



**RETURN BIDS TO:**

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Bid Receiving - PWGSC / Réception des  
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11 Laurier St., / 11, rue Laurier

Place du Portage, Phase III

Core 0B2 / Noyau 0B2

Gatineau

Québec

K1A 0S5

Bid Fax: (819) 997-9776

**LETTER OF INTEREST**

**LETTRE D'INTÉRÊT**

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

<b>Title - Sujet</b> (FSR) SAP Implementation Project	
<b>Solicitation No. - N° de l'invitation</b> FP815-190004/A	<b>Date</b> 2019-07-22
<b>Client Reference No. - N° de référence du client</b> FP815-190004	<b>GETS Ref. No. - N° de réf. de SEAG</b> PW-\$\$EL-609-36657
<b>File No. - N° de dossier</b> 609e1.FP815-190004	<b>CCC No./N° CCC - FMS No./N° VME</b>
<b>Solicitation Closes - L'invitation prend fin</b> <b>at - à 02:00 PM</b> <b>on - le 2019-07-31</b>	<b>Time Zone</b> <b>Fuseau horaire</b> Eastern Daylight Saving Time EDT
<b>F.O.B. - F.A.B.</b> <b>Plant-Usine:</b> <input type="checkbox"/> <b>Destination:</b> <input type="checkbox"/> <b>Other-Autre:</b> <input type="checkbox"/>	
<b>Address Enquiries to: - Adresser toutes questions à:</b> Bastien, Josée	<b>Buyer Id - Id de l'acheteur</b> 609e1
<b>Telephone No. - N° de téléphone</b> (613) 858-9843 ( )	<b>FAX No. - N° de FAX</b> ( ) -
<b>Destination - of Goods, Services, and Construction:</b> <b>Destination - des biens, services et construction:</b> DEPARTMENT OF FISHERIES AND OCEANS STN 9W051 200 KENT STREET OTTAWA Ontario K1A0M1 Canada	

Instructions: See Herein

Instructions: Voir aux présentes

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

## **REQUEST FOR INFORMATION (RFI)**

**TITLE:** Financial Systems Renewal (FSR) – SAP Implementation Project

### **1. Purpose and Nature of the Request for Information (RFI)**

Fisheries and Oceans Canada (DFO) is requesting Industry feedback regarding a potential upcoming procurement for the implementation of an SAP Financials System.

The intent of this RFI is to seek feedback from industry on the envisioned approach to evaluation. It is anticipated that the procurement will be leveraging the Solutions Based Informatics Professional Services (SBIPS) procurement vehicle.

This RFI is neither a call for tender nor a Request for Proposal (RFP). No agreement or contract will be entered into based on this RFI. The issuance of this RFI is not to be considered in any way a commitment by the Government of Canada, nor as authority to potential respondents to undertake any work that could be charged to Canada. This RFI is not to be considered as a commitment to issue a subsequent solicitation or award contract(s) for the work described herein.

Although the information collected may be provided as commercial-in-confidence (and, if identified as such, will be treated accordingly by Canada), Canada may use the information to assist in drafting elements of any potential future RFP or contract.

Respondents are encouraged to identify, in the information they share with Canada, any information that they feel is proprietary, third party or personal information. Please note that Canada may be obligated by law (e.g. in response to a request under the Access of Information and Privacy Act) to disclose proprietary or commercially-sensitive information concerning a respondent (for more information: <http://laws-lois.justice.gc.ca/eng/acts/a-1/>).

Participation in this RFI is encouraged but is not mandatory. There will be no short-listing of potential suppliers for the purposes of undertaking any future work as a result of this RFI. Similarly, participation in this RFI is not a condition or prerequisite for the participation in any potential subsequent solicitation.

Respondents will not be reimbursed for any cost incurred by participating in this RFI.

The RFI closing date published herein is not the deadline for comments or input. Comments and input will be accepted any time up to the time when/if a follow-on solicitation is published.

## **2. Potential Work Scope and Constraints:**

The summary of work is detailed in Annex A.

