other ADS ASSYST and Portal users;
- e. Provide support to sustain the implementation of the RCAF Portal and related interfaces to ASSYST (i.e. Service Oriented Architecture (SOA));
- f. Provide back-up, access control and archiving functionality to ensure the robustness of the ADS ITSM capability;
- g. Provide application maintenance and support of the current AF ITSM solution;
- h. Maintain processes and develop procedures in support of evolving Service Support processes;
- i. Develop of reports in support of Managerial and Operational requirements;
- j. Optimize both the Command & Control Information Systems (C2IS) and the ADS CMDBs; and
- k. Provide DND support in the development and implementation of Change and Release Management Plans.

4.1.5 **Non-Recurrent activities.** This aims to ensure the supportability, sustainability and robustness of the ADS ITSM capability throughout its normal Life Cycle, with ad-hoc required changes. Any new requirements will require the formal approval of the TA. The following life cycling requirements will continue throughout the duration of the SOW:

- a. Provide support to Axios ASSYST upgrades to latest versions and other components of the ITSM solution;
- b. Optimization of capabilities already delivered during AF ITSM Project;
- c. Develop user defined requirements and deliver real-time reports and briefings through the establishment of Reporting Services and the web-enabled RCAF Portal capabilities;
- d. Support the integration of Axios ASSYST with the Enterprise Lightweight Directory Access Protocol (LDAP) and auto discovery tools, as well as bar coding and other interfaces;
- e. Support DND's Change and Release Management initiatives;
- f. Provide ITSM SME guidance to the TAs, LCMMs and all other ADS ASSYST and Portal users;
- g. Support the Integration of SOA capabilities to accommodate both Air Force and Consolidated Secret Network Infrastructure (CSNI) users as required;
- h. Support the upgrade of ASSYST to version 10.0 or later versions;
- i. Support training requirements as identified by the TA;
- j. Support the optimization of ITIL Service Support processes (Incident, Problem, Configuration, Change, and Release Management) and integration into the ASSYST toolset;
- k. Support the expansion of the ITSM solution to other Air Force systems;
- l. Optimize the ITSM solution and support the establishment of the Joint Tactical Network including Air Force Deployed Units; and
- m. Provide support, as required, for User Acceptance Testing.

4.2 Tasks

4.2.1 The following tasks descriptions are indicative of the work that the Contractor must perform in support of the AF ITSM Life Cycle and sustainment. The ordering of the tasks is not indicative of priority. The tasks may include, but are not limited to the following:

- a. **Support Configuration Management** – The Contractor must establish process and procedures for the maintenance of the AF ITSM. The Contractor will establish additional ITSM processes and procedures as required by DND. The Contractor must provide on-site support to new and current Configuration Managers and Configuration Librarians as required.
- b. **Support and Training** - The Contractor must deliver the ADS ITSM training and develop the necessary courseware in support of all training requirements. The ADS ITSM training will cover ITIL processes and procedures, Axios ASSYST training, RCAF Portal training, as well as other types of training associated with the ADS ITSM solution.
- c. **Application Maintenance and Support** - The Contractor must support and maintain the existing ADS ITSM capability to support users of the classified domain.
- d. **Toolset and application versioning by Original Equipment Manufacturer (OEM)** - Upgraded versions of the Axios ASSYST application and other components of the ITSM solution will be released during the period of performance of this Contract. The Contractor must support all upgrade activities, including various stages of testing, pre-production development and production implementation.
- e. **Support to Service Continuity Framework** – The Contractor must support the development of the Service Continuity Model and ensure the implementation of every facet of the Model during the In-Service-Support (ISS) phase of the AF ITSM capability. These activities include the optimization of existing ITIL processes put in place during the previous phases of the project.
- f. **Support Change and Release Management Activities** - Change and Release Management for the ADS ITSM solution is critical to maintaining the fidelity and consistency of the status reporting, equipment availability and operational situational awareness for CADS. The Contractor will assist in all change and release management activities for ADS ITSM.
- g. **Training** - Plan and conduct User Workshops and training sessions to solidify the existing ADS ITSM Processes, enable DND personnel and other resources to use, access, and benefit from the existing ADS ITSM capabilities, including training on the toolset and environment, as required and directed by the TA.
- h. **Historical Maintenance Reports** - The ADS ITSM toolset is providing real-time "equipment serviceability" and "situation awareness" reporting via a web-based Portal capability using Microsoft Reporting Services and Web Center applications. Reporting requirements are continuously evolving and the Contractor must remain responsive to these new requirements.
- i. **Support Interoperability with Other DND Service Management Capabilities** - DND has mandated the use of Defence Resource Management Information System (DRMIS) for life cycle management and financial management of DND-owned weapon systems. As the ADS is one of those weapon systems, interoperability with the existing ADS ITSM solution may be required. The Contractor must be able to provide SME advice and technical assistance in support of mandated compliance with other DND projects and activities as requested by the TA.
- j. **Disaster Recovery** - An initial Disaster Recovery Plan and capability must be developed. The Contractor must support the plans to automate the transfer of live/production data between 'Hot' to 'Cold' sites located at North Bay and Winnipeg during real-live disasters
- k. **Integrate Service Oriented Architecture Capability** - The Contractor must provide subject matter expertise to guide the implementation of a SOA capability that will enable DND to automate the current manual interfaces that span across the implementation of various DND ITSM initiatives.

5.0 DELIVERY AND SUPPORT CONTRACT TEAM

5.1 Contractor Team

5.1.1 The resource requirement associated with the sustainment and life-cycling of the ADS ITSM are required to work onsite at DND facilities located either within the National Capital Region (NCR) or in North Bay, ON.

Any development, Test and Evaluation and implementation of final deliverables must be carried out in DND facilities on testing and development network or classified networks.

