



**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

OR via ePost Connect

Gatineau

Québec

K1A 0S5

Bid Fax: (819) 997-9776

**REQUEST FOR PROPOSAL
DEMANDE DE PROPOSITION**

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

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

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

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

Comments - Commentaires

Vendor/Firm Name and Address

Raison sociale et adresse du

fournisseur/de l'entrepreneur

Issuing Office - Bureau de distribution

Informatics Professional Services - EL Division/Services
professionnels en informatique - division EL

Terrasses de la Chaudière 4th Floor

10 Wellington Street

Gatineau

Québec

K1A 0S5

| | | |
|---|--|--|
| Title - Sujet Professional Services - TBIPS 2 | | |
| Solicitation No. - N° de l'invitation 08915-170500/B | Date 2019-06-07 | |
| Client Reference No. - N° de référence du client 20170500 | | |
| GETS Reference No. - N° de référence de SEAG PW-\$\$EL-618-35796 | | |
| File No. - N° de dossier 618el.08915-170500 | CCC No./N° CCC - FMS No./N° VME | |
| Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2019-07-02 | | Time Zone Fuseau horaire Eastern Daylight Saving Time EDT |
| F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input checked="" type="checkbox"/> Other-Autre: <input type="checkbox"/> | | |
| Address Enquiries to: - Adresser toutes questions à: Laassouli(EL DIV.), Hicham | | Buyer Id - Id de l'acheteur 618el |
| Telephone No. - N° de téléphone (613) 858-9817 () | FAX No. - N° de FAX () - | |
| Destination - of Goods, Services, and Construction: Destination - des biens, services et construction: Foreign Affairs, Trade and Development Canada LB PEARSON BLDG TWR C3 125 SUSSEX DR. OTTAWA Ontario K1A0G2 Canada | | |

Instructions: See Herein

Instructions: Voir aux présentes

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

BID SOLICITATION

**FOR CONTRACTS AGAINST A SUPPLY ARRANGEMENT FOR TASK-BASED INFORMATICS PROFESSIONAL SERVICES (TBIPS) – TIER 2
VARIOUS CATEGORIES**

FOR

**THE DEPARTMENT OF FOREIGN AFFAIRS,
TRADE AND DEVELOPMENT'S (DFATD)**

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List of Annexes to the Resulting Contract:

Annex A Statement of Work
Annex B Basis of Payment
Annex C Security Requirements Check List

Appendix A to Annex A - Tasking Assessment Procedure
Appendix B to Annex A - Task Authorization Form
Appendix C to Annex A – Resource Assessment Criteria
Appendix D to Annex A – Certifications at the TA stage

List of Attachments:

Attachment 1: Bid Submission Form
Attachment 2: Bid Evaluation Criteria
Attachment 3: Pricing Schedule
Attachment 4: Federal Contractors Program for Employment Equity – Certification

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 the Department of Foreign Affairs, Trade and Development's (DFATD) (the "**Client**") for Task-Based Informatics Professional Services (TBIPS) under the TBIPS Supply Arrangement (SA) method of supply.
- (b) It is intended to result in the award of up to 2 contracts in each of the 5 Workstreams, with each contract purchasing Work from only one Workstream. Each contract will be for 3 years plus 2 one-year irrevocable options allowing Canada to extend the term of the contract. Bidders do not have to submit a bid for each Workstream. In the event that a Bidder wants to bid on more than one Workstream, a separate technical bid should be submitted for each Workstream if the Bidder chooses to submit its bid in hard copies.
- (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 (CColFTA), 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 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.
- (h) Only TBIPS SA Holders currently holding a TBIPS SA for Tier 2, in all resource categories of a given Workstream and in the National Capital Region 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.
- (i) 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.
- (j) For each Workstream, the Resource Categories described below are required on an as and when requested basis in accordance with the TBIPS SA Annex "A":

WORKSTREAM 1: APPLICATION DEVELOPMENT SERVICES

| RESOURCE CATEGORY | LEVEL OF EXPERTISE | ESTIMATED NUMBER OF RESOURCES REQUIRED |
|---|--------------------|--|
| Application/Software Architect - Siebel | 1,2,3 | 7 |
| Application/Software Architect - .Net | 1,2,3 | 7 |
| Programmer/Software Developer - Siebel | 1,2,3 | 8 |
| Programmer / Analyst | 1,2,3 | 10 |
| Data Conversion Specialist | 1,2,3 | 3 |
| Quality Assurance Specialist / Analyst | 1,2,3 | 6 |

WORKSTREAM 2: INFRASTRUCTURE/DBA SERVICES

| RESOURCE CATEGORY | LEVEL OF EXPERTISE | ESTIMATED NUMBER OF RESOURCES REQUIRED |
|----------------------------------|--------------------|--|
| Application / Software Architect | 1,2,3 | 3 |
| System Analyst | 1,2,3 | 6 |
| Database Administrator | 1,2,3 | 3 |
| Network Analyst | 1,2,3 | 6 |

| | | |
|----------------------|-------|----|
| Technical Architect | 1,2,3 | 3 |
| Technology Architect | 1,2,3 | 12 |
| Technical Writer | 1,2,3 | 3 |

WORKSTREAM 3: TESTING SERVICES

| RESOURCE CATEGORY | LEVEL OF EXPERTISE | ESTIMATED NUMBER OF RESOURCES REQUIRED |
|-------------------|--------------------|--|
| Test Coordinator | 1,2,3 | 6 |
| Tester | 1,2,3 | 51 |

WORKSTREAM 4: BUSINESS SERVICES

| RESOURCE CATEGORY | LEVEL OF EXPERTISE | ESTIMATED NUMBER OF RESOURCES REQUIRED |
|------------------------------|--------------------|--|
| Tester | 1,2,3 | 6 |
| Business Analyst | 1,2,3 | 27 |
| Courseware Developer | 1,2,3 | 6 |
| Technical Writer | 1,2,3 | 3 |
| Change Management Consultant | 1,2,3 | 6 |
| Project Manager | 1,2,3 | 9 |

WORKSTREAM 5: PROJECT SUPPORT SERVICES

| RESOURCE CATEGORY | LEVEL OF EXPERTISE | ESTIMATED NUMBER OF RESOURCES REQUIRED |
|----------------------------------|--------------------|--|
| Application / Software Architect | 1,2,3 | 6 |
| Technology Architect | 1,2,3 | 3 |
| Project Manager | 1,2,3 | 24 |
| Project Scheduler | 1,2,3 | 6 |

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 Conflict of Interest

- (a) Bidders are advised to refer to Conflict of Interest provisions at Article 18 of SACC 2003, Standard Instructions – Goods or Services – Competitive Requirements (dated 2018-05-22) and Conflict of Interest provisions of SACC 2035, General Condition – Higher Complexity – Services (dated 2018-06-21) available on the Public Works and Government Services Canada (PWGSC) Website.
- (b) Bidders are advised that Canada will not accept a bid from the following resource and private sector contractor as they have provided assistance and services in preparing strategies and documentation related to this procurement process. In addition, Bidders are advised that a bid will be rejected if any of the resources or private sector contractors listed below was involved in any manner in the preparation of its bid.

| RESOURCE NAME | CONTRACTOR |
|---------------|--|
| Nina Rejhon | I4C Information Technology Consulting Inc. |

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 (RFS), the Bidder has already provided a list of names, as requested under the *Ineligibility and Suspension Policy*. During this procurement process, the Bidder must immediately inform Canada in writing of any changes affecting the list of names.
- (e) Subsection 4 of Section 05, Submission of bids of Standard Instructions 2003 incorporated by reference above, is amended as follows:

Delete: 60 days

Insert: 180 days
- (f) Subsection 1 of Section 08, Transmission by facsimile or by epost Connect of Standard Instructions 2003 incorporated by reference above, is deleted and replaced by the following:
 - 1. Facsimile

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

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

or, if applicable, the email address identified in the bid solicitation.
 - ii. PWGSC regional offices: The only acceptable email address to use with epost Connect for responses to bid solicitations issued by PWGSC regional offices is identified in the bid solicitation.
 - b. To submit a bid using epost Connect service, the Bidder must either:

- i. send directly its bid only to the specified PWGSC Bid Receiving Unit, using its own licensing agreement for epost Connect provided by Canada Post Corporation; or
 - ii. send as early as possible, and in any case, at least six business days prior to the solicitation closing date and time, (in order to ensure a response), an email that includes the bid solicitation number to the specified PWGSC Bid Receiving Unit requesting to open an epost Connect conversation. Requests to open an epost Connect conversation received after that time may not be answered.
- c. If the Bidder sends an email requesting epost Connect service to the specified Bid Receiving Unit in the bid solicitation, an officer of the Bid Receiving Unit will then initiate an epost Connect conversation. The epost Connect conversation will create an email notification from Canada Post Corporation prompting the Bidder to access and action the message within the conversation. The Bidder will then be able to transmit its bid afterward at any time prior to the solicitation closing date and time.
- d. If the Bidder is using its own licensing agreement to send its bid, the Bidder must keep the epost Connect conversation open until at least 30 business days after the solicitation closing date and time.
- e. The bid solicitation number should be identified in the epost Connect message field of all electronic transfers.
- f. It should be noted that the use of epost Connect service requires a Canadian mailing address. Should a bidder not have a Canadian mailing address, they may use the Bid Receiving Unit address specified in the solicitation in order to register for the epost Connect service.
- g. For bids transmitted by epost Connect service, Canada will not be responsible for any failure attributable to the transmission or receipt of the bid including, but not limited to, the following:
 - i. receipt of a garbled, corrupted or incomplete bid;
 - ii. availability or condition of the epost Connect service;
 - iii. incompatibility between the sending and receiving equipment;
 - iv. delay in transmission or receipt of the bid;
 - v. failure of the Bidder to properly identify the bid;
 - vi. illegibility of the bid;
 - vii. security of bid data; or,
 - viii. inability to create an electronic conversation through the epost Connect service.
- h. The Bid Receiving Unit will send an acknowledgement of the receipt of bid document(s) via the epost Connect conversation, regardless of whether the conversation was initiated by the supplier using its own license or the Bid Receiving Unit. This acknowledgement will confirm only the receipt of bid document(s) and will not confirm if the attachments may be opened nor if the content is readable.
- i. Bidders must ensure that they are using the correct email address for the Bid Receiving Unit when initiating a conversation in epost Connect or communicating with the Bid Receiving Unit and should not rely on the accuracy of copying and pasting the email address into the epost Connect system.
- j. A bid transmitted by epost Connect service constitutes the formal bid of the Bidder and must be submitted in accordance with section 05.

2.2 Submission of Bids

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

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

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

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

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

2.3 Enquiries - Bid Solicitation

- (a) All enquiries must be submitted in writing to the Contracting Authority no later than 5 calendar days before the bid closing date. Enquiries received after that time may not be answered.
- (b) Bidders should reference as accurately as possible the numbered item of the bid solicitation to which the enquiry relates. Care should be taken by Bidders to explain each question in sufficient detail in order to enable Canada to provide an accurate answer. Technical enquiries that are of a proprietary nature must be clearly marked "proprietary" at each relevant item. Items identified as "proprietary" will be treated as such except where Canada determines that the enquiry is not of a proprietary nature. Canada may edit the question(s) or may request that the Bidder do so, so that the proprietary nature of the question(s) is eliminated, and the enquiry can be answered with copies to all Bidders. Enquiries not submitted in a form that can be distributed to all Bidders may not be answered by Canada.

2.4 Former Public Servant

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

(b) **Definitions**

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

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

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

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

(c) **Former Public Servant in Receipt of a Pension**

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

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

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

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

(d) **Work Force Adjustment Directive**

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

If so, the Bidder must provide the following information:

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

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

2.5 Applicable Laws

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

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

2.6 Improvement of Requirement During Solicitation Period

Should bidders consider that the specifications or Statement of Work contained in the bid solicitation could be improved technically or technologically, bidders are invited to make suggestions, in writing, to the Contracting Authority named in the bid solicitation. Bidders must clearly outline the suggested improvement as well as the reasons for the suggestion. Suggestions that do not restrict the level of competition nor favour a particular bidder will be given consideration provided they are submitted to the Contracting Authority in accordance with the article entitled "Enquiries - Bid Solicitation". Canada will have the right to accept or reject any or all suggestions.

2.7 Volumetric Data

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

PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

(a) Epost Connect Bid Submission

- (i) If the Bidder chooses to submit its bid electronically, Canada requests that the Bidder submits its bid in accordance with section 08 of the 2003 Standard Instructions. The epost Connect system has a limit of 1GB per single message posted and a limit of 20GB per conversation.
- (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) Soft Copy Bid Submission (USB key)

- (i) If the Bidder chooses to submit its bid in soft copy via the PWGSC Bid Receiving Unit, Canada requests that the Bidder submits its bid in separate sections as follows:
 - (A) Section I: Technical Bid – One soft copy on a USB key
 - (B) Section II: Financial Bid – One soft copy on a SEPARATE USB key
 - (C) Section III: Certifications – One soft copy on a USB key
- (c) Canada is not requesting a hard copy of the bid. However, if the Bidder submits a hard copy of its bid, and if there is a discrepancy between the wording of the soft or epost Connect copy and the hard copy, the wording of the soft or epost Connect copy will have priority over the wording of the hard copy.
- (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. A single bid may contain bids to be awarded a contract in one or more Workstreams. However, a bid may not contain a bid from the Bidder, including related entities to be awarded more than one contract in any given Workstream.
- (ii) For the purposes of this Article, regardless of the jurisdiction where any of the entities concerned is incorporated or otherwise formed as a matter of law (whether that entity is a natural person, corporation, partnership, etc), an entity will be considered to be "**related**" to a Bidder if:
 - (A) they are the same legal entity (i.e., the same natural person, corporation, partnership, limited liability partnership, etc.);
 - (B) they are "related persons" or "affiliated persons" according to the Canada Income Tax Act;
 - (C) the entities have now or in the two years before bid closing had a fiduciary relationship with one another (either as a result of an agency arrangement or any other form of fiduciary relationship); or
 - (D) the entities otherwise do not deal with one another at arm's length, or each of them does not deal at arm's length with the same third party.
- (iii) Individual members of a joint venture cannot participate in another bid, either by submitting a bid alone or by participating in another joint venture. .

(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 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) **Substantiation of Technical Compliance:**

- (A) **Mandatory Technical Criteria:** The technical bid must substantiate the compliance with the specific articles of Attachment "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 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 "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.
- (B) **Point-Rated Technical Criteria:** The technical bid must substantiate the compliance with the specific articles of Attachment "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 "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.

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

- (A) In conducting its evaluation of the bids, Canada may, but will have no obligation to request that a bidder provide customer references. If Canada sends such a written request, the bidder will have 2 working days to provide the necessary information to Canada. Failure to meet this deadline will result in the bid being declared non-responsive. These customer references must each confirm if requested by PWGSC, the facts identified in the Bidder's bid, as required by Attachment "2".

- (B) The form of question to be used to request confirmation from customer references is as follows:

[Sample Question to Customer Reference: "Has [the Bidder] provided your organization with [describe the services and, if applicable, describe any required time frame within which those services must have been provided]?"

☐ *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 Pricing Schedule provided in Attachment "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) **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.

- (c) **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.

3.4 Section III: Certifications

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

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

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

4.1.1 Phased Bid Compliance Process

4.1.1.1 General

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

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

THE SUBJECT OF THE NOTICE OR CAR, AND MAY RENDER ITS BID NON-RESPONSIVE TO OTHER MANDATORY REQUIREMENTS.

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

4.1.1.2 Phase I: Financial Bid

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

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

4.1.1.3 Phase II: Technical Bid

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

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

4.1.1.4 Phase III: Final Evaluation of the Bid

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

4.2 Technical Evaluation

A separate technical evaluation will be conducted for each Workstream.

(a) Mandatory Technical Criteria:

- (i) Each bid will be reviewed for compliance with the mandatory requirements of the bid solicitation. Any element of the bid solicitation that is identified specifically with the words "must" or "mandatory" is a mandatory requirement. Bids that do not comply with each and every mandatory requirement will be declared non-responsive and be disqualified.
- (ii) The mandatory technical criteria are described in Attachment 2.

- (iii) If the Phased Bid Compliance Process applies, it will apply only to mandatory technical criteria identified by the superscript (^{PB}). Mandatory technical criteria not identified by the superscript (^{PB}) will not be subject to the Phased Bid Compliance Process.
- (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 2.
- (c) **Number of Resources Evaluated:**

Resources will only be assessed after contract award once specific tasks are requested of the Contractor. After contract award, the Task Authorization process will be in accordance with Part 7 – Resulting Contract Clauses, the Article titled “Task Authorization”. When a Task Authorization Form (TA Form) is issued, the Contractor will be requested to propose a resource to satisfy the specific requirement based on the TA Form’s Statement of Work. The proposed resource will then be assessed against the criteria identified in the Contract’s Statement of Work in accordance with Appendix C of Annex A.
- (d) **Reference Checks:**
 - (i) Whether or not to conduct reference checks is discretionary. However, if PWGSC chooses to conduct reference checks for any given rated or mandatory requirement, it will check the references for that requirement for all bidders to be recommended for contract award.
 - (ii) For reference checks, Canada will conduct the reference check in writing by email. Canada will send all email reference check requests to contacts supplied by all the Bidders within a 48-hour period using the email address provided in the bid. Canada will not award any points and/or a bidder will not meet the mandatory experience requirement (as applicable) unless the response is received within 5 working days of the date that Canada’s email was sent.
 - (iii) If Canada does not receive a response from the contact person within the 5 working days, Canada will not contact the Bidder and will not permit the substitution of an alternate contact person.
 - (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) The financial evaluation will be conducted using the firm per diem rates (for level 3 only of each resource category) provided by the responsive bid(s). A separate financial evaluation will be conducted for each Workstream.
- (b) There are two possible financial evaluation methods for this requirement. The first method will be used if three or more bids are determined responsive (see (c) Financial Evaluation - Method A below). The second method will be used if fewer than three bids are determined responsive (see (d) Financial Evaluation - Method B below).

(c) **Financial Evaluation - Method A:** The following financial evaluation method will be used if three or more bids are determined responsive:

- (i) **STEP 1 - ESTABLISHING THE LOWER AND UPPER MEDIAN BAND LIMITS FOR EACH PERIOD AND EACH RESOURCE CATEGORY:** The Contracting Authority will establish, for each period and each Resource Category of each Workstream, the median band limits based on the firm per diem rates provided by the technically responsive bids. For each such Resource Category the median will be calculated using the median function in Microsoft Excel and will represent a range that encompasses any rate to a value of minus (-) 10% of the median, and an upper median rate to a value of plus (+) 30% of the median. When an even number of technically responsive bids have been determined, an average of the middle two rates will be used to calculate the median band limits and for an odd number of technically responsive bids, the middle rate will be used.
- (ii) **STEP 2 - POINTS ALLOCATION:** For each period and each Resource Category of each Workstream points will be allocated as follows:
- (A) A Bidder's proposed firm per diem rate that is either lower than the established lower median band limit or higher than the established upper median band limit for that period and Resource Category will be allocated 0 points.
- (B) A Bidder's proposed firm per diem rate falling within the upper and lower median band limits, for that period and Resource Category, will be allocated points using the following calculation, which will be rounded to two decimal places:
- $$\frac{\text{Lowest proposed firm per diem rate within the median band limits}}{\text{Bidder's proposed firm per diem rate within the median band limits}} \times \text{Maximum Points Assigned at Table 1 below}$$
- (C) A Bidder's proposed firm per diem rate falling within the established median band limits which is the lowest proposed firm per diem rate will be allocated the applicable maximum points assigned at Table 1 below.

| TABLE 1 - MAXIMUM POINTS ASSIGNED WORKSTREAM 1 | | | | |
|---|-------------------------------|--------------------|--------------------|-----------------|
| RESOURCE CATEGORIES (LEVEL 3 ONLY) | INITIAL CONTRACT PERIOD | OPTION PERIOD 1 | OPTION PERIOD 2 | TOTAL POINTS |
| Application/Software Architect - Siebel | 200 | 200 | 200 | 600 |
| Application/Software Architect - .Net | 200 | 200 | 200 | 600 |
| Programmer/Software Developer - Siebel | 200 | 200 | 200 | 600 |
| Programmer / Analyst | 200 | 200 | 200 | 600 |
| Data Conversion Specialist | 200 | 200 | 200 | 600 |
| Quality Assurance Specialist / Analyst | 200 | 200 | 200 | 600 |
| TOTAL | 1,200 | 1,200 | 1,200 | 3,600 |

| TABLE 1 - MAXIMUM POINTS ASSIGNED WORKSTREAM 2 | | | | |
|---|-------------------------------|--------------------|--------------------|-----------------|
| RESOURCE CATEGORIES (LEVEL 3 ONLY) | INITIAL CONTRACT PERIOD | OPTION PERIOD 1 | OPTION PERIOD 2 | TOTAL POINTS |
| Application / Software Architect | 200 | 200 | 200 | 600 |
| System Analyst | 200 | 200 | 200 | 600 |
| Database Administrator | 200 | 200 | 200 | 600 |
| Network Analyst | 200 | 200 | 200 | 600 |

| TABLE 1 - MAXIMUM POINTS ASSIGNED WORKSTREAM 2 | | | | |
|---|-------------------------------|--------------------|--------------------|-----------------|
| RESOURCE CATEGORIES (LEVEL 3 ONLY) | INITIAL CONTRACT PERIOD | OPTION PERIOD 1 | OPTION PERIOD 2 | TOTAL POINTS |
| Technical Architect | 200 | 200 | 200 | 600 |
| Technology Architect | 200 | 200 | 200 | 600 |
| Technical Writer | 200 | 200 | 200 | 600 |
| TOTAL | 1,400 | 1,400 | 1,400 | 4,200 |

| TABLE 1 - MAXIMUM POINTS ASSIGNED WORKSTREAM 3 | | | | |
|---|-------------------------------|--------------------|--------------------|-----------------|
| RESOURCE CATEGORIES (LEVEL 3 ONLY) | INITIAL CONTRACT PERIOD | OPTION PERIOD 1 | OPTION PERIOD 2 | TOTAL POINTS |
| Test Coordinator | 200 | 200 | 200 | 600 |
| Tester | 200 | 200 | 200 | 600 |
| TOTAL | 400 | 400 | 400 | 1,200 |

| TABLE 1 - MAXIMUM POINTS ASSIGNED WORKSTREAM 4 | | | | |
|---|-------------------------------|--------------------|--------------------|-----------------|
| RESOURCE CATEGORIES (LEVEL 3 ONLY) | INITIAL CONTRACT PERIOD | OPTION PERIOD 1 | OPTION PERIOD 2 | TOTAL POINTS |
| Tester | 200 | 200 | 200 | 600 |
| Business Analyst | 200 | 200 | 200 | 600 |
| Courseware Developer | 200 | 200 | 200 | 600 |
| Technical Writer | 200 | 200 | 200 | 600 |
| Change Management Consultant | 200 | 200 | 200 | 600 |
| Project Manager | 200 | 200 | 200 | 600 |
| TOTAL | 1,200 | 1,200 | 1,200 | 3,600 |

| TABLE 1 - MAXIMUM POINTS ASSIGNED WORKSTREAM 5 | | | | |
|---|-------------------------------|--------------------|--------------------|-----------------|
| RESOURCE CATEGORIES (LEVEL 3 ONLY) | INITIAL CONTRACT PERIOD | OPTION PERIOD 1 | OPTION PERIOD 2 | TOTAL POINTS |
| Application / Software Architect | 200 | 200 | 200 | 600 |
| Technology Architect | 200 | 200 | 200 | 600 |
| Project Manager | 200 | 200 | 200 | 600 |
| Project Scheduler | 200 | 200 | 200 | 600 |
| TOTAL | 800 | 800 | 800 | 2,400 |

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

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

| TABLE 2 - EXAMPLE OF A FINANCIAL EVALUATION USING METHOD A: | | | | | | | |
|---|---|----------|----------|----------|----------|----------|----------|
| Resource Category | Max. Points | Bidder 1 | | Bidder 2 | | Bidder 3 | |
| | | Year 1 | Year 2 | Year 1 | Year 2 | Year 1 | Year 2 |
| Programmer | 150 (75 pts. per year) | \$400.00 | \$400.00 | \$420.00 | \$450.00 | \$450.00 | \$450.00 |
| Business Analyst | 100 (50 pts. per year) | \$600.00 | \$600.00 | \$600.00 | \$620.00 | \$650.00 | \$820.00 |
| Project Manager | 50 (25 pts. per year) | \$555.00 | \$900.00 | \$750.00 | \$800.00 | \$700.00 | \$800.00 |
| TOTAL | 300 | | | | | | |
| STEP 1 - Establishing the lower and upper median band limits for each year and each resource category | | | | | | | |
| (Median 1) | For the Programmer Resource Category, the year 1 median would be \$420.00. The lower median band limit would be \$336.00 and higher median band limit would be \$546.00. | | | | | | |
| (Median 2) | For the Programmer Resource Category, the year 2 median would be \$450.00. The lower median band limit would be \$360.00 and higher median band limit would be \$585.00. | | | | | | |
| (Median 3) | For the Business Analyst Resource Category, the year 1 median would be \$600.00. The lower median band limit would be \$480.00 and higher median band limit would be \$780.00. | | | | | | |
| (Median 4) | For the Business Analyst Resource Category, the year 2 median would be \$620.00. The lower median band limit would be \$496.00 and higher median band limit would be \$806.00. | | | | | | |
| (Median 5) | For the Project Manager Resource Category, the year 1 median would be \$700.00. The lower median band limit would be \$560.00 and higher median band limit would be \$910.00. | | | | | | |
| (Median 6) | For the Project Manager Resource Category, the year 2 median would be \$800.00. The lower median band limit would be \$640.00 and higher median band limit would be \$1,040.00. | | | | | | |
| STEP 2 - Points Allocation: | | | | | | | |
| Bidder 1: | | | | | | | |
| Programmer Year 1 = 75 points (lowest rate within the lower and upper median band limits) | | | | | | | |
| Programmer Year 2 = 75 points (lowest rate within the lower and upper median band limits) | | | | | | | |
| Business Analyst Year 1 = 50 points (lowest rate within the lower and upper median band limits) | | | | | | | |
| Business Analyst Year 2 = 50 points (lowest rate within the lower and upper median band limits) | | | | | | | |
| Project Manager Year 1 = 0 points (outside the lower and higher median band limits) | | | | | | | |
| Project Manager Year 2 = 22.22 points (based on the following calculation = (Lowest rate of \$800.00 / Bidder's proposed rate of \$900.00) Multiplied by 25 pts) | | | | | | | |
| Bidder 2: | | | | | | | |
| Programmer Year 1 = 71.43 points (based on the following calculation = (Lowest rate of \$400.00 / Bidder's proposed rate of \$420.00) Multiplied by 75 pts) | | | | | | | |
| Programmer Year 2 = 66.67 points (based on the following calculation = (Lowest rate of \$400.00 / Bidder's proposed rate of \$450.00) Multiplied by 75 pts) | | | | | | | |
| Business Analyst Year 1 = 50 points (lowest price within the lower and upper median band limits) | | | | | | | |
| Business Analyst Year 2 = 48.39 points (based on the following calculation = (Lowest rate of \$600.00 / Bidder's proposed rate of \$620.00) Multiplied by 50 pts) | | | | | | | |
| Project Manager Year 1 = 23.33 points (based on the following calculation = (Lowest rate of \$700.00 / Bidder's proposed rate of \$750.00) Multiplied by 25 pts) | | | | | | | |
| Project Manager Year 2 = 25 points (lowest price within the lower and upper median band limits) | | | | | | | |
| Bidder 3: | | | | | | | |

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

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

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

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

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

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

| TABLE 3 - MAXIMUM POINTS ASSIGNED WORKSTREAM 1 | | | | |
|---|--|----------------------------|----------------------------|-------------------------|
| RESOURCE CATEGORIES | INITIAL CONTRACT PERIOD | OPTION PERIOD 1 | OPTION PERIOD 2 | TOTAL POINTS |
| Application/Software Architect - Siebel | 200 | 200 | 200 | 600 |
| Application/Software Architect - .Net | 200 | 200 | 200 | 600 |
| Programmer/Software Developer - Siebel | 200 | 200 | 200 | 600 |
| Programmer / Analyst | 200 | 200 | 200 | 600 |
| Data Conversion Specialist | 200 | 200 | 200 | 600 |
| Quality Assurance Specialist / Analyst | 200 | 200 | 200 | 600 |
| TOTAL | 1,200 | 1,200 | 1,200 | 3,600 |

| TABLE 3 - MAXIMUM POINTS ASSIGNED WORKSTREAM 2 | | | | |
|---|--|----------------------------|----------------------------|-------------------------|
| RESOURCE CATEGORIES | INITIAL CONTRACT PERIOD | OPTION PERIOD 1 | OPTION PERIOD 2 | TOTAL POINTS |
| Application / Software Architect | 200 | 200 | 200 | 600 |

| TABLE 3 - MAXIMUM POINTS ASSIGNED WORKSTREAM 2 | | | | |
|---|-------------------------------|--------------------|--------------------|-----------------|
| RESOURCE CATEGORIES | INITIAL CONTRACT PERIOD | OPTION PERIOD 1 | OPTION PERIOD 2 | TOTAL POINTS |
| System Analyst | 200 | 200 | 200 | 600 |
| Database Administrator | 200 | 200 | 200 | 600 |
| Network Analyst | 200 | 200 | 200 | 600 |
| Technical Architect | 200 | 200 | 200 | 600 |
| Technology Architect | 200 | 200 | 200 | 600 |
| Technical Writer | 200 | 200 | 200 | 600 |
| TOTAL | 1,400 | 1,400 | 1,400 | 4,200 |

| TABLE 3 - MAXIMUM POINTS ASSIGNED WORKSTREAM 3 | | | | |
|---|-------------------------------|--------------------|--------------------|-----------------|
| RESOURCE CATEGORIES | INITIAL CONTRACT PERIOD | OPTION PERIOD 1 | OPTION PERIOD 2 | TOTAL POINTS |
| Test Coordinator | 200 | 200 | 200 | 600 |
| Tester | 200 | 200 | 200 | 600 |
| TOTAL | 400 | 400 | 400 | 1,200 |

| TABLE 3 - MAXIMUM POINTS ASSIGNED WORKSTREAM 4 | | | | |
|---|-------------------------------|--------------------|--------------------|-----------------|
| RESOURCE CATEGORIES | INITIAL CONTRACT PERIOD | OPTION PERIOD 1 | OPTION PERIOD 2 | TOTAL POINTS |
| Tester | 200 | 200 | 200 | 600 |
| Business Analyst | 200 | 200 | 200 | 600 |
| Courseware Developer | 200 | 200 | 200 | 600 |
| Technical Writer | 200 | 200 | 200 | 600 |
| Change Management Consultant | 200 | 200 | 200 | 600 |
| Project Manager | 200 | 200 | 200 | 600 |
| TOTAL | 1,200 | 1,200 | 1,200 | 3,600 |

| TABLE 3 - MAXIMUM POINTS ASSIGNED WORKSTREAM 5 | | | | |
|---|-------------------------------|--------------------|--------------------|-----------------|
| RESOURCE CATEGORIES | INITIAL CONTRACT PERIOD | OPTION PERIOD 1 | OPTION PERIOD 2 | TOTAL POINTS |
| Application / Software Architect | 200 | 200 | 200 | 600 |
| Technology Architect | 200 | 200 | 200 | 600 |
| Project Manager | 200 | 200 | 200 | 600 |
| Project Scheduler | 200 | 200 | 200 | 600 |
| TOTAL | 800 | 800 | 800 | 2,400 |

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

(e) Substantiation of Professional Services Rates

In Canada's experience, bidders will from time to time propose rates at the time of bidding for one or more categories of resources that they later refuse to honour, on the basis that these rates do not allow them to recover their own costs and/or make a profit. When evaluating the rates bid for professional services, Canada may, but will have no obligation to, require price support in accordance with this Article. If Canada requests price support, it will be requested from all otherwise responsive bidders who have proposed a rate that is at least 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
- (iii) in respect of each contract for which an invoice is submitted as substantiation, a résumé for the resource that provided the services under that contract that demonstrates that, in relation to the resource category for which the rates are being substantiated, the resource would meet the mandatory requirements and achieve any required pass mark for any rated criteria; and
- (iv) the name, telephone number and, if available, e-mail address of a contact person at the customer who received each invoice submitted under (i), so that Canada may verify any information provided by the Bidder.

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

(f) Formulae in Pricing Tables

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

4.4 Basis of Selection

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

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

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

- (i) A bid must comply with the requirements of the bid solicitation, meet all mandatory evaluation criteria and obtain the required pass marks for the point rated criteria identified in this bid solicitation to be declared responsive.
- (ii) The responsive bid that obtains the highest Total Bidder Score will be recommended for award of a contract. For any given Bidder, the greatest possible Total Technical Score is 70 while the greatest possible Total Financial Score is 30.

- (A) Calculation of Total Technical Score: For each Workstream the Total Technical Score will be computed for each responsive bid by converting the Technical Score obtained for the point-rated technical criteria using the following formula, rounded to two decimal places:

$$\frac{\text{Technical Score}}{\text{Maximum Technical Points (Bidders, please refer to the maximum technical points for each Workstream at Attachment 2)}} \times 70 = \text{Total Technical Score}$$

- (B) Calculation of Total Financial Score: For each Workstream the Total Financial Score will be computed for each responsive bid by converting the Financial Score obtained for the financial evaluation using the following formula rounded to two decimal places:

$$\frac{\text{Financial Score}}{\text{Total Maximum Points Assigned (Bidders, please refer to the total maximum points assigned for each Workstream)}} \times 30 = \text{Total Financial Score}$$

- (C) Calculation of the Total Bidder Score: For each Workstream the Total Bidder Score will be computed for each responsive bid in accordance with the following formula:

$$\text{Total Technical Score} + \text{Total Financial Score} = \text{Total Bidder Score}$$

- (iii) In the event of identical Total Bidder Scores occurring within a given Workstream, then the bid with the highest Total Technical Score will become the top-ranked bidder.

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

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

- (A) the Bidder with the highest Total Bidder Score will receive **90%** of the funding initially allocated for that Workstream; and

- (B) the Bidder with the next highest Total Bidder Score will receive **10%** of the funding initially allocated for that Workstream.

- (c) Bidders should note that all contract awards are subject to Canada's internal approvals process, which includes a requirement to approve funding in the amount of any proposed contract. Despite the fact that the Bidder may have been recommended for contract award, a contract will only be awarded if internal approval is granted according to Canada's internal policies. If approval is not granted, no contract will be awarded.

PART 5 – CERTIFICATIONS 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 4, 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) Certification of Language – English and/or Bilingual and/or French

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

Unilingual English - 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.

Unilingual French - fluent in French. The individual(s) proposed must be able to communicate orally and in writing in French without any assistance and with minimal errors.

Bilingual - fluent in both official languages of Canada (French and English). The individual(s) proposed must be able to communicate orally and in writing in French and English without any assistance and with minimal errors.

(c) **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;
- (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

Note to Bidders: Any resulting contract would only list the applicable Workstream(s) above that are awarded to the successful bidder(s) in accordance with the evaluation methodology set out in this bid solicitation. If a bidder is selected for award of more than one Workstream, Canada reserves the right to award one contract for all the Workstreams awarded to that bidder.

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

7.1 Requirement

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

7.2 Task Authorization

- (a) **As-and-when-requested Task Authorizations:** The Work or a portion of the Work to be performed under the Contract will be on an "as-and-when-requested basis" using a Task Authorization (TA). The Work described in the TA must be in accordance with the scope of the Contract. The Contractor must not commence work until a validly issued TA has been issued by Canada and received by the Contractor. The Contractor acknowledges that any work performed before such issuance and receipt will be done at the Contractor's own risk.
- (b) **Allocation of Task Authorizations:** More than one contract has been awarded for this requirement. As a result, the Task Authorizations issued under this series of contracts will be allocated in accordance with the following:
 - (i) At the time this series of contracts was awarded, each contractor was allocated an amount of funding as specified in the Limitation of Expenditure in respect of Task Authorizations based on the evaluation process described in the bid solicitation that resulted in the award of this series of contracts.

- (ii) Canada will use a rotational method to allocate the draft Task Authorizations, where the rotation is based on the amount of funding remaining under each of the respective contracts.
 - (iii) Canada will send the first draft Task Authorization to the contractor with the greatest value of funding under its contract. If more than one contractor has the same value, it will be assigned to the contractor ranked first as determined under the evaluation process in the bid solicitation that resulted in the award of this series of contracts.
 - (iv) The contractor sent a draft TA will have the time set out further below under the subparagraph entitled "Contractor's Response to Draft Task Authorization" to respond to the Contracting Authority.
 - (v) If the contractor to whom the draft TA is first sent either fails to respond on time or confirms in writing that it refuses to perform the task, the draft TA will then be forwarded to the contractor with the next-greatest balance remaining of allocated funding.
 - (vi) The process of sending out a draft TA to the contractor with the greatest balance remaining will continue until Canada either cancels the requirement for the task or it has been validly issued to one of the contractors. If none of the contractors can perform the task (in accordance with all the terms and conditions of this series of contracts), Canada may acquire the required Work by other means.
 - (vii) Once the Task Authorization is issued, for the purposes of calculations for the allocation of Task Authorizations, the value of that Task Authorization, including any applicable options under that TA (and the value of any subsequent amendment to that TA) will be subtracted from the funding allocated to that contractor.
 - (viii) When the next requirement to perform a task is identified, it will be sent to the contractor with the greatest balance remaining of allocated funding. If more than one contractor has the greatest balance remaining of allocated funds (i.e., several contractors have equal amounts of allocated funding), the draft TA will be sent to the contractor among them that ranked highest under the bid solicitation evaluation process. If any contract in this series of contracts is amended to add funding for Task Authorizations, all the remaining contracts (i.e., all contracts that have not previously been terminated) will be amended to add funding in amounts proportionate to the funding initially provided under each contract for Task Authorizations (e.g., if three contracts were awarded with \$2M, \$1M and \$750,000 in funding for Task Authorizations respectively, and \$200,000 is added to the first contract, then \$100,000 will be added to the second contract and \$75,000 will be added to the third).
- (c) **Assessment of Resources Proposed at TA Stage:** Processes for issuing, responding to and assessing Task Authorizations are further detailed in Appendices A,B, C and D of Annex A.
- (d) **Form and Content of draft Task Authorization:**
- (i) The Technical Authority will provide the Contractor with a description of the task in a draft Task Authorization 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.
- (e) **Contractor's Response to Draft Task Authorization:** The Contractor must provide to the Technical Authority, within 5 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.
- (f) **Task Authorization Limit and Authorities for Validly Issuing Task Authorizations:**
- (i) To be validly issued, a TA must include the following signatures:
 - (A) for any TA, inclusive of revisions, with a value less than or equal to \$300,000.00 (excluding Applicable Taxes), the TA must be signed by the Technical Authority.
 - (B) for any TA, inclusive of revisions, with a value greater than this amount, a TA must include the following signatures:
 - (1) the Technical Authority; and
 - (2) the Contracting Authority.
- Any TA that does not bear the appropriate signatures is not validly issued by Canada. Any work performed by the Contractor without receiving a validly issued TA is done at the Contractor's own risk. If the Contractor receives a TA that is not appropriately signed, the Contractor must notify the Contracting Authority. By providing written notice to the Contractor, the Contracting Authority may suspend the Client's ability to issue TA's at any time, or reduce the dollar value threshold described in subarticle (A) above; any suspension or reduction notice is effective upon receipt.
- (g) **Periodic Usage Reports:**
- (i) The Contractor must compile and maintain records on its provision of services to the federal government under Task Authorizations validly issued under the Contract. The Contractor must provide this data to Canada in accordance with the reporting requirements detailed below. If some data is not available, the reason must be indicated. If services are not provided during a given period, the Contractor must still provide a "NIL" report. The data must be submitted on 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) **TA Response:**

(i) In addition to Canada's other rights under the Contract (including termination), where in at least three instances in a six-month period the Contractor has either:

- (A) not responded or refused to respond to the TA on time or
- (B) provided a TA response that is declared non-responsive

Canada may, at its discretion, provide written notice to the Contractor that an action plan must be delivered to Canada describing measures or actions to be implemented to eliminate the problem. The Contractor will have five working days from the time of such notice to deliver the action plan to both the Technical Authority and the Contracting Authority and 20 working days to rectify the problem.