## **3. Legislation, Trade Agreements, and Government Policies:**

The following is indicative of some of the legislation, trade agreements and government policies that could impact any follow-on solicitation(s):

- I. Canada Free Trade Agreement (CFTA)
- II. The Comprehensive and Economic Trade Agreement (CETA)
- III. North American Free Trade Agreement (NAFTA)
- IV. World Trade Organization – Agreements on Government Procurement (WTO-AGP)
- V. Federal Contractors Program for Employment Equity (FCP-EE)

## **4. Schedule:**

In providing responses, the following expected schedule should be utilized as a baseline:

- I. Request for Information (RFI) – July 2019
- II. RFI submission review – August 2019
- III. Solicitation for contract – August 2019
- IV. Contract award – October 2019
- V. SAP System go-live – April 2021

## **5. Important Notes to Respondents:**

Interested respondents may submit their responses to the PSPC Contracting Authority, identified below, preferably via email:

Josée Bastien  
Supply Team Leader  
Public Services and Procurement Canada  
Address: 10 Wellington Street, Gatineau, QC  
Telephone: 613-858-9843  
E-mail: [josee.bastien@tpsgc-pwgsc.gc.ca](mailto:josee.bastien@tpsgc-pwgsc.gc.ca)

Field Code Changed

A point of contact for the Respondent should be included in the package.

Changes to this RFI may occur and will be advertised on the Government Electronic Tendering System. Canada asks Respondents to visit [Buyandsell.gc.ca](http://Buyandsell.gc.ca) regularly to check for changes, if any.

## **6. Closing date for the RFI:**

Responses to this RFI are to be submitted to the PWGSC Contracting Authority identified above by close of business, on or before Wednesday July 31, 2019.

## **7. Feedback from Industry**

DFO is seeking information from industry in regard to its anticipated evaluation approach provided in Annex B. Specifically, please provide a response to each of the following questions:

- What is your feedback on the proposed evaluation approach?
- What is your feedback on the proposed Mandatory Criteria?
- Are there additional areas that Canada should consider addressing in the Technical Proposal Evaluation?

## **8. Follow-up Activity**

Canada may, in its discretion, contact any respondents to follow up with additional questions or for clarification of any aspect of a response. Canada reserves the right to invite any or all respondents to present their submissions to this RFI and/or perform a product demonstration.

## **ANNEX A – Project Summary**

### **Introduction**

Fisheries and Oceans Canada (DFO) has launched the Financial Systems Renewal (FSR) – SAP Implementation initiative to modernize and transform its financial management systems and processes. DFO will be engaging a Systems Integrator (SI) to lead the design, development and implementation of Phase 1 of a new best in class financial systems solution, to be released on April 1, 2021. The RFP for these services is targeted to be released in August 2019.

### **Departmental Background**

DFO has the lead federal role in managing Canada's fisheries and safeguarding its waters. Through sound science, forward-looking policy, and operational and service excellence, DFO employees work collaboratively toward the following three strategic outcomes:

- Economically Prosperous Maritime Sectors and Fisheries;
- Sustainable Aquatic Ecosystems; and
- Safe and Secure Waters.

The Canadian Coast Guard (CCG), a special operating agency within DFO, is responsible for services and programs that contribute to the Department's strategic outcomes and to the safety, security, and accessibility of Canada's waterways.

### **Financial Systems Renewal (FSR) – SAP Implementation Project Overview**

DFO is currently using Oracle Financials (version 12.1.3) which was implemented in December 2013 as the financial system of record. This current version is nearing the end of its lifecycle, with vendor support for this version ending in December 2021.

The Oracle Financials implementation at DFO is referred to as the "ABACUS" system. Over the past few years, investments in ABACUS have been minimal, which has, over time, increased the risk to the Department. Furthermore, DFO has developed several add-on systems to address specific needs / requirements which has exacerbated maintenance and support costs. This compounds the risks as DFO nears a potential state of un-supported Oracle Financials software.

To mitigate the risks associated with ABACUS, DFO requires a new Financial Systems Solution that not only meets its mandatory financial and materiel management requirements, but also serves as a key enabler of internal services transformation to better support the diverse and complex programs and services that the organization delivers.

In 2012, Treasury Board Secretariat (TBS) established SAP as the standard Financial and Materiel Management System for the Government of Canada. The TBS Office of the Comptroller General (OCG) is developing an SAP S/4 HANA Digital Core for small GoC

departments that are currently using FreeBalance software for their financial systems. Known as the Government of Canada Finance and Materiel Management (GCfm) solution, this Digital Core is considered the "A" template for S/4HANA solutions in the GoC. Furthermore, the OCG has taken the lead on deploying S/4HANA within a GoC approved Protected B, medium integrity, and medium availability (PBMM) cloud environment.