5.2 Resources

5.2.1 Technical Architect (Level 3) - The Technical Architect located in the NCR must:

Establish a governance model, structure, processes and practices that position Air Force to derive the full benefits of SOAs;

- a. Develop a vision and the requirements that align with SOA best practices;
- b. Develop and establish a roadmap and recommendations that aligns with SOA best practices to confirm compliance to Air Force's vision and to ensure full benefits of SOA technology going forward;
- c. Configure the development, staging and production environments to include any software map server;
- d. Design, document, test, and support the Web-Based Portal capability with WebCenter;
- e. Configure AF Portal expansion components (Portlets, Portal Pages, Transport Sets) for all three environments (development, staging, and production);
- f. Build and load AF Portal expansion components (Portlets, Portal Pages, Transport Sets) for all three environments (development, staging, and production);
- g. Provide support for unit and system tests and Java developers to release the bug fixes;
- h. Review and update the Portal Deployment Guide, Operational Procedure Guide and any other documents;
- i. Support the interface between Portal and Axios ASSYST CMDB; Support AF Portal capabilities with Microsoft Reporting Services;
- j. Support the expansion of the ITSM reporting solution that consolidates various information sources available within Axios ASSYST and other related systems to include the design, optimization, and continued implementation of the Air Force Portal capability;
- k. Support the integration of other systems and protocols into the AF ITSM capability; Support the lab environments at 455 Blvd. de la Carrière;
- l. Identify, research, and develop security policies and procedures that will serve to strengthen the user access based on Role-based access; and
- m. Provide technical support on any other applications or systems as required by the Air Force Command and Control Information System (AFCCIS) Weapon System as well as ADS systems.

5.2.2 Application/Software Architect (Level 3) - The Application/Software Architect located in the NCR must:

- a. Support software upgrade planning, definition of requirements and development of Work Breakdown Structure (WBS);
- b. Design, develop, and document AF ITSM prototype solutions in support of the AF ITSM capability and its associated Web-based Portal reporting system;
- c. Design the software build;
- d. Develop and document the software build;
- e. Prepare and document test plans;
- f. Prepare and document AF ITSM training material and conduct training sessions as needed;
- g. Prepare and document implementation/roll-out plans; Support the administration of both Axios ASSYST CMDBs;
- h. Respond to queries and issues associated with the functionality of Axios ASSYST, Structured Query Language (SQL) Server Databases, and Microsoft Reporting Services;
- i. Support the upgrade of Axios ASSYST, SQL, and Microsoft Reporting Services software; Produce ad-hoc reports using SQL scripts;
- j. Produce canned reports using Visual Studio to develop the SQL script and the report layout prior to deployment to Reporting Services;
- k. Support Excel tools using Visual Basic (VB) Application scripts;
- l. Support HyperText Markup Language (HTML) and VB scripts;
- m. Perform monthly maintenance of SQL Databases;

- n. Monitor system performance and recommend adjustments when needed; Develop and Maintain technical documentation;
- o. Collaborate with other AF ITSM Process Managers, Librarians and Coordinators;
- p. Collaborate with System Administrators when migrating to new infrastructure and troubleshooting performance issues; and
- q. Rollout new releases provided by AF ITSM Project activities to Testing Lab and coordinate testing activities prior to rollout of new releases to production.

5.2.3 Database Analyst/IM Administrator (Level 3) - The Database Analyst/IM Administrator located in the NCR must:

- a. Create libraries or other storage areas to hold AFCCIS and ADS software and documentation (referred to as CIs);
- b. Ensure the execution of the Receive and Install process of all new AFCCIS and ADS Components including Labelling of new components, shipping, and disposal of components as needed;
- c. Maintain current and historical status information on all CIs;
- d. Ensure the security preservation of the master copies of all CIs;
- e. Issue new version of CIs for change or correction when required;
- f. Maintain records of all CIs copies and notify holders of any changes to copies;
- g. Capture, record, store and distribute Configuration Management (CM) metrics;
- h. Produce reports on status of CIs;
- i. Assist in conduction reviews of the CM process;
- j. Assist in the preparation of ITSM training packages for all Air Force Wing/Units/Organizations;
- k. Plan and implement the migration of the Definitive Software Library (DSL) from the AFCCIS Project Office (JCS(Air)) to the AFCCIS LCMM;
- l. Define new database structures;
- m. Define and finalize data conversion strategy;
- n. Define database conversion specifications;
- o. Identify requirements for improvements to existing databases by determining users' information requirements and system performance and functional requirements;
- p. Develop and implement procedures that will ensure the accuracy, completeness, and timeliness of data stored in the database;
- q. Mediates and resolves conflicts among users' needs for data; and
- r. Advise programmers, analysts, and users about the efficient use of data.

5.2.4 Business System Analyst (Level 3) - The Business System Analyst located at 22 Wing North Bay must:

- a. Develop and document statements of requirements in response to capability deficiencies analysis and reports;
- b. Deliver briefings/presentations to senior leadership within DND (Major and above);
- c. Review and provide advice regarding future AF ITSM direction, plans and performance;
- d. Review and provide advice regarding the AF ITSM support to Air Force Deployed units;
- e. Support Users in the identification and definition of individual systems requirements and implementation methodology;
- f. Develop and document Statements of Requirements (SOR) for both Axios 'assyst' and Oracle portal;
- g. Perform ITIL analysis of functional requirements to identify information, procedures, and decision workflows for ASSYST;
- h. Evaluate existing procedures and methods, identify and document items such as database content, structure, application subsystems;
- i. Define and document interfaces of manual to automated operations within AF ITSM application subsystems and interfaces between other DND systems;
- j. Establish acceptance test criteria with client.
- k. Analyze and develop requirement documents, design documents, and specification documents for systems;
- l. Implement systems to support projects, departments, organizations or businesses;