(ii) In any instance wherein an action plan is not delivered and/or is not implemented and rectifies the problem:

Canada may immediately remove a Resource Category from the available resource categories under which Work may be requested in the Contract, if the Contractor in at least three instances when issued a TA request for the same Resource Category, has either:

- (A) not responded or refused to respond to the TA on time or
- (B) provided a TA response that has been declared non-responsive.

The above may only be exercised by the Contracting Authority by notice in writing and will be evidenced, for administrative purposes only, by a contract amendment removing the Resource Category.

- (i) **Refusal of Task Authorizations or Submission of a Response which is not Valid:** The Contractor is not required to submit a response to every draft TA sent to it by Canada. However, in addition to Canada's other rights to terminate the Contract, Canada may immediately, and without further notice, terminate the Contract for default in accordance with the General Conditions if the Contractor in at least three instances has either not responded or has not submitted a valid response when sent a draft TA. For greater clarity, each draft TA, which is identifiable by its task number, will only count as one instance. A valid response is one that is submitted within the required time period and meets all requirements of the draft TA issued, including proposing the required number of resources who each meet the minimum experience and other requirements of the categories identified in the draft TA at pricing not exceeding the rates set out in Annex B. Each time the Contractor does not submit a valid response, the Contractor agrees Canada may at its option decrease the Minimum Contract Value in the clause titled "Minimum Work Guarantee" by 2%. This decrease will be evidenced for administrative purposes only through a contract amendment issued by the Contracting Authority (which does not require the agreement of the Contractor).
- (j) **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:**

The following Supplemental General Conditions:

- (i) 4002 (2010-08-16), Supplemental General Conditions - Software Development or Modification Services;
- (ii) 4006 (2010-08-16), Supplemental General Conditions - Contractor to Own Intellectual Property Rights in Foreground Information

apply to and form part of the Contract.

7.5 Security Requirement

The following security requirements (SRCL #20 and related clauses provided by the Contract Security Program) as set out under Annex "B" to the Supply Arrangement, applies to and forms part of the Contract.

- a) The Contractor must, at all times during the performance of the Contract, hold a valid Facility Security Clearance at the level of **secret**, issued by the Canadian Industrial Security Directorate (CISD), Public Services and Procurement Canada (PSPC)
- b) This contract includes access to Controlled Goods. Prior to access, the contractor must be registered in the Controlled Goods Program of PSPC

- c) The Contractor 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 **RELIABILITY status, confidential** or **secret** as required, granted or approved by CISC/PSPC
- d) The Contractor must not remove any protected/classified information from the identified work site(s), and the Contractor must ensure that its personnel are made aware of and comply with this restriction
- e) Subcontracts which contain security requirements are not to be awarded without the prior written permission of CISC/PSPC
- f) The Contractor must comply with the provisions of the:
 - a. Security Requirements Check List and security guide (if applicable), attached at Annex C
 - b. Industrial Security Manual (Latest Edition)

7.6 Contract Period

- (a) **Contract Period:** The "**Contract Period**" is the entire period of time during which the Contractor is obliged to perform the Work, which includes:
 - (i) The "**Initial Contract Period**", which begins on the date the Contract is awarded and ends 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 2 additional one-year periods under the same terms and conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions set out in the Basis of Payment.
 - (ii) Canada may exercise this option at any time by sending a written notice to the Contractor before the expiry date of the Contract. The option may only be exercised by the Contracting Authority, and will be evidenced, for administrative purposes only, through a contract amendment.

7.7 Authorities

(a) Contracting Authority

The Contracting Authority for the Contract is:

Name: Hicham Laassouli

Title: Supply Specialist

Public Works and Government Services Canada

Acquisitions Branch

Directorate: Informatics and Telecommunications Systems Procurement Directorate

Address: 10 Wellington, Gatineau, Québec

Telephone: 613-858-9817

E-mail address: hicham.laassouli@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: *(contact information will be identified at the time of contract award)*

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

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

(c) Contractor's Representative *(contact information will be identified at the time of contract award)*

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

7.8 Proactive Disclosure of Contracts with Former Public Servants

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

7.9 Payment**(a) Basis of Payment**

- (i) **Professional Services provided under a Task Authorization with a Maximum Price:** For professional services requested by Canada, in accordance with a validly issued Task Authorization, Canada will pay the Contractor, in arrears, up to the Maximum Price for the TA, for actual time worked and any resulting deliverables in accordance with the firm all-inclusive per diem rates set out in Annex B, Basis of Payment, Applicable Taxes extra. Partial days will be prorated based on actual hours worked based on a 7.5-hour workday.
- (ii) **Professional Services provided under a Task Authorization with a Firm Price:** For professional services requested by Canada, in accordance with a validly issued Task Authorization, Canada will pay the Contractor the firm price set out in the Task Authorization (based on the firm, all-inclusive per diem rates set out in Annex B), Applicable Taxes extra.
- (iii) **Resource Retention Incentive:** In consideration of the Contractor satisfactorily completing all of its obligations under the authorized Task Authorization (TA), the Contractor will be paid a Retention Incentive provided that each of the specific resource(s) listed in the initial TA stay and perform the required services until the end or completion of the TA including any Amendments. The eligibility for this incentive will be based on the start date of the TA for all Resource Categories as specified in the authorized TA and does not apply to replacement resources. Canada will pay a resource retention incentive of 2% of the total value of the TA.

- (iv) **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.
 - (v) **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.
 - (vi) **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 excluded 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.
 - (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) **Method of Payment for Task Authorizations with a Firm Price - Lump Sum Payment on Completion:** Canada will pay the Contractor upon completion and delivery of all the Work associated with the validly issued Task Authorization in accordance with the payment provisions of the Contract if:
- (i) an accurate and complete invoice and any other documents required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
 - (ii) all such documents have been verified by Canada; and
 - (iii) the Work delivered has been accepted by Canada.
- (e) **Method of Payment for Resource Retention Incentive - Lump Sum Payment on Completion:** Canada will pay the Contractor a resource retention incentive, upon completion and delivery of all the Work associated with the validly issued Task Authorization, in accordance with the payment provisions outlined at article 7.9 Payment, (a) Basis of Payment, (iii) Resource Retention Incentive of the Contract if:
- (i) an accurate and complete invoice and any other documents required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
 - (ii) all such documents have been verified by Canada; and
 - (iii) the Work delivered has been accepted by Canada.
- (f) **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.
- (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.
- (b) The Contractor's invoice must include a separate line item for each subparagraph in the Basis of Payment provision, and must show all applicable Task Authorization numbers.
- (c) By submitting invoices, the Contractor is certifying that the goods and services have been delivered and that all charges are in accordance with the Basis of Payment provision of the Contract, including any charges for work performed by subcontractors.

- (d) The Contractor must provide the original and two copies of each invoice to the Technical Authority, and a copy to the Contracting Authority.

7.11 Certifications and Additional Information

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

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) 4002 (2010-08-16), Supplemental General Conditions - Software Development or Modification Services;
 - (ii) 4006 (2010-08-16), Supplemental General Conditions - Contractor to Own Intellectual Property Rights in Foreground Information;
- (c) General Conditions 2035 (2018-06-21), 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;
 - (iv) Appendix D to Annex A - Certifications at the TA stage;
- (e) Annex B, Basis of Payment;
- (f) Annex C, Security Requirements Check List;
- (g) the validly issued Task Authorizations and any required certifications (including all of their annexes, if any); and
- (h) the Contractor's bid dated _____, as clarified on _____ "or" as amended _____.

7.15 Foreign Nationals (Canadian Contractor)

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

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

7.16 Foreign Nationals (Foreign Contractor)

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

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

- (i) The Contractor must comply with the insurance requirements specified in this Article. The Contractor must maintain the required insurance coverage for the duration of the Contract. Compliance with the insurance requirements does not release the Contractor from or reduce its liability under the Contract.
- (ii) The Contractor is responsible for deciding if additional insurance coverage is necessary to fulfill its obligation under the Contract and to ensure compliance with any applicable law. Any additional insurance coverage is at the Contractor's expense, and for its own benefit and protection.
- (iii) The Contractor should forward to the Contracting Authority within ten (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.

7.18 Controlled Goods Program

- (a) SACC Manual clause A9131C (2014-11-27) Controlled Goods Program

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 Joint Venture Contractor

- (a) The Contractor confirms that the name of the joint venture is _____ and that it is comprised of the following members: _____ (*information will be identified at the time of contract award*).
- (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.*

7.21 Professional Services - General

- (a) The Contractor must provide professional services on an "as and when requested" basis 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.

7.22 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.

7.23 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.

7.24 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.

7.25 Identification Protocol Responsibilities

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

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

ANNEX A

STATEMENT OF WORK

1.0 TITLE

Informatics Professional Services for the following WorkStreams:

1. Workstream 1: Application Development Services
2. Workstream 2 : Infrastructure/DBA Services
3. Workstream 3: Testing Services
4. Workstream 4: Business Services
5. Workstream 5: Project Support Services

2.0 BACKGROUND

The Department of Foreign Affairs, Trade and Development's (DFATD) primary responsibility is the promotion and protection of Canada's interests abroad and the conduct of Canada's relations with other countries.

The Department is headquartered in Ottawa, and maintains a presence internationally. DFATD operates an extensive network of missions (embassies, high commissions, and consulates), honorary consulates, and other representational offices. Within Canada, DFATD operates through regional offices of Passport Canada and a network of trade commissioners working in International Trade Offices across the country.

The spread and complexity of Canada's representation abroad has a profound impact on the nature and scope of the Department's IM/IT equipment, networks and infrastructure. The design, implementation and operation of IM/IT services are hugely affected by the extent to which Canada's employees abroad are scattered around the world; by the enormous differences encountered in diverse public infrastructures and technologies available internationally; and by the competing interests of host countries; and by hosting Government of Canada departments and agencies operating abroad.

3.0 OBJECTIVE

To obtain Informatics Professional services on an as required basis to support the Import and Export Control System (EICS II) Upgrade Program. EICS controls the flow of goods between Canada and its trading partners, this is a major upgrade to the platform and its functionality.

4.0 TECHNICAL ENVIRONMENT

Microsoft .NET
Team Foundation Server
Microsoft IIS servers
IBM MQ
IBM/COGNOS BI
Siebel CRM
Oracle BI Publisher
Tomcat
Microsoft Server Operating System
Microsoft SQL Server

5.0 SCOPE OF WORK

5.1 The Contractor must provide informatics professional services to DFATD on an "as and when requested" basis as initiated through Task Authorizations (TAs). TAs may be issued for any of the resource categories identified in 5.3 below.

5.2 Key Program Initiatives

Key program initiatives to be supported, but not limited to:

5.2.1 Export Import Control System (EICS II)

The EICS II technical environment at DFATD will be based on Siebel CRM 8.x application, which will serve as the internal permit management application. In the Public Access Zone (PAZ), DFATD will be hosting a .NET web application which allows businesses to apply for the permits. All servers are presently running Windows Server 2008 R2 with MS SQL 2012 , however DFATD will be moving to Windows Server 2012 R2 with MS SQL 2016.

In general, support, maintenance and enhancements of applications involving activities such as:

- Requirements Definition and Analysis
- Application Design and Development
- Testing
- Problem Report Management
- Application Deployment
- Software Platform Maintenance
- Environment/Application Monitoring
- User and Technical Documentation

5.3 Streams and Resource Categories

Although a common task list is presented for all categories, GAC recognizes that work assignments defined at the Task Authorization may warrant a higher level resource as the work may be deemed more complex by the nature of the project or operational context. GAC identifies project or operational complexity as a combination of factors such as project value and or complexity, having a timeline in excess of 6 months, or involving supervising deliverables of the more junior category resources associated with it.

5.3.1 Stream 1 – Application Development Services

| TBIPS ID | RESOURCE CATEGORY | TBIPS Levels |
|----------|--|--------------|
| A.1 | Application/Software Architect | 1,2,3 |
| A.6 | Programmer/Software Developer | 1,2,3 |
| A.7 | Programmer / Analyst | 1,2,3 |
| I.1 | Data Conversion Specialist | 1,2,3 |
| P.11 | Quality Assurance Specialist / Analyst | 1,2,3 |

5.3.2 Stream 2 –Infrastructure/DBA Services

| TBIPS ID | RESOURCE CATEGORY | TBIPS Levels |
|----------|--|--------------|
| A.1 | Application / Software Architect | 1,2,3 |
| A.8 | System Analyst | 1,2,3 |
| I.2 | Database Administrator | 1,2,3 |
| I.6 | Network Analyst | 1,2,3 |
| I.10 | Technical Architect | 1,2,3 |
| I.11 | Technology Architect | 1,2,3 |
| B.14 | Technical Writer | 1,2,3 |

5.3.3 Stream 3 – Testing Services

| TBIPS ID | RESOURCE CATEGORY | TBIPS Levels |
|----------|----------------------------------|--------------|
| A.10 | Test Coordinator | 1,2,3 |
| A.11 | Tester | 1,2,3 |

5.3.4 Stream 4 –Business Services

| TBIPS ID | RESOURCE CATEGORY | TBIPS Levels |
|----------|--|--------------|
| A.11 | Tester | 1,2,3 |
| B.1 | Business Analyst | 1,2,3 |
| B.9 | Couseware Developer | 1,2,3 |
| B.14 | Technical Writer | 1,2,3 |
| P.1 | Change Management Consultant | 1,2,3 |
| P.9 | Project Manager | 1,2,3 |

5.3.5 Stream 5 – Project Support Services

| TBIPS ID | RESOURCE CATEGORY | TBIPS Levels |
|----------|--|--------------|
| A.1 | Application / Software Architect | 1,2,3 |
| I.11 | Technology Architect | 1,2,3 |
| P.9 | Project Manager | 1,2,3 |
| P.10 | Project Scheduler | 1,2,3 |

5.4 Tasks and Resource Specific Deliverables

5.4.1 Workstream 1: Application Development Services

5.4.1.1 A.1 - Application/Software Architect

Tasks include, but are not limited to the following:

Supporting and enhancing Siebel application systems by:

- Translating functional and business requirements into technical requirements via SUC/SREQs and other artifacts in the requirements management tool;
- Collecting and documenting technical and functional requirements based on new business requirements;
- Analyzing business requirements, conducting options analysis and preparing options analysis reports which include the analysis of solutions, estimated delivery plans, required resources and cost estimates for each solution.
- Defining and documenting the systems design using out-of-the box Siebel;
- Incorporating recommendations / requirements resulting from architecture decisions, security evaluations and/or testing into system designs;
- Preparing or assisting in the creation of architectural documentation;
- Providing consultation and support to the project team related to the Siebel implementation best practices;
- Defining and documenting interfaces within application sub-systems, to external systems and between new and existing systems;
- Identifying and documenting system specific standards and frameworks;
- Preparing and presenting briefings, presentations/demos, updates, briefing notes, and/or reports.

5.4.1.2 A.6 - Programmer/Software Developer

Tasks include, but are not limited to the following:

Supporting and enhancing Siebel application systems by:

- Updating existing code and/or developing new code as per functional designs to produce new versions of the application;
- Developing Scripts and Scenarios;
- Analyzing business requirements;
- Developing report requirements
- Packaging the new builds;

- Performing version control activities for releases incorporating new requirements;
- Preparing new versions for release/deployment;
- Conducting unit testing activities on new versions;
- Analyzing and fixing reported bugs/problems;
- Monitoring and fixing issues related to the interfaces with non-Siebel platforms such as SAP, .NET;
- Tracking and reporting the status of reported problem reports;
- Attending problem review board meetings;
- Testing bug fixes;
- Performing/participating in product upgrades;
- Applying patches;
- Monitoring and addressing system performance and availability; and,
- Providing presentation/demos.

5.4.1.3 A.7 - Programmer / Analyst

Tasks include, but are not limited to the following:

Supporting and enhancing .NET application systems by:

- Updating existing code and/or developing new code as per functional designs to produce new versions of the application;
- Developing scripts and scenarios;
- Analyzing system requirements;
- Performing version control activities for releases incorporating new requirements;
- Conducting unit testing activities on new versions;
- Analyzing and fixing reported bugs/problems;
- Tracking and reporting the status of reported problem reports;
- Attending problem review board meetings;
- Testing bug fixes;
- Performing/participating in product upgrades / applying patches;
- Monitoring and addressing system performance and availability;
- Providing presentation/demos.

5.4.1.4 I.1 –Data Conversion Specialist

Tasks include, but are not limited to the following:

- Documenting, implementing and maintaining the Logical Data Model (LDM) and physical Siebel databases for the EICS II application
- Working in collaboration with the design and development team,
- Maintaining and updating the LDM and physical Siebel databases for the EICS II system, as required including impacts from change requests and TFS bugs/issues;
- Maintaining and updating the code tables for the EICS II system, as required including impacts from change requests and TFS bugs/issues;
- designing, planning, developing and executing the data migration activities and processes required to migrate the DFATD systems into the new EICS II system
- Maintaining and/or finalizing documentation such as data migration process inventory, EICS & EXCOL database tables & columns not being migrated, data migration requirements

- document, go-live migration steps, Siebel deployment steps and various other complex mappings documents
- Completing the design, documenting, development and implementation of a fully optimized data migration process using Siebel's EIM, SQL scripts and SSIS packages
 - Identifying EICS & EXCOL data quality issues and providing data cleansing recommendations to business for resolution and/or action
 - Providing data analysis services and SQL script support to various project team members such as the Business team, Design team, Developers, Testers and Business Intelligence team
 - For EICS II project change requests (CRs):
 - Providing estimations on impact and level of efforts as it relates to data migration activities
 - Implementing approved change requests impacting data migration
 - Analyzing and resolving data migration defects reported in TFS
 - Participating in the EICS II dry-run planning and execution
 - Performing data migration activities in the deployment of Siebel releases to the various environments (SYSTEST, STAGING etc.)
 - Performing DBA activities/tasks in support of EICS II project deployments and environments
 - Performing pre & post data migration validation/verification including audit reports with each release, up to and including Go-Live
 - Executing Pre-Go live data migrations activities two weeks prior to Go-live
 - Executing Go-live data migration activities on Go-live weekend
 - Providing post-migration support activities:
 - Ensuring that the EICS and EXCOL databases remain accessible in case DFATD data is required for a fix in EICS-II
 - Addressing non-critical exceptions encountered during migration
 - Addressing any data issues that may arise as users start using the new EICS-II system
 - Coordinating data cleansing in the new EICS-II database

5.4.1.5 P.11 –Quality Assurance Specialist / Analyst

Tasks include, but are not limited to the following:

- Leading development of test plans, test scripts and test data;
- Participating in functional and technical design reviews as required;
- Conducting functional, integration and system regression testing;
- Documenting test results;
- Triaging of QA/UAT defects;
- Identifying and documenting software defects;
- Participating in deployment activities such as pre-sanity;
- Providing estimates for Change Requests;
- Providing demos/walkthroughs, as required to Team/Technical Lead, client or other stakeholders.
- Writing and executing software test cases against system requirements;
- Creating automation test cases;
- Finding and reporting bugs;
- Creating and maintaining test suites;
- Performing system, regression, functional, performance, load and exploratory testing;

5.4.2 Workstream 2: Infrastructure/DBA Services**5.4.2.1 A.1 - Application/Software Architect**

Tasks include, but are not limited to the following:

- Installing, configuring and administering Siebel.
- Installing, configuring and administering Oracle BI Publisher
- Installing, configuring and administering a search tool integrated with Siebel.
- Designing, building and testing automated installation procedures.
- Creating draft documents – Install and configuration, Run/Operations/Troubleshooting, Build Books, Run books.
- Interfacing with the client on infrastructure support, configuration (e.g. on the load balancing technologies), and support to the Department for the deployment of the application
- Providing post-implementation support to the team and in the system.

5.4.2.2 A.8 - System Analyst

Tasks include, but are not limited to the following:

- Installing, configuring and administering IBM WebSphere MQ.
- Designing, building and testing automated installation procedures.
- Interfacing with the client on infrastructure support, configuration (e.g. on load balancing technologies) and support to the department for the deployment of the application.
- Performing system, regression, functional, performance, load and exploratory testing.
- Installing, configuring and administering .NET application deployment packages

5.4.2.3 I.2 - Database Administrator

Tasks include, but are not limited to the following:

- Customizing database conversion routines.
- Developing Data Conversion Strategies.
- Designing, building, and testing dashboards, reports, applications, and portal interfaces including SSIS packages for ETL processes SSRS automated reports, SQL code/stored procedures, triggers
- Improving performance, scalability, and stability of databases, and application processes
- Designing, developing, and maintaining database objects (tables, views, stored procedures, triggers) in SQL environments
- Identifying issues and improvements to existing SQL processes for optimal efficiency
- Creating and suggest indexes, data structures, in-memory tables, and other performance turning concepts to incorporate best industry practices into the product suite
- Determining the logical design characteristics and information management strategies to store, move, and manage data
- Translating requirements into SQL-based objects, such as queries, stored procedures, functions, etc.
- Coding SQL stored procedures for application, user, & interface layers of the database
- Reproducing business calculations as SQL queries

- Reviewing query performance and optimize as required
- Assisting with production configuration, and deployment
- Designing, planning and migrating data from legacy systems to new applications
- Generating new database with internal clients.
- Developing and implementing procedures for data stored in the database.
- Designing, developing and implementing security procedures for the database, including access and user account management.
- Advising programmers, analysts, and users about the efficient use of data and SQL queries.
- Defining interrelationships between data as it relates to data model.
- Maintaining configuration control of the database.
- Data architecture
 - Designing changes to schema and to existing application/tables/data structures
 - Performing Impact analysis and table modification
 - Archiving design and implementation
- Performing and/or coordinating updates to the database design.
- Controlling and coordinating changes to the database, including the deletion of records, changes to the existing records, and additions to the database.
- Participating in the development and coordination of the back-up, the disaster recovery and virus protection procedures.
- Providing Data Management / Data Analysis support to Analysts, Developers, Testers, Business Analysts, and Business Intelligence Analysts.
- Analyzing issues and controlling, coordinating and implementing fixes using Siebel EIM
- Developing, deploying and executing SQL scripts from and to different environments.
- Configuratiing, managing, documenting, deploying, supporting, maintaining and troubleshooting of ALWAYSON, TLS encryption, TDE encryption, and data auditing
- Troubleshooting SQL server (including Siebel).
- Debugging database or query performance issues
- Implementting and supporting Oracle Secure Enterprise Search (OSes) databases.

5.4.2.4 I.6 - *Network Analyst*

Tasks include, but are not limited to the following:

- Analyzing and troubleshooting problems within a diverse Windows environment.
- Performing system administration within a windows environment.
- Implementing application clustering using Microsoft Clustering.
- Configuring applications to use load balancer.
- Implementing, maintaining and troubleshooting firewalls.
- Creating draft documents such as install and configuration documents, and Run/Ops/Troubleshooting documents.

5.4.2.5 I.10 - *Technical Architect*

Tasks include, but are not limited to the following:

- Overseeing end-to-end architectural integrity and the relationship with other projects within the context of the business program.
- Implementing strategic solutions that address identified business challenges.
- Maintaining a full software development lifecycle perspective and maintain consistency with

- Enterprise and industry standards and delivery capabilities (Software Development Cycle)
- Identifying and translating system requirements into software design documentation.
- Assessing the validity of the design based on the requirements.
- Working closely with developers and the performance testing team to ensure proper implementation.
- Providing recommendations on and evaluating deployment options with a view to risk minimization.
- Ensuring the integration and full interoperability of all aspects of technology solutions.
- Evaluating hardware and software relative to their ability to support specified requirements.
- Determining potential and actual bottlenecks, and improving system performance through recommendations.

5.4.2.6 I.11 - *Technology Architect*

Tasks include, but are not limited to the following:

- Overseeing end-to-end architectural integrity and the relationship with other projects within the context of the business program.
- Converting business requirements into strategic solutions that address identified business challenges.
- Maintain a full software development lifecycle perspective and concern his/her self with maintaining consistency with Enterprise and industry standards and delivery capabilities.
- Providing recommendations expertise to identify and translate system requirements into software design documentation.
- Assessing the validity of the design based on the requirements.
- Working closely with developers to ensure proper implementation. Act as liaison between the Client (through the Business Analyst) and the developers.
- Providing recommendations on and evaluating deployment options with a view to risk minimization.
- Ensuring all aspects of technology solutions are integrated per the business plan.
- Evaluating and recommending hardware and software relative to their ability to support specified requirements.
- Determining potential and actual bottlenecks, and improving system performance through recommendations.

5.4.2.7 B.14 - *The Technical Writer*

Tasks include, but are not limited to the following:

- Working with team resources to determine what type and level of documentation (ex : build books, technical documentation, user manuals, , etc.) is required and planning production of required documents.
- Reviewing documentation standards and the existing project documentation and making recommendations on improvements.
- Gathering information concerning the features and functions provided by the technical resources.
- Assessing the audience for the documents/manuals and write or edit the required content.
- Validating the accuracy of the information collected.
- Coordinating the preparation of any required illustrations and diagrams.

- Designing the layout of the documents/manuals.
- Providing usability studies where needed to improve the design of an application that is being developed.
- Using word-processing, desk-top publishing and graphic software packages to produce final copies.
- Providing briefings and status reports to management.
- Participating in team meetings.

5.4.3 Workstream 3: Testing Services

5.4.3.1 A.10 - Test Coordinator

Tasks include, but are not limited to the following:

- Directing performance test planning and coordination.
- Performance testing in accordance with the business plan.
- Managing and monitoring performance test plans for all levels of testing.
- Developing frame work for Siebel CRM application using Java programming language for automation testing tool RFT (Rational Functional Tester)
- Updating existing code and/or develop new code as per functional designs using Java programming language
- Managing walkthroughs and reviews related to testing and implementation readiness.
- Performance test status reporting.
- Developing performance test scenarios and test scripts.
- Establishing and maintaining performance test strategies for a multi-platform, multi-operating system environment.
- Establishing software performance testing procedures for unit and/or integration testing and regression testing with emphasis on automating the testing procedures.
- Establishing and operating "interoperability" performance testing procedures to ensure that the interaction and co-existence of various software elements, which are proposed to be distributed on the common infrastructure, conform to appropriate departmental standards and have no unforeseen detrimental effects on the shared infrastructure.
- Establishing a validation and verification capability which assumes functional and performance compliance.
- Providing recommendations, guidance and coordination efforts for test strategies and plans, selection of automated testing tools, and identification of resources required for testing.
- Planning, organizing and scheduling testing efforts for large systems, including the execution of systems integration tests, specialized tests, and user acceptance testing (e.g., stress tests).
- Engaging all performance test activity for a given project.
- Collaborating with project stakeholders to ensure effective performance planning and requirements definition.
- Analyzing performance & business requirements, deliverables, results, etc.
- Assisting in defining the performance parameters of the requirement.
- Performing performance risk analysis and mitigation strategies.
- Ensuring performance test consistency and adherence to organizational practices.
- Building and evaluating quality checkpoints.
- Reviewing, monitoring and summarizing the progress of project testing activities –specifically performance testing

- Reviewing performance testing reports.
- Working with project stakeholders during project definition phase to help the team understand risks, dependencies, and opportunities; participate in requirements definition and review; lend subject matter expertise to projects.
- Developing performance test strategies, test approaches for performance and automation events.
- Providing recommendations and implementing process improvements that will accomplish team, department and business goals.
- Transferring knowledge to to engineers, software developers and Quality Assurance (QA) Testers.

5.4.3.2 A.11 - Tester

Tasks include, but are not limited to the following:

- Managing walkthroughs and reviews related to testing and implementation readiness.
- Overseeing testing in accordance with the business plan.
- Data Migration and Audit testing.
- Writing and executing software test cases against system requirements,
- Creating automation test cases,
- Finding and reporting bugs
- Creating and maintaining test suites
- Performing system, regression, functional, performance, load and exploratory testing
- Engaging all performance test activity for a given project.
- Collaborating with project stakeholders to ensure effective performance planning and requirements definition.
- Analyzing performance & business requirements, deliverables, results, etc.
- Performance requirement definition.
- Performing performance risk analysis.
- Ensuring performance test consistency and adherence to organizational practices.
- Building and evaluating quality checkpoints.
- Reviewing, monitoring and summarizing progress of project testing activities – specifically performance testing
- Reviewing performance testing reports.
- Active performance testing in all phases of the project defined by the development lifecycle.
- Working with project stakeholders during project definition to help the team understand risks, dependencies, and opportunities;
- participating in requirements definition and review;
- lending subject matter expertise to projects.
- Developing performance test strategies, test approaches for performance and automation events
- Providing recommendations and implementing process improvements that will accomplish team, department and business goals.
- Data Migration and Audit testing.
- Writing and executing software test cases against system requirements,
- Creating automation test cases,
- Finding and reporting bugs
- Creating and maintaining test suites
- Performing system, regression, functional, performance, load and exploratory testing

5.4.4 Workstream 4: Business Services**5.4.4.1 A.10 - Tester**

Tasks include, but are not limited to the following:

- Providing recommendations, and guide coordination efforts for test strategies and plans, selection of automated testing tools to the designated technical staff,
- Planning, organizing, and scheduling testing efforts for designated systems, including the execution of systems integration tests, specialized tests, and user acceptance testing (e.g., stress tests).Collaborating with project stakeholders to ensure effective performance planning and definition of future requirements.
- Analyzing business requirements, deliverables, and test results.
- Performing risk analysis.
- Reviewing, monitoring and summarizing progress of project testing activities.
- Reviewing testing reports regarding status of project.
- Performing testing activities in all phases of the project lifecycle.
- Collaborating with project stakeholders during project definition phase to help the team understand risks and dependencies.
- Developing test strategies, test approaches for potential testing automation.
- Providing recommendations on and implementing process improvements.

5.4.4.2 B.1 –Business Analyst

Tasks include, but are not limited to the following:

- Facilitating working group sessions and conducting interviews with clients to gather their functional and non-functional requirements.
- Documenting requirements for review by different stakeholders (clients, technical staff).
- Consulting with the with Departmental subject matter experts to obtain information on the technical feasibility of system requirements.
- Proposing solutions relating to business process improvements and business procedures;
- Identifying and documenting new business processes.
- Documenting recommendations in the form of mock-ups, use cases/user stories, and schedules .
- Responding to questions from the designers, developers and Quality Assurance Analysts resulting from their review of the business requirements during design, development, and testing phases.
- Attending system walkthrough sessions with the client and developers to validate requirements and to document any requests for functional changes to the solution.
- Drafting User Acceptance Test cases.
- Assisting and participating in User Acceptance Testing of the proposed solution with the client.
- Documenting issues identified in User Acceptance Testing.
- Providing input to the Technical Authority , issues and risk management recommendations.
- Preparing project decks for status reporting to the working group and executive sponsors.
- Validating the developed solution with the requirements and the client.

5.4.4.3 B.9 –*Courseware Developer*

Tasks include, but are not limited to the following:

- Performing needs assessment/analysis for training purposes.
- Planning and monitoring training projects.
- Performing job, task, and/or teaching content analysis.
- Writing criterion-referenced, performance-based teaching objectives.
- Providing recommendations on instructional media and strategies.
- Developing performance measurement standards.
- Developing training materials.
- Preparing end-users for implementation of courseware materials.
- Conducting training courses through a variety of mediums, whether on-line, in-class, self-paced, or other acceptable teaching methodologies.
- Communicate effectively by visual, oral, and written form with individuals, small group, and in front of large audiences with Departmental employees in a variety of forums and seniority..
- Managing and leading the Courseware Development following Project Management Principles.

5.4.4.4 B.14 –*Technical Writer*

Tasks include, but are not limited to the following:

- Working with team resources to determine what type and level of learning related documentation is required (ex : help text, technical documentation, user manuals, web page content and produce technical documentation.)
- Reviewing and evaluating documentation standards and existing project documentation and providing recommendations for improvements.
- Liaising with and gathering features and functions information from other technical resources to clarify all related technical aspects.
- Gathering and assessing end user requirements for the development of documents/manuals and writing/editing required content.
- Reviewing and verifying the accuracy of technical information provided by internal resources.
- Preparing or providing input in the preparation of any required illustrations and diagrams
- Designing layouts of documents and manuals to provide clarity and logical provision of information.
- Providing usability studies, as requested, to improve the design of an application that is being developed.
- Utilizing word-processing, desk-top publishing and graphic software packages to produce final copies/camera-ready copies of technical information..

5.4.4.5 P.1 –*Change Management Consultant*

Tasks include, but are not limited to the following:

- Analysing and developing business "critical success factors".
- Analysing and developing architecture requirements design, process development, process mapping and training.
- Guiding functional Resources in defining business strategy and processes in support of transformation and change management activities.
- Participating in change impact analysis and change management activities.

- Participating in organizational realignment (job re-design organizational re-structuring).
- Coordinating development of training and coordination with other stakeholders.
- Creating and presenting to various stakeholders, change management activities
- Presenting to various stakeholders, and facilitating meetings and discussions.
- Providing recommendations on and assisting in implementation of any change management initiatives.
- Identifying and providing recommendations on any project schedule issues
- Providing communication recommendations for distribution internally and outside of the Department.

5.4.4.6 P.9 –*Project Manager*

Tasks include, but are not limited to the following:

- Managing several Project Resources, each responsible for an element of the project and its associated project team.
- Managing the project during the development, implementation and operations startup by ensuring that resources are made available and that the project is developed and is fully operational within previously agreed time, cost and performance parameters.
- Formulating statements of problems; establishing procedures for the development and implementation of significant, new or modified project elements to solve these problems, and obtaining approval from the Technical Authority.
- Define and document the objectives for the project; determine budgetary requirements, the composition, roles and responsibilities and terms of reference for the project team.
- Reporting progress of the project on an ongoing basis and at scheduled points in the life cycle.
- Meets in conference with stakeholders and other project managers and states problems in a form capable of being solved.
- Preparing plans, charts, tables and diagrams to assist technical staff in analyzing or displaying problems; work with a variety of departmentally defined project management tools.

5.4.5 Workstream 5: Project Support Services

5.4.5.1 A.1 - *Application/Software Architect*

Tasks include, but are not limited to the following:

- Developing technical architectures, frameworks and strategies, either for an organization entity or for a major application area, to meet the business and application requirements.
- Identifying the policies and requirements that would be defined or require refinement based on a particular solution.
- Analyzing and evaluating alternative technology solutions to meet business problems.
- Ensuring the integration of all aspects of technology solutions.
- Monitoring industry trends to ensure that solutions fit with government and industry directions for technology.
- Analyzing functional requirements to identify information, procedures and decision flows.
- Evaluating existing procedures and methods, identify and document database content, structure, and application sub-systems,
- Developing data dictionary.
- Defining and documenting interfaces of manual to automated operations within application sub-

- systems, to external systems and between new and existing systems.
- Defining input/output sources, including detailed plan for technical design phase, and obtain approval of the system proposal.
- Identifying and documenting system specific standards relating to programming, documentation and testing, covering program libraries, data dictionaries, naming conventions, etc.

5.4.5.2 I.11 - *Technology Architect*

Tasks include, but are not limited to the following:

- Overseeing for end-to-end architectural integrity and the related integration with other projects within the context of the business program.
- Converting business requirements into strategic solutions that address identified business challenges to meet clients specifications or requirements.
- Provide recommendations to identify and translate system requirements into software design documentation. Assessing the validity of the design based on the requirements.
- Providing recommendations on and evaluating deployment options with a view to risk minimization.
- Ensuring the integration of all aspects of technology solutions.
- Evaluating hardware and software relative to their ability to support specified requirements.
- Evaluating potential and actual bottlenecks to improve system performance through recommendations.

5.4.5.3 P.9 - *Project Manager*

Tasks include, but are not limited to the following:

- Guiding several Project Resources, each responsible for an element of the project and its associated project team.
- Managing the project during the development, implementation and operations startup by ensuring that resources are made available and that the project is developed and is fully operational within previously agreed time, cost and performance parameters.
- Formulating statements of problems; establishing procedures for the development and implementation of significant, new or modified project elements to solve these problems, and obtaining approval thereof.
- Defining and documenting the objectives for the project; determining budgetary requirements, the composition, roles and responsibilities and terms of reference for the project team.
- Reporting progress of the project on an ongoing basis and at scheduled points in the life cycle.
- Initiating meetings with stakeholders and other project managers when required.
- Preparing plans, charts, tables and diagrams to assist in analyzing or displaying problems; work with a variety of departmentally defined project management tools.

5.4.5.4 P.10 - *Project Scheduler*

Tasks include, but are not limited to the following:

- Developing and supporting project schedules.
- Developing and maintaining Work Breakdown Structures.

- Producing reports and identifying scheduling and/or dependency issues.
- Conducting and providing critical path analysis.
- Scheduling co-ordination efforts with internal and external project stakeholders.
- Coordinating work efforts with each member of the project(s) team using a results based approach.
- Ensuring the placement of documentation under configuration management as required.
- Reviewing the activities, status and progress with the Technical authority as required.
- Updating and maintaining the integrated master project schedule (and other schedules).
- Identifying implement and process improvement efforts related to scheduling and coordination activities.

6.0 DELIVERABLES

The following deliverables are associated with this “Statement of Work” but are not limited to:

- Resources must provide technical advice and the transfer of functional knowledge through the provision of written documents and individual and group training.
- The Contractor must provide the deliverables in draft, final or both forms to the Technical Authority or their representative as specified in each Task Authorization (TA). The scope and specific content of each deliverable will be submitted to the Technical Authority for review and to determine acceptance.
- The final copies of the deliverables must incorporate the comments received and changes requested by the Technical Authority or their representative and will be delivered on or before the end date specified in each TA.
- Each resource must submit a weekly status report to the Technical Authority conforming to the report format specified in each TA.
- The schedule, format and content of each deliverable shall be mutually agreed to by the Technical Authority and the Contractor in writing and will be detailed in the Task Authorization.
- Progress (status) reports. The resource shall prepare a written status and progress reports on the work performed for the project, which is to be attached to the monthly timesheet claim. At a minimum progress reports shall contain the following information:
 - All significant activities performed by the resources during the period,
 - Status of all action/decision items, as well as a list of outstanding activities,
 - A description of any problems encountered which are likely to require the attention of the Technical Authority and any recommendations relating to the conduct of the work.
 - Current milestones with planned dates, progress since last report, issues encountered, and next steps,
 - Hours expended by the Contractor against the task during the reporting period,
 - Highlight the expectations/deliverables for the coming month, week and quarter.
- Progress reports and timesheets must also be included when sending the invoice.
- Project Plans;
- Completed and Unit Tested code;
- System Design Specifications;
- Analysis Documents;
- Completed Releases;
- Requirements Studies;
- Use cases;

- Test plans and scripts;
- Architecture Variance;
- Business Context Models such as Business Use Case (BUC) Models;
- Documented results of Unit, System and Integration Test Plans
- Prototypes / Proof of Concepts
- Presentations/Demos on application code and platform changes
- Preliminary Option Analysis (POA);
- Conceptual System Design (CSD);
- Technical Design Document (TDD);
- Consultation Documentation;
- Initial Project Plans (IPP)technical content;
- Development Strategy;
- Context Strategy;
- Usability Engagement Plan;
- Usability Value and Risk Assessment;
- Business User Model;
- Critical Success Factors;
- Documentation according to DFATD's set of best practices, standards and methodologies;
- Development of technical design, documentation, and procedures;
- Perform monitoring of query usage and recommend way to modify tables for increased performance (e.g., adding indices, joining tables, adding foreign keys, etc.);
- Costing/Financial reports

6.1 Format of Deliverables

All documentation/status reports must be submitted to the Technical Authority by email. Deliverables must be editable in a format compatible with the DFATD's desktop using the Microsoft Office Suite (e.g., Word, Excel, PowerPoint, Project and Visio) currently at version 2010.