DFO is a member of the GoC's Oracle Cluster. The OCG has not yet established a template / solution for Oracle Cluster members or other departments which are significantly larger than the typical FreeBalance departments. DFO and the OCG have agreed to establish a new "B" template leveraging the GCfm solution Digital Core as a baseline for large departments. DFO will leverage the GCfm-A solution and introduce additional capabilities to address any identified gaps to support DFO requirements resulting in the DFO GCfm-B solution.

The TBS-OCG SAP solution will bring benefits such as streamlined and automated business processes, strengthened controls, enhanced multi-year financial planning and analysis, as well as real time forecasting and reporting. By migrating to this new platform, DFO will be able to leverage the work of other departments and add functionality specific to DFO's needs.

#### **FSR – SAP Implementation Scope of Services**

The following is a brief description of the scope of services that the selected SI will be required to provide:

- Stage 1 – Design: Design services and deliverables, including the business and technical solution designs, with supporting designs and plans for change management, release strategy and post implementation support. A decision to proceed with implementation will be made after Stage 1 – Design.
- Stage 2 – Implementation: Develop, integrate, test and deploy the fully functional DFO Financial Systems Solution, including all required data migration and conversions along with the transition to ongoing operations and support.
- Project Management & Oversight: Overall responsibility for project management including planning, execution, monitoring and control throughout the implementation.

The SI may also be required to perform or provide additional services as-and-when requested throughout the Contract.

Request for Information No. –  
N° de la demande d'information  
FP815-190004/A

Am. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
609el

**ANNEX B – Anticipated evaluation approach**

**Technical Proposal Evaluation Structure**

Bidder Technical Proposals will be evaluated based on the following structure. Additional details on the Mandatory Criteria, Point Rated Criteria, and Oral Presentation are provided in the sections that follow.

- A. Mandatory Criteria
  - i. SAP Financials Implementation Experience
  - ii. SAP S/4HANA Implementation Experience
  - iii. Business Transformation Implementation Experience
- B. Point Rated Criteria (1200 points)
  - i. Methodology: Methodology
  - ii. Project Approach: Business Transformation, Change Management, Skill Development and Knowledge Transfer
  - iii. Project Team: Project Team Structure, Key Resources
  - iv. Project Plans: Design Stage Plan, Implementation Stage Plan
- C. Oral Presentation (300 points)



## Technical Proposal Evaluation – Mandatory Criteria

### MC1 – SAP Financials Implementation Experience

Mandatory Criteria ID	Mandatory Criteria Description
MC1	<p>The Bidder must provide three (3) <b>Reference Projects</b><sup>1</sup> where the Bidder or an <b>Affiliate</b><sup>2</sup> of the Bidder completed the implementation of an <b>SAP Financials Solution</b><sup>3</sup> that meets the following criteria:</p> <ul style="list-style-type: none"><li>a) The <b>Project Value</b><sup>4</sup> of the <b>Reference Project</b><sup>1</sup> must be \$25M (CAD) or greater;</li><li>b) The <b>Contract Value</b><sup>5</sup> of the <b>Reference Project</b><sup>1</sup> must be \$15M (CAD) or greater;</li><li>c) The <b>Reference Project</b><sup>1</sup> must have been completed in the past ninety-six (96) months prior to the RFP Posting Date;</li><li>d) The <b>Reference Project</b><sup>1</sup> must have been deployed to at least 3,000 users in multiple locations, in a decentralized, multi-regional environment;</li></ul> <p>Collectively, the <b>Reference Projects</b><sup>1</sup> must meet the following criteria:</p> <ul style="list-style-type: none"><li>e) A minimum of one of the <b>Reference Projects</b><sup>1</sup> must be for services provided by the Bidder itself (i.e., versus provided by an <b>Affiliate</b><sup>2</sup>). A Technical Proposal where the Bidder only submits projects undertaken by an <b>Affiliate</b><sup>2</sup> will be deemed non-compliant; and</li></ul>