5.4.1.8 **Execute AF ITSM ConOps**

- a. Support the establishment of the AF Tactical environment and the merge of the C2IS and ADS CMDBs;
- b. Provide updated documentation associated with these tasks (i.e. Data Dictionary, Data Schema, and Nomenclature of Configuration Items).
- c. Support the merge of the Air Force C2IS CMDB with the DND CSNI. This merge will consist of the Air Force C2IS with DND common Information Technology Infrastructure (ITI) equipment and services only;
- d. Provide updated documentation associated with the above task (Data Dictionary, Schema, Nomenclature, etc);
- e. Support the conduct of workshops with Users in order to identify future AF ITSM functionality;
- f. Document and deliver outcome of workshop discussions along with appropriate recommendations on future course of actions and direction; and
- g. Identify, recommend, support, and document way forward from TA/LCMM impacting AF ITSM.

5.4.1.9 **Expansion of ADS**

- a. Conduct requirements definition with Users and provide documentation;
- b. Conduct analysis of requirements and evaluations and provide associated documentation as well as recommendations;
- c. Develop design document and provide documentation;
- d. Coordinate and Support the conduct of User Acceptance Testing (UAT) and provide associated documentation; and
- e. Support deployment of new capabilities.

5.4.1.10 **Integrate with other AF Enterprise Resource Planning (ERPs)**

- a. Conduct a detailed analysis of the requirements, evaluate integration options, and provide recommendations and associated documentation;
- b. Develop and provide an Integration plan
- c. Execute the plan, if approved.

5.4.1.11 **Development of Reports through Web-Center Portal**

The Contractor must deploy the Portal WebCenter application and continue the expansion of ADS system operational briefings within RCAF Portal. As requested by the TA, the Contractor must remain responsive to new reporting requirements emerging from the C2IS and ADS Users communities. The Contractor must provide to the TA a catalogue of available reports covering C2IS and ADS systems, User Guides, Handbooks, and Design documents.

5.4.1.12 **Collaborate with other ITSM Projects**

As requested by the TA, the Contractor must collaborate with the Enterprise ITSM project in both the Classified and Designated domains and must plan to migrate the AF ITSM Tactical capability to the Joint Tactical Network when and if requested, while developing the capability to support AF Deployed Units. This can be done through the following:

- a. SME services and advices
- b. Briefings and Presentations
- c. Demonstrations of ITSM applications.

5.4.1.13 **SLM Framework**

The Contractor must develop the SLM framework, including the development of SLAs and OLAs with internal and external Service Providers. The Contractor must build and expand upon the existing Service Catalogue that was established during the preceding phase of the AF ITSM Project. In addition, the Contractor must build the Knowledge Management capability in support of both, the C2IS and the ADS systems and services and submit process guides, design documents, and Service Desk procedures.

5.4.1.14 **Service Suppliers access to Axios 'assyst'**

As the AF ITSM capability is being expanded to the ADS systems and services, external Service Providers will be required to integrate their own support capabilities into the AF ITSM model. When such a requirement emerge, the Contractor must support the integration process, develop and submit to the TA all relevant documentation such as but not limited to the analysis and design documents, Test plans, and Test results as well as all data structure documentation.

5.4.1.15 **Disaster Recovery**

The Air Force has a requirement to automate the data transfer between "Hot" (Winnipeg) and "Cold" (North Bay) Service Desk Sites during disaster recovery. The Contractor must define requirements, develop, design and test Disaster Recovery Plan

5.4.1.16 **Expand to other ITIL Processes**

During the preceding phases of the AF ITSM project, only the lower layer ITIL processes were developed and mapped into the Axios 'assyst' toolset. These processes included: Incident, Problem, Configuration, Change and Release Management processes. The Contractor may be requested to add other ITIL processes to the AF ITSM model. For each new process added to the model, the Contractor must develop and submit the appropriate process guides, procedures, and design documents.

5.4.1.17 **Infrastructures & Environments**

To ensure the supportability and sustainability of the AF ITSM capability, DND has established a Test Facility at 455 Blvd de la Carrière, Gatineau. The Contractor must maintain the various test environments such as but not limited to development, integration, UAT, Pre-Production and Production testing. The Contractor must also support and configure the test capabilities to support training, testing and military exercises.

5.4.1.18 In addition to the above mentioned deliverables, the Contractor must manage the progress of the tasks and submit reports to the TA as follows:

- a. Submit to the TA monthly progress reports that address the progress of each group of tasks, budget and status, as well as any potential changes.

5.4.1.19 The Contractor is responsible for the production of Release Notes, Configuration Code and Design Documentation for all configuration changes released into production.

6.0 GENERAL MANAGEMENT AND ADMINISTRATION

6.1 General

6.1.1 To provide the professional services specified in the Contract, cooperation between TA and the Contractor is necessary in order to ensure that the contract is managed in a formal and structured manner, and that there is full accountability for tasks issued, services rendered, and payment received.

6.2 Location of Work

6.2.1 The work will be performed as stated in section 5.2 primarily in the NCR on DND premises at 455 Blvd de la Carrière, Gatineau, Québec, or other alternative locations in the NCR and at 22 Wing North Bay, Ontario. DND is to supply the necessary office equipment for the work performed in the Life Cycle Management establishment and facilities, including desks, computers and software. Access to the divisional Local Area Network (LAN) is subject to security requirements as outlined in the Security Requirements Check List (SRCL) included in this Contract.

6.3 Language of Work

6.3.1 Unless otherwise indicated, the support services must be carried out in English and in French, based on the choice of the User requesting support.