6.2 Reporting Requirements

The Contractor must produce a daily, weekly and/or monthly status report as required by the Technical Authority, which at a minimum will include the following elements:

- a) Accomplishments: All activities completed during the previous period.
- b) Planned Activities: All activities planned for the next period.
- c) Unplanned Activities: All activities completed which were not planned for the period.
- d) Risks, Issues and Mitigation: All risks and issues identified, with probability of occurrence, impact, and measures applied to mitigate the risks.
- e) Time Management Report: The amount of time spent on the various project activities.

GOVERNMENT FURNISHED EQUIPMENT

DFATD will provide the Contractor with access to the following, on an as required basis, for the purpose of completing the work requirements of the contract. It is to be understood that all accesses and privileges, products and services shall be ended or revoked and returned upon completion of the TA..

- Accounts on applicable computer networks and electronic mail system;

- Production workstation;
- Development workstation with sufficient configuration to run software necessary for development, design and/or testing;
- Various application development, testing and requirements management products required to complete scope of work;
- Secure Token to access DFATD computer networks remotely, as required;
- Access to a printer;
- ID card allowing access to building and floor;
- Reference materials, as needed;

7. LANGUAGE REQUIREMENTS

Resources must possess the language skills (i.e. Bilingual, English, or French) as specified in the TA.

8. LOCATION OF WORK

Work may be performed remotely via the DFATD provided SIGNET Web solution AND/OR at DFATD facilities located within the National Capital Region and access to IT systems and infrastructure will be made available as required from the 111 Sussex Drive, 4200 Labelle facility, or the 200 Promenade du Portage location. The contractor is required to attend meetings at DFATD and is liable for his/her own transportation and related expenses.

9. TRAVEL REQUIREMENTS

Travel is not required.

ANNEX B

BASIS OF PAYMENT

WORKSTREAM 1: APPLICATION DEVELOPMENT SERVICES

| Initial Contract Period | | |
|---|--------------------|--------------------|
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| Application/Software Architect - Siebel | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Application/Software Architect - .Net | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Programmer/Software Developer - Siebel | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Programmer / Analyst | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Data Conversion Specialist | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Quality Assurance Specialist/Analyst | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |

| Option Period 1 | | |
|---|--------------------|--------------------|
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| Application/Software Architect - Siebel | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Application/Software Architect - .Net | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Programmer/Software Developer - Siebel | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Programmer / Analyst | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Data Conversion Specialist | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Quality Assurance Specialist/Analyst | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |

| Option Period 2 | | |
|---|--------------------|--------------------|
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| Application/Software Architect - Siebel | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Application/Software Architect - .Net | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Programmer/Software Developer - Siebel | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Programmer / Analyst | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Data Conversion Specialist | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Quality Assurance Specialist/Analyst | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |

WORKSTREAM 2: INFRASTRUCTURE/DBA SERVICES

| Initial Contract Period | | |
|--------------------------------|--------------------|--------------------|
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| Application/Software Architect | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| System Analyst | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Database Administrator | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Network Analyst | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Technical Architect | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Technology Architect | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Technical Writer | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |

| Option Period 1 | | |
|--------------------------------|--------------------|--------------------|
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| Application/Software Architect | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| System Analyst | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Database Administrator | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Network Analyst | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Technical Architect | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Technology Architect | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Technical Writer | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |

| Option Period 2 | | |
|--------------------------------|--------------------|--------------------|
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| Application/Software Architect | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| System Analyst | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Database Administrator | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Network Analyst | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Technical Architect | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Technology Architect | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Technical Writer | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |

WORKSTREAM 3: TESTING SERVICES

| Initial Contract Period | | |
|-------------------------|--------------------|--------------------|
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| Test Coordinator | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Tester | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |

| Option Period 1 | | |
|-------------------|--------------------|--------------------|
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| Test Coordinator | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Tester | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |

| Option Period 2 | | |
|-------------------|--------------------|--------------------|
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| Test Coordinator | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Tester | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |

WORKSTREAM 4: BUSINESS SERVICES

| Initial Contract Period | | |
|------------------------------|--------------------|--------------------|
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| Tester | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Business Analyst | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Courseware Developer | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Technical Writer | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Change Management Consultant | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Project Manager | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |

| Option Period 1 | | |
|------------------------------|--------------------|--------------------|
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| Tester | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Business Analyst | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Courseware Developer | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Technical Writer | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Change Management Consultant | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Project Manager | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |

| Option Period 2 | | |
|------------------------------|--------------------|--------------------|
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| Tester | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Business Analyst | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Courseware Developer | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Technical Writer | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Change Management Consultant | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Project Manager | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |

WORKSTREAM 5: PROJECT SUPPORT SERVICES

| Initial Contract Period | | |
|--------------------------------|--------------------|--------------------|
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| Application/Software Architect | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Technology Architect | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Project Manager | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Project Scheduler | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |

| Option Period 1 | | |
|--------------------------------|--------------------|--------------------|
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| Application/Software Architect | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Technology Architect | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Project Manager | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Project Scheduler | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |

| Option Period 2 | | |
|--------------------------------|--------------------|--------------------|
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| Application/Software Architect | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Technology Architect | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Project Manager | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Project Scheduler | Level 3 | \$ TBD |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |

ANNEX C
SECURITY REQUIREMENTS CHECK LIST
(SEE ATTACHED HERETO)

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 Technical Authority a quotation of rates to supply the requested Resource Categories based on the information identified in the TA Form, as well as its corresponding proposed resource(s). 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 5 working days (or any longer time period specified in the draft TA) turnaround time to submit a quotation.
2. With each quotation the Contractor must propose the required number of resources and 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 Contractor's quotation may be found 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.

APPENDIX B TO ANNEX A
TASK AUTHORIZATION FORM
(SEE ATTACHED HERETO)

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 Appendix. 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 the assessor can verify this information. The tables should not contain all the project information from the resume. Only the specific answer should be provided.

The point-rated requirements listed herein will be used to create evaluation grids for a proposed resource in the relevant resource category of the Task Authorization process.

Workstream 1 - Application Development Services

1. A.1 - Application/Software Architect (Siebel Specialty)

| # | Mandatory Criteria | Demonstrated Experience (Contractor to Insert Data) | Meets/Does not meet |
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| M1 | <p>The Contractor must demonstrate using project descriptions that the proposed resource has the required years of experience working as an Application/Software Architect in accordance with the TBIPS Supply Arrangement Experience levels listed below. Referenced projects must demonstrate at least 50% of the associated tasks listed in Annex A – Statement of Work for the same resource category to qualify.</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience</p> | | |
| M2 | <p>The Contractor must provide at least two (2) references from related projects in the last five (5) years that can validate the knowledge and experience under M1 of the proposed resource. Information should include Organization, contact name, contact number, contact e-mail address, contact relationship to resource, a description of the projects and the date and duration of the contract.</p> <p>*Note The Crown will accept two (2) references from one (1) project only if a resource has been assigned to the project for five (5) or more years. References must be a resources direct</p> | | |

| # | Mandatory Criteria | Demonstrated Experience (Contractor to Insert Data) | Meets/Does not meet |
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| | supervisor, manager, or director in order to qualify. Applies to all Levels 1 to 3. Referenced projects must be no less than six (6) months in duration. | | |
| M3 | The Contractor must demonstrate that the proposed resource is willing and able to obtain Controlled Goods Clearance through the PWGSC Controlled Goods Clearance Program. The Contractor has a maximum of sixty (60) days to clear any proposed resources from the time of TA acceptance. Applies to all Levels 1 to 3. | | |
| M4 | The Contractor must demonstrate using project descriptions that the proposed resource has the required years of experience in the architecture, design, and implementation of the Siebel product in accordance with the TBIPS Supply Arrangement Experience levels listed below: Level 1: < 5 years of experience Level 2: 5- < 10 years of experience Level 3: 10+ years of experience | | |
| M5 | The Contractor must demonstrate using project descriptions that the proposed resource has the required years of experience within the last twelve (12) years with the configuration and support of the Siebel product in accordance with the TBIPS Supply Arrangement Experience levels listed below: Level 1: < 5 years of experience Level 2: 5- < 10 years of experience Level 3: 10+ years of experience | | |

| Rated Criteria | | Demonstrated Experienced | Max Points | Scoring | Score |
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| R1 | The Contractor should demonstrate that the proposed resource has obtained and holds | | /20 | Certification = 20 points | |

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| | an Oracle Siebel certification. A copy of the certification must be provided in the proposal. | | | | |
| R2 | The Contractor should demonstrate using project descriptions that the proposed resource has experience integrating Siebel and/or .Net with other applications, such as IBM WebSphere (MQ Series), SAP, etc. | | /20 | Less than 5 years = 0 points 5 to less than 7 years = 5 points 7 to less than 9 years = 10 points 9 to less than 11 years = 15 points 11 years and more = 20 points | |
| R3 | The Contractor should demonstrate using project descriptions that the proposed resource has experience translating business requirements into design and the preparation of technical specification documents. | | /20 | Less than 5 years = 0 points 5 to less than 7 years = 5 points 7 to less than 9 years = 10 points 9 to less than 11 years = 15 points 11 years and more = 20 points | |
| R4 | The Contractor should demonstrate using project descriptions that the proposed resource has experience designing and developing Siebel and/or .Net user interfaces and/or integration objects for a permit-based issuance application. | | /10 | 1 project = 5 points 2 or more projects = 10 points | |
| R5 | The Contractor should demonstrate using project descriptions that the proposed resource has experience with Team Foundation Server (TFS). | | /10 | Less than 2 years = 0 points 2 to less than 4 years = 5 points 4 years and more = 10 points | |
| R6 | The Contractor should demonstrate using project | | /10 | Less than 2 years = 0 points | |

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| | descriptions that the proposed resource has experience with the requirements management solution Blueprint. | | | 2 to less than 4 years = 5 points 4 years and more = 10 points | |
| R7 | <p>The Contractor should demonstrate, using project descriptions that the proposed resource has a minimum of five (5) years experience within the past ten (10) years in participating or leading consultation sessions with Departmental stakeholders to gather business, technical or functional requirements that are required to design business or application solutions.</p> <p><i>*A stakeholder is defined as an individual, group, or organization that may affect, be affected by, or perceive itself to be affected by a decision, activity, or outcome of a project, program, or portfolio.</i></p> | | /20 | Less than 5 years = 0 points 5 to less than 7 years = 5 points 7 to less than 9 years = 10 points 9 to less than 11 years = 15 points 11 years and more = 20 points | |
| Pass Mark = 80 out of 110 | | | /110 | | |

2. A.1 - Application/Software Architect (.Net Specialty)

| # | Mandatory Criteria | Demonstrated Experience (Contractor to Insert Data) | Meets/Does not meet |
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| M1 | <p>The Contractor must demonstrate, using project descriptions that the proposed resource has the required years of experience working as an Application/Software Architect in accordance with the TBIPS Supply Arrangement Experience levels listed below. Referenced projects must demonstrate at least 50% of the associated tasks listed in Annex A – Statement of Work for the same resource category to qualify.</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> | | |

| # | Mandatory Criteria | Demonstrated Experience (Contractor to Insert Data) | Meets/Does not meet |
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| | Level 3: 10+ years of experience | | |
| M2 | <p>The Contractor must provide at least two (2) references from related projects in the last five (5) years that can validate the knowledge and experience under M1 of the proposed resource. Information should include Organization, contact name, contact number, contact e-mail address, contact relationship to resource, a description of the projects and the date and duration of the contract.</p> <p>*Note The Crown will accept two (2) references from one (1) project only if a resource has been assigned to the project for five (5) or more years. References must be a resources direct supervisor, manager, or director in order to qualify. Applies to all Levels 1 to 3.</p> <p>Referenced projects must be no less than six (6) months in duration.</p> | | |
| M3 | <p>The Contractor must demonstrate that the proposed resource is willing and able to obtain Controlled Goods Clearance through the PWGSC Controlled Goods Clearance Program. The Contractor has a maximum of sixty (60) days to clear any proposed resources from the time of TA acceptance. Applies to all Levels 1 to 3.</p> | | |
| M4 | <p>The Contractor must demonstrate using project descriptions that the proposed resource has the required years of experience working in the architecture, design, and implementation of the .Net product in accordance with the TBIPS Supply Arrangement Experience levels listed below:</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience</p> | | |
| M5 | <p>The Contractor must demonstrate using project descriptions that the proposed resource has the required years of experience, within the last twelve (12) years with the configuration and support of the .Net product in accordance with the TBIPS Supply Arrangement Experience levels listed below:</p> <p>Level 1: < 5 years of experience</p> | | |

| # | Mandatory Criteria | Demonstrated Experience (Contractor to Insert Data) | Meets/Does not meet |
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| | Level 2: 5- < 10 years of experience Level 3: 10+ years of experience | | |

| Rated Criteria | | Demonstrated Experienced | Max Points | Scoring | Score |
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| R1 | The Contractor should demonstrate using project descriptions that the proposed resource has experience integrating Siebel and/or .Net with other applications, such as IBM WebSphere (MQ Series), SAP, etc. | | /20 | Less than 5 years = 0 points 5 to less than 7 years = 5 points 7 to less than 9 years = 10 points 9 to less than 11 years = 15 points 11 years and more = 20 points | |
| R2 | The Contractor should demonstrate using project descriptions that the proposed resource has experience translating business requirements into design and the preparation of technical specification documents. | | /20 | Less than 5 years = 0 points 5 to less than 7 years = 5 points 7 to less than 9 years = 10 points 9 to less than 11 years = 15 points 11 years and more = 20 points | |
| R3 | The Contractor should demonstrate using project descriptions that the proposed resource has experience designing and developing Siebel and/or .Net user interfaces and/or integration objects for a permit-based issuance application. | | /10 | 1 project = 5 points 2 or more projects = 10 points | |

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| R4 | The Contractor should demonstrate using project descriptions that the proposed resource has experience with Team Foundation Server (TFS). | | /10 | Less than 2 years = 0 points 2 to less than 4 years = 5 points 4 years and more = 10 points | |
| R5 | The Contractor should demonstrate using project descriptions that the proposed resource has experience with the requirements management solution Blueprint. | | /10 | Less than 2 years = 0 points 2 to less than 4 years = 5 points 4 years and more = 10 points | |
| R6 | The Contractor should demonstrate using project descriptions that the proposed resource has a minimum of five (5) years of experience within the past ten (10) years in participating or leading consultation sessions with Departmental stakeholders to gather business, technical or functional requirements that are required to design business or application solutions <i>*A stakeholder is defined as an individual, group, or organization that may affect, be affected by, or perceive itself to be affected by a decision, activity, or outcome of a project, program, or portfolio.</i> | | /20 | Less than 5 years = 0 points 5 to less than 7 years = 5 points 7 to less than 9 years = 10 points 9 to less than 11 years = 15 points 11 years and more = 20 points | |
| Pass Mark = 65 out of 90 | | | /90 | | |

3. A.6 - Programmer/Software Developer - Siebel

| # | Mandatory Criteria | Demonstrated Experience (Contractor to Insert Data) | Meets/Does not meet |
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| M1 | <p>The Contractor must demonstrate, using project descriptions that the proposed resource has the required years of experience working as a Programmer/Software Developer in accordance with the TBIPS Supply Arrangement Experience levels listed below. Referenced projects must demonstrate at least 50% of the associated tasks listed in Annex A – Statement of Work for the same resource category to qualify.</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience</p> | | |
| M2 | <p>The Contractor must provide at least two (2) references from related projects in the last five (5) years that can validate the knowledge and experience under M1 of the proposed resource. Information should include Organization, contact name, contact number, contact e-mail address, contact relationship to resource, a description of the projects and the date and duration of the contract.</p> <p>*Note The Crown will accept two (2) references from one (1) project only if a resource has been assigned to the project for five (5) or more years. References must be a resources direct supervisor, manager, or director in order to qualify. Applies to all Levels 1 to 3.</p> <p>Referenced projects must be no less than six (6) months in duration.</p> | | |
| M3 | <p>The Contractor must demonstrate that the proposed resource is willing and able to obtain Controlled Goods Clearance through the PWGSC Controlled Goods Clearance Program. The Contractor has a maximum of sixty (60) days to clear any proposed resources from the time of TA acceptance. Applies to all Levels 1 to 3.</p> | | |
| M4 | <p>The Contractor must demonstrate using project descriptions that the proposed resource has the required years of experience in Siebel application development within the last twelve (12) years in accordance with the</p> | | |

| # | Mandatory Criteria | Demonstrated Experience (Contractor to Insert Data) | Meets/Does not meet |
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| | <p>TBIPS Supply Arrangement Experience levels listed below:</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience</p> | | |

| Rated Criteria | | Demonstrated Experienced | Max Points | Scoring | Score |
|----------------|--|--------------------------|------------|--|-------|
| R1 | The Contractor should demonstrate that the proposed resource has a valid Oracle Siebel certification. A copy of the certification must be provided in the proposal. | | /20 | Certification = 20 points | |
| R2 | The Contractor should demonstrate using project descriptions that the proposed resource has experience using Siebel Tools to configure Siebel applications within the last fifteen (15) years. | | /20 | <p>Less than 4 years = 0 points</p> <p>4 to less than 6 years = 5 points</p> <p>6 to less than 8 years = 10 points</p> <p>8 to less than 10 years = 15 points</p> <p>10 years and more = 20 points</p> | |
| R3 | The Contractor should demonstrate using project descriptions that the proposed resource has experience in Siebel scripting. | | /20 | <p>Less than 4 years = 0 points</p> <p>4 to less than 6 years = 5 points</p> <p>6 to less than 8 years = 10 points</p> | |

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| | | | | 8 to less than 10 years = 15 points 10 years and more = 20 points | |
| R4 | The Contractor should demonstrate using project descriptions that the proposed resource has experience designing and configuring Siebel workflows. | | /20 | Less than 4 years = 0 points 4 to less than 6 years = 5 points 6 to less than 8 years = 10 points 8 to less than 10 years = 15 points 10 years and more = 20 points | |
| R5 | The Contractor should demonstrate using project descriptions that the proposed resource has experience designing, developing and testing Siebel user interfaces and/or integration objects for a permit-based issuance application. | | /10 | Less than 1 year = 0 point 1 to less than 3 years = 5 points 3 years and more = 10 points | |
| R6 | The Contractor should demonstrate using project descriptions that the proposed resource has experience with the requirements management tool Blueprint. | | /10 | Less than 2 years = 0 points 2 to less than 4 years = 5 points 4 years and more = 10 points | |
| R7 | The Contractor should demonstrate using project descriptions that the proposed resource has experience with Team Foundation Server (TFS). | | /10 | Less than 2 years = 0 points 2 to less than 4 years = 5 points | |

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| | | | | 4 years and more = 10 points | |
| R8 | The Contractor should demonstrate using project descriptions that the proposed resource has experience with Oracle BI Publisher integrated with a Siebel application. | | /20 | Less than 4 years = 0 points 4 to less than 6 years = 5 points 6 to less than 8 years = 10 points 8 to less than 10 years = 15 points 10 years and more = 20 points | |
| R9 | The Contractor should demonstrate using project descriptions that the proposed resource has configuration / development experience in Siebel CRM - Version 17.0 [IP2017] or above. | | /15 | Less than 1 month = 0 points 1 to less than 6 months = 5 points 6 months to less than 1 year = 10 points 1 year and more = 15 points | |
| R10 | The Contractor should demonstrate using project descriptions that the proposed resource has experience using Microsoft SQL to develop queries or stored procedures, and identify and debug Siebel application problems. | | /20 | Less than 4 years = 0 points 4 to less than 6 years = 5 points 6 to less than 8 years = 10 points 8 to less than 10 years = 15 points 10 years and more = 20 points | |

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| R11 | The proposed resource should demonstrate experience using project descriptions with Siebel server administration and/or enterprise level configurations for purposes of migrating repository/non-repository objects, optimizing performance, or for general trouble-shooting. | | /30 | Less than 1 year = 0 points 1 to less than 3 years = 5 points 3 to less than 5 years = 10 points 5 to less than 7 years = 15 points 7 to less than 9 years = 20 points 9 to less than 11 years = 25 points 11 years and more = 30 points | |
| Pass Mark = 145 out of 195 | | | /195 | | |

4. A.7 - Programmer/Analyst

| # | Mandatory Criteria | Demonstrated Experience (Contractor to Insert Data) | Meets/Does not meet |
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| M1 | <p>The Contractor must demonstrate using project descriptions that the proposed resource has the required years of experience working as a Programmer/Analyst in accordance with the TBIPS Supply Arrangement Experience levels listed below. Referenced projects must demonstrate at least 50% of the associated tasks listed in Annex A – Statement of Work for the same resource category to qualify.</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience</p> | | |
| M2 | The Contractor must provide at least two (2) references from related projects in the last five (5) years that can validate the knowledge and experience under M1 of the proposed resource. Information should include Organization, contact name, contact number, contact e- | | |

| # | Mandatory Criteria | Demonstrated Experience (Contractor to Insert Data) | Meets/Does not meet |
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| | <p>mail address, contact relationship to resource, a description of the projects and the date and duration of the contract.</p> <p>*Note The Crown will accept two (2) references from one (1) project only if a resource has been assigned to the project for five (5) or more years. References must be a resources direct supervisor, manager, or director in order to qualify. Applies to all Levels 1 to 3.</p> <p>Referenced projects must be no less than six (6) months in duration.</p> | | |
| M3 | The Contractor must demonstrate that the proposed resource is willing and able to obtain Controlled Goods Clearance through the PWGSC Controlled Goods Clearance Program. The Contractor has a maximum of sixty (60) days to clear any proposed resources from the time of TA acceptance. Applies to all Levels 1 to 3. | | |
| M4 | <p>The Contractor must demonstrate using project descriptions that the proposed resource has the required years of experience within the last twelve (12) years with .NET application development using Microsoft Visual Studio .NET. in accordance with the TBIPS Supply Arrangement Experience levels listed below:</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience</p> | | |
| M5 | <p>The Contractor must demonstrate using project descriptions that the proposed resource has the required years of experience within the last twelve (12) years in the development of SQL stored procedures and Transact-SQL queries in a Microsoft SQL Server environment in accordance with the TBIPS Supply Arrangement Experience levels listed below:</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience.</p> | | |

| # | Mandatory Criteria | Demonstrated Experience (Contractor to Insert Data) | Meets/Does not meet |
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| M6 | <p>The Contractor must demonstrate using project descriptions that the proposed resource has the required years of experience with ASP.NET application development utilizing C#.NET and JavaScript application development in accordance with the TBIPS Supply Arrangement Experience levels:</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience.</p> | | |

| Rated Criteria | | Demonstrated Experienced | Max Points | Scoring | Score |
|----------------|--|--------------------------|------------|--|-------|
| R1 | The Contractor should demonstrate using project descriptions that the proposed resource has experience in the development of Transact-SQL queries and stored procedures in a Microsoft SQL Server environment. | | /20 | <p>Less than 4 years = 0 points</p> <p>4 to less than 5 years = 5 points</p> <p>5 to less than 6 years = 10 points</p> <p>6 to less than 7 years = 15 points</p> <p>7 years and more = 20 points</p> | |
| R2 | The Contractor should demonstrate using project descriptions that the proposed resource has experience in the design and development of enterprise class relational databases. | | /20 | <p>Less than 4 years = 0 points</p> <p>4 to less than 6 years of = 5 points</p> <p>6 to less than 8 years = 10 points</p> <p>8 to less than 10 = 15 points</p> | |

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| | | | | 10 years and more = 20 points | |
| R3 | The Contractor should demonstrate using project descriptions that the proposed resource has experience with ASP.NET application development utilizing C#.NET with Microsoft Visual Studio .NET. | | /15 | Less than 6 years = 0 points 6 to less than 8 years = 5 points 8 to less than 10 years = 10 points 10 years and more = 15 points | |
| R4 | The Contractor should demonstrate that the proposed resource has passed exams towards Microsoft Certified Solution Developer (MCSD) or Microsoft Certified Professional Developer (MCPD) certifications. Contractors must provide proof of completed exams or a copy of the certification in the proposal. | | /5 | 1 point per exam for each of the following: 70-480, 70-486, 70-487, 70-511, 70-513, 70-515, 70-516, 70-519 up to a maximum of 5 points. OR 5 points will be awarded for full MCSD or MCPD certification. | |
| R5 | The Contractor should demonstrate using project descriptions that the proposed resource has experience in developing public-facing web applications/web sites which are compliant with the Government of Canada Web standards: Common Look and Feel (CLF) Standards 2.0 / Web Content Accessibility Guidelines (WCAG) / Web Experience Toolkit (WET). | | /10 | 1 project = 5 points 2 or more projects = 10 points | |
| R6 | The Contractor should demonstrate using project descriptions that the proposed resource has experience in | | /15 | Less than 6 years = 0 points | |

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| | developing Web Services using protocols SOAP and/or J-SOON. | | | 6 to less than 8 years = 5 points 8 to less than 10 years = 10 points 10 years and more = 15 points | |
| R7 | The Contractor should demonstrate using project descriptions that the proposed resource has experience developing applications using Microsoft Team Foundation Server. | | /20 | Less than 2 years = 0 points 2 to less than 3 years = 5 points 3 to less than 4 years = 10 points 4 to less than 5 years = 15 points 5 years and more = 20 points | |
| R8 | The Contractor should demonstrate using project descriptions that the proposed resource has experience developing web applications using HTML5. | | /10 | 1 project = 5 points 2 or more projects = 10 points | |
| R9 | The Contractor should demonstrate using project descriptions that the proposed resource has a minimum of six (6) years of experience working with HTML and CSS. | | /10 | Less than 6 years = 0 points 6 to less than 8 years = 5 points 8 years and more = 10 points | |
| R10 | The Contractor should demonstrate using project descriptions that the proposed resource has a minimum of six (6) years of experience working with JavaScript or JQuery. | | /10 | Less than 6 years = 0 points 6 to less than 8 years = 5 points 8 years and more = 10 points | |
| Pass Mark = 100 out of 135 | | | /135 | | |

5. I.1 - Data Conversion Specialist

| # | Mandatory Criteria | Demonstrated Experience (Contractor to Insert Data) | Meets/Does not meet |
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| M1 | <p>The Contractor must demonstrate, using project descriptions that the proposed resource has the required years of experience working as a Data Conversion Specialist in accordance with the TBIPS Supply Arrangement Experience levels listed below. Referenced projects must demonstrate at least 50% of the associated tasks listed in Annex A – Statement of Work for the same resource category to qualify.</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience</p> | | |
| M2 | <p>The Contractor must provide at least two (2) references from related projects in the last five (5) years that can validate the knowledge and experience under M1 of the proposed resource. Information should include Organization, contact name, contact number, contact e-mail address, contact relationship to resource, a description of the projects and the date and duration of the contract.</p> <p>*Note The Crown will accept two (2) references from one (1) project only if a resource has been assigned to the project for five (5) or more years. References must be a resources direct supervisor, manager, or director in order to qualify. Applies to all Levels 1 to 3.</p> <p>Referenced projects must be no less than six (6) months in duration.</p> | | |
| M3 | <p>The Contractor must demonstrate that the proposed resource is willing and able to obtain Controlled Goods Clearance through the PWGSC Controlled Goods Clearance Program. The Contractor has a maximum of sixty (60) days to clear any proposed resources from the time of TA acceptance. Applies to all Levels 1 to 3.</p> | | |
| M4 | <p>The Contractor must demonstrate using project descriptions that the proposed resource has the required years of experience planning, designing and developing data migration processes for a large-scale data migration in accordance with the TBIPS Supply Arrangement Experience levels listed below:</p> | | |

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| | <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience</p> <p><i>*Large-scale is defined as the migration of data from four or more systems into one single Siebel CRM application involving the migration of a minimum 50 million records.</i></p> | | |
| M5 | <p>The Contractor must demonstrate using project descriptions that the proposed resource has the required years of experience as a Data Modeller specifically with an Oracle Siebel CRM using Microsoft SQL Server 2008 or above in accordance with the TBIPS Supply Arrangement Experience levels listed below:</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience</p> | | |
| M6 | <p>The Contractor must demonstrate using project descriptions that the proposed resource has the required years of experience in data migration activities specifically with an Oracle Siebel CRM using Microsoft SQL server 2008 or above in accordance with the TBIPS Supply Arrangement Experience levels listed below:</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience</p> | | |
| M7 | <p>The Contractor must demonstrate using project descriptions that the proposed resource has the required years of experience in the design, development, maintenance of data migration processes specifically using Siebel Enterprise Integration Manager (EIM), SQL scripts and SQL Server Integration Services (SSIS) using SSDT-BI Tools in accordance with the TBIPS Supply Arrangement Experience levels listed below:</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience</p> | | |

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| M8 | <p>The Contractor must demonstrate using project descriptions that the proposed resource has the required years of experience with Siebel 7.5 or above in accordance with the TBIPS Supply Arrangement Experience levels listed below:</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience.</p> | | |
| M9 | <p>The Contractor must demonstrate using project descriptions that the proposed resource has the required years of experience using Siebel Tools in accordance with the TBIPS Supply Arrangement Experience levels listed below:</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience.</p> | | |

| Rated Criteria | | Demonstrated Experienced | Max Points | Scoring | Score |
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| R1 | The Contractor should demonstrate using project descriptions that the proposed resource has experience in the design, development and maintenance of Logical Data Models (LDMs) using the AllFusion ERwin Data Modeler tool. | | /15 | <p>Less than 5 years = 0 points</p> <p>5 to less than 10 years = 5 points</p> <p>10 to less than 15 years = 10 points</p> <p>15 years and more = 15 points</p> | |
| R2 | The Contractor should demonstrate using project descriptions that the proposed resource has experience in the implementation and management of code tables (i.e. seed data / list of values). | | /15 | <p>Less than 5 years = 0 points</p> <p>5 to less than 10 years = 5 points</p> <p>10 to less than 15 years = 10 points</p> <p>15 years and more = 15 points</p> | |

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| R3 | The Contractor should demonstrate using project descriptions that the proposed resource has experience using Siebel Enterprise Integration Manager (EIM) to load mass quantities of data into a Siebel database. | | /10 | Less than 1 year = 0 points 1 to less than 6 years = 5 points 6 years and more = 10 points | |
| R4 | The Contractor should demonstrate using project descriptions that the proposed resource has experience with SQL Server Integration Services (SSIS) using SSDT-BI. | | /10 | Less than 1 year = 0 points 1 to less than 5 years = 5 points 5 years and more = 10 points | |
| R5 | The Contractor should demonstrate using project descriptions that the proposed resource has experience writing SQL scripts. | | /15 | Less than 5 years = 0 points 5 to less than 10 years = 5 points 10 to less than 15 years = 10 points 15 years and more = 15 points | |
| R6 | The Contractor should demonstrate using project descriptions that the proposed resource has experience developing and executing data migration validation/verification. | | /10 | Less than 1 year = 0 points 1 to less than 5 years = 5 points 5 years and more = 10 points | |
| R7 | The Contractor should demonstrate using project descriptions that the proposed resource has experience in Siebel deployments. | | /5 | Less than 5 years = 0 points 5 years or more = 5 points | |
| R8 | The Contractor should demonstrate using project descriptions that the proposed resource has experience | | /15 | Less than 5 years = 0 points 5 to less than 10 years = 5 points | |

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| | performing Database Administrator activities/tasks. | | | 10 to less than 15 years = 10 points 15 years and more = 15 points | |
| R9 | The Contractor must demonstrate using project descriptions that the proposed resource has a minimum of five (5) years experience using Team Foundation Server (TFS) for defect tracking of bugs/issues and version control. | | /5 | Less than 5 years = 0 points 5 to less than 7 years = 1 point 7 to less than 9 years = 3 points 9 years and more = 5 points | |
| R10 | The Contractor should demonstrate using project descriptions that the proposed resource has a minimum of five (5) years experience using the requirements management tool Blueprint. | | /5 | Less than 5 years = 0 points 5 to less than 7 years = 1 point 7 to less than 9 years = 3 points 9 years and more = 5 points | |
| Pass Mark = 75 out of 105 | | | /105 | | |

6. P.11 - Quality Assurance Specialist

| # | Mandatory Criteria | Demonstrated Experience (Contractor to Insert Data) | Meets/Does not meet |
|-----------|---|---|---------------------|
| M1 | <p>The Contractor must demonstrate, using project descriptions that the proposed resource has the required years of experience working as a Quality Assurance/Specialist in accordance with the TBIPS Supply Arrangement Experience levels listed below. Referenced projects must demonstrate at least 50% of the associated tasks listed in Annex A – Statement of Work for the same resource category to qualify.</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience</p> | | |

| # | Mandatory Criteria | Demonstrated Experience (Contractor to Insert Data) | Meets/Does not meet |
|-----------|---|---|---------------------|
| M2 | <p>The Contractor must provide at least two (2) references from related projects in the last five (5) years that can validate the knowledge and experience under M1 of the proposed resource. Information should include Organization, contact name, contact number, contact e-mail address, contact relationship to resource, a description of the projects and the date and duration of the contract.</p> <p>*Note The Crown will accept two (2) references from one (1) project only if a resource has been assigned to the project for five (5) or more years. References must be a resources direct supervisor, manager, or director in order to qualify. Applies to all Levels 1 to 3.</p> <p>Referenced projects must be no less than six (6) months in duration.</p> | | |
| M3 | <p>The Contractor must demonstrate that the proposed resource is willing and able to obtain Controlled Goods Clearance through the PWGSC Controlled Goods Clearance Program. The Contractor has a maximum of sixty (60) days to clear any proposed resources from the time of TA acceptance. Applies to all Levels 1 to 3.</p> | | |
| M4 | <p>The Contractor must demonstrate using project descriptions that the proposed resource has the required years of experience related to developing, documenting, and executing test plans, test strategies, test scripts and/or test cases for Siebel CRM applications in accordance with the TBIPS Supply Arrangement Experience levels listed below:</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience.</p> | | |
| M5 | <p>The Contractor must demonstrate using project descriptions that the proposed resource has the required years of experience within the past twelve (12) years in using automated testing software and other packages or custom-built testing tools to simulate the executing of system and application tests in accordance with the TBIPS Supply Arrangement Experience levels listed below:</p> <p>Level 1: < 5 years of experience</p> | | |

| # | Mandatory Criteria | Demonstrated Experience (Contractor to Insert Data) | Meets/Does not meet |
|---|---|--|---------------------|
| | Level 2: 5- < 10 years of experience Level 3: 10+ years of experience. | | |

| Rated Criteria | | Demonstrated Experienced | Max Points | Scoring | Score |
|----------------|---|--------------------------|------------|--|-------|
| R1 | The Contractor should demonstrate using project descriptions that the proposed resource has experience testing Siebel based applications. | | /20 | Less than 1 year = 0 points 1 to less than 3 years = 5 points 3 to less than 5 years = 10 points 5 to less than 7 years = 15 points 7 years and more = 20 points | |
| R2 | The Contractor should demonstrate, using project descriptions, that the proposed resource has experience testing .NET applications. | | /20 | Less than 1 year = 0 points 1 to less than 3 years = 5 points 3 to less than 5 years = 10 points 5 to less than 7 years = 15 points 7 years and more = 20 points | |
| R3 | The Contractor should demonstrate using project descriptions that the proposed resource has experience testing interfaces between Siebel applications and non-Siebel platforms. | | /20 | Less than 1 year = 0 points 1 to less than 3 years = 5 points 3 to less than 5 years = 10 points 5 to less than 7 years = 15 points | |

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|----------------------------------|---|--|-------------|--|--|
| | | | | 7 years and more = 20 points | |
| R4 | The Contractor should demonstrate using project descriptions that the proposed resource has experience with Siebel builds and migrations. | | /20 | Less than 1 year = 0 points 1 to less than 3 years = 5 points 3 to less than 5 years = 10 points 5 to less than 7 years = 15 points 7 years and more = 20 points | |
| R5 | The Contractor should demonstrate using project descriptions that the proposed resource has experience with the requirements management tool Blueprint. | | /15 | Less than 1 year = 0 points 1 to less than 2 years = 5 points 2 to less than 3 years = 10 points 3 years and more = 15 points | |
| R6 | The Contractor should demonstrate using project descriptions that the proposed resource has experience with Team Foundation Server (TFS) Test Manager to execute and track test cases, and defects. | | /15 | Less than 1 year = 0 points 1 to less than 2 years = 5 points 2 to less than 3 years = 10 points 3 years and more = 15 points | |
| R7 | The Contractor should demonstrate that the proposed resource has worked more than six (6) consecutive months on the same project within the past two (2) years. | | /10 | Less than 6 months = 0 points 6 months to less than 1 year = 5 points 1 year and more = 10 points | |
| Pass Mark = 90 out of 120 | | | /120 | | |

Workstream 2 – Infrastructure/DBA Services

1. A.1 - Application/Software Architect

| # | Mandatory Criteria | Demonstrated Experience (Contractor to Insert Data) | Meets/Does not meet |
|-----------|---|--|---------------------|
| M1 | <p>The Contractor must demonstrate, using project descriptions that the proposed resource has the required years of experience working as an Application/Software Architect in accordance with the TBIPS Supply Arrangement Experience levels listed below. Referenced projects must demonstrate at least 50% of the associated tasks listed in Annex A – Statement of Work for the same resource category to qualify.</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience</p> | | |
| M2 | <p>The Contractor must provide at least two (2) references from related projects in the last five (5) years that can validate the knowledge and experience under M1 of the proposed resource. Information should include Organization, contact name, contact number, contact e-mail address, contact relationship to resource, a description of the projects and the date and duration of the contract.</p> <p>*Note The Crown will accept two (2) references from one (1) project only if a resource has been assigned to the project for five (5) or more years. References must be a resources direct supervisor, manager, or director in order to qualify. Applies to all Levels 1 to 3.</p> <p>Referenced projects must be no less than six (6) months in duration.</p> | | |
| M3 | <p>The Contractor must demonstrate that the proposed resource is willing and able to obtain Controlled Goods Clearance through the PWGSC Controlled Goods Clearance Program. The Contractor has a maximum of sixty (60) days to clear any proposed resources from the time of TA acceptance. Applies to all Levels 1 to 3.</p> | | |
| M4 | <p>The Contractor must demonstrate using project descriptions, that the proposed resource has the required years of experience designing, configuring and implementing business applications making extensive use of or integrated with a commercial Client Relationship Management (CRM) type</p> | | |

| # | Mandatory Criteria | Demonstrated Experience (Contractor to Insert Data) | Meets/Does not meet |
|---|---|--|---------------------|
| | <p>product in accordance with the TBIPS Supply Arrangement Experience levels listed below:</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience.</p> | | |

| Rated Criteria | | Demonstrated Experienced | Max Points | Scoring | Score |
|----------------|--|--------------------------|------------|---|-------|
| R1 | The Contractor should demonstrate, using project descriptions, that the proposed resource has experience analyzing and solving problems within a complex Microsoft (MS) Windows Server (2008 or higher) environment. | | /20 | <p>Less than 2 years = 0 points</p> <p>2 to less than 5 years = 5 points</p> <p>5 to less than 8 years = 10 points</p> <p>8 to less than 11 years = 15 points</p> <p>11 years or more = 20 points</p> | |
| R2 | The Contractor should demonstrate, using project descriptions, that the proposed resource has experience analyzing, troubleshooting, and solving Siebel (version 7x or higher) issues. | | /20 | <p>Less than 2 years = 0 points</p> <p>2 to less than 5 years = 5 points</p> <p>5 to less than 8 years = 10 points</p> <p>8 to less than 11 years = 15 points</p> <p>11 years or more = 20 points</p> | |
| R3 | The Contractor should demonstrate, using project descriptions, that the proposed | | /15 | <p>Less than 1 year = 0 points</p> | |