Mandatory Criteria ID	Mandatory Criteria Description
	<p>f) The Bidder must demonstrate, using the three (3) <b>Reference Projects</b><sup>1</sup>, that (A) the Bidder or an <b>Affiliate</b><sup>2</sup> has experience performing all of the following services; and (B) each <b>Reference Project</b><sup>1</sup> includes one or more of the following services*:</p> <ul style="list-style-type: none"><li>i. Business Process Design;</li><li>ii. Solution Analysis;</li><li>iii. Solution Design;</li><li>iv. Solution Development;</li><li>v. Solution Deployment;</li><li>vi. Organizational Change Management;</li><li>vii. Training;</li><li>viii. Project Management; and</li><li>ix. Post Implementation Support.</li></ul> <p>* The following definitions apply to the evaluation of this requirement:</p> <p><b>1) Business Process Design:</b> <i>The activity of designing the business processes required to meet a set of business requirements. Process design uses a number of tools including process narratives, process flow charts, and process steps.</i></p> <p><b>2) Solution Analysis:</b> <i>The activity of developing business and system requirements, as well as business and system use cases for the business processes and sub-processes.</i></p>

Mandatory Criteria ID	Mandatory Criteria Description
	<p><b>3) Solution Design:</b> <i>The activity of developing business and system processes, architectures and application designs for the solution being implemented.</i></p> <p><b>4) Solution Development:</b> <i>The tailoring, configuration, programming, integration, documentation, quality management and testing of system components for the solution being implemented.</i></p> <p><b>5) Solution Deployment:</b> <i>People, process and technology activities relating to the implementation of the designed and developed solution, including planning and execution of release management activities; movement of applications from development and test environments to the production environment; final performance and security testing, data conversion, integration testing; and transition to support services.</i></p> <p><b>6) Organizational Change Management:</b> <i>Organizational Change Management (OCM) supports the changing needs and capabilities of an organization. OCM is used to prepare, adopt and implement organizational changes, including changes to culture, policies, and procedures, as well as employee roles, skills and responsibilities.</i></p> <p><b>7) Training:</b> <i>Design, development, management and delivery of train-the-trainer and/or end user training requirements, strategies and materials including classroom training, computer-based training, tutorials, presentations, self-help guides and other training documentation.</i></p> <p><b>8) Project Management:</b> <i>Services for project management planning, execution, monitoring and control of activities defined in a project plan required for the implementation of the solution, including integration management, scope management, schedule management, quality management, status reporting, as well as risk and issue management.</i></p>

Mandatory Criteria ID	Mandatory Criteria Description
	<b>9) Post Implementation Support:</b> <i>The services required during a stabilization period after implementation of the solution, which provides business and technical support to ensure user enquires and system issues are managed to help ensure the transition to the new solution and system.</i>

MC2 – SAP S/4HANA Implementation Experience

Mandatory Criteria ID	Mandatory Criteria Description
MC2	<p>The Bidder must provide three (3) <b>Reference Projects</b><sup>1</sup> where the Bidder or an <b>Affiliate</b><sup>2</sup> of the Bidder completed an <b>SAP S/4HANA Implementation</b><sup>6</sup> that meets the following criteria:</p> <ul style="list-style-type: none"><li>a) The <b>Project Value</b><sup>4</sup> of the <b>Reference Project</b><sup>1</sup> must be \$15M (CAD) or greater;</li><li>b) The <b>Contract Value</b><sup>5</sup> of the <b>Reference Project</b><sup>1</sup> must be \$10M (CAD) or greater;</li><li>c) The <b>Reference Project</b><sup>1</sup> must have been completed in the past sixty (60) months prior to the RFP Posting Date;</li><li>d) The <b>Reference Project</b><sup>1</sup> must have been deployed to at least 1,000 users in multiple locations, in a decentralized, multi-regional environment;</li></ul> <p>Collectively, the <b>Reference Projects</b><sup>1</sup> must meet the following criteria:</p> <ul style="list-style-type: none"><li>e) A minimum of one of the <b>Reference Projects</b><sup>1</sup> must be for services provided by the Bidder itself (i.e., versus provided by an <b>Affiliate</b><sup>2</sup>). A Technical Proposal where the Bidder only submits projects undertaken by an <b>Affiliate</b><sup>2</sup> will be deemed non-compliant;</li><li>f) A minimum of one <b>Reference Project</b><sup>1</sup> must be for services provided by the Bidder to migrate to SAP S/4HANA from an non-SAP Enterprise Resource Planning solution (e.g., Oracle); and</li></ul>