6.3.2 The deliverables of this SOW must be produced in English.

6.4 Hours for Providing Support Services

See Section 3

6.5 Travel

6.5.1 The Contractor must remain responsive to requirements emerging from outside the NCR. These requirements range from the delivery of training, the support of various levels of testing, the support to military exercises. In addition, the Contractor could be called upon to support the TA in the conduct of meetings, the delivery of presentations and/or demonstrations, as well as conduct Audit Visits.

6.5.2 The Contractor must support the above Project efforts which may be conducted at various Air Force Units across Canada. There is no requirement to travel outside Canada.

6.5.3 The requirement for any travel and trip report will be identified by the Technical Authority. All travel will require prior written approval by the TA or the authorized representative.

6.5.4 Invoices for Travel and Living costs are to be supported by documentation (receipts) and will be reimbursed in accordance with the Treasury Board Policy and Guidelines on Travel in effect at the time of travel at actual cost with no allowance for mark-up or profit.

6.5.5 If required by the TA, the Contractor personnel must prepare a trip report and provide it to the TA, for review and approval, no later than 14 working days after return from the trip.

6.6 Management and Organization

6.6.1 **Contract Control** - The Technical Authority has the authority to co-ordinate and control the assignment of all tasks, including the establishment of task priorities. The TA for this requirement is the primary point of contact for the Contractor's personnel.

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6.6.2 **DND Support to Contractor** – To aid Contractor in the provision of the required services, the following information, materials, and assistance will be provided if available and deemed appropriate by the TA:

- a. All available data and documents such as policy documents, directives, instructions, performance data, technical documents, and other data;
- b. Consultation with the TA and other DND specialists as may be arranged by the TA; and

7.0 MANAGEMENT

7.1 General Administration Support

7.1.1 The Contractor must provide administrative services to joint DND/Contractor meetings, briefings and visits, including preparation and printing of minutes, as well as weekly activity reports.

7.2 Quality Assurance

7.2.1 The Contractor must adhere to the current AFCCIS Quality Assurance Plan which will be presented upon contract award. This program applies to all AFCCIS and AF ITSM definition and implementation cycles.

7.2.2 DND will witness all Contractor efforts to accomplish the SOW requirements and maintains the right to approve or reject resulting processes and products before subsequent related processes and products are implemented.

APPENDIX A TO ANNEX A - TASKING ASSESSMENT PROCEDURE

1. Where a requirement for a specific 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 DND Procurement Representative a quotation of rates to supply the requested Resource Categories 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

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APPENDIX B TO ANNEX A - TASK AUTHORIZATION FORM

All invoices/progress claims must show the referenced Contract and Task numbers. Toutes les factures doivent indiquer les numéros du contrat et de la tâche.		Contract no. - No du contrat
		Task no. - No de la tâche
Amendment no. - No de la modification	Increase/Decrease - Augmentation/Réduction	Previous value - Valeur précédente
To - À	<p>TO THE CONTRACTOR</p> <p>You are requested to supply the following services in accordance with the terms of the above referenced Contract. Only services included in the Contract can be supplied against this task.</p> <p>Please advise the undersigned if the completion date cannot be met. Invoices/progress claims shall be prepared in accordance with the instructions set out in the contract.</p> <p>À L'ENTREPRENEUR</p> <p>Vous êtes prié de fournir les services suivants en conformité des termes du contrat mentionné ci-dessus. Seules les services mentionnés dans le contrat doivent être fournis à l'appui de cette demande.</p> <p>Prière d'aviser le signataire si la livraison ne peut se faire dans les délais prescrits. Les factures doivent être établies selon les instructions énoncées dans le contrat.</p> <p style="text-align: center;">_____</p> <p style="text-align: center;">Date for the Department of National Defence pour le ministère de la Défense nationale</p>	
Delivery location - Expédiez à		
Delivery/Completion date - Date de livraison/d'achèvement From - De : To - À :		
Contract item no. No d'article du contrat		
		Applicable Taxes Taxes applicables
		Total
<p>DND PROCUREMENT REPRESENTATIVE :</p> <p>_____</p> <p>Name (type or print) Title (type or print)</p> <p>_____</p> <p>Signature Date</p> <p>THE CONTRACTOR HEREBY ACCEPTS THE TASK AUTHORIZATION IDENTIFIED ABOVE :</p> <p>_____</p> <p>Name (type or print) Title (type or print)</p> <p>_____</p> <p>Signature Date</p>		
<p>APPLICABLE ONLY TO PWGSC CONTRACTS: The Contracting Authority signature is required when the total value of the DND 626 exceeds the threshold specified in the Contract.</p> <p>NE S'APPLIQUE QU'AUX CONTRATS DE TPSGC : La signature de l'autorité contractante est requise lorsque la valeur totale du formulaire DND 626 est supérieure au seuil précisé dans le contrat.</p> <p>_____</p> <p>for the Department of Public Works and Government Services pour le ministère des Travaux publics et services gouvernementaux</p>		

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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.

Note to Bidders: Attachments 4.1 and Attachment 4.2 – Bid Evaluation Criteria will be inserted and will form part of the resulting contract.

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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 - [English]

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

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ANNEX B - BASIS OF PAYMENT

INITIAL CONTRACT PERIOD:

Initial Contract Period – Year 1		
Resource Category	Level of Expertise	Firm Per Diem Rate
I.10. Technical Architect	3	\$(To be inserted upon Contract Award)
A.1. Application/Software Architect	3	\$(To be inserted upon Contract Award)
I.3. Database Analyst/IM Administrator	3	\$(To be inserted upon Contract Award)
B.6. Business Systems Analyst	3	\$(To be inserted upon Contract Award)
B.10. Helpdesk Specialist	2	\$(To be inserted upon Contract Award)