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|----------------------------------|--|--|-------------|---|--|
| | resource has experience clustering Siebel using Microsoft Clustering. | | | 1 to less than 3 years = 5 points 3 to less than 5 years = 10 points 5 years or more = 15 points | |
| R4 | The Contractor should demonstrate, using project descriptions, that the proposed resource has experience load balancing Siebel using either Siebel native or hardware solutions. | | /25 | Less than 1 year = 0 points 1 to less than 2 years = 5 points 2 to less than 3 years = 10 points 3 to less than 4 years = 15 points 4 to less than 5 years = 20 points 5 years or more = 25 points | |
| R5 | The Contractor should demonstrate, using project descriptions, that the proposed resource has experience installing, configuring and administering Oracle BI Publisher. | | /15 | 1 to 2 projects = 5 point 3 to 4 projects = 10 points 5 or more projects = 15 points | |
| R6 | The Contractor should demonstrate, using project descriptions, that the proposed resource has experience automating install processes. | | /5 | 1 to 2 projects = 1 point 3 to 4 projects = 3 points 5 or more projects = 5 points | |
| Pass Mark = 75 out of 100 | | | /100 | | |

2. A.8 - System Analyst

| # | Mandatory Criteria | Demonstrated Experience (Contractor to Insert Data) | Meets/Does not meet |
|-----------|---|--|---------------------|
| M1 | <p>The Contractor must demonstrate, using project descriptions that the proposed resource has the required years of experience working as a System Analyst in accordance with the TBIPS Supply Arrangement Experience levels listed below. Referenced projects must demonstrate at least 50% of the associated tasks listed in Annex A – Statement of Work for the same resource category to qualify.</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience</p> | | |
| M2 | <p>The Contractor must provide at least two (2) references from related projects in the last five (5) years that can validate the knowledge and experience under M1 of the proposed resource. Information should include Organization, contact name, contact number, contact e-mail address, contact relationship to resource, a description of the projects and the date and duration of the contract.</p> <p>*Note The Crown will accept two (2) references from one (1) project only if a resource has been assigned to the project for five (5) or more years. References must be a resources direct supervisor, manager, or director in order to qualify. Applies to all Levels 1 to 3.</p> <p>Referenced projects must be no less than six (6) months in duration.</p> | | |
| M3 | <p>The Contractor must demonstrate that the proposed resource is willing and able to obtain Controlled Goods Clearance through the PWGSC Controlled Goods Clearance Program. The Contractor has a maximum of sixty (60) days to clear any proposed resources from the time of TA acceptance. Applies to all Levels 1 to 3.</p> | | |
| M4 | <p>The Contractor must demonstrate, using project descriptions, that the proposed resource has the required years of experience building, installing, configuring and administrating WebSphere MQ products in accordance with the TBIPS Supply Arrangement Experience levels listed below:</p> <p>Level 1: < 5 years of experience</p> | | |

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|-----------|--|--|--|
| | Level 2: 5- < 10 years of experience Level 3: 10+ years of experience | | |
| M5 | The Contractor must demonstrate that the proposed resource holds a valid Microsoft Certified Systems Engineer (MCSE)* or a Microsoft Certified Systems Administrator (MCSA)* certification. Contractors must provide a copy of the certification(s). *No substitutions will be accepted | | |

| Rated Criteria | | Demonstrated Experienced | Max Points | Scoring | Score |
|----------------|--|--------------------------|------------|--|-------|
| R1 | The Contractor should demonstrate, using project descriptions that the proposed resource has experience building, installing, configuring and administering WebSphere MQ products. | | /20 | Less than 1 year = 0 points 1 to less than 4 years = 5 points 4 to less than 7 years = 10 points 7 to less than 10 years = 15 points 10 years or more = 20 points | |
| R2 | The Contractor should demonstrate, using project descriptions, that the proposed resource has experience installing, configuring and troubleshooting major operating systems (Win 2008 and 2012 server) in a Microsoft Active Directory environment. | | /25 | Less than 2 years = 0 points 2 to less than 4 years = 5 points 4 to less than 6 years = 10 points 6 to less than 8 years = 15 points 8 to less than 10 years = 20 points 10 years or more = 25 points | |

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|----------------------------------|---|--|-------------|---|--|
| R3 | The Contractor should demonstrate, using project descriptions, that the proposed resource has experience configuring and troubleshooting Internet Information Services (IIS) version 7+. | | /25 | Less than one year = 0 points 1 to less than 2 years = 5 points 2 to less than 3 years = 10 points 3 to less than 4 years = 15 points 4 to less than 5 years = 20 points 5 years or more = 25 points | |
| R4 | The Contractor should demonstrate, using project descriptions, that the proposed resource has experience deploying .NET applications. | | /20 | Less than 2 years = 0 points 2 to less than 5 years = 5 points 5 to less than 8 years = 10 points 8 to less than 11 years = 15 points 11 years or more = 20 points | |
| R5 | The Contractor should demonstrate, using project descriptions, that the proposed resource has experience working on *multi-million dollar project(s). *To qualify as Multi-Million, the dollar value must be greater than \$10 million. | | /15 | Less than 1 project = 0 points 1 to 2 projects = 5 point 3 to 4 projects = 10 points 5 or more projects = 15 points | |
| Pass Mark = 75 out of 105 | | | /105 | | |

3. I.2 - Database Administrator

| # | Mandatory Criteria | Demonstrated Experience (Contractor to Insert Data) | Meets/Does not meet |
|-----------|---|--|---------------------|
| M1 | <p>The Contractor must demonstrate, using project descriptions that the proposed resource has the required years of experience working as a Database Administrator in accordance with the TBIPS Supply Arrangement Experience levels listed below. Referenced projects must demonstrate at least 50% of the associated tasks listed in Annex A – Statement of Work for the same resource category to qualify.</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience</p> | | |
| M2 | <p>The Contractor must provide at least two (2) references from related projects in the last five (5) years that can validate the knowledge and experience under M1 of the proposed resource. Information should include Organization, contact name, contact number, contact e-mail address, contact relationship to resource, a description of the projects and the date and duration of the contract.</p> <p>*Note The Crown will accept two (2) references from one (1) project only if a resource has been assigned to the project for five (5) or more years. References must be a resources direct supervisor, manager, or director in order to qualify. Applies to all Levels 1 to 3.</p> <p>Referenced projects must be no less than six (6) months in duration.</p> | | |
| M3 | <p>The Contractor must demonstrate that the proposed resource is willing and able to obtain Controlled Goods Clearance through the PWGSC Controlled Goods Clearance Program. The Contractor has a maximum of sixty (60) days to clear any proposed resources from the time of TA acceptance. Applies to all Levels 1 to 3.</p> | | |
| M4 | <p>The Contractor must demonstrate, using project descriptions that the proposed resource has the required years of experience with database and data modeling techniques and processes as part of a team managing complex IM/IT software development projects (within the past twelve (12) years) in accordance with the TBIPS Supply Arrangement Experience levels listed below:</p> | | |

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| <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience.</p> <p>**Complex is defined as encompassing multiple Commercial Off the Shelf (COTS) products including front-end, back-end, database and middleware products.</p> | | |
|--|--|--|

| Rated Criteria | | Demonstrated Experienced | Max Points | Scoring | Score |
|----------------|--|--------------------------|------------|---|-------|
| R1 | <p>The Contractor should demonstrate, using project descriptions that the proposed resource has experience working with MS SQL Server in at least four (4) of the following areas:</p> <ul style="list-style-type: none"> - Data architecture, including: <ul style="list-style-type: none"> • Design changes to schema and existing applications/tables/data structures • Impact analysis and table modification • Archive design and implementation • Deletion of records - Developing and coordinating backup, disaster recovery and virus protection procedures - Developing, deploying and executing SQL scripts from and to different environments in support of the SQL database and the Siebel application. - Providing Data Management / Data Analysis support to Analysts, Developers, Testers, business analysts and Business Intelligence. - Developing and implementing procedures that will ensure the accuracy, completeness, | | /15 | <p>Less than 4 areas = 0 points</p> <p>4 areas = 5 points</p> <p>5 areas = 10 points</p> <p>6 areas = 15 points</p> | |

| | | | | | |
|-----------|---|--|------------|---|--|
| | <p>and timeliness of data stored in the database.</p> <ul style="list-style-type: none"> - Debugging database or query performance issues | | | | |
| R2 | <p>The Contractor should demonstrate, using project descriptions, that the proposed resource has experience in configuration, documentation, deployment for each of the following:</p> <ul style="list-style-type: none"> - Replication (e.g. ALWAYS ON) - Encryption (e.g. TLS, TDE) Data auditing | | /20 | <p>Less than 2 projects = 0 points</p> <p>2 projects = 5 points</p> <p>3 projects = 10 points</p> <p>4 projects = 15 points</p> <p>5 projects or more = 20 points</p> | |
| R3 | <p>The Contractor should demonstrate, using project descriptions, that the proposed resource has experience in designing, developing and implementing security procedures for the database, including access and user account management.</p> | | /20 | <p>Less than 2 projects = 0 points</p> <p>2 projects = 5 points</p> <p>3 projects = 10 points</p> <p>4 projects = 15 points</p> <p>5 projects or more = 20 points</p> | |
| R4 | <p>The Contractor should demonstrate, using project descriptions, that the proposed resource has experience developing and customizing database conversion strategies and routines.</p> | | /20 | <p>Less than 2 projects = 0 points</p> <p>2 projects = 5 points</p> <p>3 projects = 10 points</p> <p>4 projects = 15 points</p> <p>5 projects or more = 20 points</p> | |
| R5 | <p>The Contractor should demonstrate, using project descriptions, that the proposed</p> | | /15 | <p>Less than 1 year = 0 points</p> | |

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|---------------------------------|--|--|------------|---|--|
| | resource has experience implementing and supporting the MS SQL database server running in support of a Siebel application. | | | 1 to less than 3 years = 5 points 3 to less than 5 years = 10 points 5 years and more = 15 points | |
| Pass Mark = 65 out of 90 | | | /90 | | |

4. I.6 - Network Analyst

| # | Mandatory Criteria | Demonstrated Experience (Contractor to Insert Data) | Meets/ Does not meet |
|-----------|---|--|-------------------------|
| M1 | <p>The Contractor must demonstrate, using project descriptions that the proposed resource has the required years of experience working as a Network Analyst in accordance with the TBIPS Supply Arrangement Experience levels listed below. Referenced projects must demonstrate at least 50% of the associated tasks listed in Annex A – Statement of Work for the same resource category to qualify.</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience</p> | | |
| M2 | <p>The Contractor must provide at least two (2) references from related projects in the last five (5) years that can validate the knowledge and experience under M1 of the proposed resource. Information should include Organization, contact name, contact number, contact e-mail address, contact relationship to resource, a description of the projects and the date and duration of the contract.</p> <p>*Note The Crown will accept two (2) references from one (1) project only if a resource has been assigned to the project for five (5) or more years. References must be a resources direct supervisor, manager, or director in order to qualify. Applies to all Levels 1 to 3.</p> <p>Referenced projects must be no less than six (6) months in duration.</p> | | |

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| M3 | The Contractor must demonstrate that the proposed resource is willing and able to obtain Controlled Goods Clearance through the PWGSC Controlled Goods Clearance Program. The Contractor has a maximum of sixty (60) days to clear any proposed resources from the time of TA acceptance. Applies to all Levels 1 to 3. | | |
| M4 | The Contractor must demonstrate that the proposed resource holds a valid Microsoft Certified Systems Engineer (MCSE)* or a Microsoft Certified Systems Administrator (MCSA)* certification. Contractors must provide a copy of the certification. <i>*No substitutions will be accepted</i> | | |

| Rated Criteria | | Demonstrated Experienced | Max Points | Scoring | Score |
|----------------|--|--------------------------|------------|---|-------|
| R1 | The Contractor should demonstrate, using project descriptions, that the proposed resource has experience implementing and using Microsoft System Center Operations Manager (SCOM). | | /20 | Less than one year = 0 points 1 to less than 2 years = 5 points 2 to less than 3 years = 10 points 3 to less than 4 years = 15 5 years or more = 20 points | |
| R2 | The Contractor should demonstrate, using project descriptions, that the proposed resource has experience with LOAD Balancing technology and configuring applications to use load balancer. | | /20 | Less than one year = 0 points 1 to less than 2 years = 5 points 2 to less than 3 years = 10 points 3 to less than 4 years = 15 points 4 years or more = 20 points | |

| | | | | | |
|-----------|---|--|------------|--|--|
| R3 | The Contractor should demonstrate, using project descriptions, that the proposed resource has experience with installing, configuring or troubleshooting Microsoft SQL (version 2008 or higher) Server. | | /25 | Less than one year = 0 points 1 to less than 2 years = 5 points 2 to less than 3 years = 10 points 3 to less than 4 years = 15 points 4 to less than 5 years = 20 points 5 years and more = 25 points | |
| R4 | The Contractor should demonstrate, using project descriptions, that the proposed resource has experience with Transport Layer Security (TLS) 1.2 and with implementing applications using the TLS 1.2 technology. | | /15 | Less than 1 year = 0 points 1 to less than 3 years = 5 points 3 to less than 5 years = 10 points 5 years or more = 15 points | |
| R5 | The Contractor should demonstrate, using project descriptions, that the proposed resource has experience implementing, maintaining and troubleshooting firewalls. | | /15 | Less than 1 year = 0 points 1 to less than 3 years = 5 points 3 years to less than 5 years = 10 points 5 years or more = 15 points | |
| R6 | The Contractor should demonstrate, using project descriptions, that the proposed resource has experience working on multi-million* dollar IM/IT project(s). | | /20 | Less than 1 project = 0 points 1 to 2 projects = 5 points 3 to 4 projects = 10 points | |

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|----------------------------------|--|--|-------------|---|--|
| | <i>*Multi-million dollar is defined as greater than \$10 million.</i> | | | 5 to 6 projects = 15 points 7 projects or more = 20 points | |
| Pass Mark = 85 out of 115 | | | /115 | | |

5. I.10 - Technical Architect

| # | Mandatory Criteria | Demonstrated Experience (Contractor to Insert Data) | Meets/Does not meet |
|-----------|---|---|---------------------|
| M1 | <p>The Contractor must demonstrate, using project descriptions that the proposed resource has the required years of experience working as a Technical Architect in accordance with the TBIPS Supply Arrangement Experience levels listed below. Referenced projects must demonstrate at least 50% of the associated tasks listed in Annex A – Statement of Work for the same resource category to qualify.</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience</p> | | |
| M2 | <p>The Contractor must provide at least two (2) references from related projects in the last five (5) years that can validate the knowledge and experience under M1 of the proposed resource. Information should include Organization, contact name, contact number, contact e-mail address, contact relationship to resource, a description of the projects and the date and duration of the contract.</p> <p>*Note The Crown will accept two (2) references from one (1) project only if a resource has been assigned to the project for five (5) or more years. References must be a resources direct supervisor, manager, or director in order to qualify. Applies to all Levels 1 to 3.</p> <p>Referenced projects must be no less than six (6) months in duration.</p> | | |

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|-----------|---|--|--|
| M3 | The Contractor must demonstrate that the proposed resource is willing and able to obtain Controlled Goods Clearance through the PWGSC Controlled Goods Clearance Program. The Contractor has a maximum of sixty (60) days to clear any proposed resources from the time of TA acceptance. Applies to all Levels 1 to 3. | | |
| M4 | <p>The Contractor must demonstrate, using project descriptions, that the proposed resource has the required years of experience implementing IM/IT applications or solutions (within the last fifteen (15) years) in accordance with the TBIPS Supply Arrangement Experience levels listed below:</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience</p> | | |

| Rated Criteria | | Demonstrated Experienced | Max Points | Scoring | Score |
|----------------|---|--------------------------|------------|---|-------|
| R1 | The Contractor should demonstrate, using project descriptions, that the proposed resource has experience working, communicating and negotiating with clients, technical teams, and vendors in IM/IT application projects. | | /15 | <p>Less than 3 years = 0 points</p> <p>3 to less than 5 years = 5 points</p> <p>5 to less than 7 years = 10 points</p> <p>7 years or more = 15 points</p> | |
| R2 | The Contractor should demonstrate, using project descriptions, that the proposed resource has experience implementing and optimizing Siebel (version 7x or higher) architecture. | | /15 | <p>Less than 2 projects = 0 points</p> <p>2 projects = 5 points</p> <p>3 projects = 10 points</p> <p>4 or more projects = 15 points</p> | |
| R3 | The Contractor should demonstrate, using project descriptions, that the proposed | | /15 | <p>Less than 1 year = 0 points</p> | |

| | | | | | |
|---------------------------------|--|--|------------|--|--|
| | resource has experience with Transport Layer Security (TLS) 1.2 and implementing applications using the TLS 1.2 technology. | | | 1 to less than 3 years = 5 points 3 years to less than 5 years = 10 points 5 years and more = 15 points | |
| R4 | The Contractor should demonstrate, using project descriptions, that the proposed resource has experience implementing hardware and software changes to improve system performance through recommendations to address potential and actual bottlenecks. | | /15 | Less than 2 projects = 0 points 2 projects = 5 points 3 projects = 10 points 4 or more projects = 15 points | |
| R5 | The Contractor should demonstrate, using project descriptions, that the proposed resource has experience working on multi-million* dollar IM/IT project(s). <i>*Multi-million dollar is defined as greater than \$10 million.</i> | | /15 | Less than 2 projects = 0 points 2 projects = 5 points 3 projects = 10 points 4 or more projects = 15 points | |
| Pass Mark = 55 out of 75 | | | /75 | | |

6. I.11 - Technology Architect

| # | Mandatory Criteria | Demonstrated Experience (Contractor to Insert Data) | Meets/Does not meet |
|-----------|--|---|---------------------|
| M1 | The Contractor must demonstrate, using project descriptions that the proposed resource has the required years of experience working as a Technology Architect in accordance with the TBIPS Supply Arrangement Experience levels listed below. Referenced projects must demonstrate at least 50% of the associated tasks listed in Annex A – Statement of Work for the same resource category to qualify. | | |

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|-----------|---|--|--|
| | <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience</p> | | |
| M2 | <p>The Contractor must provide at least two (2) references from related projects in the last five (5) years that can validate the knowledge and experience under M1 of the proposed resource. Information should include Organization, contact name, contact number, contact e-mail address, contact relationship to resource, a description of the projects and the date and duration of the contract.</p> <p>*Note The Crown will accept two (2) references from one (1) project only if a resource has been assigned to the project for five (5) or more years. References must be a resources direct supervisor, manager, or director in order to qualify. Applies to all Levels 1 to 3.</p> <p>Referenced projects must be no less than six (6) months in duration.</p> | | |
| M3 | <p>The Contractor must demonstrate that the proposed resource is willing and able to obtain Controlled Goods Clearance through the PWGSC Controlled Goods Clearance Program. The Contractor has a maximum of sixty (60) days to clear any proposed resources from the time of TA acceptance. Applies to all Levels 1 to 3.</p> | | |
| M4 | <p>The Contractor must demonstrate, using project descriptions, that the proposed resource has the required years of experience working in IM/IT solution architecture within the last fifteen (15) years in accordance with the TBIPS Supply Arrangement Experience levels listed below:</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience.</p> | | |

| Rated Criteria | | Demonstrated Experienced | Max Points | Scoring | Score |
|----------------|---|--------------------------|------------|--|-------|
| R1 | The Contractor should demonstrate, using project descriptions, that the proposed resource has been the main contributor to the creation of at | | /15 | <p>Less than 3 documents = 0 points</p> <p>3 to 4 documents = 5 points</p> | |

| | | | | | |
|-----------|---|--|------------|---|--|
| | <p>least three (3) of the following documents:</p> <ul style="list-style-type: none"> - Concept of Business Operations Overview - Functional Components - Business Interaction Diagram - Information architecture - Information Exchange Matrix - Application Component Catalog - Function to Application Allocation - Application Interface Diagram - Logical Application Architecture - Concept of Operations - Logical Technology Architecture <p>*Validity may be confirmed via reference check.</p> | | | <p>5 to 6 documents = 10 points</p> <p>7 or more documents = 15 points</p> | |
| R2 | The Contractor should demonstrate, using project descriptions, that the proposed resource has experience working with clients, technical teams, and vendors in IM/IT application projects. | | /20 | <p>Less than 3 years = 0 points</p> <p>3 to less than 6 years = 5 points</p> <p>6 to less than 9 years = 10 points</p> <p>9 to less than 12 years = 15 points</p> <p>12 years or more = 20 points</p> | |
| R3 | The Contractor should demonstrate, using project descriptions, that the proposed resource has experience conducting business or options analysis and recommending IM/IT solutions that fit within the enterprise context. | | /20 | <p>Less than 3 years = 0 points</p> <p>3 years to less than 6 years = 5 points</p> <p>6 years to less than 9 years = 10 points</p> | |

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| | | | | 9 to less than 12 years = 15 points 12 years or more = 20 points | |
| R4 | The Contractor should demonstrate, using project descriptions, that the proposed resource has experience interpreting business requirements and converting them into integrated, strategic technology solutions for the delivery of IM/IT application / system projects that address identified business challenges. | | /15 | Less than 2 projects = 0 points 2 projects = 5 points 3 projects = 10 points 4 or more projects = 15 points | |
| R5 | The Contractor should demonstrate, using project descriptions, that the proposed resource has experience defining and evaluating system and solution deployment options with a view to risk minimization. | | /15 | Less than 2 projects = 0 points 2 projects = 5 points 3 projects = 10 points 4 or more projects = 15 points | |
| R6 | The Contractor should demonstrate, using project descriptions, that the proposed resource has experience evaluating hardware and software relative to their ability to support specified requirements and improving system performance through recommendations to address potential and actual bottlenecks. | | /15 | Less than 2 projects = 0 points 2 projects = 5 points 3 projects = 10 points 4 or more projects = 15 points | |
| R7 | The Contractor should demonstrate, using project descriptions, that the proposed resource has experience working on multi-million* dollar | | /15 | Less than 2 projects = 0 points 2 projects = 5 points | |

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| | IM/IT project(s). | | | 3 projects = 10 points 4 or more projects = 15 points | |
| | <i>*Multi-million dollar is defined as greater than \$10 million.</i> | | | | |
| Pass Mark = 85 out of 115 | | | /115 | | |

7. B.14 - Technical Writer

| # | Mandatory Criteria | Demonstrated Experience (Contractor to Insert Data) | Meets/Does not meet |
|-----------|--|---|---------------------|
| M1 | <p>The Contractor must demonstrate, using project descriptions that the proposed resource has the required years of experience working as a Technical Writer in accordance with the TBIPS Supply Arrangement Experience levels listed below. Referenced projects must demonstrate at least 50% of the associated tasks listed in Annex A – Statement of Work for the same resource category to qualify.</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience</p> | | |
| M2 | <p>The Contractor must provide at least two (2) references from related projects in the last five (5) years that can validate the knowledge and experience under M1 of the proposed resource. Information should include Organization, contact name, contact number, contact e-mail address, contact relationship to resource, a description of the projects and the date and duration of the contract.</p> <p><i>*Note The Crown will accept two (2) references from one (1) project only if a resource has been assigned to the project for five (5) or more years. References must be a resources direct supervisor, manager, or director in order to qualify. Applies to all Levels 1 to 3.</i></p> <p>Referenced projects must be no less than six (6) months in duration.</p> | | |
| M3 | <p>The Contractor must demonstrate that the proposed resource is willing and able to obtain Controlled Goods Clearance through the PWGSC Controlled Goods Clearance Program. The Contractor has a maximum of sixty (60) days to clear any proposed resources from the time of TA acceptance. Applies to all Levels 1 to 3.</p> | | |

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| M4 | <p>The Contractor must demonstrate, using project descriptions, that the proposed resource has the required years of experience (within the past 15 years) as a Technical Writer determining documentation requirements for application development projects in accordance with the TBIPS Supply Arrangement Experience levels listed below:</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience</p> | | |
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| Rated Criteria | | Demonstrated Experienced | Max Points | Scoring | Score |
|---------------------------------|---|--------------------------|------------|---|-------|
| R1 | The Contractor should demonstrate, using project descriptions, that the proposed resource has experience developing documentation plans for large (more than 1,000 users) systems. | | /15 | 1 - 2 projects = 5 points 3 - 4 projects = 10 points 5 or more projects = 15 points | |
| R2 | The Contractor should demonstrate, using project descriptions, that the proposed resource has experience developing technical and user documentation for IM/IT systems. | | /20 | 1 - 2 projects = 5 points 3 - 4 projects = 10 points 5 - 6 projects = 15 points 6 or more projects = 20 points | |
| R3 | The Contractor should demonstrate using project descriptions, that the proposed resource has experience reviewing and assessing existing technical documentation and developing and executing plans based on the results. | | /15 | 1 - 2 projects = 5 points 3 to 4 projects = 10 points 5 or more projects = 15 points | |
| Pass Mark = 35 out of 50 | | | /50 | | |

Workstream 3 – Testing Services

1. A.10 - Test Coordinator

| # | Mandatory Criteria | Demonstrated Experience (Contractor to Insert Data) | Meets/Does not meet |
|-----------|---|--|---------------------|
| M1 | <p>The Contractor must demonstrate, using project descriptions that the proposed resource has the required years of experience working as a Test Coordinator in accordance with the TBIPS Supply Arrangement Experience levels listed below. Referenced projects must demonstrate at least 50% of the associated tasks listed in Annex A – Statement of Work for the same resource category to qualify.</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience</p> | | |
| M2 | <p>The Contractor must provide at least two (2) references from related projects in the last five (5) years that can validate the knowledge and experience under M1 of the proposed resource. Information should include Organization, contact name, contact number, contact e-mail address, contact relationship to resource, a description of the projects and the date and duration of the contract.</p> <p>*Note The Crown will accept two (2) references from one (1) project only if a resource has been assigned to the project for five (5) or more years. References must be a resources direct supervisor, manager, or director in order to qualify. Applies to all Levels 1 to 3.</p> <p>Referenced projects must be no less than six (6) months in duration.</p> | | |
| M3 | <p>The Contractor must demonstrate that the proposed resource is willing and able to obtain Controlled Goods Clearance through the PWGSC Controlled Goods Clearance Program. The Contractor has a maximum of sixty (60) days to clear any proposed resources from the time of TA acceptance. Applies to all Levels 1 to 3.</p> | | |
| M4 | <p>The Contractor must demonstrate, using project descriptions that the proposed resource has the required years of experience with developing testing environments, test scripts, test packages for systems and applications, within</p> | | |

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| | <p>the last twenty (20) years in accordance with the TBIPS Supply Arrangement Experience levels listed below:</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience.</p> | | |
| M5 | <p>The Contractor must demonstrate, using project descriptions, that the proposed resource has the required years of experience as a automation test developer availing of automated test tools, using Neoload or RFT Rational Functional Tester within the past twenty (20) years in accordance with the TBIPS Supply Arrangement Experience levels listed below:</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience.</p> | | |
| M6 | <p>The Contractor must demonstrate, using project descriptions, that the proposed resource has the required combined years of experience in all aspects of software application testing: analysis, planning, performance, automation, and user acceptance within the last twelve (12) years in accordance with the TBIPS Supply Arrangement Experience levels listed below:</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience.</p> | | |

| Rated Criteria | | Demonstrated Experienced | Max Points | Scoring | Score |
|----------------|--|--------------------------|------------|--|-------|
| R1 | The Contractor should demonstrate, using project descriptions, that the proposed resource has experience setting-up test environments, building frame work for Siebel CRM and .Net applications using Java | | /25 | <p>Less than 2 years = 0 points</p> <p>2 to less than 4 years = 5 points</p> <p>4 to less than 6 years = 10 points</p> | |

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| | scripting and/or coding for systems and applications. | | | 6 to less than 8 years =15 points 8 to less than 10 years =20 points 10 years and more = 25 points | |
| R2 | The Contractor should demonstrate, using project descriptions, that the proposed resource has experience in using automated testing software and other packages or custom built testing tools to simulate the executing of system and application performance test transactions, or automation functional test scripts, using either NeoLoad or RFT (Rational Functional Tester) **Contractors must indicate software and version used to validate this experience. | | /25 | Less than 2 years = 0 points 2 to less than 4 years = 5 points 4 to less than 6 years = 10 points 6 to less than 8 years =15 points 8 to less than 10 years =20 points 10 years and more = 25 points | |
| R3 | The Contractor should demonstrate, using project descriptions, that the proposed resource has experience with Localization Testing (with in the past (30) years. | | /20 | Less than 3 years = 0 points 3 to less than 5 years = 5 points 5 to less than 7 years = 10 points 7 to less than 9 years = 15 points 9 years and more = 20 points | |
| R4 | The Contractor should demonstrate, using project descriptions, that the proposed resource has experience testing .NET applications. | | /5 | Less than 2 years = 0 points 2 to less than 5 years = 1 point 5 to less than 8 years = 3 points | |

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| | | | | 8 years and more = 5 points | |
| R5 | The Contractor should demonstrate, using project descriptions, that the proposed resource has experience testing Siebel (version 7x or higher) products. | | /20 | Less than 2 years = 0 points 2 to less than 4 years = 5 points 4 to less than 6 years = 10 points 6 to less than 8 years = 15 points 8 years and more = 20 points | |
| R6 | The Contractor should demonstrate that the proposed resource has at least one (1) of the following: <ul style="list-style-type: none"> • Performance testing certification • Software testing certification • Computer Engineering degree • Computer Science degree • Software Engineering degree Examples include, but are not limited to: HP ATP – LoadRunner, IBM Rational Performance Tester, or Rational Functional Tester A copy of the certification or degree must be provided with the bid. | | /10 | Certification or degree = 10 points | |
| R7 | The Contractor should demonstrate, using project descriptions that the proposed resource has experience independently drafting, reviewing, and consensus building performance or | | /20 | 1 project = 5 points 2 projects = 10 points 3 projects = 15 points | |

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| | <p>automation functional testing strategies.</p> <p>The Contractor must provide one (1) sample extensive performance testing plan that was produced and managed by the proposed resource in the last five (5) years</p> | | | 4 or more projects = 20 points | |
| R8 | <p>The Contractor should demonstrate, using project descriptions that the proposed resource has experience identifying and articulating issues, and presenting solution options in regards to Performance or Automation Functional Testing, within the last five (5) years. Contractors should describe, in detail, at least one (1) issue and its related presented solution option.</p> | | /25 | <p>1 project = 5 points</p> <p>2 projects = 10 points</p> <p>3 projects = 15 points</p> <p>4 projects = 20 points</p> <p>5 or more projects = 25 points</p> | |
| R9 | <p>The Contractor should demonstrate, using project descriptions, that the proposed resource has experience with all following levels of software system testing (within the past twenty (20) years):</p> <ul style="list-style-type: none"> • Analysis • Planning • Performance • Automation • User acceptance | | /25 | <p>Less than 2 years = 0 points</p> <p>2 to less than 4 years = 5 points</p> <p>4 to less than 6 years = 10 points</p> <p>6 to less than 8 years =15 points</p> <p>8 to less than 10 years =20 points</p> <p>10 years and more = 25 points</p> | |

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| R10 | The Contractor should demonstrate, using project descriptions that the proposed resource has worked more than six (6) months on the same project within the past two (2) years. | | /10 | Less than 6 months = 0 points 6 months to less than 1 year = 5 points 1 year and more = 10 points | |
| Pass Mark = 140 out of 185 | | | /185 | | |

2. A.11 - Tester

| # | Mandatory Criteria | Demonstrated Experience (Contractor to Insert Data) | Meets/Does not meet |
|-----------|--|--|---------------------|
| M1 | <p>The Contractor must demonstrate, using project descriptions that the proposed resource has the required years of experience working as a Tester in accordance with the TBIPS Supply Arrangement Experience levels listed below. Referenced projects must demonstrate at least 50% of the associated tasks listed in Annex A – Statement of Work for the same resource category to qualify.</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience</p> | | |
| M2 | <p>The Contractor must provide at least two (2) references from related projects in the last five (5) years that can validate the knowledge and experience under M1 of the proposed resource. Information should include Organization, contact name, contact number, contact e-mail address, contact relationship to resource, a description of the projects and the date and duration of the contract.</p> <p>*Note The Crown will accept two (2) references from one (1) project only if a resource has been assigned to the project for five (5) or more years. References must be a resources direct supervisor, manager, or director in order to qualify. Applies to all Levels 1 to 3.</p> | | |

| # | Mandatory Criteria | Demonstrated Experience (Contractor to Insert Data) | Meets/Does not meet |
|-----------|---|---|---------------------|
| | Referenced projects must be no less than six (6) months in duration. | | |
| M3 | The Contractor must demonstrate that the proposed resource is willing and able to obtain Controlled Goods Clearance through the PWGSC Controlled Goods Clearance Program. The Contractor has a maximum of sixty (60) days to clear any proposed resources from the time of TA acceptance. Applies to all Levels 1 to 3. | | |
| M4 | The Contractor must demonstrate, using project descriptions that the proposed resource has the required years of experience with practical hands-on experience writing test cases and developing test scripts and test packages for systems and applications, within the last twelve (12) years in accordance with the TBIPS Supply Arrangement Experience levels listed below: Level 1: < 5 years of experience Level 2: 5- < 10 years of experience Level 3: 10+ years of experience.. | | |
| M5 | The Contractor must demonstrate using project descriptions that the proposed resource has the required years of experience as a Tester availing of Rational Functional Tester tool within the past fifteen (15) years in accordance with the TBIPS Supply Arrangement Experience levels listed below: Level 1: < 5 years of experience Level 2: 5- < 10 years of experience Level 3: 10+ years of experience | | |

| Rated Criteria | | Demonstrated Experienced | Max Points | Scoring | Score |
|----------------|---|--------------------------|------------|------------------------------|-------|
| R1 | The Contractor should demonstrate, using project descriptions, that the proposed resource has experience in using automated testing | | /25 | Less than 2 years = 0 points | |

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| | <p>software and other packages or custom-built testing tools to simulate the executing of system and application performance test transactions or automation functional test scripts, using either NeoLoad or RFT (Rational Functional Tester</p> <p>**Contractors must indicate software and version used to validate this experience.</p> | | | <p>2 to less than 4 years = 5 points</p> <p>4 to less than 6 years = 10 points</p> <p>6 to less than 8 years =15 points</p> <p>8 to less than 10 years =20 points</p> <p>10 years and more = 25 points</p> | |
| R2 | <p>The Contractor should demonstrate, using project descriptions, that the proposed resource has experience with all following levels of software system testing (within the past twenty (20) years):</p> <ul style="list-style-type: none"> • Analysis • Planning • Performance • Automation • User acceptance | | /25 | <p>Less than 2 years = 0 points</p> <p>2 to less than 4 years = 5 points</p> <p>4 to less than 6 years = 10 points</p> <p>6 to less than 8 years =15 points</p> <p>8 to less than 10 years =20 points</p> <p>10 years and more = 25 points</p> | |
| R3 | <p>The Contractor should demonstrate, using project descriptions, that the proposed resource has experience testing .NET applications.</p> | | /25 | <p>Less than 2 years = 0 points</p> <p>2 to less than 4 years = 5 points</p> <p>4 to less than 6 years = 10 points</p> <p>6 to less than 8 years =15 points</p> <p>8 to less than 10 years =20 points</p> <p>10 years and more = 25 points</p> | |

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| R4 | The Contractor should demonstrate, using project descriptions, that the proposed resource has experience testing Siebel (version 7x or higher) products. | | /15 | <p>Less than 2 years = 0 points</p> <p>2 to less than 5 years = 5 points</p> <p>5 to less than 8 years = 10 points</p> <p>8 years and more = 15 points</p> | |
| R5 | <p>The Contractor should demonstrate that the proposed resource has at least one (1) of the following:</p> <ul style="list-style-type: none"> • Performance testing certification • Software testing certification • Computer Engineering degree • Computer Science degree • Software Engineering degree <p>Examples include, but are not limited to: HP ATP – LoadRunner, IBM Rational Performance Tester, or Rational Functional Tester</p> <p>A copy of the certification or degree must be provided with the bid.</p> | | /10 | Certification and/or degree = 10 points | |
| R6 | The Contractor should demonstrate, using project descriptions that the proposed resource has experience with Performance testing or Automation Functional Testing. | | /25 | <p>Less than 2 years = 0 points</p> <p>2 to less than 4 years = 5 points</p> <p>4 to less than 6 years = 10 points</p> <p>6 to less than 8 years = 15 points</p> | |

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|------------|--|--|------------|---|--|
| | | | | 8 to less than 10 years =20 points 10 years and more = 25 points | |
| R7 | The Contractor should demonstrate, using project descriptions, that the proposed resource has experience with Data Migration testing (within the past twenty (20) years). | | /25 | Less than 2 years = 0 points 2 to less than 4 years = 5 points 4 to less than 6 years = 10 points 6 to less than 8 years =15 points 8 to less than 10 years =20 points 10 years and more = 25 points | |
| R8 | The Contractor should demonstrate, using project descriptions that the proposed resource has experience with Microsoft Test Manager product. | | /15 | Less than 1 year = 0 points 1 to less than 3 years = 5 points 3 to less than 5 years = 10 points 5 years and more = 15 points | |
| R9 | The Contractor should demonstrate, using project description, that the proposed resource has experience with working on *multi-million dollar project(s). *Multi-Million dollar means greater than \$10 million. | | /5 | Less than 1 project = 0 points 1 to 2 projects = 1 point 3 to 4 projects = 3 points 5 or more projects = 5 points | |
| R10 | The Contractor should demonstrate, using project descriptions that the proposed resource has worked more than | | /15 | Less than 6 months = 0 points | |

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| | six (6) months on the same project within the past two (2) years. | | | 6 months to less than 1 year = 10 points 1 year and more = 15 points | |
| Pass Mark = 135 out of 185 | | | /185 | | |