Mandatory Criteria ID	Mandatory Criteria Description
	<p>g) The Bidder must demonstrate, using the three (3) <b>Reference Projects</b><sup>1</sup>, that (A) the Bidder or an <b>Affiliate</b><sup>2</sup> has experience performing all of the following services; and (B) each <b>Reference Project</b><sup>1</sup> includes one or more of the following services*:</p> <ul style="list-style-type: none"><li>i. Business Process Design;</li><li>ii. Solution Analysis;</li><li>iii. Solution Design;</li><li>iv. Solution Development;</li><li>v. Solution Deployment;</li><li>vi. Organizational Change Management;</li><li>vii. Training;</li><li>viii. Project Management; and</li><li>ix. Post Implementation Support.</li></ul> <p>* The following definitions apply to the evaluation of this requirement:</p> <p><b>1) Business Process Design:</b> <i>The activity of designing the business processes required to meet a set of business requirements. Process design uses a number of tools including process narratives, process flow charts, and process steps.</i></p> <p><b>2) Solution Analysis:</b> <i>The activity of developing business and system requirements, as well as business and system use cases for the business processes and sub-processes.</i></p> <p><b>3) Solution Design:</b> <i>The activity of developing business and system processes, architectures and application designs for the solution being implemented.</i></p> <p><b>4) Solution Development:</b> <i>The tailoring, configuration, programming, integration, documentation, quality management and testing of system components for the solution being implemented.</i></p>

Mandatory Criteria ID	Mandatory Criteria Description
	<p><b>5) Solution Deployment:</b> People, process and technology activities relating to the implementation of the designed and developed solution, including planning and execution of release management activities; movement of applications from development and test environments to the production environment; final performance and security testing, data conversion, integration testing; and transition to support services.</p> <p><b>6) Organizational Change Management:</b> Organizational Change Management (OCM) supports the changing needs and capabilities of an organization. OCM is used to prepare, adopt and implement organizational changes, including changes to culture, policies, and procedures, as well as employee roles, skills and responsibilities.</p> <p><b>7) Training:</b> Design, development, management and delivery of train-the-trainer and/or end user training requirements, strategies and materials including classroom training, computer-based training, tutorials, presentations, self-help guides and other training documentation.</p> <p><b>8) Project Management:</b> Services for project management planning, execution, monitoring and control of activities defined in a project plan required for the implementation of the solution, including integration management, scope management, schedule management, quality management, status reporting, as well as risk and issue management.</p> <p><b>9) Post Implementation Support:</b> The services required during a stabilization period after implementation of the solution, which provides business and technical support to ensure user enquires and system issues are managed to help ensure the transition to the new solution and system.</p>

MC3 – Business Transformation Implementation Experience

Mandatory Criteria ID	Mandatory Criteria Description
MC3	<p>The Bidder must provide three (3) <b>Reference Projects</b><sup>1</sup> where the Bidder or an <b>Affiliate</b><sup>2</sup> of the Bidder completed the implementation of a <b>Business Transformation Project</b><sup>7</sup> that meets the following criteria:</p> <ul style="list-style-type: none"><li>a) The <b>Project Value</b><sup>4</sup> of the <b>Reference Project</b><sup>1</sup> must be \$25M (CAD) or greater;</li><li>b) The <b>Contract Value</b><sup>5</sup> of the <b>Reference Project</b><sup>1</sup> must be \$15M (CAD) or greater;</li><li>c) The <b>Reference Project</b><sup>1</sup> must have been completed in the past ninety-six (96) months prior to the RFP Posting Date;</li><li>d) The <b>Reference Project</b><sup>1</sup> must have been deployed to at least 3,000 users in multiple locations, in a decentralized, multi-regional environment;</li></ul> <p>Collectively, the <b>Reference Projects</b><sup>1</sup> must meet the following criteria:</p> <ul style="list-style-type: none"><li>e) A minimum of one of the <b>Reference Projects</b><sup>1</sup> must be for services provided by the Bidder itself (i.e., versus provided by an <b>Affiliate</b><sup>2</sup>). A Technical Proposal where the Bidder only submits projects undertaken by an <b>Affiliate</b><sup>2</sup> will be deemed non-compliant; and</li><li>f) The Bidder must demonstrate, using the three (3) <b>Reference Projects</b><sup>1</sup>, that (A) the Bidder or an <b>Affiliate</b><sup>2</sup> has experience performing all of the following services; and (B) each <b>Reference Project</b><sup>1</sup> includes one or more of the</li></ul>