Initial Contract Period – Year 2		
Resource Category	Level of Expertise	Firm Per Diem Rate
I.10. Technical Architect	3	\$(To be inserted upon Contract Award)
A.1. Application/Software Architect	3	\$(To be inserted upon Contract Award)
I.3. Database Analyst/IM Administrator	3	\$(To be inserted upon Contract Award)
B.6. Business Systems Analyst	3	\$(To be inserted upon Contract Award)
B.10. Helpdesk Specialist	2	\$(To be inserted upon Contract Award)

Initial Contract Period – Year 3		
Resource Category	Level of Expertise	Firm Per Diem Rate
I.10. Technical Architect	3	\$(To be inserted upon Contract Award)
A.1. Application/Software Architect	3	\$(To be inserted upon Contract Award)
I.3. Database Analyst/IM Administrator	3	\$(To be inserted upon Contract Award)
B.6. Business Systems Analyst	3	\$(To be inserted upon Contract Award)
B.10. Helpdesk Specialist	2	\$(To be inserted upon Contract Award)

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OPTION PERIOD:

Option Period – Year 1		
Resource Category	Level of Expertise	Firm Per Diem Rate
I.10. Technical Architect	3	\$(To be inserted upon Contract Award)
A.1. Application/Software Architect	3	\$(To be inserted upon Contract Award)
I.3. Database Analyst/IM Administrator	3	\$(To be inserted upon Contract Award)
B.6. Business Systems Analyst	3	\$(To be inserted upon Contract Award)
B.10. Helpdesk Specialist	2	\$(To be inserted upon Contract Award)

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ANNEX C - SECURITY REQUIREMENTS CHECK LIST

COMMON-PS-SRCL#41

 Government of Canada / Gouvernement du Canada	Contract Number / Numéro du contrat W8485-195127
	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 National Defence	2. Branch or Directorate / Direction générale ou Direction ADMCM-1 / DCAEPM / DAEPM (E-C)	
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 Professional services to support AF ITSM Portal and ASSYST systems in service support contract		
5. a) Will the supplier require access to Controlled Goods? / Le fournisseur aura-t-il accès à des marchandises contrôlées? <input type="checkbox"/> No / Non <input checked="" 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? / 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"/>
Specify country(ies): / Préciser le(s) pays:	Specify country(ies): / Préciser le(s) pays:	Specify country(ies): / Préciser le(s) pays:
7. c) Level of information / Niveau d'information		
PROTECTED A / PROTÉGÉ A <input type="checkbox"/>	NATO UNCLASSIFIED / NATO NON CLASSIFIÉ <input type="checkbox"/>	PROTECTED A / PROTÉGÉ A <input type="checkbox"/>
PROTECTED B / PROTÉGÉ B <input type="checkbox"/>	NATO RESTRICTED / NATO DIFFUSION RESTREINTE <input type="checkbox"/>	PROTECTED B / PROTÉGÉ B <input type="checkbox"/>
PROTECTED C / PROTÉGÉ C <input type="checkbox"/>	NATO CONFIDENTIAL / NATO CONFIDENTIEL <input type="checkbox"/>	PROTECTED C / PROTÉGÉ C <input type="checkbox"/>
CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>	NATO SECRET / NATO SECRET <input type="checkbox"/>	CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>
SECRET / SECRET <input checked="" type="checkbox"/>	COSMIC TOP SECRET / COSMIC TRÈS SECRET <input type="checkbox"/>	SECRET / SECRET <input type="checkbox"/>
TOP SECRET / TRÈS SECRET <input type="checkbox"/>		TOP SECRET / TRÈS SECRET <input type="checkbox"/>
TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>		TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>

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Gouvernement du Canada

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PART A: CONTINUED / PARTIE A (suite)

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

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

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

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

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

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

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

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

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

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

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

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

PRODUCTION

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

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

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

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

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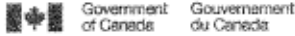


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PMF / C-2 (continued) / PARTIE C-2 (suite)

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

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

SUMMARY CHART / TABLEAU RÉCAPITULATIF

Category / Catégorie	PROTECTED / PROTÉGÉ			CLASSIFIED / CLASSIFIÉ			NATO				COMSEC					
	A	B	C	CONFIDENTIAL / CONFIDENTIEL	SECRET	TOP SECRET / TRÈS SECRET	NATO RESTRICTED	NATO CONFIDENTIAL	NATO SECRET	COMSEC TOP SECRET	PROTECTED / PROTÉGÉ			SECRET	TOP SECRET / TRÈS SECRET	
							NATO DIFFUSION RESTRICTED	NATO CONFIDENTIAL	COMSEC TOP SECRET	A	B	C				
Information / Assets / Renseignements / Données																
Production																
IT Media / Support TI / IT Use / L'usage technique																

12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED?
La description du travail visé par le présent LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE? No / Non Yes / Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification".
Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire.

12. b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED?
La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE? No / Non Yes / Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification" and indicate with attachments (e.g. SECRET with Attachments).
Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire et indiquer qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).

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ANNEX D - NON-DISCLOSURE AGREEMENT

I, _____, recognize that in the course of my work as an employee or subcontractor of _____, I may be given access to information by or on behalf of Canada in connection with the Work, pursuant to Contract Serial No **W8485-195127/001/IPS** between Her Majesty the Queen in right of Canada, represented by the Minister of Public Works and Government Services and _____, including any information that is confidential or proprietary to third parties, and information conceived, developed or produced by the Contractor as part of the Work. For the purposes of this agreement, information includes but not limited to: any documents, instructions, guidelines, data, material, advice or any other information whether received orally, in printed form, recorded electronically, or otherwise and whether or not labelled as proprietary or sensitive, that is disclosed to a person or that a person becomes aware of during the performance of the Contract.

I agree that I will not reproduce copy, use, divulge, release or disclose, in whole or in part, in whatever way or form any information described above to any person other than a person employed by Canada on a need to know basis. I undertake to safeguard the same and take all necessary and appropriate measures, including those set out in any written or oral instructions issued by Canada, to prevent the disclosure of or access to such information in contravention of this agreement.