Workstream 4 – Business Services

1. A.11 - Tester

| # | Mandatory Criteria | Demonstrated Experience (Contractor to Insert Data) | Meets/Does not meet |
|-----------|---|--|---------------------|
| M1 | <p>The Contractor must demonstrate, using project descriptions that the proposed resource has the required years of experience working as a Tester in accordance with the TBIPS Supply Arrangement Experience levels listed below. Referenced projects must demonstrate at least 50% of the associated tasks listed in Annex A – Statement of Work for the same resource category to qualify.</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience</p> | | |
| M2 | <p>The Contractor must provide at least two (2) references from related projects in the last five (5) years that can validate the knowledge and experience under M1 of the proposed resource. Information should include Organization, contact name, contact number, contact e-mail address, contact relationship to resource, a description of the projects and the date and duration of the contract.</p> <p>*Note The Crown will accept two (2) references from one (1) project only if a resource has been assigned to the project for five (5) or more years. References must be a resources direct supervisor, manager, or director in order to qualify. Applies to all Levels 1 to 3.</p> <p>Referenced projects must be no less than six (6) months in duration.</p> | | |
| M3 | <p>The Contractor must demonstrate that the proposed resource is willing and able to obtain Controlled Goods Clearance through the PWGSC Controlled Goods Clearance Program. The Contractor has a maximum of sixty (60) days to clear any proposed resources from the time of TA acceptance. Applies to all Levels 1 to 3.</p> | | |
| M4 | <p>The Contractor must demonstrate, using project descriptions, that the proposed resource has the required years of cumulative practical hands-on experience writing test cases and developing test scripts and test packages for systems and applications, within the last twelve (12) years in</p> | | |

| # | Mandatory Criteria | Demonstrated Experience (Contractor to Insert Data) | Meets/Does not meet |
|-----------|--|---|---------------------|
| | <p>accordance with the TBIPS Supply Arrangement Experience levels listed below:</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience.</p> | | |
| M5 | <p>The Contractor must demonstrate, using project descriptions, that the proposed resource has the required years of experience coding AND executing automation tests using *Rational Functional Tester within the past ten (15) years in accordance with the TBIPS Supply Arrangement Experience levels listed below:</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience..</p> <p>*Version of Rational Functional Tester must be provided.</p> | | |
| M6 | <p>The Contractor must demonstrate, using project descriptions, that the proposed resource has the required years of hands on experience with *Performance Testing of large scale mission-critical IT Systems in accordance with the TBIPS Supply Arrangement Experience levels listed below:</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience</p> <p>*Experience must include all of the following types of testing:</p> <ul style="list-style-type: none"> -Stress -Load -Endurance -Volume -Scalability -Spike | | |

| Rated Criteria | | Demonstrated Experienced | Max Points | Scoring | Score |
|----------------|--|--------------------------|------------|---|-------|
| R1 | The Contractor should demonstrate, using project descriptions, that the proposed resource has at least five (5) years of documented experience writing test cases and developing test scripts and test packages for systems and applications, within the last eleven (11) years. | | /20 | Less than 5 years = 0 points 5 to less than 7 years = 5 points 7 to less than 9 years = 10 points 9 to less than 11 years = 15 points 11 years and more = 20 points | |
| R2 | The Contractor should demonstrate, using project descriptions, that the proposed resource has at least three (3) years of experience within the past eleven (11) years.as a Tester utilizing Rational Functional Tester. **Version of Rational Functional Tester must be provided. | | /25 | Less than 3 years = 0 points 3 to less than 5 years = 5 points 5 to less than 7 years = 10 points 7 to less than 9 years = 15 points 9 to less than 11 years = 20 points 11 years and more = 25 points | |
| R3 | The Contractor should demonstrate, using project descriptions, that the proposed resource has at least five (5) years of experience within the past eleven (11) years using automated testing software and other packages or custom-built testing tools to simulate the executing of system and application test transactions in real time | | /20 | Less than 5 years = 0 points 5 to less than 7 years = 5 points 7 to less than 9 years = 10 points 9 to less than 11 years = 15 points | |

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|-----------|--|--|------------|---|--|
| | | | | 11 years and more = 20 points | |
| R4 | The Contractor should demonstrate, using project descriptions, that the proposed resource has combined experience in all aspects of software system testing: analysis, planning, performance, automation, and user acceptance within the last five (5) years. | | /10 | Less than 3 years = 0 points 3 to less than 5 years = 5 points 5 years and more = 10 points | |
| R5 | The Contractor should demonstrate, using project descriptions, that the proposed resource has experience writing User Journeys and cross-referencing them to Business Processes and Requirements. | | /20 | Less than 5 years = 0 points 5 to less than 7 years = 5 points 7 to less than 9 years = 10 points 9 to less than 11 years = 15 points 11 years and more = 20 points | |
| R6 | The Contractor should demonstrate, using project descriptions, that the proposed resource has experience in using automated testing software and other packages or custom-built testing tools to simulate the executing of system and application test transactions. | | /20 | Less than 5 years = 0 points 5 to less than 7 years = 5 points 7 to less than 9 years = 10 points 9 to less than 11 years = 15 points 11 years and more = 20 points | |

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| R7 | <p>The Contractor should demonstrate, using project descriptions, that the proposed resource has experience with all of the following levels of software system testing (within the past twenty (20) years):</p> <ul style="list-style-type: none"> • Analysis • Planning • Performance • Automation • User acceptance | | /20 | <p>Less than 5 years = 0 points</p> <p>5 to less than 7 years = 5 points</p> <p>7 to less than 9 years = 10 points</p> <p>9 to less than 11 years = 15 points</p> <p>11 years and more = 20 points</p> | |
| R8 | <p>The Contractor should demonstrate, using project descriptions, that the proposed resource has experience testing .NET applications.</p> | | /15 | <p>Less than 2 years = 0 points</p> <p>2 to less than 5 years = 5 points</p> <p>5 to less than 8 years = 10 points</p> <p>8 years and more = 15 points</p> | |
| R9 | <p>The Contractor should demonstrate, using project descriptions, that the proposed resource has experience testing Siebel (version 7x or higher) products.</p> | | /15 | <p>Less than 2 years = 0 points</p> <p>2 to less than 5 years = 5 points</p> <p>5 to less than 8 years = 10 points</p> <p>8 years and more = 15 points</p> | |
| Pass Mark = 120 out of 165 | | | /165 | | |

2. B.1 - Business Analyst

| # | Mandatory Criteria | Demonstrated Experience (Contractor to Insert Data) | Meets/Does not meet |
|-----------|---|--|---------------------|
| M1 | <p>The Contractor must demonstrate, using project descriptions that the proposed resource has the required years of experience working as a Business Analyst in accordance with the TBIPS Supply Arrangement Experience levels listed below. Referenced projects must demonstrate at least 50% of the associated tasks listed in Annex A – Statement of Work for the same resource category to qualify.</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience</p> | | |
| M2 | <p>The Contractor must provide at least two (2) references from related projects in the last five (5) years that can validate the knowledge and experience under M1 of the proposed resource. Information should include Organization, contact name, contact number, contact e-mail address, contact relationship to resource, a description of the projects and the date and duration of the contract.</p> <p>*Note The Crown will accept two (2) references from one (1) project only if a resource has been assigned to the project for five (5) or more years. References must be a resources direct supervisor, manager, or director in order to qualify. Applies to all Levels 1 to 3.</p> <p>Referenced projects must be no less than six (6) months in duration.</p> | | |
| M3 | <p>The Contractor must demonstrate that the proposed resource is willing and able to obtain Controlled Goods Clearance through the PWGSC Controlled Goods Clearance Program. The Contractor has a maximum of sixty (60) days to clear any proposed resources from the time of TA acceptance. Applies to all Levels 1 to 3.</p> | | |
| M4 | <p>The Contractor must demonstrate that the proposed resource has the required years of experience working as Business Analysts for IM/IT solution projects (tasks include: identifying/documenting business requirements; report mock-ups based on client requirements; assist with</p> | | |

| # | Mandatory Criteria | Demonstrated Experience (Contractor to Insert Data) | Meets/Does not meet |
|---|---|--|---------------------|
| | <p>drafting of User acceptance test cases) within the last fifteen (15) years in accordance with the TBIPS Supply Arrangement Experience levels listed below:</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience</p> | | |

| Rated Criteria | | Demonstrated Experienced | Max Points | Scoring | Score |
|----------------|--|--------------------------|------------|--|-------|
| R1 | <p>The Contractor should demonstrate, using project descriptions that the proposed resource has experience performing a minimum of four (4) or more tasks related to Business Analysis for each project described. Projects within the past fifteen (15) years will be considered and evaluated.</p> <p>Examples of tasks which would be considered acceptable include but are not limited to:</p> <ul style="list-style-type: none"> Defining non-functional and functional requirements using Business Requirements Documents, Use Cases, Systems Requirements Documents etc. Describing as-is processes and to-be processes Writing User Acceptance Criteria Running requirements gathering workshops | | /25 | <p>Less than 2 years = 0 points</p> <p>2 to less than 4 years = 5 points</p> <p>4 to less than 6 years = 10 points</p> <p>6 to less than 8 years = 15 points</p> <p>8 to less than 10 years = 20 points</p> <p>10 years and over = 25 points</p> | |

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| | <ul style="list-style-type: none"> Performing a functional decomposition of an existing system | | | | |
| R2 | The Contractor should demonstrate, using project descriptions that the proposed resource has experience as a Business Analyst responding to questions from either Designers, Developers or Quality Assurance Analysts resulting from their review of business requirements during the design, development and testing phases. Projects within the past fifteen (15) years will be considered and evaluated. | | /25 | Less than 2 years = 0 points 2 to less than 4 years = 5 points 4 to less than 6 years = 10 points 6 to less than 8 years = 15 points 8 to less than 10 years = 20 points 10 years and over = 25 points | |
| R3 | The Contractor should demonstrate, using project descriptions that the proposed resource has experience assisting with and attending system walkthrough sessions with the clients and developers to validate requirements and to document any requests for functional changes to the solution. Projects within the past fifteen (15) years will be considered and evaluated. | | /25 | Less than 2 years = 0 points 2 to less than 4 years = 5 points 4 to less than 6 years = 10 points 6 to less than 8 years = 15 points 8 to less than 10 years = 20 points 10 years and over = 25 points | |
| R4 | The Contractor should demonstrate, using project descriptions that the proposed resource has experience working as a Business Analyst on a complex IM/IT project for a minimum of twelve (12) consecutive months or more within the past fifteen (15) years. Points will not be awarded for a Business Analyst's work which was of less than twelve (12) | | /25 | Less than 2 years = 0 points 2 to less than 4 years = 5 points 4 to less than 6 years = 10 points 6 to less than 8 years = 15 points | |

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| | months duration on a project. Multiple projects of more than twelve months can be added together to create a cumulative total. Bids should reflect the start and end date of each participant's participation on each project. | | | 8 to less than 10 years = 20 points 10 years and over = 25 points | |
| R5 | The Contractor should demonstrate, using project descriptions that the proposed resource has a minimum of five (5) years experience working with a requirements management tool (e.g. Blueprint) and working in Excel to generate reports. | | /5 | Less than 5 years = 0 points 5 years and more = 5 points | |
| R6 | The Contractor should demonstrate, using project descriptions that the proposed resource has experience as a Business Analyst working on IM/IT systems with a budget in excess of \$15 million. Projects within the past fifteen (15) years will be considered and evaluated. | | /20 | Less than 1 IM/IT system = 0 points 1 IM/IT system = 5 points 2 IM/IT systems = 10 points 3 IM/IT systems = 15 points More than 3 IM/IT systems = 20 points | |
| Pass Mark = 90 out of 110 | | | /125 | | Please select. |

3. B.9 - Courseware Developer

| # | Mandatory Criteria | Demonstrated Experience (Contractor to Insert Data) | Meets/Does not meet |
|-----------|---|--|---------------------|
| M1 | <p>The Contractor must demonstrate, using project descriptions that the proposed resource has the required years of experience working as Courseware Developer in accordance with the TBIPS Supply Arrangement Experience levels listed below. Referenced projects must demonstrate at least 50% of the associated tasks listed in Annex A – Statement of Work for the same resource category to qualify.</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience</p> | | |
| M2 | <p>The Contractor must provide at least two (2) references from related projects in the last five (5) years that can validate the knowledge and experience under M1 of the proposed resource. Information should include Organization, contact name, contact number, contact e-mail address, contact relationship to resource, a description of the projects and the date and duration of the contract.</p> <p>*Note The Crown will accept two (2) references from one (1) project only if a resource has been assigned to the project for five (5) or more years. References must be a resources direct supervisor, manager, or director in order to qualify. Applies to all Levels 1 to 3.</p> <p>Referenced projects must be no less than six (6) months in duration.</p> | | |
| M3 | <p>The Contractor must demonstrate that the proposed resource is willing and able to obtain Controlled Goods Clearance through the PWGSC Controlled Goods Clearance Program. The Contractor has a maximum of sixty (60) days to clear any proposed resources from the time of TA acceptance. Applies to all Levels 1 to 3.</p> | | |

| Rated Criteria | | Demonstrated Experienced | Max Points | Scoring | Score |
|----------------|---|--------------------------|------------|---|-------|
| R1 | The Contractor should demonstrate using project descriptions that the proposed resource has experience in assessing/analyzing the needs of its clients and making appropriate recommendations. | | /20 | Less than 2 years 0 points 2 to less than 5 years = 5 points 5 to less than 8 years = 10 points 8 to less than 11 years = 15 points 11 years or more = 20 points | |
| R2 | The Contractor should demonstrate using project descriptions that the proposed resource has experience developing at least four (4) different types of user-focused content including but not limited to the following examples: <ul style="list-style-type: none"> • Online assistance • Printed manuals • Realistic examples • Tutorials • Self-paced training courses • Instructor-led training material | | /20 | Less than 2 years = 0 points 2 to less than 5 years = 5 points 5 to less than 8 years = 10 points 8 to less than 11 years = 15 points 11 years or more = 20 points | |
| R3 | The Contractor should demonstrate using project descriptions that the proposed resource has experience developing IM/IT training material. | | /20 | Less than 2 years = 0 points 2 to less than 5 years = 5 points 5 to less than 8 years = 10 points 8 to less than 11 years = 15 points 11 years or more = 20 points | |

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| R4 | The Contractor should demonstrate, using project descriptions that the proposed resource has at least ten (10) years of experience within the last fifteen (15) years working in IT Courseware development. | | /20 | Less than 10 years = 0 points 10 to less than 12 years = 5 points 12 to less than 14 years = 10 points 14 to less than 16 years = 15 points 16 years and more = 20 points | |
| R5 | The Contractor should demonstrate, using project descriptions that the proposed resource has at least ten (10) years of experience within the last fifteen (15) years analyzing needs, developing and delivering IM/IT training material. | | /20 | Less than 10 years = 0 points 10 to less than 12 years = 5 points 12 to less than 14 years = 10 points 14 to less than 16 years = 15 points 16 years and more = 20 points | |
| R6 | The Contractor should demonstrate using project descriptions that the proposed resource has successfully delivered IM/IT training material. | | /10 | Less than 2 years = 0 points 2 to less than 5 years = 5 points 5 years and more = 10 points | |
| R7 | The Contractor should demonstrate using project descriptions that the proposed resource has experience managing and leading the IT Courseware Development following Project Management standards. | | /20 | Less than 2 years = 0 points 2 to less than 5 years = 5 points 5 to less than 8 years = 10 points 8 to less than 11 years = 15 points | |

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| | | | | 11 years and more = 20 points | |
| R8 | The Contractor should demonstrate using project descriptions, that the proposed resource has experience working in a large IT environment (more than 5,000 seats environment) within the past fifteen (15) years. | | /20 | Less than 2 years = 0 points 2 to less than 5 years = 5 points 5 to less than 8 years = 10 points 8 to less than 11 years = 15 points 11 years and more = 20 points | |
| Pass Mark = 110 out of 150 | | | /150 | | Please select. |

4. **B.14 - Technical Writer**

| # | Mandatory Criteria | Demonstrated Experience (Contractor to Insert Data) | Meets/Does not meet |
|-----------|--|---|---------------------|
| M1 | <p>The Contractor must demonstrate, using project descriptions that the proposed resource has the required years of experience working as a Technical Writer in accordance with the TBIPS Supply Arrangement Experience levels listed below. Referenced projects must demonstrate at least 50% of the associated tasks listed in Annex A – Statement of Work for the same resource category to qualify.</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience</p> | | |
| M2 | <p>The Contractor must provide at least two (2) references from related projects in the last five (5) years that can validate the knowledge and experience under M1 of the proposed resource. Information should include Organization, contact name, contact number, contact e-mail address, contact relationship to resource, a description of the projects and the date and duration of the contract.</p> <p>*Note The Crown will accept two (2) references from one (1) project only if a resource has been assigned to the project for five (5) or</p> | | |

| # | Mandatory Criteria | Demonstrated Experience (Contractor to Insert Data) | Meets/Does not meet |
|-----------|---|---|---------------------|
| | more years. References must be a resources direct supervisor, manager, or director in order to qualify. Applies to all Levels 1 to 3. Referenced projects must be no less than six (6) months in duration. | | |
| M3 | The Contractor must demonstrate that the proposed resource is willing and able to obtain Controlled Goods Clearance through the PWGSC Controlled Goods Clearance Program. The Contractor has a maximum of sixty (60) days to clear any proposed resources from the time of TA acceptance. Applies to all Levels 1 to 3. | | |

| Rated Criteria | | Demonstrated Experienced | Max Points | Scoring | Score |
|----------------|--|--------------------------|------------|--|-------|
| R1 | The Contractor should demonstrate, using project descriptions, that the proposed resource has experience developing documentation plans for large (more than 1,000 users) systems. | | /15 | Less than 1 project = 0 points 1 - 2 projects = 5 points 3 - 4 projects = 10 points 5 or more projects = 15 points | |
| R2 | The Contractor should demonstrate, using project descriptions, that the proposed resource has experience developing technical and user focused documentation for IM/IT systems. | | /30 | Less than 1 project = 0 points 1 - 2 projects = 5 points 3 - 4 projects = 10 points 5 - 6 projects = 15 points 7 - 8 projects = 20 points 9 - 10 projects = | |

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| | | | | 25 points More than 10 projects = 30 points | |
| R3 | The Contractor should demonstrate using project descriptions, that the proposed resource has experience reviewing and assessing existing technical documentation, with the goal of making recommendations to project stakeholders on potential improvements. | | /15 | Less than 1 project = 0 points 1 - 2 projects = 5 points 3 to 4 projects = 10 points 5 or more projects = 15 points | |
| R4 | The Contractor should demonstrate, using project descriptions, that the proposed resource has a minimum of ten(10) years of recent experience (within the past 15 years) acting in the role of a Technical Writer tasked with determining documentation requirements for application development projects. | | /20 | Less than 10 years = 0 points 10 to less than 12 years = 5 points 12 to less than 14 years = 10 points 14 to less than 16 years = 15 points 16 years and more = 20 points | |
| Pass Mark = 60 out of 80 | | | /80 | | Please select. |

5. P.1 - Change Management Consultant

| # | Mandatory Criteria | Demonstrated Experience (Contractor to Insert Data) | Meets/Does not meet |
|-----------|--|---|---------------------|
| M1 | The Contractor must demonstrate, using project descriptions that the proposed resource has the required years of experience working as a Change Management Consultant in accordance with the TBIPS Supply Arrangement Experience levels listed below. Referenced projects must demonstrate at least 50% of the associated tasks listed in Annex A – Statement of Work for the same resource category to qualify. | | |

| # | Mandatory Criteria | Demonstrated Experience (Contractor to Insert Data) | Meets/Does not meet |
|-----------|---|---|---------------------|
| | <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience</p> | | |
| M2 | <p>The Contractor must provide at least two (2) references from related projects in the last five (5) years that can validate the knowledge and experience under M1 of the proposed resource. Information should include Organization, contact name, contact number, contact e-mail address, contact relationship to resource, a description of the projects and the date and duration of the contract.</p> <p>*Note The Crown will accept two (2) references from one (1) project only if a resource has been assigned to the project for five (5) or more years. References must be a resources direct supervisor, manager, or director in order to qualify. Applies to all Levels 1 to 3.</p> <p>Referenced projects must be no less than six (6) months in duration.</p> | | |
| M3 | <p>The Contractor must demonstrate that the proposed resource is willing and able to obtain Controlled Goods Clearance through the PWGSC Controlled Goods Clearance Program. The Contractor has a maximum of sixty (60) days to clear any proposed resources from the time of TA acceptance. Applies to all Levels 1 to 3.</p> | | |

| Rated Criteria | | Demonstrated Experienced | Max Points | Scoring | Score |
|----------------|--|--------------------------|------------|---|-------|
| R1 | The Contractor should demonstrate, using project descriptions that the proposed resource has experience conducting change readiness assessments and providing recommendations to clients for addressing pain points. | | /20 | <p>Less than 1 year = 0 points</p> <p>1 to less than 3 years = 5 points</p> <p>3 to less than 5 years = 10 points</p> <p>5 to less than 7 years = 15 points</p> | |

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| | | | | 7 years and more = 20 points | |
| R2 | The Contractor should demonstrate, using project descriptions that the proposed resource has experience developing communications products to further change management requirements and adapting those materials to diverse audiences. | | /20 | Less than 1 year = 0 points 1 to less than 3 years = 5 points 3 to less than 5 years = 10 points 5 to less than 7 years = 15 points 7 years and more = 20 points | |
| R3 | The Contractor should demonstrate, using project descriptions that the proposed resource has experience facilitating stakeholder discussions, identifying business processes improvements and successfully implementing the improvements. | | /20 | Less than 1 year = 0 points 1 to less than 3 years = 5 points 3 to less than 5 years = 10 points 5 to less than 7 years = 15 points 7 years and more = 20 points | |
| R4 | The Contractor should demonstrate, using project descriptions that the proposed resource has at least ten (10) years of experience within the last fifteen (15) years) working in Change Management | | /15 | Less than 10 years = 0 points 10 to less than 12 years = 5 points 12 to less than 14 years = 10 points 14 years and more = 15 points | |
| R5 | The Contractor should demonstrate, using project descriptions that the proposed resource has at least five (5) years of experience within the past ten (10) years managing change management activities for IT projects within an environment with | | /20 | Less than 5 years = 0 points 5 to less than 7 years = 5 points 7 to less than 9 years = 10 points | |

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| | at least three different types of user groups (e.g. departmental, non-government, individual citizens, other government departments, agencies) | | | 9 to less than 11 years = 15 points 11 years and more = 20 points | |
| R6 | The Contractor should demonstrate, using project descriptions that the proposed resource has experience managing client expectations, providing consultative advice, guidance and coaching, and developing consensus. | | /20 | Less than 1 year = 0 points 1 to less than 3 years = 5 points 3 to less than 5 years = 10 points 5 to less than 7 years = 15 points 7 years and more = 20 points | |
| R7 | The Contractor should demonstrate, using project descriptions that the proposed resource has experience conducting performance monitoring of change management activities. | | /15 | Less than 2 years = 0 points 2 to less than 5 years = 5 points 5 to less than 8 years = 10 points 8 years and more = 15 points | |
| R8 | The Contractor should demonstrate that the proposed resource has successfully completed a change management certificate or certification within the last five years. Proof of valid certificate or certification must be provided. | | /10 | Certification = 10 points | |
| Pass Mark = 105 out of 140 | | | /140 | | Please select. |

6. P.9 - Project Manager

| # | Mandatory Criteria | Demonstrated Experience (Contractor to Insert Data) | Meets/Does not meet |
|-----------|---|--|---------------------|
| M1 | <p>The Contractor must demonstrate, using project descriptions that the proposed resource has the required years of experience working as a Project Manager in accordance with the TBIPS Supply Arrangement Experience levels listed below. Referenced projects must demonstrate at least 50% of the associated tasks listed in Annex A – Statement of Work for the same resource category to qualify.</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience</p> | | |
| M2 | <p>The Contractor must provide at least two (2) references from related projects in the last five (5) years that can validate the knowledge and experience under M1 of the proposed resource. Information should include Organization, contact name, contact number, contact e-mail address, contact relationship to resource, a description of the projects and the date and duration of the contract.</p> <p>*Note The Crown will accept two (2) references from one (1) project only if a resource has been assigned to the project for five (5) or more years. References must be a resources direct supervisor, manager, or director in order to qualify. Applies to all Levels 1 to 3.</p> <p>Referenced projects must be no less than six (6) months in duration.</p> | | |
| M3 | <p>The Contractor must demonstrate that the proposed resource is willing and able to obtain Controlled Goods Clearance through the PWGSC Controlled Goods Clearance Program. The Contractor has a maximum of sixty (60) days to clear any proposed resources from the time of TA acceptance. Applies to all Levels 1 to 3.</p> | | |

| Rated Criteria | | Demonstrated Experienced | Max Points | Scoring | Score |
|----------------|---|--------------------------|------------|---|-------|
| R1 | <p>The Contractor should demonstrate, using project descriptions, that the proposed resource has experience leading Public Sector Information Management or Information Technology projects within a large organization.</p> <p>Large is defined as more than 5,000 Geographically dispersed users.</p> | | /15 | <p>Less than 5 years = 0 points</p> <p>5 to less than 10 years = 5 points</p> <p>10 to less than 15 years = 10 points</p> <p>15 years or more = 15 points</p> | |
| R2 | <p>The Contractor should demonstrate, using project descriptions, that the proposed resource has experience leading Public Sector Information Management or Information Technology projects within a large organization globally distributed (more than one [1] continent).</p> | | /10 | <p>Less than 1 year = 0 points</p> <p>1 to less than 2 years = 5 points</p> <p>2 years or more = 10 points</p> | |
| R3 | <p>The Contractor should demonstrate, using project descriptions, that the proposed resource has experience providing strategic advice to executives on the following:</p> <ul style="list-style-type: none"> • Project deliverable, content, scope and timeframes; • Defining and documenting team objectives; and, • Reporting on project execution and performance. | | /15 | <p>Less than 5 years = 0 points</p> <p>5 to less than 10 years = 5 points</p> <p>10 to less than 15 years = 10 points</p> <p>15 years or more = 15 points</p> | |
| R4 | <p>The Contractor should demonstrate, using project descriptions that the proposed resource has a minimum of ten (10) years of experience managing large projects as a project manager within a federal government or agency.</p> | | /20 | <p>Less than 10 years = 0 points</p> <p>10 to less than 12 years = 5 points</p> <p>12 to less than 14 years = 10 points</p> | |

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| | Large projects are defined as projects which contain matrixed multidisciplinary teams with a project value of \$5M or more. | | | 14 to less than 16 years = 15 points 16 years and more = 20 points | |
| R5 | <p>The Contractor should demonstrate, using project descriptions that the proposed resource has experience as a project manager managing complex multi-team projects in all of the following areas of project management:</p> <ul style="list-style-type: none"> • Project Scope Management • Project Time Management • Project Cost Management • Project Change Requests • Project Communications Management • Project Risk Management • Project Deliverables • Project Documentation • Project Evaluation • Project Stakeholder Management | | /20 | <p>Less than 5 years = 0 points</p> <p>5 years to less than 10 years = 10 points</p> <p>10 years to less than 15 years = 15 points</p> <p>15 years or more = 20 points</p> | |
| R6 | <p>The Contractor should demonstrate, by providing copies of the certificates, that the proposed resource has:</p> <ul style="list-style-type: none"> • PMP certification • Prince 2 (Practitioner or Foundations) <p>Note: A valid copy of the Certification must be submitted with the Contractor's proposal.</p> | | /10 | <p>1 certification = 5 Points</p> <p>2 certifications = 10 points</p> | |
| R7 | <p>The Contractor should demonstrate, using project descriptions, that the proposed resource has a minimum of ten (10) years within the last 15 years of combined demonstrated experience in all of the following:</p> <ul style="list-style-type: none"> • writing project proposals; • project plans; • cost estimates; and, | | /20 | <p>Less than 10 years = 0 points</p> <p>10 to less than 12 years = 5 points</p> <p>12 to less than 14 years = 10 points</p> | |

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| | <ul style="list-style-type: none"> project roadmaps. | | | 14 to less than 16 years = 15 points 16 years and more = 20 points | |
| R8 | <p>The Contractor should demonstrate, using project descriptions, that the proposed resource has a minimum of ten (10) years within the last fifteen (15) years of combined demonstrated experience in performing all of the following tasks as part of projects:</p> <ul style="list-style-type: none"> Planning scope, timeline, cost, human resources, risks, communication overall, and procurement Business Process Re-engineering | | /20 | Less than 10 years = 0 points 10 to less than 12 years = 5 points 12 to less than 14 years = 10 points 14 to less than 16 years = 15 points 16 years and more = 20 points | |
| R9 | <p>The Contractor should demonstrate, using project descriptions that the proposed resource has experience working within a centralized Project Management Office in a large IM/IT environment.</p> <p>Large IT environment is defined as more than 5,000 geographically dispersed users.</p> | | /30 | Less than 5 years = 0 points 5 to less than 10 years = 10 points 10 to less than 15 years = 20 points 15 years or more = 30 points | |
| R10 | <p>The Contractor should demonstrate, using project descriptions, that the proposed resource has experience providing proposals with regards to strategies that would maximize project completion and success on at least one (1) business transformation project.</p> | | /20 | 1 project = 10 points 2 or more projects = 20 points | |
| R11 | <p>The Contractor should demonstrate, using project descriptions the proposed resources has combined experience managing relationships with project</p> | | /20 | 1 project = 10 points 2 or more projects = 20 Points | |

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| | <p>stakeholder relations on a project with all of the following:</p> <ul style="list-style-type: none">• internal stakeholders,• external stakeholder(s). <p>To be accepted, stakeholders must be identified and the Contractor must provide an explanation of how they are a "stakeholder" (i.e. what is their stake).</p> | | | | |
| Pass Mark = 150 out of 200 | | | /200 | | Please select. |

Workstream 5 – Project Support Services

1. A.1 - Application/Software Architect

| # | Mandatory Criteria | Demonstrated Experience (Contractor to Insert Data) | Meets/Does not meet |
|-----------|---|--|---------------------|
| M1 | <p>The Contractor must demonstrate, using project descriptions that the proposed resource has the required years of experience working as an Application Software Architect in accordance with the TBIPS Supply Arrangement Experience levels listed below. Referenced projects must demonstrate at least 50% of the associated tasks listed in Annex A – Statement of Work for the same resource category to qualify.</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience</p> | | |
| M2 | <p>The Contractor must provide at least two (2) references from related projects in the last five (5) years that can validate the knowledge and experience under M1 of the proposed resource. Information should include Organization, contact name, contact number, contact e-mail address, contact relationship to resource, a description of the projects and the date and duration of the contract.</p> <p>*Note The Crown will accept two (2) references from one (1) project only if a resource has been assigned to the project for five (5) or more years. References must be a resources direct supervisor, manager, or director in order to qualify. Applies to all Levels 1 to 3.</p> <p>Referenced projects must be no less than six (6) months in duration.</p> | | |
| M3 | <p>The Contractor must demonstrate that the proposed resource is willing and able to obtain Controlled Goods Clearance through the PWGSC Controlled Goods Clearance Program. The Contractor has a maximum of sixty (60) days to clear any proposed resources from the time of TA acceptance. Applies to all Levels 1 to 3.</p> | | |
| M4 | <p>The Contractor must demonstrate, using project descriptions that the proposed resource has the required years of experience within the past twelve (12) years with</p> | | |

| # | Mandatory Criteria | Demonstrated Experience (Contractor to Insert Data) | Meets/Does not meet |
|---|--|--|---------------------|
| | <p>facilitating consultation sessions with stakeholders in accordance with the TBIPS Supply Arrangement Experience levels listed below:</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience.</p> <p>Duties must include:</p> <ul style="list-style-type: none"> gathering business, technical or functional requirements that are required to deliver business or application solutions. <p>*this may include meeting with stakeholders, such as: senior management, technical staff, clients and project managers.</p> | | |

| Rated Criteria | | Demonstrated Experienced | Max Points | Scoring | Score |
|----------------|---|--------------------------|------------|--|-------|
| R1 | <p>The Contractor should demonstrate using project descriptions, that the proposed resource has experience managing at least four (4) tasks related to implementing applications or solutions within the past twenty (20) years.</p> <p>List of tasks:</p> <ul style="list-style-type: none"> Validating Business Requirements System design Data modeling System development Quality Assurance System Architecture | | /10 | <p>Less than 10 years = 0 points</p> <p>10 to less than 15 years = 5 points</p> <p>15 years and more = 10 points</p> | |
| R2 | The Contractor should demonstrate using project descriptions, that the proposed | | /15 | Less than 10 years = 0 points | |

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| | resource has project experience translating business requirements into design and preparation of technical specification documents within the past twenty (20) years. | | | 10 to less than 12 years = 5 points 12 to less than 14 years = 10 points 14 years and more = 15 points | |
| R3 | The Contractor should demonstrate using project descriptions that the proposed resource has project experience in integrating different technologies or products from different vendors for the delivery of application/system projects. within the past twenty (20) years | | /15 | Less than 10 years = 0 points 10 to less than 12 years = 5 points 12 to less than 14 years = 10 points 14 years and more = 15 points | |
| R4 | The Contractor should demonstrate, using project descriptions that the proposed resource has experience working as Application/Software Architect with Blueprint (Requirements Management Tool) and Excel. within the past eight (8) years. | | /10 | Less than 2 years = 0 points 2 to less than 4 years = 5 points 4 years and more = 10 points | |
| R5 | The Contractor should demonstrate, using project description that the proposed resource has experience working with Team Foundation Server (TFS) within the past eight (8) years. | | /10 | Less than 2 years = 0 points 2 to less than 4 years = 5 points 4 years and more = 10 points | |
| R6 | The Contractor should demonstrate, using project description that the proposed resource has experience working with .Net within the past eight (8) years. | | /10 | Less than 2 years = 0 points 2 to less than 4 years = 5 points 4 years and more = 10 points | |
| R7 | The Contractor should demonstrate, using project description that the proposed resource has experience working | | /10 | Less than 2 years = 0 points | |

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| | with Siebel within the past eight (8) years. | | | 2 to less than 4 years = 5 points 4 years and more = 10 points | |
| Pass Mark = 60 out of 80 | | | /80 | | |

2. I.11 - Technology Architect

| # | Mandatory Criteria | Demonstrated Experience (Contractor to Insert Data) | Meets/Does not meet |
|-----------|---|---|---------------------|
| M1 | <p>The Contractor must demonstrate, using project descriptions that the proposed resource has the required years of experience working as a Technology Architect in accordance with the TBIPS Supply Arrangement Experience levels listed below. Referenced projects must demonstrate at least 50% of the associated tasks listed in Annex A – Statement of Work for the same resource category to qualify.</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience</p> | | |
| M2 | <p>The Contractor must provide at least two (2) references from related projects in the last five (5) years that can validate the knowledge and experience under M1 of the proposed resource. Information should include Organization, contact name, contact number, contact e-mail address, contact relationship to resource, a description of the projects and the date and duration of the contract.</p> <p>*Note The Crown will accept two (2) references from one (1) project only if a resource has been assigned to the project for five (5) or more years. References must be a resources direct supervisor, manager, or director in order to qualify. Applies to all Levels 1 to 3.</p> <p>Referenced projects must be no less than six (6) months in duration.</p> | | |
| M3 | The Contractor must demonstrate that the proposed resource is willing and able to obtain Controlled Goods | | |

| # | Mandatory Criteria | Demonstrated Experience (Contractor to Insert Data) | Meets/Does not meet |
|-----------|---|--|---------------------|
| | Clearance through the PWGSC Controlled Goods Clearance Program. The Contractor has a maximum of sixty (60) days to clear any proposed resources from the time of TA acceptance. Applies to all Levels 1 to 3. | | |
| M4 | <p>The Contractor must demonstrate, using project descriptions that the proposed resource has the required years of experience within the last fifteen (15) years working in IM/IT solution architecture in accordance with the TBIPS Supply Arrangement Experience levels listed below:</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience</p> | | |
| M5 | <p>The Contractor must demonstrate, using project descriptions that the proposed resource has the required years of experience within the last fifteen (15) years in implementing IM/IT applications or solutions in accordance with the TBIPS Supply Arrangement Experience levels listed below:</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience</p> | | |

| Rated Criteria | | Demonstrated Experienced | Max Points | Scoring | Score |
|----------------|--|--------------------------|------------|---|-------|
| R1 | The Contractor should demonstrate, using project descriptions that the proposed resource has project experience working with clients, technical teams and vendors in IM/IT application projects. | | /20 | <p>Less than 7 years = 0 points</p> <p>7 to less than 10 years = 5 points</p> <p>10 to less than 13 years = 10 points</p> <p>13 to less than 16 years = 15 points</p> | |

| | | | | | |
|-----------|--|--|------------|---|--|
| | | | | 16 years and more = 20 points | |
| R2 | The Contractor should demonstrate, using project descriptions that the proposed resource has project experience in conducting business or options analysis and recommending IM/IT solutions that fit within the enterprise context. | | /25 | Less than 7 years = 0 points 7 to less than 9 years = 5 points 9 to less than 11 years = 10 points 11 to less than 13 years = 15 points 13 to less than 15 years = 20 points 15 years and more = 25 points | |
| R3 | The Contractor should demonstrate, using project descriptions that the proposed resource has experience in interpreting business requirements and converting those into integrated, strategic technology solutions for the delivery of IM/IT application/system projects that address identified business challenges and requirements. | | /20 | Less than 2 projects = 0 points 2 projects = 5 points 3 projects = 10 points 4 projects = 15 points 5 or more projects = 20 points | |
| R4 | The Contractor should demonstrate, using project descriptions, that the proposed resource has experience in creating and maintaining a Security Requirement Traceability Matrix (SRTM). | | /20 | Less than 2 projects = 0 points 2 projects = 5 points 3 projects = 10 points 4 projects = 15 points | |

| | | | | | |
|-----------|---|--|------------|---|--|
| | | | | 5 and more projects = 20 points | |
| R5 | The Contractor should demonstrate, using project descriptions, that the proposed resource has experience in risk minimization by defining and evaluating system and solution deployment options. | | /20 | Less than 2 projects = 0 points 2 projects = 5 points 3 projects = 10 points 4 projects = 15 points 5 and more projects = 20 points | |
| R6 | The Contractor should demonstrate, using project descriptions, that the proposed resource has experience evaluating hardware and software and making recommendations to address specific requirements improving system performance and addressing potential and actual bottlenecks. | | /20 | Less than 2 projects = 0 points 2 projects = 5 points 3 projects = 10 points 4 projects = 15 points 5 and more projects = 20 points | |
| R7 | The Contractor should demonstrate, using project descriptions, that the proposed resource has experience working as a Technology Architect on projects having a minimum value of \$10 million. | | /15 | Less than 1 project = 0 points 1 project = 5 points 2 projects = 10 points 3 and more projects = 15 points | |
| R8 | The Contractor should demonstrate that the proposed resource has a valid IT | | /15 | Certification = 15 points | |

| | | | | | |
|-----------------------------------|---|--|-------------|--|----------------|
| | Architecture certification. A copy of the certification must be provided with the proposal. | | | | |
| Pass Mark = 115 out of 155 | | | /155 | | Please select. |