Mandatory Criteria ID	Mandatory Criteria Description
	<p>following services*:</p> <ul style="list-style-type: none"><li>i. Business Process Design;</li><li>ii. Solution Analysis;</li><li>iii. Solution Design;</li><li>iv. Solution Development;</li><li>v. Solution Deployment;</li><li>vi. Organizational Change Management;</li><li>vii. Stakeholder Engagement</li><li>viii. Communications;</li><li>ix. Stakeholder Relationship Management;</li><li>x. Training; and</li><li>xi. Project Management.</li></ul> <p>* The following definitions apply to the evaluation of this requirement:</p> <p><b>1) Business Process Design:</b> <i>The activity of designing the business processes required to meet a set of business requirements. Process design uses a number of tools including process narratives, process flow charts, and process steps.</i></p> <p><b>2) Solution Analysis:</b> <i>The activity of developing business and system requirements, as well as business and system use cases for the business processes and sub-processes.</i></p> <p><b>3) Solution Design:</b> <i>The activity of developing business and system processes, architectures and application designs for the solution being implemented.</i></p> <p><b>4) Solution Development:</b> <i>The tailoring, configuration, programming, integration, documentation, quality management and testing of system components for the solution being implemented.</i></p>

Mandatory Criteria ID	Mandatory Criteria Description
	<p><b>5) Solution Deployment:</b> People, process and technology activities relating to the implementation of the designed and developed solution, including planning and execution of release management activities; movement of applications from development and test environments to the production environment; final performance and security testing, data conversion, integration testing; and transition to support services.</p> <p><b>6) Organizational Change Management:</b> Organizational Change Management (OCM) supports the changing needs and capabilities of an organization. OCM is used to prepare, adopt and implement organizational changes, including changes to culture, policies, and procedures, as well as employee roles, skills and responsibilities.</p> <p><b>7) Stakeholder Engagement:</b> The process by which an organization involves people who may be affected by the decisions it makes or can influence the implementation of its decisions. This may include direct and indirect communications, workshops, meetings, etc.</p> <p><b>8) Communications:</b> Documentation and provision of communiques, briefing notes and presentations of various aspects of a project focused to the level, understanding and focus of key stakeholders including senior executives.</p> <p><b>9) Stakeholder Relationship Management:</b> The management of all aspects of the working relationship between the project and its impacted internal and external stakeholders. This includes a holistic relationship management strategy to ensure alignment across relevant levels of the organization, which may include working sessions, executive meetings and targeted communications to ensure a firm understanding of the stakeholders' key challenges, business, transformational drivers, and support for implementation readiness.</p> <p><b>10) Training:</b> Design, development, management and delivery of train-the-trainer and/or end user training requirements, strategies and materials including classroom training, computer-based training, tutorials, presentations, self-help guides and other training documentation.</p> <p><b>11) Project Management:</b> Services for project management planning, execution, monitoring and control of activities defined in a project plan required for the implementation of the solution, including integration management, scope management, schedule management, quality management, status reporting, as well as risk and issue management.</p>

## Appendix 1 to Technical Proposal Evaluation – Mandatory Criteria: Definitions

The following definitions apply to the Mandatory Technical Evaluation Criteria.

1. **Reference Project(s):** A Reference Project is a client-defined project for which the Bidder or an **Affiliate**<sup>2</sup> of the Bidder performed some or all of the services to assist the client in delivering the project.
2. **Affiliate(s):** Is defined in accordance with Article 01 – Integrity Provisions – Bid – (2015-07-03) of the 2003 Standard Instructions – Goods or Services – Competitive Requirements.

The Bidder must provide an organization chart for the Bidder showing all person, including, but not limited to, organizations, bodies corporate, societies, companies, firms, partnerships, associations of persons, parent companies or subsidiaries, whether partly or wholly-owned, as well as individuals, directors, officers and key employees if:

- a. one controls or has the power to control the other, or
- b. a third party has the power to control both.