I also acknowledge that any information provided to the Contractor by or on behalf of Canada must be used solely for the purpose of the Contract and must remain the property of Canada or a third party, as the case may be.

I agree that the obligation of this agreement will survive the completion of the Contract Serial No **W8485-195127/001/IPS**

Signature

Date

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ATTACHMENT 3.1 - 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	
Bidder's Procurement Business Number (PBN) [see the Standard Instructions 2003] [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.]		
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"	

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Security Clearance Level of Bidder

[include both the level and the date it was granted]

[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.]

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

ATTACHMENT 4.1- MANDATORY TECHNICAL CRITERIA

(As Revised May 02nd, 2019)

1. The Bidder is advised that only listing experience without providing any supporting data to describe where and how such experience was obtained will not constitute "demonstrated" for the purpose of the evaluation.
2. Experience must be demonstrated by project summaries. For all mandatory criteria, the Bidder must submit at a minimum, the following:
 - a. Name of the client organization;
 - b. Project start and end dates (month/year to month/year); and
 - c. Description of the roles and responsibilities of the Bidder or the Bidder's Proposed Resource in the project.
3. In the case where the timelines of two or more projects overlap, the duration of time common to each project will not be counted more than once.
4. It is recommended that the Bidder include a grid in their proposals, cross-referencing statements of compliance with the supporting data and resume evidence contained in their proposals. Note: the compliance grid, by and of itself does not constitute demonstrated evidence.
5. Education must have been obtained from a recognized Canadian university, college or high school, or the equivalent as established by a recognized* Canadian academic credentials assessment service, if obtained outside Canada.

*The list of recognized Canadian academic credentials assessment service providers can be found under the Canadian Information Centre for International Credentials website, at the following Internet link:
<http://www.cicic.ca/indexe.stm>.
6. Canada reserves the right to request and contact Client references to validate information in the proposal.
7. For the mandatory technical criteria below, when a diploma, degree, certification, etc. is requested, the Bidder must provide it with the Bid. If it is not provided with the Bid, the Contracting Authority may request that the Bidder provide the document within a specified time frame. If the document is not provided within this time frame, the Bid will be considered non-responsive.

CORPORATE MANDATORY TECHNICAL CRITERIA

#	<i>Corporate Mandatory Criteria</i>	<i>Met (Yes/No)</i>	<i>Cross Reference to bid</i>
M-1	<p>The Bidder must have completed at least two (2) Information Management and Information Technology Service Management (IM/ITSM) project implementations at Government of Canada organizations or Crown Corporations. One of the two (2) implementations must be for government of Canada organization that delivers Web-based real-time reporting services in support of operational users. At least one (1) implementation must have covered a full project lifecycle (project initiation, requirements gathering, design, build, test, training and rollout.)</p> <p>To demonstrate this experience for each project, the Bidder must provide the following:</p> <ul style="list-style-type: none"> a) names of client organizations; b) name of client; c) client's title; d) client's telephone number and e-mail address; and e) description of the projects; and f) project start and end date <p>The information listed above should be submitted with the bid using <u>Form 1 – Customer Reference Contact Information Form</u>. If any of the information is not submitted, the Contracting Authority will inform the Bidder of a time-frame within which to provide the information. Failure to provide the information listed above within the time-frame provided will render the bid non-responsive.</p> <p>It is the Bidder's responsibility to ensure that any information divulged is accurate.</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. For example, Z (customer) contracted with Y for services. Y, in turn, entered into a contract with X to provide all or part of these services to Z. In this example, Y is a prime contractor and X is a subcontractor.</p> <p>Bidders are reminded that a Supply Arrangement or Standing Offer is not a contract and therefore any reference to this type of document will not be accepted for the purpose of evaluating contract experience. For example if the Bidder references it's TBIPS SA number such as EN578-055605/XXX/EL for the purpose of demonstrating experience under the evaluation</p>		

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	criteria, Canada will disregard this experience because it does not relate to a specific contract.		
M-2	The Bidder must be a certified Axios assyst Service Provider partner with resources qualified to provide Axios assyst training that is certified by Axios Systems. A copy of the Axios Systems Qualification document must be provided with the bid.		
M-3	<p>The Bidder must provide a Contract Management Plan (CMP) that will address the following:</p> <ol style="list-style-type: none">1) The Bidder's proposed approach to assure the overall efficient sustainability and supportability ITSM capabilities. The CMP must reflect the Bidder's experience in having implemented a ITSM project;2) High-Level (Tier 1 / 2 Work Breakdown Structure (WBS));3) Conflict Management, Resource Management and Responsibility Assessment;4) Acquisition of new capabilities through the project Life-Cycle;5) Task Authorization and Administration;6) Organization Interfaces;7) Risk Management Plan; and8) Quality Assurance		

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RESOURCES MANDATORY TECHNICAL CRITERIA

I.10 TECHNICAL ARCHITECT – LEVEL 3			
#	Resource Mandatory Criteria	Met (Yes/No)	Cross Reference to bid
M-4	The proposed resource must hold an undergraduate degree from a recognized university or a College Certificate in computer science. A copy of the degree must be provided with the bid.		
M-5	The proposed resource must have a minimum of ten (10) years of demonstrated experience as a Technical Architect.		
M-6	The proposed resource must have a minimum of five (5) years of experience within the last seven (7) years as the Technical Architect for the implementation of an Oracle Portal / Oracle WebCenter solution.		
M-7	The proposed resource must have worked in at least one (1) project performing the role of Technical Architect for the integration of Oracle Portal / Oracle WebCenter with Google Earth and Axios assyst.		