3. P.9 - Project Manager

| # | Mandatory Criteria | Demonstrated Experience (Contractor to Insert Data) | Meets/Does not meet |
|-----------|---|--|---------------------|
| M1 | <p>The Contractor must demonstrate, using project descriptions that the proposed resource has the required years of experience working as a Project Manager in accordance with the TBIPS Supply Arrangement Experience levels listed below. Referenced projects must demonstrate at least 50% of the associated tasks listed in Annex A – Statement of Work for the same resource category to qualify.</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience</p> | | |
| M2 | <p>The Contractor must provide at least two (2) references from related projects in the last five (5) years that can validate the knowledge and experience under M1 of the proposed resource. Information should include Organization, contact name, contact number, contact e-mail address, contact relationship to resource, a description of the projects and the date and duration of the contract.</p> <p>*Note The Crown will accept two (2) references from one (1) project only if a resource has been assigned to the project for five (5) or more years. References must be a resources direct supervisor, manager, or director in order to qualify. Applies to all Levels 1 to 3.</p> <p>Referenced projects must be no less than six (6) months in duration.</p> | | |

| | | | |
|-----------|---|--|----------------|
| M3 | The Contractor must demonstrate that the proposed resource is willing and able to obtain Controlled Goods Clearance through the PWGSC Controlled Goods Clearance Program. The Contractor has a maximum of sixty (60) days to clear any proposed resources from the time of TA acceptance. Applies to all Levels 1 to 3. | | |
| M4 | <p>The Contractor must demonstrate, using project descriptions that the proposed has the required years of experience within the last fifteen (15) years working as an IM/IT Project Manager within a federal government department/ agency or equivalent, in size and scope, private sector organization in accordance with the TBIPS Supply Arrangement Experience levels listed below:</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience</p> <p>*Large projects are defined as projects which contain matrixed multidisciplinary teams with a project value of \$5M or more.</p> | | Please select. |

| Rated Criteria | | Demonstrated Experienced | Max Points | Scoring | Score |
|----------------|--|--------------------------|------------|---|-------|
| R1 | <p>The Contractor should demonstrate using project descriptions, that the proposed resource has experience managing complex projects which included responsibility for managing at least five (5) of the following nine (9) aspects related to project management for a minimum of five (5) years each to be considered (within the last fifteen (15) years).</p> <ol style="list-style-type: none"> 1. Scope management 2. Time management 3. Cost management 4. Quality management 5. HR management 6. Communication management 7. Risk management 8. Procurement management | | /25 | <p>Less than 5 aspects = 0 points</p> <p>5 aspects = 5 points</p> <p>6 aspects = 10 points</p> <p>7 aspects = 15 points</p> <p>8 aspects = 20 points</p> <p>9 aspects = 25 points</p> | |

| | | | | | |
|-----------|---|--|------------|---|--|
| | 9. Stakeholder management | | | | |
| R2 | <p>The Contractor should demonstrate, using project descriptions, that the proposed has experience advising IM/IT senior management such as executive director, director general and/or CIO level or equivalent within the last fifteen (15) years.</p> <p>Advice could include the following:</p> <ul style="list-style-type: none"> • Project deliverable, content, scope and timeframes; and • Reporting on project execution and performance. | | /20 | <p>Less than 8 years = 0 points</p> <p>8 to less than 10 years = 5 points</p> <p>10 to less than 12 years = 10 points</p> <p>12 to less than 14 years = 15 points</p> <p>14 years or more = 20 points</p> | |
| R3 | <p>The Contractor should demonstrate using project description that the proposed has experience with Microsoft Project working as an IM/IT Project Manager within the last fifteen (15) years.</p> | | /20 | <p>Less than 2 years = 0 point</p> <p>2 to less than 5 years = 5 points</p> <p>5 to less than 8 years = 10 points</p> <p>8 to less than 11 years = 15 points</p> <p>11 years and more = 20 points</p> | |
| R4 | <p>The Contractor should demonstrate using project descriptions, that the proposed has experience working on IM/IT system projects where the project duration was a minimum of twelve (12) consecutive months within the last fifteen (15) years.</p> | | /20 | <p>Less than 1 IM/IT system project = 0 points</p> <p>1-2 IM/IT system projects = 5 points</p> <p>3-4 IM/IT systems projects = 10 points</p> <p>5-6 IM/IT systems projects = 15 points</p> | |

| | | | | | |
|-----------|--|--|------------|--|--|
| | | | | 7 and more IM/IT systems projects = 20 points | |
| R5 | <p>The Contractor should demonstrate, using project descriptions, that the proposed resource has experience working on IM/IT projects as a project manager.</p> <p>Each project with a minimum value of fifteen (15) million dollars within the last fifteen (15) years.</p> <p>To qualify, the resource must have worked on the project for a minimum of 12 consecutive months.</p> | | /15 | <p>Less than 1 IM/IT system = 0 points</p> <p>1 IM/IT system = 5 points</p> <p>2 IM/IT systems = 10 points</p> <p>3 and more IM/IT systems = 15 points</p> | |
| R6 | <p>The Contractor should demonstrate, using project descriptions that the proposed has experience working with Team Foundation Server (TFS) within the last five (5) years.</p> | | /10 | <p>Less than 1 year = 0 points</p> <p>1 year and more = 10 points</p> | |
| R7 | <p>The Contractor should demonstrate, using project descriptions that the proposed has experience with planning and coordinating all resources needed to execute UAT and Training (including system acceptance criteria) of IM/IT systems in both official languages.</p> | | /20 | <p>Less than 5 years = 0 points</p> <p>5 to less than 8 years = 5 points</p> <p>8 to less than 11 years = 10 points</p> <p>11 to less than 14 years = 15 points</p> <p>14 years and more = 20 points</p> | |
| R8 | <p>The Contractor should demonstrate, using project descriptions that the proposed has experience managing IM/IT change and with planning and coordinating all resources needed to build, deploy and transition</p> | | /25 | <p>Less than 8 years = 0 points</p> <p>8 to less than 10 years = 5 points</p> <p>10 to less than 12 years = 10 points</p> <p>12 to less than 14 years = 15 points</p> | |

| | | | | | |
|------------|--|--|------------|---|--|
| | IM/IT application release to operations. | | | 14 to less than 16 years = 20 points 16 years and more = 25 points | |
| R9 | <p>The Contractor should demonstrate, using project descriptions, that the proposed has experience leading Information Management or Information Technology projects within a large organization.</p> <p>*Large is defined as more than 5,000 geographically dispersed users.</p> | | /30 | Less than 5 years = 0 points 5 to less than 7 years = 5 points 7 to less than 9 years = 10 points 9 to less than 11 years = 15 points 11 to less than 13 years = 20 points 13 to less than 15 years = 25 points 15 years and more = 30 points | |
| R10 | The Contractor should demonstrate, using project descriptions, that the proposed has experience leading Information Management or Information Technology projects within a large organization globally distributed (more than one [1] continent). | | /15 | Less than 1 project = 0 points 1 – 2 projects = 5 points 3 – 4 projects = 10 points 5 or more projects = 15 points | |
| R11 | <p>The Contractor should demonstrate, using project descriptions, that the proposed has combined experience as a project manager managing complex, multiteam projects in all of the following areas of project management:</p> <ol style="list-style-type: none"> 1. Project Integration Management 2. Project Scope Management | | /15 | Less than 5 years = 0 points 5 to less than 10 years = 5 points 10 to less than 15 years = 10 points 15 years and more years = 15 points | |

| | | | | | |
|------------|--|--|------------|---|--|
| | 3. Project Time Management 4. Project Cost Management 5. Project Communications Management 6. Project Risk Management 7. Project Procurement Management 8. Project Stakeholder Management | | | | |
| R12 | <p>The Contractor should demonstrate that the proposed resource has at least 1 of the following certifications:</p> <ul style="list-style-type: none"> • PMP certification and/or • Prince 2 (Practitioner or Foundations) • Or other certification recognized by an international body. <p>A copy of the Certification must be submitted with the Contractor's proposal.</p> | | /10 | 1 certification = 5 points 2 certifications = 10 points | |
| R13 | <p>The Contractor should demonstrate, using project descriptions, that the proposed resource has experience within a central Project Management Office or IM/IT Office in a large IT environment.</p> <p>*Large IT environment is defined as more than 5,000 geographically dispersed users.</p> | | /30 | Less than 5 years = 0 points 5 to less than 7 years = 5 points 7 to less than 9 years = 10 points 9 to less than 11 years = 15 points 11 to less than 13 years = 20 points 13 to less than 15 years = 25 points 15 years and more = 30 points | |
| R14 | <p>The Contractor should demonstrate, using project descriptions, that the proposed resource has combined experience managing stakeholder relations on a project with all of the following:</p> | | /20 | 1 project = 10 points 2 or more projects = 20 points | |

| | | | | | |
|-----------------------------------|---|--|-------------|--|----------------|
| | <ol style="list-style-type: none"> 1. internal stakeholders, 2. external government stakeholder(s), and 3. external private sector stakeholder(s). | | | | |
| Pass Mark = 205 out of 275 | | | /275 | | Please select. |

4. P.10 - Project Scheduler

| # | Mandatory Criteria | Demonstrated Experience (Contractor to Insert Data) | Meets/ Does not meet |
|-----------|---|--|-------------------------|
| M1 | <p>The Contractor must demonstrate, using project descriptions that the proposed resource has the required years of experience working as a Project Scheduler in accordance with the TBIPS Supply Arrangement Experience levels listed below. Referenced projects must demonstrate at least 50% of the associated tasks listed in Annex A – Statement of Work for the same resource category to qualify.</p> <p>Level 1: < 5 years of experience</p> <p>Level 2: 5- < 10 years of experience</p> <p>Level 3: 10+ years of experience</p> | | |
| M2 | <p>The Contractor must provide at least two (2) references from related projects in the last five (5) years that can validate the knowledge and experience under M1 of the proposed resource. Information should include Organization, contact name, contact number, contact e-mail address, contact relationship to resource, a description of the projects and the date and duration of the contract.</p> <p>*Note The Crown will accept two (2) references from one (1) project only if a resource has been assigned to the project for five (5) or more years. References must be a resources direct supervisor, manager, or director in order to qualify. Applies to all Levels 1 to 3.</p> <p>Referenced projects must be no less than six (6) months in duration.</p> | | |
| M3 | The Contractor must demonstrate that the proposed resource is willing and able to obtain Controlled Goods Clearance through the PWGSC Controlled Goods | | |

| # | Mandatory Criteria | Demonstrated Experience (Contractor to Insert Data) | Meets/ Does not meet |
|---|--|--|-------------------------|
| | Clearance Program. The Contractor has a maximum of sixty (60) days to clear any proposed resources from the time of TA acceptance. Applies to all Levels 1 to 3. | | |

| Rated Criteria | | Demonstrated Experienced | Max Points | Scoring | Score |
|----------------|---|--------------------------|------------|--|-------|
| R1 | <p>The Contractor should demonstrate, using project descriptions that the proposed resource has a minimum of five (5) years of project management / scheduling experience. For project experience to qualify, the resource must have been responsible for at least four (4) of the following seven (7) project management / scheduling aspects (within the past 15 years).</p> <ol style="list-style-type: none"> 1. Developing Master project schedules 2. Performing Earned Value Analysis 3. Identifying, manage and analyze critical paths 4. Developing Work breakdown structure 5. Performing Resource levelling 6. Performing Task/activity sequencing 7. Creating GANTT charts | | /20 | <p>Less than 4 of the listed aspects = 0 points</p> <p>4 out of 7 = 5 points</p> <p>5 out of 7 = 10 points</p> <p>6 out of 7 = 15 points</p> <p>7 out of 7 = 20 points</p> | |
| R2 | <p>The Contractor should demonstrate, using project descriptions that the proposed resource has a minimum of three (3) years of project management / scheduling experience. For project experience to qualify, the resource must have has been responsible</p> | | /20 | <p>Less than 4 of the listed aspects = 0 points</p> <p>4 out of 7 = 5 points</p> | |

| | | | | | |
|-----------|---|--|------------|---|--|
| | <p>for at least four (4) of the following seven (7) project management / scheduling aspects (within the past 15 years).</p> <ol style="list-style-type: none"> 1. Developing Master project schedules 2. Performing Earned Value Analysis 3. Identifying, manage and analyze critical paths 4. Developing Work breakdown structure 5. Performing Resource levelling 6. Performing Task/activity sequencing 7. Creating GANTT charts | | | <p>5 out of 7 = 10 points</p> <p>6 out of 7 = 15 points</p> <p>7 out of 7 = 20 points</p> | |
| R3 | <p>The Contractor should demonstrate using project descriptions that the proposed resource has experience with project management techniques and processes as part of a team managing complex IM/IT development projects (within the past 10 years).</p> <p><i>**A Complex project is defined as having a Project Complexity and Risk Assessment (PCRA) rating of level 4 in accordance to Treasury Board guidelines, as per https://www.tpsgc-pwgsc.gc.ca/biens-property/sngp-npms/pcra-ecrp/risqueproj-riskmnl-eng.html#p22.</i></p> | | /20 | <p>Less than 1 year = 0 points</p> <p>1 to less than 3 years = 5 points</p> <p>3 to less than 5 years = 10 points</p> <p>5 to less than 7 years = 15 points</p> <p>7 years and over = 20 points</p> | |
| R4 | <p>The Contractor should demonstrate using project descriptions that the proposed resource has experience working with Microsoft Project as a Project Scheduler.</p> | | /15 | <p>Less than 2 years = 0 points</p> <p>2 to less than 5 years = 5 points</p> <p>5 to less than 8 years = 10 points</p> <p>8 years and over = 15 points</p> | |

| | | | | | |
|----------------------------------|---|--|-------------|---|----------------|
| R5 | The Contractor should demonstrate, using project descriptions, that the proposed resource has experience as a project scheduler within a central Project Management Office in a large IT environment (more than 5,000 seats environment) (within the past 15 years) | | /15 | Less than 2 years = 0 points 2 to less than 5 years = 5 points 5 to less than 8 years = 10 points 8 years and over = 15 points | |
| R6 | The Contractor should demonstrate that the proposed resource has project scheduling experience for projects developing and implementing IM/IT systems in excess of \$15 million (within the past 15 years). For project experience to qualify, the resource must have performed the role on the project for a minimum of 6 consecutive months within the last years. | | /15 | 1 IM/IT system project = 5 points 2 IM/IT systems project = 10 points 3 or more IM/IT systems project = 15 points | |
| Pass Mark = 75 out of 105 | | | /105 | | Please select. |

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 – Unilingual French or English or Bilingual

The Contractor certifies that the proposed resource(s) in response to this draft Task Authorization is/are

Unilingual English - 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.

Unilingual French - fluent in French. The individual(s) proposed must be able to communicate orally and in writing in French without any assistance and with minimal errors.

Bilingual - fluent in both official languages of Canada (French and English). The individual(s) proposed must be able to communicate orally and in writing in French and English without any assistance and with minimal errors.

Print name of authorized individual & sign above

Date

ATTACHMENT 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" | |

| | | |
|--|-------------------|---------------|
| 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.] | | |
| Workstream covered by this bid: Bidders should indicate which Workstream they are proposing to supply in this bid (If the bidder has submitted bid for one or more Workstreams, please only indicate the Workstream covered by this bid). | Workstream | Yes/No |
| | Workstream 1 | |
| | Workstream 2 | |
| | Workstream 3 | |
| | Workstream 4 | |
| | Workstream 5 | |
| <p>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:</p> <ol style="list-style-type: none"> 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 2

BID EVALUATION CRITERIA

Note: Bidders may respond to one, or all Workstreams. Each Workstream will be evaluated separately and up to two contracts will be awarded per Workstream.

Workstream 1 - Data Management

1. Evaluation Summary (Workstream 1)

| No. | Mandatory Criteria | Compliant Yes/No |
|--|--|------------------|
| M-1 ^{PB} | Corporate Experience (Contracts) | |
| | • Reference Contract #1 | |
| | • Reference Contract #2 | |
| | • Reference Contract #3 | |
| M-2 ^{PB} | Corporate Experience (Resources) | |
| M-3 ^{PB} | Corporate Experience (Controlled Goods) | |
| M-4 ^{PB} | Corporate Experience | |
| No. | Point-Rated Criteria | Maximum Points |
| R-1 | Reference Contracts | 30 |
| | 1) Reference Contract #1 | |
| | 2) Reference Contract #2 | |
| | 3) Reference Contract #3 | |
| R-2 | ISO Quality Management Certification | 25 |
| R-3 | Corporate Experience (Bilingual Resources) | 20 |
| R-4 | Resource Management Processes | 160 |
| R-5 | Corporate Experience in Excess of M-4 | 100 |
| Overall Maximum Points | | 335 |
| Pass Mark (70% of Overall Maximum Points) | | 234.5 |

2. Corporate Mandatory Evaluation Criteria

| Item | Mandatory Criteria | Demonstrated Experience |
|------------------------|---|-------------------------|
| M1^{PB} | <p>The Bidder must provide three (3) Customer Reference Contracts, with a cumulative billed value of \$15,000,000.00, within the last five (5) years prior to the issuance date of this RFP, that meet the following criteria:</p> <ol style="list-style-type: none"> Each of the contracts must have a minimum invoiced value of \$5,000,000.00 (Canadian, including taxes) as of the issuance date of this RFP. At least two (2) of the contracts was for providing Informatics Professional Services <p>The following must be included with the bid for each contract:</p> | |

| | | |
|-------------------------|---|--|
| | a) A letter from its client (referencing a contract serial number or other unique identifier) that shows that the Bidder has provided and invoiced a customer (with who the Bidder deals with at arm's length) for services in the amount of \$5,000,000.00 | |
| M2 ^{PB} | <p>For one (1) of the contracts referenced in M1, the Bidder must demonstrate, using Appendix A to Attachment 2 that it directly placed a minimum of fifteen (15) resources concurrently for a period of six (6) months</p> <p>To be accepted, Bidders must submit a signed Client attestation letter with their bid stating that a minimum of fifteen (15) resources were placed concurrently for a period of six (6) months.</p> | |
| M3 ^{PB} | The Bidder must demonstrate that it holds valid Controlled Goods Clearance issued by PWGSC. A copy of the clearance must be submitted with the bid. | |

M4^{PB}

The Bidder must demonstrate the Minimum Billed Days for ALL Resource Categories Identified below:

To be accepted:

- 1) The billed days must have been for the delivery of Informatics Professional Services;
- 2) At least two (2) of the contracts provided must have been for resources at the level of SECRET, or higher.
- 3) The billed days must have occurred within the past five (5) years prior to the issuance date of this RFP.
- 4) The billed days must have been provided under a maximum of four (4) contracts;
- 5) The reference contract must have been contracted directly with the Bidder and does not include the parent, subsidiaries or other affiliates of the Bidder, or its subcontractors.
- 6) The work billed for any given resource category must include at least 50% of the associated tasks listed in **Annex A – Statement of Work** for the same resource category; and,

The Bidder must provide a completed Billed Days Response Template for each Resource Category using Appendix B to Attachment 2.

| Category of Personnel | Level | Minimum Billed Days* |
|--|-------|----------------------|
| Application/Software Architect | 3 | 1000 |
| Programmer/Software Developer | 3 | 3000 |
| Programmer / Analyst | 3 | 3000 |
| Data Conversion Specialist | 3 | 900 |
| Quality Assurance Specialist / Analyst | 3 | 1000 |

* Billed days cannot be referenced for more than one resource category. 1 Billed day = 7.5 hours.

3. Corporate Rated Evaluation Criteria

| Item # | Point Rated Criteria | Max pts | Bidders Response | |
|--------|--|---------|---|--|
| | | | Eval. Criteria | Demonstrated Experience (Bidders to insert data) |
| R1 | <p>The Bidder should demonstrate experience over and beyond Mandatory Requirement M1:</p> <p>The Bidder must provide three (3) Customer Reference Contracts, with a cumulative billed value of \$15,000,000.00, within the last five (5) years prior to the issuance date of this RFP, that meet the following criteria:</p> <ol style="list-style-type: none"> Each of the contracts must have a minimum invoiced value of \$5,000,000.00 (Canadian, including taxes) as of the issuance date of this RFP. At least two (2) of the contracts was for providing Informatics Professional Services <p>The following must be included with the bid for each contract:</p> <ol style="list-style-type: none"> A letter from its client (referencing a contract serial number or other unique identifier) that shows that the Bidder has provided and invoiced a customer (with who the Bidder deals with at arm's length) for services in the amount of \$5,000,000.00 | /30 | <p>>\$15M - \$18M = 10 points</p> <p>>\$18M - \$20M = 20 points</p> <p>>\$20M = 30 points</p> <p>For a maximum of 30 points</p> | |
| R2 | <p>The Bidder should demonstrate that they hold current ISO Quality Management Certification, or have started the registration process to become certified.</p> <p>Proof of certification or registration to become certified must be provided with the bid. The Crown will only accept a letter from a registered external ISO Auditor as proof of a Bidders ISO registration process.</p> | /25 | <p>ISO 9001:2015 Certification or registration to become certified = 25 points</p> <p>For a maximum of 25 points</p> | |
| R3 | <p>The Official Languages Act provides that English and French are the languages of work in federal institutions. Leadership in official languages calls on all managers in institutions to respect the language-of-work rights of employees, to create and maintain a workplace that is conducive to the use of English and French in bilingual regions, for example by holding bilingual meetings; and to communicate to employees the role that official languages play in service excellence for Canadians.</p> | /20 | <ul style="list-style-type: none"> Less than 5 bilingual resources = 0 points 5 to 9 bilingual resources = 4 points 10 to 14 bilingual | |

| | | | Bidders Response | |
|-------------|--|------------|---|--|
| Item # | Point Rated Criteria | Max pts | Eval. Criteria | Demonstrated Experience (Bidders to insert data) |
| | For contracts referenced in M1, the Bidder should demonstrate its experience providing teams of <u>bilingual</u> resources. | | resources = 8 points • 15 to 19 bilingual resources = 12 points • 20 to 25 bilingual resources = 16 points • More than 25 bilingual resources = 20 points For a maximum of 20 points | |
| R4 | Resource Management Processes The Bidder should describe the approach and processes related to the management of its professional services resources that will be utilized to ensure the Bidder's ability to propose qualified resources to DFATD within five (5) days of receipt of a TA and minimize turnover of those resources. If applicable, the Bidder should demonstrate where the same approach and process was utilized successfully to support one of the referenced contracts provided in response to mandatory requirement M1 Corporate Experience above. | | | |
| R4.1 | Recruitment of Resources | | | |
| | a) The Bidder's response will be evaluated based on the extent to which the proposed approach and process should result in the provision of qualified resources to DFATD within five (5) days of receipt of a TA as demonstrated through the following elements: <ol style="list-style-type: none"> Identifies and describes the risks associated with recruitment of resources; Demonstrates that all aspects of the risks were identified and were addressed with a risk mitigation strategy; Provides a detailed description of the processes supporting the mitigation strategy; Demonstrates that process has been implemented within the organizations as standard operating procedure; and Demonstrates a flexible approach that is able to address difficult or unexpected situations | /30 | A maximum of 30 points will be awarded: 30 points – Addresses 5 elements (i. to v.); 20 points – Addresses 4 elements (i. to v.); 10 points – Addresses 3 elements (i. to v.); or | |

| | | | Bidders Response | |
|--------|--|---------|---|--|
| Item # | Point Rated Criteria | Max pts | Eval. Criteria | Demonstrated Experience (Bidders to insert data) |
| | | | 0 points – Less than 3 elements addressed (i. to v.). | |
| | b) The Bidder's response will be evaluated based on the extent to which the Bidder has demonstrated that the approach described in response to a) above has been used previously by this Bidder to support another client. | /10 | <p>Up to an additional 10 points will be awarded (only if a minimum of 10 points have been awarded above):</p> <ul style="list-style-type: none"> • 10 points – All elements described in the Bidder's response to a) above are demonstrated; • 5 points – At least 3 elements described in the Bidder's response to a) above are demonstrated; or • 0 points – None of the elements described in the Bidder's response to a) above are | |

| Item # | Point Rated Criteria | Max pts | Bidders Response | |
|-------------|---|------------|--|--|
| | | | Eval. Criteria | Demonstrated Experience (Bidders to insert data) |
| | | | demonstrated | |
| R4.2 | Screening of Resources | | | |
| | <p>a) The Bidder's response will be evaluated based on the extent to which the description of the proposed approach and process should result in the provision of qualified resources that are a good fit for the role as demonstrated through the following elements:</p> <ul style="list-style-type: none"> i. Identifies and describes the risks associated with screening of resources; ii. Demonstrates that all aspects of the risks were understood and were addressed with a risk mitigation strategy; iii. Provides a detailed description of the processes supporting the mitigation strategy; iv. Demonstrates that process has been implemented within the organizations as standard operating procedure; and v. Demonstrates a flexible approach that is able to address difficult or unexpected situations | /30 | <p>A maximum of 30 points will be awarded:</p> <ul style="list-style-type: none"> • 30 points – Addresses 5 elements (i. to v.); • 20 points – Addresses 4 elements (i. to v.); • 10 points – Addresses 3 elements; or • 0 points – Less than 3 elements addressed (i. to v.). | |
| | <p>b) The Bidder's response will be evaluated based on the extent to which the Bidder has demonstrated that this described approach has been successfully used previously by the Bidder to support another client.</p> | /10 | <p>Up to an additional 10 points will be awarded (only if a minimum of 10 points have been awarded above):</p> <ul style="list-style-type: none"> • 10 points – All elements described in the Bidder's response | |

| | | | Bidders Response | |
|-------------|--|-----------|--|--|
| Item # | Point Rated Criteria | Max pts | Eval. Criteria | Demonstrated Experience (Bidders to insert data) |
| | | | <p>to a) above are demonstrated;</p> <ul style="list-style-type: none"> • 5 points – At least 3 elements described in the Bidder's response to a) above are demonstrated; or • 0 points – None of the elements described in the Bidder's response to a) above are demonstrated. | |
| R4.3 | Training and ongoing development of resources | | | |
| | <p>a) The Bidder's response will be evaluated based on the extent to which the description of the proposed approach and process should result in the provision of contract resources that are competent and knowledgeable of the client's IT environment and the support tools they utilize as demonstrated through the following elements:</p> <ul style="list-style-type: none"> i. Identifies and describes the risks associated with training and ongoing development of resources; ii. Demonstrates that all aspects of the risks were understood and were addressed with a risk mitigation strategy; iii. Provides a detailed description of the processes supporting the mitigation strategy; iv. Demonstrates that process has been implemented within the organizations as standard operating procedure; and v. Demonstrates a flexible approach that is able to address difficult or unexpected situations. | 30 | <p>A maximum of 30 points will be awarded:</p> <ul style="list-style-type: none"> • 30 points – Addresses 5 elements (i. to v.); • 20 points – Addresses 4 elements (i. to v.); • 10 points – Addresses 3 elements (i. to v.); or • 0 points – Less than | |

| Item # | Point Rated Criteria | Max pts | Bidders Response | |
|--------|---|---------|---|--|
| | | | Eval. Criteria | Demonstrated Experience (Bidders to insert data) |
| | | | 3 elements addressed (i. to v.). | |
| | b) The Bidder's response will be evaluated based on the extent to which the Bidder has demonstrated that this described approach has been successfully used previously by the Bidder to support another client. | 10 | <p>Up to an additional 10 points will be awarded (only if a minimum of 10 points have been awarded above):</p> <ul style="list-style-type: none"> • 10 points – All elements described in the Bidder's response to a) above are demonstrated; • 5 points – At least 3 elements described in the Bidder's response to a) above are demonstrated; or • 0 points – None of the elements described in the Bidder's response to a) above are demonstrated. | |

| Item # | Point Rated Criteria | Max pts | Bidders Response | |
|-------------|---|------------|---|--|
| | | | Eval. Criteria | Demonstrated Experience (Bidders to insert data) |
| R4.4 | Retention of resources | | | |
| | <p>a) The Bidder's response will be evaluated based on the extent to which the description of the proposed approach and process should result in the provision of contract resources that are competent and knowledgeable of the client's IT environment and the support tools they utilize as demonstrated through the following elements:</p> <ul style="list-style-type: none"> vi. Identifies and describes the risks associated with training and ongoing development of resources; vii. Demonstrates that all aspects of the risks were understood and were addressed with a risk mitigation strategy; viii. Provides a detailed description of the processes supporting the mitigation strategy; ix. Demonstrates that process has been implemented within the organizations as standard operating procedure; and x. Demonstrates a flexible approach that is able to address difficult or unexpected situations. | 30 | <p>A maximum of 30 points will be awarded:</p> <ul style="list-style-type: none"> • 30 points – Addresses 5 elements (i. to v.); • 20 points – Addresses 4 elements (i. to v.); • 10 points – Addresses 3 elements (i. to v.); or • 0 points – Less than 3 elements addressed (i. to v.). | |
| | <p>b) The Bidder's response will be evaluated based on the extent to which the Bidder has demonstrated that this described approach has been successfully used previously by the Bidder to support another client.</p> | /10 | <p>Up to an additional 10 points will be awarded (only if a minimum of 10 points have been awarded above):</p> <ul style="list-style-type: none"> • 10 points – All elements described in the Bidder's response to a) above are demonstrated; • 5 points – Some elements | |

| | | | Bidders Response | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--|---|---------------------------------------|--|--|--|--|-------------|--|--|--|--|--|-----|-----|-----|-----|----------|--------------|---------------------------------------|------------------------------|---------------------------------------|--|--|--|-----------------|----------------------|--------------------------------|-------|------|-----|-------|-------------------------------|-------|------|-----|------|----------------------|-------|------|-----|-------|----------------------------|-------|-----|-----|-------|--|-------|------|-------|--------|--|--|--|--|-------|------|---|--|
| Item # | Point Rated Criteria | Max pts | Eval. Criteria | Demonstrated Experience (Bidders to insert data) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | <p>described in the Bidder's response to a) above; or</p> <ul style="list-style-type: none"> • 0 points – Approach proposed in response to a) above is not demonstrated. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| R5 | <p>The Bidder should demonstrate its billed days experience in excess to the Minimum Billed Days per category under M1.</p> <table border="1"> <thead> <tr> <th colspan="5">EXAMPLE EVALUATION SCENARIO</th></tr> <tr> <th colspan="5">BILLED DAYS</th></tr> <tr> <th></th><th>(A)</th><th>(B)</th><th>(C)</th><th>(D)</th></tr> </thead> <tbody> <tr> <td>Category</td><td>Bidder Total</td><td>Min. Billed days identified under SM1</td><td>Billed days in excess of SM1</td><td>Bidder % increase to a maximum of 100</td></tr> <tr> <td></td><td></td><td></td><td>(C) = (A) – (B)</td><td>(D) = (C) / (B) *100</td></tr> <tr> <td>Application/Software Architect</td><td>1,200</td><td>1000</td><td>200</td><td>20.00</td></tr> <tr> <td>Programmer/Software Developer</td><td>3,100</td><td>3000</td><td>100</td><td>3.33</td></tr> <tr> <td>Programmer / Analyst</td><td>3,500</td><td>3000</td><td>500</td><td>16.67</td></tr> <tr> <td>Data Conversion Specialist</td><td>1,500</td><td>900</td><td>600</td><td>66.67</td></tr> <tr> <td>Quality Assurance Specialist / Analyst</td><td>2,000</td><td>1000</td><td>1,000</td><td>100.00</td></tr> <tr> <td colspan="4">BIDDER SCORE = SUM OF (D) FOR ALL CATEGORIES / 5 (which will be rounded to two decimal places)</td><td>41.33</td></tr> </tbody> </table> | EXAMPLE EVALUATION SCENARIO | | | | | BILLED DAYS | | | | | | (A) | (B) | (C) | (D) | Category | Bidder Total | Min. Billed days identified under SM1 | Billed days in excess of SM1 | Bidder % increase to a maximum of 100 | | | | (C) = (A) – (B) | (D) = (C) / (B) *100 | Application/Software Architect | 1,200 | 1000 | 200 | 20.00 | Programmer/Software Developer | 3,100 | 3000 | 100 | 3.33 | Programmer / Analyst | 3,500 | 3000 | 500 | 16.67 | Data Conversion Specialist | 1,500 | 900 | 600 | 66.67 | Quality Assurance Specialist / Analyst | 2,000 | 1000 | 1,000 | 100.00 | BIDDER SCORE = SUM OF (D) FOR ALL CATEGORIES / 5 (which will be rounded to two decimal places) | | | | 41.33 | /100 | <p>The bidder's demonstrated "Total Billed Days" provided in response to M1 will be used to evaluate this criterion.</p> <p>The bidder will be awarded points as demonstrated in the example evaluation scenario on the left side.</p> <p>In this example, the bidder would score 41.33 out of a possible 100 points.</p> | |
| EXAMPLE EVALUATION SCENARIO | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| BILLED DAYS | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | (A) | (B) | (C) | (D) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Category | Bidder Total | Min. Billed days identified under SM1 | Billed days in excess of SM1 | Bidder % increase to a maximum of 100 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | (C) = (A) – (B) | (D) = (C) / (B) *100 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Application/Software Architect | 1,200 | 1000 | 200 | 20.00 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Programmer/Software Developer | 3,100 | 3000 | 100 | 3.33 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Programmer / Analyst | 3,500 | 3000 | 500 | 16.67 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Data Conversion Specialist | 1,500 | 900 | 600 | 66.67 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Quality Assurance Specialist / Analyst | 2,000 | 1000 | 1,000 | 100.00 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| BIDDER SCORE = SUM OF (D) FOR ALL CATEGORIES / 5 (which will be rounded to two decimal places) | | | | 41.33 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

ATTACHMENT 2

BID EVALUATION CRITERIA

Workstream 2 - Application Services

1. Evaluation Summary (Workstream 2)

| No. | Mandatory Criteria | Compliant Yes/No |
|---|---|------------------|
| M-1 PB | Corporate Experience (Contracts) | |
| | <ul style="list-style-type: none"> Reference Contract #1 Reference Contract #2 Reference Contract #3 | |
| M-2 PB | Corporate Experience (Resources) | |
| M-3 PB | Corporate Experience (Controlled Goods) | |
| M-4 PB | Corporate Experience | |
| No. | Point-Rated Criteria | Maximum Points |
| R-1 | Reference Contracts | 30 |
| | 4) Reference Contract #1 | |
| | 5) Reference Contract #2 | |
| | 6) Reference Contract #3 | |
| R-2 | ISO Quality Management Certification | 25 |
| R-3 | Corporate Experience (Bilingual Resources) | 20 |
| R-4 | Resource Management Processes | 160 |
| R-5 | Corporate Experience in excess of M-4 | 100 |
| Overall Maximum Points | | 335 |
| Pass Mark (70% of Overall Maximum Points) | | 234.5 |

2. Corporate Mandatory Evaluation Criteria

| Item | Mandatory Criteria | Demonstrated Experience |
|--------------|---|-------------------------|
| M1 PB | <p>The Bidder must provide three (3) Customer Reference Contracts, with a cumulative billed value of \$15,000,000.00, within the last five (5) years prior to the issuance date of this RFP, that meet the following criteria:</p> <ol style="list-style-type: none"> Each of the contracts must have a minimum invoiced value of \$5,000,000.00 (Canadian, including taxes) as of the issuance date of this RFP. At least two (2) of the contracts was for providing Informatics Professional Services | |

| | <p>The following must be included with the bid for each contract:</p> <p>A letter from its client (referencing a contract serial number or other unique identifier) that shows that the Bidder has provided and invoiced a customer (with who the Bidder deals with at arm's length) for services in the amount of \$5,000,000.00</p> | | | | | | | | | | | | | | | | | | | |
|--------------------------------|---|-----------------------|-------|---------------------|--------------------------------|---|------|----------------|---|------|------------------------|---|-----|-----------------|---|-----|---------------------|---|-----|--|
| M2 ^{PB} | <p>For one (1) of the contracts referenced in M1, the Bidder must demonstrate, using Appendix A to Attachment 2 that it directly placed a minimum of fifteen (15) resources concurrently for a period of six (6) months.</p> <p>To be accepted, Bidders must submit a signed Client attestation letter with their bid stating that a minimum of fifteen (15) resources were placed concurrently for a period of six (6) months.</p> | | | | | | | | | | | | | | | | | | | |
| M3 ^{PB} | <p>The Bidder must demonstrate that it holds valid Controlled Goods Clearance issued by PWGSC. A copy of the clearance must be submitted with the bid.</p> | | | | | | | | | | | | | | | | | | | |
| M4 ^{PB} | <p>The Bidder must demonstrate the Minimum Billed Days for ALL Resource Categories Identified below:</p> <p>To be accepted:</p> <ol style="list-style-type: none"> 1) The billed days must have been for the delivery of Informatics Professional Services; 2) At least two (2) of the contracts provided must have been for resources at the level of SECRET, or higher. 3) The billed days must have occurred within the past five (5) years prior to the issuance date of this RFP. 4) The billed days must have been provided under a maximum of four (4) contracts; 5) The reference contract must have been contracted directly with the Bidder and not with the Bidder's subcontractor or affiliate. 6) The work billed for any given resource category must include at least 50% of the associated tasks listed in Annex A – Statement of Work for the same resource category; and, <p>The Bidder must provide a completed Billed Days Response Template for each Resource Category using Appendix B to Attachment 2.</p> <table border="1"> <thead> <tr> <th>Category of Personnel</th><th>Level</th><th>Minimum Billed Days</th></tr> </thead> <tbody> <tr> <td>Application/Software Architect</td><td>3</td><td>1500</td></tr> <tr> <td>System Analyst</td><td>3</td><td>2000</td></tr> <tr> <td>Database Administrator</td><td>3</td><td>750</td></tr> <tr> <td>Network Analyst</td><td>3</td><td>500</td></tr> <tr> <td>Technical Architect</td><td>3</td><td>500</td></tr> </tbody> </table> | Category of Personnel | Level | Minimum Billed Days | Application/Software Architect | 3 | 1500 | System Analyst | 3 | 2000 | Database Administrator | 3 | 750 | Network Analyst | 3 | 500 | Technical Architect | 3 | 500 | |
| Category of Personnel | Level | Minimum Billed Days | | | | | | | | | | | | | | | | | | |
| Application/Software Architect | 3 | 1500 | | | | | | | | | | | | | | | | | | |
| System Analyst | 3 | 2000 | | | | | | | | | | | | | | | | | | |
| Database Administrator | 3 | 750 | | | | | | | | | | | | | | | | | | |
| Network Analyst | 3 | 500 | | | | | | | | | | | | | | | | | | |
| Technical Architect | 3 | 500 | | | | | | | | | | | | | | | | | | |

| | | | | |
|--|---|---|------|--|
| | Technology Architect | 3 | 1000 | |
| | Technical Writer | 3 | 250 | |
| | * Billed days cannot be referenced for more than one resource category. 1 Billed day = 7.5 hours. | | | |