If the required organization chart has not been received by the time the evaluation of responses is completed, Canada will inform the Bidder of a time frame within which to provide the information. Failure to provide the organization chart within the time frame specified will render the Bidder response non-responsive. Providing the required organization chart is a mandatory requirement for this RFP.

As per the Canada Business Corporations Act, Affiliated bodies are defined as:

- a) one body corporate affiliated with another body corporate if one of them is the subsidiary of the other or both are subsidiaries of the same body corporate or each of them is controlled by the same person; and
- b) if two bodies corporate are affiliated with the same body corporate at the same time, they are deemed to be affiliated with each other.

3. **SAP Financials Solution:** A project involving the implementation of an SAP financial management solution using the SAP Financial Accounting (FI) and Controlling (CO) modules, using SAP Enterprise Resource Planning Financials, or using SAP S/4HANA Finance.

4. **Project Value:** Total cost of the project, in Canadian dollars (CAD\$), including the client organization's internal costs, external professional services costs, hardware costs, and software costs.
5. **Contract Value:** The total contract value to Bidder or its **Affiliate<sup>2</sup>**, in Canadian dollars (CAD\$), for all professional services provided to the client for the **Reference Project<sup>1</sup>**. The total contract value consists of the total cumulative value of all contracts that the Bidder had for the **Reference Project<sup>1</sup>**.
6. **SAP S/4HANA Implementation:** A project that implemented SAP S/4HANA. SAP Business Suite 4 SAP HANA (SAP S/4HANA) is a business suite that is built on SAP's proprietary operational database system and in-memory computing platform called SAP HANA. SAP S/4HANA is the successor of SAP R/3 and SAP ERP and is optimized for SAP's in-memory database SAP HANA.
7. **Business Transformation Project:** A project which fundamentally changes the systems, processes, people and technology across a whole business/organization or a business/organizational unit, to achieve measurable improvements in organizational efficiency, effectiveness, as well as internal and external stakeholder engagement and satisfaction.

**Technical Proposal Evaluation: Point Rated Criteria**

**Total Point Rated Criteria (1200 Points)**

**R1 – Methodology (200 points)**

**R1.1 – Agile Methodology (200 points)**

Point Rated Criteria Description	Max Pts	Point Allocation	Substantiation
The Bidder's proposed Methodology should demonstrate the Bidder's ability to meet the Methodology Requirements identified in Appendix 2 of the Point Rated Technical Evaluation Criteria without introducing a <b>Project Risk</b> <sup>1</sup> .  Note: The Bidder's response to R1.1 should be no more than twenty (20) pages.	200	200	The Bidder's proposed Methodology: <ul style="list-style-type: none"><li>Meets all sixteen Methodology Requirements; and</li><li>Does not introduce a <b>Project Risk</b><sup>1</sup>.</li></ul>
		150	The Bidder's proposed Methodology: <ul style="list-style-type: none"><li>Meets Methodology Requirement MR-1;</li><li>Meets between 11 and 15 Methodology Requirements</li></ul>
			The Bidder should propose a Methodology the will be used to deliver the Tasks and Deliverables identified in SOW Sections 7, 8 and 9.  The Bidder should provide a mapping of all Deliverables identified in the SOW to the Bidder's proposed Methodology.  The Bidder should demonstrate how it will ensure its proposed Methodology accounts for

Point Rated Criteria Description	Max Pts	Point Allocation	Substantiation
			<p>between MR-2 and MR-16; and</p> <ul style="list-style-type: none"> <li>Does not introduce a <b>Project Risk</b><sup>1</sup>.</li> </ul>
		<b>100</b>	<p>The Bidder's proposed Methodology:</p> <ul style="list-style-type: none"> <li>Meets Methodology Requirement MR-1;</li> <li>Meets between 7 and 10 Methodology Requirements between MR-2 and MR-16; and</li> <li>Does not introduce a <b>Project Risk</b><sup>1</sup>.</li> </ul>
		<b>75</b>	<p>The Bidder's proposed Methodology:</p> <ul style="list-style-type: none"> <li>Meets Methodology Requirement MR-1;</li> <li>Meets between 1 and 6 Methodology Requirements</li> </ul>