A.1 APPLICATION / SOFTWARE ARCHITECT – LEVEL 3			
#	Resource Mandatory Criteria	Met (Yes/No)	Cross Reference to bid
M-8	The proposed resource must hold an undergraduate degree from a recognized university or a college certificate in IT. A copy of the degree must be provided with the bid.		
M-9	The proposed resource must have ten (10) years of demonstrated experience as an Application/Software Architect.		
M-10	The proposed resource must have five (5) years of demonstrated experience within the last ten (10) years working as an Axios assyst architect.		
M-11	The proposed resource must have at least five (5) years of experience using Microsoft SQL Server.		
M-12	The proposed resource must have a current Axios assyst Silver certification. A copy of the certificate must be provided with the bid.		
M-13	The proposed resource must hold an ITIL Foundations Certificate. A copy of the certification must be provided with the bid.		

I.3 DATA ANALYST / IM ADMINISTRATOR - LEVEL 3			
#	Resource Mandatory Criteria	Met (Yes/No)	Cross Reference to bid
M-14	The proposed resource must hold an undergraduate degree from a recognized university or a college certificate in IT. A copy of the degree must be provided with the bid.		
M-15	The proposed resource must have ten (10) years of demonstrated experience as a Data Analyst/IM Administrator.		
M-16	The proposed resource must have a minimum of three (3) years of demonstrated experience in the integration and configuration of Definitive Software Library (DSL) processes and maintenance activities associated with and ITIL-based Configuration Management Database (CMDB) using Axios assist.		
M-17	The proposed resource must hold a minimum of an ITIL Foundations Certificate. A copy of the certification must be provided with the bid.		
M-18	The proposed resource must have a minimum of three (3) years of demonstrated experience within the last ten (10) years in the deployment of ITIL based Configuration Management processes and procedures using the Axios 'assyst' toolset.		

B.6 BUSINESS SYSTEM ANALYST – LEVEL 3			
#	Resource Mandatory Criteria	Met (Yes/No)	Cross Reference to bid
M-19	The proposed resource must: - Hold an undergraduate degree from a recognized university or a college certificate in IT (<i>A copy of the degree must be provided with the bid.</i>) , or - Demonstrate a minimum of ten (10) years of experience delivering Information Technology (IT) services.		
M-20	The proposed resource must have ten (10) years of demonstrated experience as a Business Systems Analyst.		
M-21	The proposed resource must have a minimum of three (3) years of demonstrated experience within the last ten (10) years in working with		

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	Air Defence and North Warning Systems with Axios Assyst and Oracle Portal.		
M-22	The proposed resource must hold an ITIL Foundations Certificate. A copy of the certification must be provided with the bid.		

B.10 HELP DESK SPECIALIST – LEVEL 2

#	Resource Mandatory Criteria	Met (Yes/No)	Cross Reference to bid
M-23	The proposed resource must: - Hold an undergraduate degree from a recognized university or a college certificate in an IT. <i>(A copy of the degree must be provided with the bid)</i> , or - Demonstrate a minimum of ten (10) years of experience delivering Information Technology (IT) services.		
M-24	The proposed resource must have five (5) years of demonstrated experience as a Help Desk Specialist.		
M-25	The proposed resource must have a minimum of three (3) years of demonstrated experience within the last ten (10) years in working with Axios Assyst.		
M-26	The proposed resource must hold an ITIL Foundations Certificate. A copy of the certification must be provided with the bid.		

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ATTACHMENT 4.2- POINT-RATED TECHNICAL CRITERIA

I.10 TECHNICAL ARCHITECT – LEVEL 3					
#	Resource Point-Rated Criteria	Point Allocation	Score	Max. Points	Cross reference to bid
R-1	Demonstrated experience in performing the role of Technical Architect for the integration of Microsoft Reporting Services and Oracle Portal / Webcenter and Google Earth.	1 project = 1 pt. 2 or more projects = 2 pts		2	
R-2	Demonstrated experience in working within a Defence Weapons Project on a Department of National Defence classified network	1 project = 1 pt. 2 or more projects = 2 pts		2	
R-3	Demonstrated experience with Service Oriented Architecture (SOA) implementations.	1 project = 1 pt. 2 or more projects = 2 pts		2	
R-4	Demonstrated experience with WebLogic.	1 project = 1 pt. 2 or more projects = 2 pts		2	
Maximum Points				/8	
Minimum Points				/5	

A.1 APPLICATION SOFTWARE ARCHITECT – LEVEL 3					
#	Resource Point-Rated Criteria	Point Allocation	Score	Max. Points	Cross reference to bid
R-5	Demonstrated experience in working in Air Defence (AD) operations.	1 project=1 pt.		1	
R-6	Demonstrated experience in the development of reports using MS Reporting Services.	1 project = 1 pt. 2 or more projects = 2 pts		2	
R-7	Demonstrated experience in developing solutions that included all components of the ITSM framework architecture (Axios 'assyst', SQL Reporting Services).	1 project = 1 pt. 2 or more projects = 2 pts		2	
R-8	Demonstrated experience in implementing ITIL Service Support using Axios 'assyst'.	1 project = 1 pt. 2 or more projects = 2 pts		2	
Maximum Points				/7	
Minimum Points				/4	

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I.3 DATA ANALYST / IM ADMINISTRATOR – LEVEL 3

#	Resource Point-Rated Criteria	Point Allocation	Score	Max. Points	Cross reference to bid
R-9	Demonstrated experience in implementing IT Projects within a government defence operational environment.	1 project = 1 pt. 2 or more projects = 2 pts		2	
R-10	Demonstrated experience in the development of processes covering the implementation of an ITSM solution based on the Axios 'assyst' toolset.	1 project = 1 pt. 2 or more projects = 2 pts		2	
R-11	Demonstrated experience in the development and fielding of ITIL-based processes.	1 project = 1 pt. 2 or more projects = 2 pts		2	
R-12	Demonstrated experience on project facilitating and documenting ITIL-based process design workshop.	1 project = 1 pts 2 or more projects = 2 pts		2	
Maximum Points				/8	
Minimum Points				/5	