3. Corporate Rated Evaluation Criteria

| | | | Bidders Response | |
|-----------|--|------------|---|--|
| Item # | Point Rated Criteria | Max pts. | Eval. Criteria | Demonstrated Experience (Bidders to insert data) |
| R1 | <p>The Bidder should demonstrate experience over and beyond Mandatory Requirement M1:</p> <p>The Bidder must provide three (3) Customer Reference Contracts, with a cumulative billed value of \$15,000,000.00, within the last five (5) years prior to the issuance date of this RFP, that meet the following criteria:</p> <ol style="list-style-type: none"> Each of the contracts must have a minimum invoiced value of \$5,000,000.00 (Canadian, including taxes) as of the issuance date of this RFP. At least two (2) of the contracts was for providing Informatics Professional Services <p>The following must be included with the bid for each contract:</p> <ol style="list-style-type: none"> A letter from its client (referencing a contract serial number or other unique identifier) that shows that the Bidder has provided and invoiced a customer (with who the Bidder deals with at arm's length) for services in the amount of \$5,000,000.00 | /30 | <p>>\$15M - \$18M = 10 points</p> <p>>\$18M - \$20M = 20 points</p> <p>>\$20M = 30 points</p> <p>For a maximum of 30 points</p> | |
| R2 | <p>The Bidder should demonstrate that they hold current ISO Quality Management Certification, or have started the registration process to become certified.</p> <p>Proof of certification or registration to become certified must be provided with the bid. The Crown will only accept a letter from a registered external ISO Auditor as proof of a Bidders ISO registration process.</p> | /25 | <p>ISO 9001:2015 Certification or registration to become certified = 25 points</p> <p>For a maximum of 25 points</p> | |

| | | | Bidders Response | |
|--------|--|----------|---|---|
| Item # | Point Rated Criteria | Max pts. | Eval. Criteria | Demonstrated Experience (Bidders to insert data) |
| R3 | <p>The Official Languages Act provides that English and French are the languages of work in federal institutions. Leadership in official languages calls on all managers in institutions to respect the language-of-work rights of employees, to create and maintain a workplace that is conducive to the use of English and French in bilingual regions, for example by holding bilingual meetings; and to communicate to employees the role that official languages play in service excellence for Canadians.</p> <p>For contracts referenced in M1, the Bidder should demonstrate its experience providing teams of <u>bilingual</u> resources.</p> | /20 | <ul style="list-style-type: none"> Less than 5 bilingual resources = 0 points 5 to 9 bilingual resources = 4 points 10 to 14 bilingual resources = 8 points 15 to 19 bilingual resources = 12 points 20 to 25 bilingual resources = 16 points More than 25 bilingual resources = 20 points <p>For a maximum of 20 points</p> | |
| R4 | <p>Resource Management Processes</p> <p>The Bidder should describe the approach and processes related to the management of its professional services resources that will be utilized to ensure the Bidder's ability to propose qualified resources to DFATD within five (5) days of receipt of a TA and minimize turnover of those resources. If applicable, the Bidder should demonstrate where the same approach and process was utilized successfully to support one of the referenced contracts provided in response to mandatory requirement M1 Corporate Experience above.</p> | | | |
| R4.1 | Recruitment of Resources | | | |
| | <p>a) The Bidder's response will be evaluated based on the extent to which the proposed approach and process should result in the provision of qualified resources to DFATD within five (5) days of receipt of a TA as demonstrated through the following elements:</p> <ol style="list-style-type: none"> Identifies and describes the risks associated with recruitment of resources; Demonstrates that all aspects of the risks were identified and were addressed with a risk mitigation strategy; | /30 | <p>A maximum of 30 points will be awarded:</p> <p>30 points – Addresses 5 elements (i. to v.);</p> <p>20 points – Addresses 4 elements (i. to v.);</p> | |

| | | | Bidders Response | |
|-------------|---|----------|---|---|
| Item # | Point Rated Criteria | Max pts. | Eval. Criteria | Demonstrated Experience (Bidders to insert data) |
| | iii. Provides a detailed description of the processes supporting the mitigation strategy; iv. Demonstrates that process has been implemented within the organizations as standard operating procedure; and v. Demonstrates a flexible approach that is able to address difficult or unexpected situations | | 10 points – Addresses 3 elements (i. to v.); or 0 points – Less than 3 elements addressed (i. to v.). | |
| | b) The Bidder's response will be evaluated based on the extent to which the Bidder has demonstrated that the approach described in response to a) above has been used previously by this Bidder to support another client. | /10 | Up to an additional 10 points will be awarded (only if a minimum of 10 points have been awarded above): <ul style="list-style-type: none"> 10 points – All elements described in the Bidder's response to a) above are demonstrated; 5 points – At least 3 elements described in the Bidder's response to a) above are demonstrated; or 0 points – None of the elements described in the Bidder's response to a) above are demonstrated | |
| R4.2 | Screening of Resources | | | |
| | a) The Bidder's response will be evaluated based on the extent to which the description of the proposed approach and process should result in the provision of qualified resources that are a good fit for the role as demonstrated through the following elements: | /30 | A maximum of 30 points will be awarded: | |

| | | | Bidders Response | |
|--------|--|----------|---|---|
| Item # | Point Rated Criteria | Max pts. | Eval. Criteria | Demonstrated Experience (Bidders to insert data) |
| | <ul style="list-style-type: none"> i. Identifies and describes the risks associated with screening of resources; ii. Demonstrates that all aspects of the risks were understood and were addressed with a risk mitigation strategy; iii. Provides a detailed description of the processes supporting the mitigation strategy; iv. Demonstrates that process has been implemented within the organizations as standard operating procedure; and v. Demonstrates a flexible approach that is able to address difficult or unexpected situations | | <ul style="list-style-type: none"> • 30 points – Addresses 5 elements (i. to v.); • 20 points – Addresses 4 elements (i. to v.); • 10 points – Addresses 3 elements; or • 0 points – Less than 3 elements addressed (i. to v.). | |
| | b) The Bidder's response will be evaluated based on the extent to which the Bidder has demonstrated that this described approach has been successfully used previously by the Bidder to support another client. | /10 | <p>Up to an additional 10 points will be awarded (only if a minimum of 10 points have been awarded above):</p> <ul style="list-style-type: none"> • 10 points – All elements described in the Bidder's response to a) above are demonstrated; • 5 points – At least 3 elements described in the Bidder's response to a) above are demonstrated; or • 0 points – None of the elements described in the Bidder's response to a) above are demonstrated. | |

| | | | Bidders Response | |
|-------------|--|-----------|--|---|
| Item # | Point Rated Criteria | Max pts. | Eval. Criteria | Demonstrated Experience (Bidders to insert data) |
| R4.3 | Training and ongoing development of resources | | | |
| | <p>a) The Bidder's response will be evaluated based on the extent to which the description of the proposed approach and process should result in the provision of contract resources that are competent and knowledgeable of the client's IT environment and the support tools they utilize as demonstrated through the following elements:</p> <ul style="list-style-type: none"> i. Identifies and describes the risks associated with training and ongoing development of resources; ii. Demonstrates that all aspects of the risks were understood and were addressed with a risk mitigation strategy; iii. Provides a detailed description of the processes supporting the mitigation strategy; iv. Demonstrates that process has been implemented within the organizations as standard operating procedure; and v. Demonstrates a flexible approach that is able to address difficult or unexpected situations. | 30 | <p>A maximum of 30 points will be awarded:</p> <ul style="list-style-type: none"> • 30 points – Addresses 5 elements (i. to v.); • 20 points – Addresses 4 elements (i. to v.); • 10 points – Addresses 3 elements (i. to v.); or • 0 points – Less than 3 elements addressed (i. to v.). | |
| | <p>b) The Bidder's response will be evaluated based on the extent to which the Bidder has demonstrated that this described approach has been successfully used previously by the Bidder to support another client.</p> | 10 | <p>Up to an additional 10 points will be awarded (only if a minimum of 10 points have been awarded above):</p> <ul style="list-style-type: none"> • 10 points – All elements described in the Bidder's response to a) above are demonstrated; • 5 points – At least 3 elements described in the Bidder's response to a) above are demonstrated; or • 0 points – None of the elements | |

| | | | Bidders Response | |
|-------------|--|------------|---|--|
| Item # | Point Rated Criteria | Max pts. | Eval. Criteria | Demonstrated Experience (Bidders to insert data) |
| | | | described in the Bidder's response to a) above are demonstrated. | |
| R4.4 | Retention of resources | | | |
| | <p>a) The Bidder's response will be evaluated based on the extent to which the description of the proposed approach and process should result in the provision of contract resources that are competent and knowledgeable of the client's IT environment and the support tools they utilize as demonstrated through the following elements:</p> <ul style="list-style-type: none"> i. Identifies and describes the risks associated with training and ongoing development of resources; ii. Demonstrates that all aspects of the risks were understood and were addressed with a risk mitigation strategy; iii. Provides a detailed description of the processes supporting the mitigation strategy; iv. Demonstrates that process has been implemented within the organizations as standard operating procedure; and v. Demonstrates a flexible approach that is able to address difficult or unexpected situations. | 30 | <p>A maximum of 30 points will be awarded:</p> <ul style="list-style-type: none"> • 30 points – Addresses 5 elements (i. to v.); • 20 points – Addresses 4 elements (i. to v.); • 10 points – Addresses 3 elements (i. to v.); or • 0 points – Less than 3 elements addressed (i. to v.). | |
| | <p>b) The Bidder's response will be evaluated based on the extent to which the Bidder has demonstrated that this described approach has been successfully used previously by the Bidder to support another client.</p> | /10 | <p>Up to an additional 10 points will be awarded (only if a minimum of 10 points have been awarded above):</p> <ul style="list-style-type: none"> • 10 points – All elements described in the Bidder's response to a) above are demonstrated; • 5 points – Some elements described in the Bidder's response to a) above; or | |

| | | | Bidders Response | | | | | |
|--------|--|----------|---|---|--------------|---------------------------------------|------------------------------|---------------------------------------|
| Item # | Point Rated Criteria | Max pts. | Eval. Criteria | Demonstrated Experience (Bidders to insert data) | | | | |
| | | | <ul style="list-style-type: none">• 0 points – Approach proposed in response to a) above is not demonstrated. | | | | | |
| R-5 | The Bidder should demonstrate its billed days experience in excess to the Minimum Billed Days per category under M4. | /100 | <p>The bidder's demonstrated "Total Billed Days" provided in response to M1 will be used to evaluate this criterion.</p> <p>The bidder will be awarded points as demonstrated in the example evaluation scenario on the left side.</p> <p>In this example, the bidder would score 65.95 out of a possible 100 points.</p> | | | | | |
| | EXAMPLE EVALUATION SCENARIO | | | | | | | |
| | BILLED DAYS | | | | | | | |
| | Category | | | | (A) | (B) | (C) | (D) |
| | | | | | Bidder Total | Min. Billed days identified under SM1 | Billed days in excess of SM1 | Bidder % increase to a maximum of 100 |
| | | | | | | | (C) = (A) – (B) | (D) = (C) / (B) *100 |
| | Application/Software Architect | | | | 2500 | 1500 | 1000 | 66.67 |
| | System Analyst | | | | 3500 | 2000 | 1500 | 75.00 |
| | Database Administrator | | | | 1500 | 750 | 750 | 100.00 |
| | Network Analyst | | | | 750 | 500 | 250 | 50.00 |
| | Technical Architect | | | | 600 | 500 | 100 | 20.00 |
| | Technology Architect | | | | 1500 | 1000 | 500 | 50.00 |
| | Technical Writer | | | | 600 | 250 | 350 | 100.00 |
| | BIDDER SCORE = SUM OF (D) FOR ALL CATEGORIES / 7 (which will be rounded to two decimal places) | | | | 65.95 | | | |

ATTACHMENT 2

BID EVALUATION CRITERIA

Workstream 3 - Testing Services

1. Evaluation Summary (Workstream 3)

| No. | Mandatory Criteria | Compliant Yes/No |
|---|---|------------------|
| M-1 PB | Corporate Experience (Contracts) | |
| | <ul style="list-style-type: none"> Reference Contract #1 Reference Contract #2 Reference Contract #3 | |
| M-2 PB | Corporate Experience (Resources) | |
| M-3 PB | Corporate Experience (Controlled Goods) | |
| M-4 PB | Corporate Experience | |
| No. | Point-Rated Criteria | Maximum Points |
| R-1 | Reference Contracts | 30 |
| | 7) Reference Contract #1 | |
| | 8) Reference Contract #2 | |
| | 9) Reference Contract #3 | |
| R-2 | ISO Quality Management Certification | 25 |
| R-3 | Corporate Experience (Bilingual Resources) | 20 |
| R-4 | Resource Management Processes | 160 |
| R-5 | Corporate Experience in excess of M-4 | 100 |
| Overall Maximum Points | | 335 |
| Pass Mark (70% of Overall Maximum Points) | | 234.5 |

2. Corporate Mandatory Evaluation Criteria

| Item | Mandatory Criteria | Demonstrated Experience |
|--------------|---|-------------------------|
| M1 PB | <p>The Bidder must provide three (3) Customer Reference Contracts, with a cumulative billed value of \$15,000,000.00, within the last five (5) years prior to the issuance date of this RFP, that meet the following criteria:</p> <ol style="list-style-type: none"> Each of the contracts must have a minimum invoiced value of \$5,000,000.00 (Canadian, including taxes) as of the issuance date of this RFP. At least two (2) of the contracts was for providing Informatics Professional Services | |

| | <p>The following must be included with the bid for each contract:</p> <p>A letter from its client (referencing a contract serial number or other unique identifier) that shows that the Bidder has provided and invoiced a customer (with who the Bidder deals with at arm's length) for services in the amount of \$5,000,000.00</p> | | | | | | | | | | |
|------------------------|---|-----------------------|-------|---------------------|------------------|---|------|--------|---|------|--|
| M2^{PB} | <p>For one (1) of the contracts referenced in M1, the Bidder must demonstrate, using Appendix A to Attachment 2 that it directly placed a minimum of fifteen (15) resources concurrently for a period of six (6) months</p> <p>To be accepted, Bidders must submit a signed Client attestation letter with their bid stating that a minimum of fifteen (15) resources were placed concurrently for a period of six (6) months.</p> | | | | | | | | | | |
| M3^{PB} | <p>The Bidder must demonstrate that it holds valid Controlled Goods Clearance issued by PWGSC. A copy of the clearance must be submitted with the bid.</p> | | | | | | | | | | |
| M4^{PB} | <p>The Bidder must demonstrate the Minimum Billed Days for ALL Resource Categories Identified below:</p> <p>To be accepted:</p> <ol style="list-style-type: none"> 1) The billed days must have been for the delivery of Informatics Professional Services; 2) At least two (2) of the contracts provided must have been for resources at the level of SECRET, or higher. 3) The billed days must have occurred within the past five (5) years prior to the issuance date of this RFP. 4) The billed days must have been provided under a maximum of four (4) contracts; 5) The reference contract must have been contracted directly with the Bidder and not with the Bidder's subcontractor or affiliate. 6) The work billed for any given resource category must include at least 50% of the associated tasks listed in Annex A – Statement of Work for the same resource category; and, <p>The Bidder must provide a completed Billed Days Response Template for each Resource Category using Appendix B to Attachment 2.</p> <table border="1"> <thead> <tr> <th>Category of Personnel</th><th>Level</th><th>Minimum Billed Days</th></tr> </thead> <tbody> <tr> <td>Test Coordinator</td><td>3</td><td>2500</td></tr> <tr> <td>Tester</td><td>3</td><td>7000</td></tr> </tbody> </table> | Category of Personnel | Level | Minimum Billed Days | Test Coordinator | 3 | 2500 | Tester | 3 | 7000 | |
| Category of Personnel | Level | Minimum Billed Days | | | | | | | | | |
| Test Coordinator | 3 | 2500 | | | | | | | | | |
| Tester | 3 | 7000 | | | | | | | | | |

| | | |
|--|---|--|
| | * Billed days cannot be referenced for more than one resource category. 1 Billed day = 7.5 hours. | |
|--|---|--|

3. Corporate Rated Evaluation Criteria

| | | | Bidders Response | |
|-----------|--|------------|---|--|
| Item # | Point Rated Criteria | Max pts. | Eval. Criteria | Demonstrated Experience (Bidders to insert data) |
| R1 | <p>The Bidder should demonstrate experience over and beyond Mandatory Requirement M1:</p> <p>The Bidder must provide three (3) Customer Reference Contracts, with a cumulative billed value of \$15,000,000.00, within the last five (5) years prior to the issuance date of this RFP, that meet the following criteria:</p> <ol style="list-style-type: none"> Each of the contracts must have a minimum invoiced value of \$5,000,000.00 (Canadian, including taxes) as of the issuance date of this RFP. At least two (2) of the contracts was for providing Informatics Professional Services <p>The following must be included with the bid for each contract:</p> <ol style="list-style-type: none"> A letter from its client (referencing a contract serial number or other unique identifier) that shows that the Bidder has provided and invoiced a customer (with who the Bidder deals with at arm's length) for services in the amount of \$5,000,000.00 | /30 | <p>>\$15M - \$18M = 10 points</p> <p>>\$18M - \$20M = 20 points</p> <p>>\$20M = 30 points</p> <p>For a maximum of 30 points</p> | |
| R2 | <p>The Bidder should demonstrate that they hold current ISO Quality Management Certification, or have started the registration process to become certified.</p> <p>Proof of certification or registration to become certified must be provided with the bid. The Crown will only accept a letter from a registered external ISO Auditor as proof of a Bidders ISO registration process.</p> | /25 | <p>ISO 9001:2015 Certification or registration to become certified = 25 points</p> <p>For a maximum of 25 points</p> | |

| | | | Bidders Response | |
|---------------|--|-----------------|---|--|
| Item # | Point Rated Criteria | Max pts. | Eval. Criteria | Demonstrated Experience (Bidders to insert data) |
| R3 | <p>The Official Languages Act provides that English and French are the languages of work in federal institutions. Leadership in official languages calls on all managers in institutions to respect the language-of-work rights of employees, to create and maintain a workplace that is conducive to the use of English and French in bilingual regions, for example by holding bilingual meetings; and to communicate to employees the role that official languages play in service excellence for Canadians.</p> <p>For contracts referenced in M1, the Bidder should demonstrate its experience providing teams of <u>bilingual</u> resources.</p> | /20 | <ul style="list-style-type: none"> • Less than 5 bilingual resources = 0 points • 5 to 9 bilingual resources = 4 points • 10 to 14 bilingual resources = 8 points • 15 to 19 bilingual resources = 12 points • 20 to 25 bilingual resources = 16 points • More than 25 bilingual resources = 20 points <p>For a maximum of 20 points</p> | |
| R4 | <p>Resource Management Processes</p> <p>The Bidder should describe the approach and processes related to the management of its professional services resources that will be utilized to ensure the Bidder's ability to propose qualified resources to DFATD within five (5) days of receipt of a TA and minimize turnover of those resources. If applicable, the Bidder should demonstrate where the same approach and process was utilized successfully to support one of the referenced contracts provided in response to mandatory requirement M1 Corporate Experience above.</p> | | | |
| R4.1 | Recruitment of Resources | | | |
| | <p>a) The Bidder's response will be evaluated based on the extent to which the proposed approach and process should result in the provision of qualified resources to DFATD within five (5) days of receipt of a TA as demonstrated through the following elements:</p> <p>i. Identifies and describes the risks associated with recruitment of resources;</p> | /30 | <p>A maximum of 30 points will be awarded:</p> <p>30 points – Addresses 5 elements (i. to v.);</p> | |

| | | | Bidders Response | |
|---------------|---|-----------------|--|--|
| Item # | Point Rated Criteria | Max pts. | Eval. Criteria | Demonstrated Experience (Bidders to insert data) |
| | ii. Demonstrates that all aspects of the risks were identified and were addressed with a risk mitigation strategy; iii. Provides a detailed description of the processes supporting the mitigation strategy; iv. Demonstrates that process has been implemented within the organizations as standard operating procedure; and v. Demonstrates a flexible approach that is able to address difficult or unexpected situations | | 20 points – Addresses 4 elements (i. to v.); 10 points – Addresses 3 elements (i. to v.); or 0 points – Less than 3 elements addressed (i. to v.). | |
| | a) The Bidder's response will be evaluated based on the extent to which the Bidder has demonstrated that the approach described in response to a) above has been used previously by this Bidder to support another client. | /10 | Up to an additional 10 points will be awarded (only if a minimum of 10 points have been awarded above): <ul style="list-style-type: none"> 10 points – All elements described in the Bidder's response to a) above are demonstrated; 5 points – At least 3 elements described in the Bidder's response to a) above are demonstrated; or 0 points – None of the elements described in the Bidder's response to a) above are demonstrated | |
| R4.2 | Screening of Resources | | | |

| | | | Bidders Response | |
|--------|---|----------|---|---|
| Item # | Point Rated Criteria | Max pts. | Eval. Criteria | Demonstrated Experience (Bidders to insert data) |
| | <p>a) The Bidder's response will be evaluated based on the extent to which the description of the proposed approach and process should result in the provision of qualified resources that are a good fit for the role as demonstrated through the following elements:</p> <ul style="list-style-type: none"> i. Identifies and describes the risks associated with screening of resources; ii. Demonstrates that all aspects of the risks were understood and were addressed with a risk mitigation strategy; iii. Provides a detailed description of the processes supporting the mitigation strategy; iv. Demonstrates that process has been implemented within the organizations as standard operating procedure; and v. Demonstrates a flexible approach that is able to address difficult or unexpected situations | /30 | <p>A maximum of 30 points will be awarded:</p> <ul style="list-style-type: none"> • 30 points – Addresses 5 elements (i. to v.); • 20 points – Addresses 4 elements (i. to v.); • 10 points – Addresses 3 elements; or • 0 points – Less than 3 elements addressed (i. to v.). | |
| | <p>b) The Bidder's response will be evaluated based on the extent to which the Bidder has demonstrated that this described approach has been successfully used previously by the Bidder to support another client.</p> | /10 | <p>Up to an additional 10 points will be awarded (only if a minimum of 10 points have been awarded above):</p> <ul style="list-style-type: none"> • 10 points – All elements described in the Bidder's response to a) above are demonstrated; • 5 points – At least 3 elements described in the Bidder's response to a) above are demonstrated; or • 0 points – None of the elements described in the Bidder's response to a) | |

| | | | Bidders Response | |
|-------------|--|-----------|--|---|
| Item # | Point Rated Criteria | Max pts. | Eval. Criteria | Demonstrated Experience (Bidders to insert data) |
| | | | above are demonstrated. | |
| R4.3 | Training and ongoing development of resources | | | |
| | <p>a) The Bidder's response will be evaluated based on the extent to which the description of the proposed approach and process should result in the provision of contract resources that are competent and knowledgeable of the client's IT environment and the support tools they utilize as demonstrated through the following elements:</p> <ul style="list-style-type: none"> i. Identifies and describes the risks associated with training and ongoing development of resources; ii. Demonstrates that all aspects of the risks were understood and were addressed with a risk mitigation strategy; iii. Provides a detailed description of the processes supporting the mitigation strategy; iv. Demonstrates that process has been implemented within the organizations as standard operating procedure; and v. Demonstrates a flexible approach that is able to address difficult or unexpected situations. | 30 | <p>A maximum of 30 points will be awarded:</p> <ul style="list-style-type: none"> • 30 points – Addresses 5 elements (i. to v.); • 20 points – Addresses 4 elements (i. to v.); • 10 points – Addresses 3 elements (i. to v.); or • 0 points – Less than 3 elements addressed (i. to v.). | |
| | <p>b) The Bidder's response will be evaluated based on the extent to which the Bidder has demonstrated that this described approach has been successfully used previously by the Bidder to support another client.</p> | 10 | <p>Up to an additional 10 points will be awarded (only if a minimum of 10 points have been awarded above):</p> <ul style="list-style-type: none"> • 10 points – All elements described in the Bidder's response to a) above are demonstrated; • 5 points – At least 3 elements described in the Bidder's response to a) above are demonstrated; or | |

| Item # | Point Rated Criteria | Max pts. | Bidders Response | |
|-------------|---|------------|---|---|
| | | | Eval. Criteria | Demonstrated Experience (Bidders to insert data) |
| | | | <ul style="list-style-type: none"> 0 points – None of the elements described in the Bidder's response to a) above are demonstrated. | |
| R4.4 | Retention of resources | | | |
| | <p>a) The Bidder's response will be evaluated based on the extent to which the description of the proposed approach and process should result in the provision of contract resources that are competent and knowledgeable of the client's IT environment and the support tools they utilize as demonstrated through the following elements:</p> <ol style="list-style-type: none"> Identifies and describes the risks associated with training and ongoing development of resources; Demonstrates that all aspects of the risks were understood and were addressed with a risk mitigation strategy; Provides a detailed description of the processes supporting the mitigation strategy; Demonstrates that process has been implemented within the organizations as standard operating procedure; and Demonstrates a flexible approach that is able to address difficult or unexpected situations. | 30 | <p>A maximum of 30 points will be awarded:</p> <ul style="list-style-type: none"> 30 points – Addresses 5 elements (i. to v.); 20 points – Addresses 4 elements (i. to v.); 10 points – Addresses 3 elements (i. to v.); or 0 points – Less than 3 elements addressed (i. to v.). | |
| | <p>b) The Bidder's response will be evaluated based on the extent to which the Bidder has demonstrated that this described approach has been successfully used previously by the Bidder to support another client.</p> | /10 | <p>Up to an additional 10 points will be awarded (only if a minimum of 10 points have been awarded above):</p> <ul style="list-style-type: none"> 10 points – All elements described in the Bidder's response to a) above are demonstrated; 5 points – Some elements described in | |

| | | | Bidders Response | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--|--|---------------------------------------|---|--|--|--|-------------|--|--|--|--|--|-----|-----|-----|-----|----------|--------------|---------------------------------------|------------------------------|---------------------------------------|--|--|--|-----------------|----------------------|------------------|-------|------|-----|-------|--------|--------|-------|------|-------|--|--|--|--|-------|-------------|---|--|
| Item # | Point Rated Criteria | Max pts. | Eval. Criteria | Demonstrated Experience (Bidders to insert data) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | <p>the Bidder's response to a) above; or</p> <ul style="list-style-type: none"> • 0 points – Approach proposed in response to a) above is not demonstrated. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| R-5 | <p>SR1 - The Bidder should demonstrate its billed days experience in excess to the Minimum Billed Days per category under M4.</p> <table border="1"> <thead> <tr> <th colspan="5">EXAMPLE EVALUATION SCENARIO</th></tr> <tr> <th colspan="5">BILLED DAYS</th></tr> <tr> <th></th><th>(A)</th><th>(B)</th><th>(C)</th><th>(D)</th></tr> </thead> <tbody> <tr> <td>Category</td><td>Bidder Total</td><td>Min. Billed days identified under SM1</td><td>Billed days in excess of SM1</td><td>Bidder % increase to a maximum of 100</td></tr> <tr> <td></td><td></td><td></td><td>(C) = (A) – (B)</td><td>(D) = (C) / (B) *100</td></tr> <tr> <td>Test Coordinator</td><td>3,200</td><td>2500</td><td>700</td><td>28.00</td></tr> <tr> <td>Tester</td><td>10,000</td><td>7,000</td><td>3000</td><td>42.86</td></tr> <tr> <td colspan="4">BIDDER SCORE = SUM OF (D) FOR ALL CATEGORIES / 2 (which will be rounded to two decimal places)</td><td>35.43</td></tr> </tbody> </table> | EXAMPLE EVALUATION SCENARIO | | | | | BILLED DAYS | | | | | | (A) | (B) | (C) | (D) | Category | Bidder Total | Min. Billed days identified under SM1 | Billed days in excess of SM1 | Bidder % increase to a maximum of 100 | | | | (C) = (A) – (B) | (D) = (C) / (B) *100 | Test Coordinator | 3,200 | 2500 | 700 | 28.00 | Tester | 10,000 | 7,000 | 3000 | 42.86 | BIDDER SCORE = SUM OF (D) FOR ALL CATEGORIES / 2 (which will be rounded to two decimal places) | | | | 35.43 | /100 | <p>The bidder's demonstrated "Total Billed Days" provided in response to M1 will be used to evaluate this criterion.</p> <p>The bidder will be awarded points as demonstrated in the example evaluation scenario on the left side.</p> <p>In this example, the bidder would score 35.43 out of a possible 100 points.</p> | |
| EXAMPLE EVALUATION SCENARIO | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| BILLED DAYS | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | (A) | (B) | (C) | (D) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Category | Bidder Total | Min. Billed days identified under SM1 | Billed days in excess of SM1 | Bidder % increase to a maximum of 100 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | (C) = (A) – (B) | (D) = (C) / (B) *100 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Test Coordinator | 3,200 | 2500 | 700 | 28.00 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Tester | 10,000 | 7,000 | 3000 | 42.86 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| BIDDER SCORE = SUM OF (D) FOR ALL CATEGORIES / 2 (which will be rounded to two decimal places) | | | | 35.43 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

ATTACHMENT 2 BID EVALUATION CRITERIA

Workstream 4 - Technical Services

1. Evaluation Summary (Workstream 4)

| No. | Mandatory Criteria | Compliant Yes/No |
|---|--|------------------|
| M-1 ^{PB} | Corporate Experience (Contracts) | |
| | • Reference Contract #1 | |
| | • Reference Contract #2 | |
| | • Reference Contract #3 | |
| M-2 ^{PB} | Corporate Experience (Resources) | |
| M-3 ^{PB} | Corporate Experience (Controlled Goods) | |
| M-4 ^{PB} | Corporate Experience | |
| No. | Point-Rated Criteria | Maximum Points |
| R-1 | Reference Contracts | 30 |
| | 10) Reference Contract #1 | |
| | 11) Reference Contract #2 | |
| | 12) Reference Contract #3 | |
| R-2 | ISO Quality Management Certification | 25 |
| R-3 | Corporate Experience (Bilingual Resources) | 20 |
| R-4 | Resource Management Processes | 160 |
| R-5 | Corporate Experience in excess of M-4 | 100 |
| Overall Maximum Points | | 335 |
| Pass Mark (70% of Overall Maximum Points) | | 234.5 |

2. Corporate Mandatory Evaluation Criteria

| Item | Mandatory Criteria | Demonstrated Experience |
|-------------------------|--|-------------------------|
| M1 ^{PB} | <p>The Bidder must provide three (3) Customer Reference Contracts, with a cumulative billed value of \$15,000,000.00, within the last five (5) years prior to the issuance date of this RFP, that meet the following criteria:</p> <p>7. Each of the contracts must have a minimum invoiced value of \$5,000,000.00 (Canadian, including taxes) as of the issuance date of this RFP.</p> <p>8. At least two (2) of the contracts was for providing Informatics Professional Services</p> <p>The following must be included with the bid for each contract:</p> <p>A letter from its client (referencing a contract serial number or other unique identifier) that shows that the Bidder has provided</p> | |

| | and invoiced a customer (with who the Bidder deals with at arm's length) for services in the amount of \$5,000,000.00 | | | | | | | | | | | | | | | | | | | | | | |
|------------------------------|--|-----------------------|-------|---------------------|--------|---|------|------------------|---|------|----------------------|---|-----|------------------|---|------|------------------------------|---|-----|-----------------|---|------|--|
| M2^{PB} | <p>For one (1) of the contracts referenced in M1, the Bidder must demonstrate, using Appendix A to Attachment 2 that it directly placed a minimum of fifteen (15) resources concurrently for a period of six (6) months</p> <p>To be accepted, Bidders must submit a signed Client attestation letter with their bid stating that a minimum of fifteen (15) resources were placed concurrently for a period of six (6) months.</p> | | | | | | | | | | | | | | | | | | | | | | |
| M3^{PB} | The Bidder must demonstrate that it holds valid Controlled Goods Clearance issued by PWGSC. A copy of the clearance must be submitted with the bid. | | | | | | | | | | | | | | | | | | | | | | |
| M4^{PB} | <p>The Bidder must demonstrate the Minimum Billed Days for ALL Resource Categories Identified below:</p> <p>To be accepted:</p> <ol style="list-style-type: none"> 1) The billed days must have been for the delivery of Informatics Professional Services; 2) At least two (2) of the contracts provided must have been for resources at the level of SECRET, or higher. 3) The billed days must have occurred within the past five (5) years prior to the issuance date of this RFP. 4) The billed days must have been provided under a maximum of four (4) contracts; 5) The reference contract must have been contracted directly with the Bidder and not with the Bidder's subcontractor or affiliate. 6) The work billed for any given resource category must include at least 50% of the associated tasks listed in Annex A – Statement of Work for the same resource category; and, <p>The Bidder must provide a completed Billed Days Response Template for each Resource Category using Appendix B to Attachment 2.</p> <table border="1"> <thead> <tr> <th>Category of Personnel</th><th>Level</th><th>Minimum Billed Days</th></tr> </thead> <tbody> <tr> <td>Tester</td><td>3</td><td>2000</td></tr> <tr> <td>Business Analyst</td><td>3</td><td>3000</td></tr> <tr> <td>Courseware Developer</td><td>3</td><td>N/A</td></tr> <tr> <td>Technical Writer</td><td>3</td><td>1000</td></tr> <tr> <td>Change Management Consultant</td><td>3</td><td>700</td></tr> <tr> <td>Project Manager</td><td>3</td><td>3500</td></tr> </tbody> </table> | Category of Personnel | Level | Minimum Billed Days | Tester | 3 | 2000 | Business Analyst | 3 | 3000 | Courseware Developer | 3 | N/A | Technical Writer | 3 | 1000 | Change Management Consultant | 3 | 700 | Project Manager | 3 | 3500 | |
| Category of Personnel | Level | Minimum Billed Days | | | | | | | | | | | | | | | | | | | | | |
| Tester | 3 | 2000 | | | | | | | | | | | | | | | | | | | | | |
| Business Analyst | 3 | 3000 | | | | | | | | | | | | | | | | | | | | | |
| Courseware Developer | 3 | N/A | | | | | | | | | | | | | | | | | | | | | |
| Technical Writer | 3 | 1000 | | | | | | | | | | | | | | | | | | | | | |
| Change Management Consultant | 3 | 700 | | | | | | | | | | | | | | | | | | | | | |
| Project Manager | 3 | 3500 | | | | | | | | | | | | | | | | | | | | | |

| | | |
|--|---|--|
| | * Billed days cannot be referenced for more than one resource category. 1 Billed day = 7.5 hours. | |
|--|---|--|

3. Corporate Rated Evaluation Criteria

| Item # | Point Rated Criteria | Max pts. | Bidders Response | |
|-----------|---|------------|---|---|
| | | | Eval. Criteria | Demonstrated Experience (Bidders to insert data) |
| R1 | <p>The Bidder should demonstrate experience over and beyond Mandatory Requirement M1:</p> <p>The Bidder must provide three (3) Customer Reference Contracts, with a cumulative billed value of \$15,000,000.00, within the last five (5) years prior to the issuance date of this RFP, that meet the following criteria:</p> <ol style="list-style-type: none"> 1. Each of the contracts must have a minimum invoiced value of \$5,000,000.00 (Canadian, including taxes) as of the issuance date of this RFP. 2. At least two (2) of the contracts was for providing Informatics Professional Services <p>The following must be included with the bid for each contract:</p> <ol style="list-style-type: none"> a) A letter from its client (referencing a contract serial number or other unique identifier) that shows that the Bidder has provided and invoiced a customer (with who the Bidder deals with at arm's length) for services in the amount of \$5,000,000.00 | /30 | <p>>\$15M - \$18M = 10 points</p> <p>>\$18M - \$20M = 20 points</p> <p>>\$20M = 30 points</p> <p>For a maximum of 30 points</p> | |
| R2 | <p>The Bidder should demonstrate that they hold current ISO Quality Management Certification, or have started the registration process to become certified.</p> <p>Proof of certification or registration to become certified must be provided with the bid. The Crown will only accept a letter from a registered external ISO Auditor as proof of a Bidders ISO registration process.</p> | /25 | <p>ISO 9001:2015 Certification or registration to become certified = 25 points</p> <p>For a maximum of 25 points</p> | |

| | | | Bidders Response | |
|--------|--|----------|---|---|
| Item # | Point Rated Criteria | Max pts. | Eval. Criteria | Demonstrated Experience (Bidders to insert data) |
| R3 | <p>The Official Languages Act provides that English and French are the languages of work in federal institutions. Leadership in official languages calls on all managers in institutions to respect the language-of-work rights of employees, to create and maintain a workplace that is conducive to the use of English and French in bilingual regions, for example by holding bilingual meetings; and to communicate to employees the role that official languages play in service excellence for Canadians.</p> <p>For contracts referenced in M1, the Bidder should demonstrate its experience providing teams of <u>bilingual</u> resources.</p> | /20 | <ul style="list-style-type: none"> Less than 5 bilingual resources = 0 points 5 to 9 bilingual resources = 4 points 10 to 14 bilingual resources = 8 points 15 to 19 bilingual resources = 12 points 20 to 25 bilingual resources = 16 points More than 25 bilingual resources = 20 points <p>For a maximum of 20 points</p> | |
| R4 | <p>Resource Management Processes</p> <p>The Bidder should describe the approach and processes related to the management of its professional services resources that will be utilized to ensure the Bidder's ability to propose qualified resources to DFATD within five (5) days of receipt of a TA and minimize turnover of those resources. If applicable, the Bidder should demonstrate where the same approach and process was utilized successfully to support one of the referenced contracts provided in response to mandatory requirement M1 Corporate Experience above.</p> | | | |
| R4.1 | Recruitment of Resources | | | |
| | <p>a) The Bidder's response will be evaluated based on the extent to which the proposed approach and process should result in the provision of qualified resources to DFATD within five (5) days of receipt of a TA as demonstrated through the following elements:</p> <p>i. Identifies and describes the risks associated with recruitment of resources;</p> | /30 | <p>A maximum of 30 points will be awarded:</p> <p>30 points – Addresses 5 elements (i. to v.);</p> | |

| | | | Bidders Response | |
|---------------|---|-----------------|--|--|
| Item # | Point Rated Criteria | Max pts. | Eval. Criteria | Demonstrated Experience (Bidders to insert data) |
| | ii. Demonstrates that all aspects of the risks were identified and were addressed with a risk mitigation strategy; iii. Provides a detailed description of the processes supporting the mitigation strategy; iv. Demonstrates that process has been implemented within the organizations as standard operating procedure; and v. Demonstrates a flexible approach that is able to address difficult or unexpected situations | | 20 points – Addresses 4 elements (i. to v.); 10 points – Addresses 3 elements (i. to v.); or 0 points – Less than 3 elements addressed (i. to v.). | |
| | b) The Bidder's response will be evaluated based on the extent to which the Bidder has demonstrated that the approach described in response to a) above has been used previously by this Bidder to support another client. | /10 | Up to an additional 10 points will be awarded (only if a minimum of 10 points have been awarded above): <ul style="list-style-type: none"> 10 points – All elements described in the Bidder's response to a) above are demonstrated; 5 points – At least 3 elements described in the Bidder's response to a) above are demonstrated; or 0 points – None of the elements described in the Bidder's response to a) above are demonstrated | |
| R4.2 | Screening of Resources | | | |

| | | | Bidders Response | |
|--------|---|----------|---|---|
| Item # | Point Rated Criteria | Max pts. | Eval. Criteria | Demonstrated Experience (Bidders to insert data) |
| | <p>a) The Bidder's response will be evaluated based on the extent to which the description of the proposed approach and process should result in the provision of qualified resources that are a good fit for the role as demonstrated through the following elements:</p> <ul style="list-style-type: none"> i. Identifies and describes the risks associated with screening of resources; ii. Demonstrates that all aspects of the risks were understood and were addressed with a risk mitigation strategy; iii. Provides a detailed description of the processes supporting the mitigation strategy; iv. Demonstrates that process has been implemented within the organizations as standard operating procedure; and v. Demonstrates a flexible approach that is able to address difficult or unexpected situations | /30 | <p>A maximum of 30 points will be awarded:</p> <ul style="list-style-type: none"> • 30 points – Addresses 5 elements (i. to v.); • 20 points – Addresses 4 elements (i. to v.); • 10 points – Addresses 3 elements; or • 0 points – Less than 3 elements addressed (i. to v.). | |
| | <p>b) The Bidder's response will be evaluated based on the extent to which the Bidder has demonstrated that this described approach has been successfully used previously by the Bidder to support another client.</p> | /10 | <p>Up to an additional 10 points will be awarded (only if a minimum of 10 points have been awarded above):</p> <ul style="list-style-type: none"> • 10 points – All elements described in the Bidder's response to a) above are demonstrated; • 5 points – At least 3 elements described in the Bidder's response to a) above are demonstrated; or • 0 points – None of the elements described in the Bidder's response to a) | |

| | | | Bidders Response | |
|-------------|--|-----------|--|---|
| Item # | Point Rated Criteria | Max pts. | Eval. Criteria | Demonstrated Experience (Bidders to insert data) |
| | | | above are demonstrated. | |
| R4.3 | Training and ongoing development of resources | | | |
| | <p>a) The Bidder's response will be evaluated based on the extent to which the description of the proposed approach and process should result in the provision of contract resources that are competent and knowledgeable of the client's IT environment and the support tools they utilize as demonstrated through the following elements:</p> <ul style="list-style-type: none"> i. Identifies and describes the risks associated with training and ongoing development of resources; ii. Demonstrates that all aspects of the risks were understood and were addressed with a risk mitigation strategy; iii. Provides a detailed description of the processes supporting the mitigation strategy; iv. Demonstrates that process has been implemented within the organizations as standard operating procedure; and v. Demonstrates a flexible approach that is able to address difficult or unexpected situations. | 30 | <p>A maximum of 30 points will be awarded:</p> <ul style="list-style-type: none"> • 30 points – Addresses 5 elements (i. to v.); • 20 points – Addresses 4 elements (i. to v.); • 10 points – Addresses 3 elements (i. to v.); or • 0 points – Less than 3 elements addressed (i. to v.). | |
| | <p>b) The Bidder's response will be evaluated based on the extent to which the Bidder has demonstrated that this described approach has been successfully used previously by the Bidder to support another client.</p> | 10 | <p>Up to an additional 10 points will be awarded (only if a minimum of 10 points have been awarded above):</p> <ul style="list-style-type: none"> • 10 points – All elements described in the Bidder's response to a) above are demonstrated; • 5 points – At least 3 elements described in the Bidder's response to a) above are demonstrated; or | |