B.6 BUSINESS SYSTEM ANALYST - LEVEL 3

#	Resource Point-Rated Criteria	Point Allocation	Score	Max. Points	Cross reference to bid
R-13	Demonstrated experience in working in Air Defence (AD) operations.	1 Project = 1 pt.		1	
R-14	Demonstrated experience as a Systems Analyst in the Department of National Defence.	1 project = 1 pt. 2 or more projects = 2 pts		2	
R-15	Demonstrated experience in implementing ITIL Service Support using Axios 'assyst'.	1 project = 1 pt. 2 or more projects = 2 pts		2	
R-16	The proposed resource has demonstrated experience implementing IT projects within a government defence operational environment.	1 project = 1 pt. 2 or more projects = 2 pts		2	
R-17	Demonstrated experience as a business analyst on an ITSM solution implementation based on Axios 'assyst' integration with Oracle Portal and Google Earth.	1 project = 1 pt. 2 or more projects = 2 pts		2	
Maximum Points				/9	
Minimum Points				/5	

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B.10 HELP DESK SPECIALIST – LEVEL 2					
#	Resource Point-Rated Criteria	Point Allocation	Score	Max. Points	Cross reference to bid
R-18	Demonstrated experience in working in Air Defence (AD) operations.	1 Project = 1 pt.		2 pts	
R-19	Demonstrated experience as a help desk specialist in the Department of National Defence.	3 years = 1 pt. 5 years or more = 2 pts		2 pts	
R-20	Demonstrated experience in implementing IT projects within a government defence operational environment.	1 project = 1 pt. 2 or more projects = 2 pts		2 pts	
R-21	Demonstrated experience as a Help Desk Specialist on an ITSM solution implementation based on Axios 'assyst' integration.	1 project = 1 pt. 2 or more projects = 2 pts		2 pts	
Maximum Points				/8	
Minimum Points				/5	

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ATTACHMENT 4.3 - PRICING SCHEDULE

In respect of the "Estimated Number of Days" listed below in (C*) the estimated number of days is for evaluation purposes only during the solicitation process and does not represent a commitment of the future usage.

Initial Contract Period – Year 1				
	(B)	(C)	(D)	(E)
Resource Category	Level of Expertise	Estimated Number of Days	Firm Per Diem Rate	Total Cost (C x D)
I.10. Technical Architect	3	120	\$	\$
A.1. Application/Software Architect	3	120	\$	\$
I.3. Database Analyst/IM Administrator	3	120	\$	\$
B.6. Business Systems Analyst	3	120	\$	\$
B.10. Helpdesk Specialist	2	120	\$	\$
Total Price Initial Contract Period – Year 1				\$ <TBD>

Initial Contract Period – Year 2				
	(B)	(C)	(D)	(E)
Resource Category	Level of Expertise	Estimated Number of Days	Firm Per Diem Rate	Total Cost (C x D)
I.10. Technical Architect	3	240	\$	\$
A.1. Application/Software Architect	3	240	\$	\$
I.3. Database Analyst/IM Administrator	3	240	\$	\$
B.6. Business Systems Analyst	3	240	\$	\$
B.10. Helpdesk Specialist	2	240	\$	\$
Total Price Initial Contract Period – Year 2				\$ <TBD>

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Initial Contract Period – Year 3				
	(B)	(C)	(D)	(E)
Resource Category	Level of Expertise	Estimated Number of Days	Firm Per Diem Rate	Total Cost (C x D)
I.10. Technical Architect	3	240	\$	\$
A.1. Application/Software Architect	3	240	\$	\$
I.3. Database Analyst/IM Administrator	3	240	\$	\$
B.6. Business Systems Analyst	3	240	\$	\$
B.10. Helpdesk Specialist	2	240	\$	\$
Total Price Initial Contract Period – Year 3				\$ <TBD>

Option Period – Year 1				
	(B)	(C)	(D)	(E)
Resource Category	Level of Expertise	Estimated Number of Days	Firm Per Diem Rate	Total Cost (C x D)
I.10. Technical Architect	3	240	\$	\$
A.1. Application/Software Architect	3	240	\$	\$
I.3. Database Analyst/IM Administrator	3	240	\$	\$
B.6. Business Systems Analyst	3	240	\$	\$
B.10. Helpdesk Specialist	2	240	\$	\$
Total Price Option Period – Year 1				\$ <TBD>

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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

- B2. 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).

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FORM 1 - CUSTOMER REFERENCE CONTACT INFORMATION FORM

Customer Reference Contact Information:	
Name of client organization: _____	
Name of client: _____	
Client's title: _____	
Client telephone n°: _____	
Email address: _____	
Short description of services provided:	
Contract n°: _____	
Start date: _____ End date: _____	
Total contract value (excluding Applicable Taxes): _____	
Number of resources provided: _____	
By signing below, the Bidder certifies that the information provided in this Form is accurate.	
Signature of authorized representative of the Bidder:	Name: _____ Title: _____ Signature: _____ Date: _____

A Word version of Form 1 - CUSTOMER REFERENCE CONTACT INFORMATION FORM is available by sending a request by e-mail to Bikina.Kaliningondo@tpsgc-pwgsc.gc.ca

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FORM 2 - ELECTRONIC PAYMENT INSTRUMENTS

The Bidder accepts to be paid by any of the following Electronic Payment Instrument(s):

- VISA Acquisition Card;
- MasterCard Acquisition Card;
- Direct Deposit (Domestic and International);
- Electronic Data Interchange (EDI);
- Wire Transfer (International Only);
- Large Value Transfer System (LVTS) (Over \$25M)