| | | | Bidders Response | |
|-------------|---|------------|---|---|
| Item # | Point Rated Criteria | Max pts. | Eval. Criteria | Demonstrated Experience (Bidders to insert data) |
| | | | <ul style="list-style-type: none"> 0 points – None of the elements described in the Bidder's response to a) above are demonstrated. | |
| R4.4 | Retention of resources | | | |
| | <p>a) The Bidder's response will be evaluated based on the extent to which the description of the proposed approach and process should result in the provision of contract resources that are competent and knowledgeable of the client's IT environment and the support tools they utilize as demonstrated through the following elements:</p> <ol style="list-style-type: none"> Identifies and describes the risks associated with training and ongoing development of resources; Demonstrates that all aspects of the risks were understood and were addressed with a risk mitigation strategy; Provides a detailed description of the processes supporting the mitigation strategy; Demonstrates that process has been implemented within the organizations as standard operating procedure; and Demonstrates a flexible approach that is able to address difficult or unexpected situations. | 30 | <p>A maximum of 30 points will be awarded:</p> <ul style="list-style-type: none"> 30 points – Addresses 5 elements (i. to v.); 20 points – Addresses 4 elements (i. to v.); 10 points – Addresses 3 elements (i. to v.); or 0 points – Less than 3 elements addressed (i. to v.). | |
| | <p>b) The Bidder's response will be evaluated based on the extent to which the Bidder has demonstrated that this described approach has been successfully used previously by the Bidder to support another client.</p> | /10 | <p>Up to an additional 10 points will be awarded (only if a minimum of 10 points have been awarded above):</p> <ul style="list-style-type: none"> 10 points – All elements described in the Bidder's response to a) above are demonstrated; 5 points – Some elements described in | |

| | | | Bidders Response | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--|---|---------------------------------------|---|--|--|--|-------------|--|--|--|--|--|-----|-----|-----|-----|----------|--------------|---------------------------------------|------------------------------|---------------------------------------|--|--|--|-----------------|----------------------|--------|------|------|------|-------|------------------|------|------|-----|-------|----------------------|--|-----|-----|-----|------------------|------|------|-----|-------|------------------------------|------|-----|-----|--------|-----------------|------|------|------|-------|--|--|--|--|-------|------|---|--|
| Item # | Point Rated Criteria | Max pts. | Eval. Criteria | Demonstrated Experience (Bidders to insert data) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | <p>the Bidder's response to a) above; or</p> <ul style="list-style-type: none"> • 0 points – Approach proposed in response to a) above is not demonstrated. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| R-5 | <p>The Bidder should demonstrate its billed days experience in excess to the Minimum Billed Days per category under M-4.</p> <table border="1"> <thead> <tr> <th colspan="5">EXAMPLE EVALUATION SCENARIO</th></tr> <tr> <th colspan="5">BILLED DAYS</th></tr> <tr> <th></th><th>(A)</th><th>(B)</th><th>(C)</th><th>(D)</th></tr> </thead> <tbody> <tr> <td>Category</td><td>Bidder Total</td><td>Min. Billed days identified under SM1</td><td>Billed days in excess of SM1</td><td>Bidder % increase to a maximum of 100</td></tr> <tr> <td></td><td></td><td></td><td>(C) = (A) – (B)</td><td>(D) = (C) / (B) *100</td></tr> <tr> <td>Tester</td><td>3400</td><td>2000</td><td>1400</td><td>70.00</td></tr> <tr> <td>Business Analyst</td><td>3600</td><td>3000</td><td>600</td><td>20.00</td></tr> <tr> <td>Courseware Developer</td><td></td><td>N/A</td><td>N/A</td><td>N/A</td></tr> <tr> <td>Technical Writer</td><td>1475</td><td>1000</td><td>475</td><td>47.50</td></tr> <tr> <td>Change Management Consultant</td><td>1500</td><td>700</td><td>800</td><td>100.00</td></tr> <tr> <td>Project Manager</td><td>5050</td><td>3500</td><td>1550</td><td>44.29</td></tr> <tr> <td colspan="4">BIDDER SCORE = SUM OF (D) FOR ALL CATEGORIES / 5 (which will be rounded to two decimal places)</td><td>38.36</td></tr> </tbody> </table> | EXAMPLE EVALUATION SCENARIO | | | | | BILLED DAYS | | | | | | (A) | (B) | (C) | (D) | Category | Bidder Total | Min. Billed days identified under SM1 | Billed days in excess of SM1 | Bidder % increase to a maximum of 100 | | | | (C) = (A) – (B) | (D) = (C) / (B) *100 | Tester | 3400 | 2000 | 1400 | 70.00 | Business Analyst | 3600 | 3000 | 600 | 20.00 | Courseware Developer | | N/A | N/A | N/A | Technical Writer | 1475 | 1000 | 475 | 47.50 | Change Management Consultant | 1500 | 700 | 800 | 100.00 | Project Manager | 5050 | 3500 | 1550 | 44.29 | BIDDER SCORE = SUM OF (D) FOR ALL CATEGORIES / 5 (which will be rounded to two decimal places) | | | | 38.36 | /100 | <p>The bidder's demonstrated "Total Billed Days" provided in response to M1 will be used to evaluate this criterion.</p> <p>The bidder will be awarded points as demonstrated in the example evaluation scenario on the left side.</p> <p>In this example, the bidder would score 38.36 out of a possible 100 points.</p> | |
| EXAMPLE EVALUATION SCENARIO | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| BILLED DAYS | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | (A) | (B) | (C) | (D) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Category | Bidder Total | Min. Billed days identified under SM1 | Billed days in excess of SM1 | Bidder % increase to a maximum of 100 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | (C) = (A) – (B) | (D) = (C) / (B) *100 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Tester | 3400 | 2000 | 1400 | 70.00 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Business Analyst | 3600 | 3000 | 600 | 20.00 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Courseware Developer | | N/A | N/A | N/A | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Technical Writer | 1475 | 1000 | 475 | 47.50 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Change Management Consultant | 1500 | 700 | 800 | 100.00 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Project Manager | 5050 | 3500 | 1550 | 44.29 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| BIDDER SCORE = SUM OF (D) FOR ALL CATEGORIES / 5 (which will be rounded to two decimal places) | | | | 38.36 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

ATTACHMENT 2

BID EVALUATION CRITERIA

Workstream 5 - Project Support Services

1. Evaluation Summary (Workstream 5)

| No. | Mandatory Criteria | Compliant Yes/No |
|---|--|------------------|
| M-1 ^{PB} | Corporate Experience (Contracts) | |
| | • Reference Contract #1 | |
| | • Reference Contract #2 | |
| | • Reference Contract #3 | |
| M-2 ^{PB} | Corporate Experience (Resources) | |
| M-3 ^{PB} | Corporate Experience (Controlled Goods) | |
| M-4 ^{PB} | Corporate Experience | |
| No. | Point-Rated Criteria | Maximum Points |
| R-1 | Reference Contracts | 30 |
| | 13) Reference Contract #1 | |
| | 14) Reference Contract #2 | |
| | 15) Reference Contract #3 | |
| R-2 | ISO Quality Management Certification | 25 |
| R-3 | Corporate Experience (Bilingual Resources) | 20 |
| R-4 | Resource Management Processes | 160 |
| R-5 | Corporate Experience in Excess of M-4 | 100 |
| Overall Maximum Points | | 335 |
| Pass Mark (70% of Overall Maximum Points) | | 234.5 |

2. Corporate Mandatory Evaluation Criteria

| Item | Mandatory Criteria | Demonstrated Experience |
|------------------|---|-------------------------|
| M1 ^{PB} | <p>The Bidder must provide three (3) Customer Reference Contracts, with a cumulative billed value of \$15,000,000.00, within the last five (5) years prior to the issuance date of this RFP, that meet the following criteria:</p> <ol style="list-style-type: none"> Each of the contracts must have a minimum invoiced value of \$5,000,000.00 (Canadian, including taxes) as of the issuance date of this RFP. At least two (2) of the contracts was for providing Informatics Professional Services <p>The following must be included with the bid for each contract:</p> | |

| | A letter from its client (referencing a contract serial number or other unique identifier) that shows that the Bidder has provided and invoiced a customer (with who the Bidder deals with at arm's length) for services in the amount of \$5,000,000.00 | | | | | | | | | | | | | | | | |
|--------------------------------|--|-----------------------|-------|---------------------|--------------------------------|---|------|----------------------|---|------|-----------------|---|------|-------------------|---|------|--|
| M2^{PB} | <p>For one (1) of the contracts referenced in M1, the Bidder must demonstrate, using Appendix A to Attachment 2 that it directly placed a minimum of fifteen (15) resources concurrently for a period of six (6) months</p> <p>To be accepted, Bidders must submit a signed Client attestation letter with their bid stating that a minimum of fifteen (15) resources were placed concurrently for a period of six (6) months.</p> | | | | | | | | | | | | | | | | |
| M3^{PB} | The Bidder must demonstrate that it holds valid Controlled Goods Clearance issued by PWGSC. A copy of the clearance must be submitted with the bid. | | | | | | | | | | | | | | | | |
| M4^{PB} | <p>The Bidder must demonstrate the Minimum Billed Days for ALL Resource Categories Identified below:</p> <p>To be accepted:</p> <ol style="list-style-type: none"> 1) The billed days must have been for the delivery of Informatics Professional Services; 2) At least two (2) of the contracts provided must have been for resources at the level of SECRET, or higher. 3) The billed days must have occurred within the past five (5) years prior to the issuance date of this RFP. 4) The billed days must have been provided under a maximum of four (4) contracts; 5) The reference contract must have been contracted directly with the Bidder and not with the Bidder's subcontractor or affiliate. 6) The work billed for any given resource category must include at least 50% of the associated tasks listed in Annex A – Statement of Work for the same resource category; and, <p>The Bidder must provide a completed Billed Days Response Template for each Resource Category using Appendix B to Attachment 2.</p> <table border="1"> <thead> <tr> <th>Category of Personnel</th><th>Level</th><th>Minimum Billed Days</th></tr> </thead> <tbody> <tr> <td>Application/Software Architect</td><td>3</td><td>2000</td></tr> <tr> <td>Technology Architect</td><td>3</td><td>1500</td></tr> <tr> <td>Project Manager</td><td>3</td><td>2500</td></tr> <tr> <td>Project Scheduler</td><td>3</td><td>1200</td></tr> </tbody> </table> <p>* Billed days cannot be referenced for more than one resource category. 1 Billed day = 7.5 hours.</p> | Category of Personnel | Level | Minimum Billed Days | Application/Software Architect | 3 | 2000 | Technology Architect | 3 | 1500 | Project Manager | 3 | 2500 | Project Scheduler | 3 | 1200 | |
| Category of Personnel | Level | Minimum Billed Days | | | | | | | | | | | | | | | |
| Application/Software Architect | 3 | 2000 | | | | | | | | | | | | | | | |
| Technology Architect | 3 | 1500 | | | | | | | | | | | | | | | |
| Project Manager | 3 | 2500 | | | | | | | | | | | | | | | |
| Project Scheduler | 3 | 1200 | | | | | | | | | | | | | | | |

3. Corporate Rated Evaluation Criteria

| Item # | Point Rated Criteria | Max pts. | Bidders Response | |
|-----------|--|------------|--|--|
| | | | Eval. Criteria | Demonstrated Experience (Bidders to insert data) |
| R1 | <p>The Bidder should demonstrate experience over and beyond Mandatory Requirement M1:</p> <p>The Bidder must provide three (3) Customer Reference Contracts, with a cumulative billed value of \$15,000,000.00, within the last five (5) years prior to the issuance date of this RFP, that meet the following criteria:</p> <ol style="list-style-type: none"> Each of the contracts must have a minimum invoiced value of \$5,000,000.00 (Canadian, including taxes) as of the issuance date of this RFP. At least two (2) of the contracts was for providing Informatics Professional Services <p>The following must be included with the bid for each contract:</p> <ol style="list-style-type: none"> A letter from its client (referencing a contract serial number or other unique identifier) that shows that the Bidder has provided and invoiced a customer (with who the Bidder deals with at arm's length) for services in the amount of \$5,000,000.00 | /30 | <p>>\$15M - \$18M = 10 points</p> <p>>\$18M - \$20M = 20 points</p> <p>>\$20M = 30 points</p> <p>For a maximum of 30 points</p> | |
| R2 | <p>The Bidder should demonstrate that they hold current ISO Quality Management Certification, or have started the registration process to become certified.</p> <p>Proof of certification or registration to become certified must be provided with the bid. The Crown will only accept a letter from a registered external ISO Auditor as proof of a Bidders ISO registration process.</p> | /25 | <p>ISO 9001:2015 Certification or registration to become certified = 25 points</p> <p>For a maximum of 25 points</p> | |
| R3 | <p>The Official Languages Act provides that English and French are the languages of work in federal institutions. Leadership in official languages calls on all managers in institutions to respect the language-of-work rights of employees, to create and maintain a workplace that is conducive to the use of English and French in bilingual regions, for example by holding bilingual meetings; and to communicate to employees the role that official languages play in service excellence for Canadians.</p> <p>For contracts referenced in M1, the Bidder should demonstrate its experience providing teams of <u>bilingual</u> resources.</p> | /20 | <ul style="list-style-type: none"> Less than 5 bilingual resources = 0 points 5 to 9 bilingual resources = 4 points 10 to 14 bilingual resources = 8 points | |

| | | | Bidders Response | |
|-------------|--|------------|--|---|
| Item # | Point Rated Criteria | Max pts. | Eval. Criteria | Demonstrated Experience (Bidders to insert data) |
| | | | <ul style="list-style-type: none"> 15 to 19 bilingual resources = 12 points 20 to 25 bilingual resources = 16 points More than 25 bilingual resources = 20 points | |
| R4 | Resource Management Processes The Bidder should describe the approach and processes related to the management of its professional services resources that will be utilized to ensure the Bidder's ability to propose qualified resources to DFATD within five (5) days of receipt of a TA and minimize turnover of those resources. If applicable, the Bidder should demonstrate where the same approach and process was utilized successfully to support one of the referenced contracts provided in response to mandatory requirement M1 Corporate Experience above. | | | |
| R4.1 | Recruitment of Resources | | | |
| | a) The Bidder's response will be evaluated based on the extent to which the proposed approach and process should result in the provision of qualified resources to DFATD within five (5) days of receipt of a TA as demonstrated through the following elements: <ol style="list-style-type: none"> Identifies and describes the risks associated with recruitment of resources; Demonstrates that all aspects of the risks were identified and were addressed with a risk mitigation strategy; Provides a detailed description of the processes supporting the mitigation strategy; Demonstrates that process has been implemented within the organizations as standard operating procedure; and Demonstrates a flexible approach that is able to address difficult or unexpected situations | /30 | A maximum of 30 points will be awarded: 30 points – Addresses 5 elements (i. to v.); 20 points – Addresses 4 elements (i. to v.); 10 points – Addresses 3 elements (i. to v.); or 0 points – Less than 3 elements addressed (i. to v.). | |
| | b) The Bidder's response will be evaluated based on the extent to which the Bidder has demonstrated that the approach described in response to a) above has been used previously by this Bidder to support another client. | /10 | Up to an additional 10 points will be awarded (only if a minimum of 10 | |

| | | | Bidders Response | |
|-------------|---|------------|---|---|
| Item # | Point Rated Criteria | Max pts. | Eval. Criteria | Demonstrated Experience (Bidders to insert data) |
| | | | <p>points have been awarded above):</p> <ul style="list-style-type: none"> • 10 points – All elements described in the Bidder's response to a) above are demonstrated; • 5 points – At least 3 elements described in the Bidder's response to a) above are demonstrated; or • 0 points – None of the elements described in the Bidder's response to a) above are demonstrated | |
| R4.2 | Screening of Resources | | | |
| | <p>a) The Bidder's response will be evaluated based on the extent to which the description of the proposed approach and process should result in the provision of qualified resources that are a good fit for the role as demonstrated through the following elements:</p> <ul style="list-style-type: none"> i. Identifies and describes the risks associated with screening of resources; ii. Demonstrates that all aspects of the risks were understood and were addressed with a risk mitigation strategy; iii. Provides a detailed description of the processes supporting the mitigation strategy; iv. Demonstrates that process has been implemented within the organizations as standard operating procedure; and v. Demonstrates a flexible approach that is able to address difficult or unexpected situations | /30 | <p>A maximum of 30 points will be awarded:</p> <ul style="list-style-type: none"> • 30 points – Addresses 5 elements (i. to v.); • 20 points – Addresses 4 elements (i. to v.); • 10 points – Addresses 3 elements; or • 0 points – Less than 3 elements addressed (i. to v.). | |

| | | | Bidders Response | |
|-------------|--|----------|--|---|
| Item # | Point Rated Criteria | Max pts. | Eval. Criteria | Demonstrated Experience (Bidders to insert data) |
| | | | | |
| | b) The Bidder's response will be evaluated based on the extent to which the Bidder has demonstrated that this described approach has been successfully used previously by the Bidder to support another client. | /10 | Up to an additional 10 points will be awarded (only if a minimum of 10 points have been awarded above): <ul style="list-style-type: none"> • 10 points – All elements described in the Bidder's response to a) above are demonstrated; • 5 points – At least 3 elements described in the Bidder's response to a) above are demonstrated; or • 0 points – None of the elements described in the Bidder's response to a) above are demonstrated. | |
| R4.3 | Training and ongoing development of resources | | | |
| | a) The Bidder's response will be evaluated based on the extent to which the description of the proposed approach and process should result in the provision of contract resources that are competent and knowledgeable of the client's IT environment and the support tools they utilize as demonstrated through the following elements: <ol style="list-style-type: none"> Identifies and describes the risks associated with training and ongoing development of resources; Demonstrates that all aspects of the risks were understood and were addressed with a risk mitigation strategy; Provides a detailed description of the processes supporting the mitigation strategy; | 30 | A maximum of 30 points will be awarded: <ul style="list-style-type: none"> • 30 points – Addresses 5 elements (i. to v.); • 20 points – Addresses 4 elements (i. to v.); • 10 points – Addresses 3 | |

| | | | Bidders Response | |
|-------------|--|----------|--|---|
| Item # | Point Rated Criteria | Max pts. | Eval. Criteria | Demonstrated Experience (Bidders to insert data) |
| | iv. Demonstrates that process has been implemented within the organizations as standard operating procedure; and v. Demonstrates a flexible approach that is able to address difficult or unexpected situations. | | elements (i. to v.); or • 0 points – Less than 3 elements addressed (i. to v.). | |
| | b) The Bidder's response will be evaluated based on the extent to which the Bidder has demonstrated that this described approach has been successfully used previously by the Bidder to support another client. | 10 | Up to an additional 10 points will be awarded (only if a minimum of 10 points have been awarded above): • 10 points – All elements described in the Bidder's response to a) above are demonstrated; • 5 points – At least 3 elements described in the Bidder's response to a) above are demonstrated; or • 0 points – None of the elements described in the Bidder's response to a) above are demonstrated. | |
| R4.4 | Retention of resources | | | |
| | a) The Bidder's response will be evaluated based on the extent to which the description of the proposed approach and process should result in the provision of contract resources that are competent and knowledgeable of the client's IT environment and the support tools they utilize as demonstrated through the following elements: | 30 | A maximum of 30 points will be awarded: • 30 points – Addresses 5 elements (i. to v.); | |

| | | | | | | Bidders Response | |
|--------|--|------------------------|-----------------------|-----------------------|-----------------------------|--|---|
| Item # | Point Rated Criteria | | | | Max pts. | Eval. Criteria | Demonstrated Experience (Bidders to insert data) |
| | i. Identifies and describes the risks associated with training and ongoing development of resources; ii. Demonstrates that all aspects of the risks were understood and were addressed with a risk mitigation strategy; iii. Provides a detailed description of the processes supporting the mitigation strategy; iv. Demonstrates that process has been implemented within the organizations as standard operating procedure; and v. Demonstrates a flexible approach that is able to address difficult or unexpected situations. | | | | | <ul style="list-style-type: none">• 20 points – Addresses 4 elements (i. to v.);• 10 points – Addresses 3 elements (i. to v.); or• 0 points – Less than 3 elements addressed (i. to v.). | |
| | b) The Bidder’s response will be evaluated based on the extent to which the Bidder has demonstrated that this described approach has been successfully used previously by the Bidder to support another client. | | | | /10 | Up to an additional 10 points will be awarded (only if a minimum of 10 points have been awarded above): <ul style="list-style-type: none">• 10 points – All elements described in the Bidder’s response to a) above are demonstrated;• 5 points – Some elements described in the Bidder’s response to a) above; or• 0 points – Approach proposed in response to a) above is not demonstrated. | |
| R-5 | The Bidder should demonstrate its billed days experience in excess to the Minimum Billed Days per category under M-4. | | | | /100 | The bidder's demonstrated “Total Billed Days” provided in response to M1 will be used to evaluate this criterion. | |
| | EXAMPLE EVALUATION SCENARIO | | | | | | |
| | BILLED DAYS | | | | | | |
| | Category | (A) Bidder Total | (B) Min. Billed | (C) Billed days | (D) Bidder % increase | | |

| | | | | | | Bidders Response | |
|---------------|--|------|---------------------------|------------------|----------------------|-------------------------|---|
| Item # | Point Rated Criteria | | | | | Max pts. | Eval. Criteria Demonstrated Experience (Bidders to insert data) |
| | | | days identified under SM1 | in excess of SM1 | to a maximum of 100 | | The bidder will be awarded points as demonstrated in the example evaluation scenario on the left side. In this example, the bidder would score 30.33 out of a possible 100 points. |
| | | | | (C) = (A) – (B) | (D) = (C) / (B) *100 | | |
| | Application/Software Architect | 2450 | 2000 | 450 | 22.50 | | |
| | Technology Architect | 1750 | 1500 | 250 | 16.67 | | |
| | Project Manager | 3200 | 2500 | 700 | 28.00 | | |
| | Project Scheduler | 1850 | 1200 | 650 | 54.17 | | |
| | BIDDER SCORE = SUM OF (D) FOR ALL CATEGORIES / 4 (which will be rounded to two decimal places) | | | | 30.33 | | |

APPENDIX A TO ATTACHMENT 2 RESOURCE PLACEMENT RESPONSE TEMPLATE

| Corporate Reference Contract Description | | (Bidder to Insert Data) |
|--|---|-------------------------|
| Client Particulars | Client Organization Name | |
| | Address | |
| | Contract or Purchase Order Number | |
| | Project Title | |
| | Client Contact Name and Title | |
| | Contact telephone number and/or e-mail address. | |
| For each Resource listed below, The bidder must specify the Resource start and end date (mm/yyyy to mm/yyyy) | | |
| • Resource #1: | | |
| • Resource #2: | | |
| • Resource #3: | | |
| • Resource #4: | | |
| • Resource #5: | | |
| • Resource #6: | | |
| • Resource #7: | | |
| • Resource #8: | | |
| • Resource #9: | | |
| • Resource #10: | | |
| • Resource #11: | | |
| • Resource #12: | | |
| • Resource #13: | | |
| • Resource #14: | | |
| • Resource #15: | | |

APPENDIX B TO ATTACHMENT 2 BILLED DAYS RESPONSE TEMPLATE

To meet Criterion 6) under M4, the Bidder must demonstrate contract experience in supplying all of the resource categories, for the required Minimum Billed Days per category, within the past 5 years prior to the issuance date of this RFP. All resources provided must have completed at least 50% of the associated tasks listed in Annex A – Statement of Work for the same resource category

The substantiation must not simply be a repetition of the tasks, but must explain responsibilities and demonstrate how the Resource carried out the work while performing the tasks.

| Category of Personnel and Level | Cross Reference to Contract Reference # _____ Billing Period: ____/____/____ (dd/mm/yy) To ____/____/____ (dd/mm/yy) | Cross Reference to Contract Reference # _____ Billing Period: ____/____/____ (dd/mm/yy) To ____/____/____ (dd/mm/yy) | Cross Reference to Contract Reference # _____ Billing Period: ____/____/____ (dd/mm/yy) To ____/____/____ (dd/mm/yy) | Cross Reference to Contract Reference # _____ Billing Period: ____/____/____ (dd/mm/yy) To ____/____/____ (dd/mm/yy) | Task from Annex A - SOW | Task performed under the contract, including substantiation |
|---------------------------------|--|--|--|--|-------------------------|---|
| | | | | | | |
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ATTACHMENT 3 PRICING SCHEDULE

WORKSTREAM 1: APPLICATION DEVELOPMENT SERVICES

| Initial Contract Period | | |
|---|--------------------|---|
| Resource Category | Level of Expertise | Firm Per Diem Rate (to be completed by the Bidder) |
| Application/Software Architect - Siebel | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Application/Software Architect - .Net | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Programmer/Software Developer - Siebel | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Programmer / Analyst | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Data Conversion Specialist | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Quality Assurance Specialist/Analyst | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |

| Option Period 1 | | |
|---|--------------------|---|
| Resource Category | Level of Expertise | Firm Per Diem Rate (to be completed by the Bidder) |
| Application/Software Architect - Siebel | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Application/Software Architect - .Net | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Programmer/Software Developer - Siebel | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Programmer / Analyst | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Data Conversion Specialist | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Quality Assurance Specialist/Analyst | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |

| Option Period 2 | | |
|---|--------------------|---|
| Resource Category | Level of Expertise | Firm Per Diem Rate (to be completed by the Bidder) |
| Application/Software Architect - Siebel | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Application/Software Architect - .Net | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Programmer/Software Developer - Siebel | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Programmer / Analyst | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Data Conversion Specialist | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Quality Assurance Specialist/Analyst | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |

WORKSTREAM 2: INFRASTRUCTURE/DBA SERVICES

| Initial Contract Period | | |
|--------------------------------|--------------------|--------------------|
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| Application/Software Architect | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| System Analyst | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Database Administrator | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Network Analyst | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Technical Architect | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Technology Architect | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Technical Writer | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |

| Option Period 1 | | |
|--------------------------------|--------------------|--------------------|
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| Application/Software Architect | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| System Analyst | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Database Administrator | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Network Analyst | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Technical Architect | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Technology Architect | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Technical Writer | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |

| Option Period 2 | | |
|--------------------------------|--------------------|--------------------|
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| Application/Software Architect | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| System Analyst | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Database Administrator | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Network Analyst | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Technical Architect | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Technology Architect | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Technical Writer | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |

WORKSTREAM 3: TESTING SERVICES

| Initial Contract Period | | |
|-------------------------|--------------------|--------------------|
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| Test Coordinator | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Tester | Level 3 | |
| | Level 2 | 80% of Level 3 |
| | Level 1 | 80% of level 3 |

| Option Period 1 | | |
|-------------------|--------------------|--------------------|
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| Test Coordinator | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Tester | Level 3 | |
| | Level 2 | 80% of Level 3 |
| | Level 1 | 80% of level 3 |

| Option Period 2 | | |
|-------------------|--------------------|--------------------|
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| Test Coordinator | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Tester | Level 3 | |
| | Level 2 | 80% of Level 3 |
| | Level 1 | 80% of level 3 |

WORKSTREAM 4: BUSINESS SERVICES

| Initial Contract Period | | |
|------------------------------|--------------------|--------------------|
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| Tester | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Business Analyst | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Courseware Developer | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Technical Writer | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Change Management Consultant | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Project Manager | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |

| Option Period 1 | | |
|------------------------------|--------------------|--------------------|
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| Tester | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Business Analyst | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Courseware Developer | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Technical Writer | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Change Management Consultant | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Project Manager | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |

| Option Period 2 | | |
|------------------------------|--------------------|--------------------|
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| Tester | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Business Analyst | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Courseware Developer | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Technical Writer | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Change Management Consultant | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Project Manager | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |

WORKSTREAM 5: PROJECT SUPPORT SERVICES

| Initial Contract Period | | |
|--------------------------------|--------------------|--------------------|
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| Application/Software Architect | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Technology Architect | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Project Manager | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Project Scheduler | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |

| Option Period 1 | | |
|--------------------------------|--------------------|--------------------|
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| Application/Software Architect | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Technology Architect | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Project Manager | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Project Scheduler | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |

| Option Period 2 | | |
|--------------------------------|--------------------|--------------------|
| Resource Category | Level of Expertise | Firm Per Diem Rate |
| Application/Software Architect | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Technology Architect | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Project Manager | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |
| Project Scheduler | Level 3 | |
| | Level 2 | 90% of Level 3 |
| | Level 1 | 80% of level 3 |

ATTACHMENT 4

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).



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 | | Global Affairs Canada | | 2. Branch or Directorate / Direction générale ou Direction SED | |
| 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 To obtain Informatics Professional services on an as required basis to support the Import and Export Control System (EICS II) Upgrade Program. EICS controls the flow of goods between Canada and its trading partners, this is a major upgrade to the platform and its functionality. | | | | | |
| 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? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé. | | | | <input checked="" type="checkbox"/> No Non | <input type="checkbox"/> Yes Oui |
| 6. c) Is this a commercial courier or delivery requirement with no overnight storage? S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit? | | | | <input checked="" type="checkbox"/> No Non | <input type="checkbox"/> Yes Oui |
| 7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès | | | | | |
| Canada <input checked="" type="checkbox"/> | | NATO / OTAN <input type="checkbox"/> | | Foreign / Étranger <input type="checkbox"/> | |
| 7. b) Release restrictions / Restrictions relatives à la diffusion | | | | | |
| No release restrictions Aucune restriction relative à la diffusion <input checked="" type="checkbox"/> | | All NATO countries Tous les pays de l'OTAN <input type="checkbox"/> | | No release restrictions Aucune restriction relative à la diffusion <input type="checkbox"/> | |
| Not releasable À ne pas diffuser <input type="checkbox"/> | | | | | |
| Restricted to: / Limité à: <input type="checkbox"/> | | Restricted to: / Limité à: <input type="checkbox"/> | | Restricted to: / Limité à: <input type="checkbox"/> | |
| Specify country(ies): / Préciser le(s) pays: | | Specify country(ies): / Préciser le(s) pays: | | Specify country(ies): / Préciser le(s) pays: | |
| 7. c) Level of information / Niveau d'information | | | | | |
| PROTECTED A PROTÉGÉ A <input checked="" type="checkbox"/> | | NATO UNCLASSIFIED NATO NON CLASSIFIÉ <input type="checkbox"/> | | PROTECTED A PROTÉGÉ A <input type="checkbox"/> | |
| PROTECTED B PROTÉGÉ B <input checked="" type="checkbox"/> | | NATO RESTRICTED NATO DIFFUSION RESTREINTE <input type="checkbox"/> | | PROTECTED B PROTÉGÉ B <input type="checkbox"/> | |
| PROTECTED C PROTÉGÉ C <input checked="" type="checkbox"/> | | NATO CONFIDENTIAL NATO CONFIDENTIEL <input type="checkbox"/> | | PROTECTED C PROTÉGÉ C <input type="checkbox"/> | |
| CONFIDENTIAL CONFIDENTIEL <input checked="" 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"/> | |

**PART A (continued) / PARTIE A (suite)**

8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS? ☒ No ☐ Yes
Non ☐ Oui

If Yes, indicate the level of sensitivity:

Dans l'affirmative, indiquer le niveau de sensibilité :

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

Short Title(s) of material / Titre(s) abrégé(s) du matériel :

Document Number / Numéro du document :

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

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

- | | | | |
|---|--|--|--|
| <input checked="" type="checkbox"/> RELIABILITY STATUS COTE DE FIABILITÉ | <input checked="" 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 ☐ Yes
Non ☐ Oui

If Yes, will unscreened personnel be escorted?

Dans l'affirmative, le personnel en question sera-t-il escorté?

☒ No ☐ Yes
Non ☐ Oui

PART C - SAFEGUARDS (SUPPLIER) / PARTIE C - MESURES DE PROTECTION (FOURNISSEUR)**INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS**

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

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

PRODUCTION

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

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

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

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



Government of Canada
Gouvernement du Canada

COMMON-PS-SRCL#20

Contract Number / Numéro du contrat

08915 - 170500

Security Classification / Classification de sécurité

UNCLASSIFIED

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

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

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

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

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

SUMMARY CHART / TABLEAU RÉCAPITULATIF

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

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

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

☒ No
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 indiquez qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).



Government of Canada
Gouvernement du Canada

Contract Number / Numéro du contrat

08915-170500

Security Classification / Classification de sécurité
UNCLASSIFIED

PART D - AUTHORIZATION / PARTIE D - AUTORISATION

13. Organization Project Authority / Chargé de projet de l'organisme

Name (print) - Nom (en lettres moulées)

F. CAMIRÉ

Title - Titre

EXECUTIVE DIRECTOR

Signature

Telephone No. - N° de téléphone

343-203-0916

Facsimile No. - N° de télécopieur

E-mail address - Adresse courriel

Francois.Camire@

Date

April 08, 2019

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

Name (print) - Nom (en lettres moulées)

Andreea Stoinesteanu

Title - Titre

Contract Security Coordinator

Signature

Andreea Stoinesteanu

Telephone No. - N° de téléphone

343-203-3069

Facsimile No. - N° de télécopieur

E-mail address - Adresse courriel

andreea.stoinesteanu@international.gc.ca

Date

2019-04-17

15. Are there additional instructions (e.g. Security Guide, Security Classification Guide) attached?

Des instructions supplémentaires (p. ex. Guide de sécurité, Guide de classification de la sécurité) sont-elles jointes?

☐

No

☐

Yes

☐

Non

☐

Oui

16. Procurement Officer / Agent d'approvisionnement

Name (print) - Nom (en lettres moulées)

Hicham Laassouli

Title - Titre

Supply Specialist

Signature

laassouli,
hicham

Digitally signed by
laassouli, hicham
Date: 2019.06.07 09:50:32
-04'00'

Telephone No. - N° de téléphone

Facsimile No. - N° de télécopieur

E-mail address - Adresse courriel

Date

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

Name (print) - Nom (en lettres moulées)

Title - Titre

Signature

Saumur, Jacques O

Digitally signed by Saumur, Jacques O
DN: c=CA, o=GC, ou=PWGSC-TPSGC,
cn=Saumur, Jacques O
Date: 2017.02.03 14:24:27 -05'00'

Telephone No. - N° de téléphone

Facsimile No. - N° de télécopieur

E-mail address - Adresse courriel

Date

Jacques Saumur

Contract Security Officer

Contracts Security Division | Division des contrats sécurité /

Contract Security Program | Programme de sécurité des contrats /

Public Services and Procurement Canada | Services publics et Approvisionnement Canada

Jacques.Saumur@tpsgc-pwgsc.gc.ca

Telephone | Téléphone 613-948-1732

Facsimile | Télécopieur 613-948-1712



TASK AUTHORIZATION FORM FORMULAIRE D'AUTORISATION DE TÂCHES

PART 1 (completed by the Technical/Project Authority) / PARTIE 1 (complété par le Responsable technique / Chargé du projet)

A. General Information / Informations générales

| | | | | |
|---|---------------------------------------|-------------------------------------|--------------------------------------|--|
| Contract Number / Numéro du contrat : <input type="text"/> | | | | |
| Contractor Name / Nom du Contracteur : <input type="text"/> | | | | |
| Task Authorization (TA) No. / N° de l'autorisation de tâches (AT) : | Commitment No. / N° de l'engagement : | Financial Coding / Code financier : | Date of Issuance / Date d'émission : | Response required by / Réponse requise par : |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

B. For Amendments Only / Aux fins de modification seulement

| | |
|--|----------------------|
| Amendment No. / N° de la modification : | <input type="text"/> |
| Reason for the Amendment / Raison pour la modification : | <input type="text"/> |

C. TA Requirements / Exigences relatives à l'AT

Required Resource(s) / Ressource(s) requise(s)

| Category / Catégorie | Level / Niveau | Estimated Level of Effort (days) / Niveau d'effort estimatif (jours) | Linguistic Profile / Profile linguistique | Required Level(s) of Security / Niveau(x) de sécurité requis | |
|----------------------|----------------|--|---|--|----------------------------------|
| | | | | | <input type="button" value="+"/> |
| | | | | | <input type="button" value="-"/> |

Statement of Work (tasks, deliverables, reports, etc.) / Énoncé des travaux (tâches, livrables, rapports, etc.)

Period of Services / Période de service:

| | | | |
|---|----------------------|---|----------------------|
| Initial Start Date / Date de début initiale : | <input type="text"/> | Initial End Date / Date de fin initiale : | <input type="text"/> |
| Extended End Date (See Reason for the Amendment) / Date de fin prolongée (voir Raison pour la modification) : | | <input type="text"/> | |
| <input type="checkbox"/> Option To Extend Initial End Date / Option pour prolonger la date de fin initiale | | | |

| | |
|---|----------------------|
| Travel Requirement(s) / Exigence(s) de voyage : | <input type="text"/> |
| Work Location(s) / Lieu(x) de travail : | <input type="text"/> |

PART 2 (completed by the Contractor and/or the Technical/Project Authority) / PARTIE 2 (complété par le Contracteur et/ou le Responsable technique / Chargé du projet)

A. Contractor Resource(s) / Ressource(s) du Contracteur

Note: once approved, only the following resources may provide services under this TA. / Nota : une fois approuvée, seules les ressources suivantes peuvent fournir des services sous la présente AT.



TASK AUTHORIZATION FORM

FORMULAIRE D'AUTORISATION DE TÂCHES

| Name / Nom | Category / Catégorie | Level / Niveau | Linguistic Profile / Profil linguistique | Level of Security / Niveau de sécurité | PWGSC Security File No. / N° du dossier de sécurité TPSGC | |
|------------|----------------------|----------------|---|---|--|--------------------|
| | | | | | | <div>+ -</div> |

B. Estimated Cost / Coût estimatif

| Category / Catégorie | Level / Niveau | Per Diem Rate / Taux journalier | Estimated Level of Effort (days) / Niveau d'effort estimatif (jours) | Total Cost / Coût estimatif |
|--|----------------|--------------------------------------|--|-----------------------------|
| | | | | |
| Estimated Cost / Coût estimatif | | | | |
| Total Estimated Travel and Living Cost / Estimé des frais de déplacement et de subsistance | | | | \$0.00 |
| Taxe rate applied / Taux d'imposition appliqué (%) | 14.975 | Applicable Taxes / Taxes applicables | | \$0.00 |
| Total Estimated Cost / Coût total estimatif | | | | \$0.00 |

PART 3 - TA APPROVAL BY CANADA / PARTIE 3 - APPROBATION DE L'AT PAR LE CANADA

By signing this TA, the authorized client authority and/or the PWGSC Contracting Authority certify(ies) that the content of this TA is in accordance with the conditions of the Contract.

En apposant sa signature sur l'AT, le client autorisé et/ou l'autorité contractante de TPSGC atteste(nt) que le contenu de cette AT est conforme aux conditions du contrat.

The client's authorization limit is **\$300,000.00**. When the value of a TA and its amendments (including GST/HST) is in excess of this limit, the TA must be signed by the authorized client and forwarded to the PWGSC Contracting Authority for authorization.

La limite d'autorisation du client est **\$300,000.00**. Lorsque la valeur de l'AT et ses modifications (incluant la TPS/TVH) dépasse cette limite, l'AT doit être signée par le client autorisé et transmise à l'autorité contractante de TPSGC pour autorisation.

Name of Authorized Client / Nom du client autorisé _____ Date _____

Name of Contracting Authority / Nom de
l'autorité contractante _____ Date _____

Signature _____

Signature _____

PART 4 - CONTRACTOR SIGNATURE / PARTIE 4 - SIGNATURE DU CONTRACTEUR

Name and Title of individual authorized to sign on behalf of the Contractor / Nom et titre
de la personne autorisée à signer au nom de l'entrepreneur _____

Signature _____ Date _____