Point Rated Criteria Description	Max Pts	Point Allocation	Substantiation
		<ul style="list-style-type: none"> <li>Does not introduce a <b>Project Risk</b><sup>1</sup>.</li> </ul>	
		<b>50</b> The Bidder's proposed Methodology: <ul style="list-style-type: none"> <li>Meets Methodology Requirement MR-1; and</li> <li>Introduces one or more <b>Project Risk</b><sup>1</sup>.</li> </ul>	
		<b>0</b> The Bidder's proposed Methodology: <ul style="list-style-type: none"> <li>Does not meet Methodology Requirement MR-1.</li> </ul> OR <ul style="list-style-type: none"> <li>Meets none of the Methodology Requirements between MR-2 and MR-16; and</li> <li>Does not introduce a <b>Project</b></li> </ul>	

Point Rated Criteria Description	Max Pts	Point Allocation	Substantiation
		Risk <sup>1</sup> .	

**R2 – Project Approach (450 points)**

**R2.1 – Business Transformation Approach (150 points)**

Point Rated Criteria Description	Max Pts	Point Allocation	Substantiation
The Bidder's proposed Business Transformation Approach should demonstrate the Bidder's ability to meet the Business Transformation Approach Requirements identified in Appendix 3 of the Point Rated Technical Evaluation Criteria without introducing a <b>Project Risk</b> <sup>1</sup> .  Note: The Bidder's response to R2.1 should be no more than twenty (20) pages.	150	150 The Bidder's proposed Business Transformation Approach: <ul style="list-style-type: none"><li>• Meets all eight Business Transformation Approach Requirements; and</li><li>• Does not introduce a <b>Project Risk</b><sup>1</sup>.</li></ul>	The Bidder should propose a Business Transformation Approach that will be used to throughout the Design and Implementation Stages.
		100 The Bidder's proposed Business Transformation Approach: <ul style="list-style-type: none"><li>• Meets between 5 and 7 Business Transformation Approach Requirements; and</li></ul>	



Point Rated Criteria Description	Max Pts	Point Allocation		Substantiation
			<ul style="list-style-type: none"><li>Does not introduce a <b>Project Risk</b><sup>1</sup>.</li></ul>	
		<b>75</b>	The Bidder's proposed Business Transformation Approach: <ul style="list-style-type: none"><li>Meets between 1 and 4 Business Transformation Approach Requirements; and</li><li>Does not introduce a <b>Project Risk</b><sup>1</sup>.</li></ul>	
		<b>50</b>	The Bidder's proposed Business Transformation Approach: <ul style="list-style-type: none"><li>Introduces one or more <b>Project Risk</b><sup>1</sup>.</li></ul>	
		<b>0</b>	The Bidder's proposed Business Transformation Approach: <ul style="list-style-type: none"><li>Does not meet any Business Transformation Approach</li></ul>	

Point Rated Criteria Description	Max Pts	Point Allocation	Substantiation
		Requirements.	

R2.2 – Change Management Approach (150 points)

Point Rated Criteria Description	Max Pts	Point Allocation	Substantiation
<p>The Bidder's proposed Change Management Approach should demonstrate the Bidder's ability to meet the Change Management Approach Requirements identified in Appendix 4 of the Point Rated Technical Evaluation Criteria without introducing a <b>Project Risk</b><sup>1</sup>.</p> <p>Note: The Bidder's response to R2.2 should be no more than twenty (20) pages.</p>	<b>150</b>	<b>150</b> The Bidder's proposed Change Management Approach: <ul style="list-style-type: none"><li>• Meets all eight Change Management Approach Requirements; and</li><li>• Does not introduce a <b>Project Risk</b><sup>1</sup>.</li></ul>	<p>The Bidder should propose a Change Management Approach that will be used to throughout the Design and Implementation Stages.</p>
		<b>100</b> The Bidder's proposed Change Management Approach: <ul style="list-style-type: none"><li>• Meets between 5 and 7 Change Management Approach Requirements; and</li></ul>	

Point Rated Criteria Description	Max Pts	Point Allocation		Substantiation
			<ul style="list-style-type: none"><li>Does not introduce a <b>Project Risk</b><sup>1</sup>.</li></ul>	
		<b>75</b>	The Bidder's proposed Change Management Approach: <ul style="list-style-type: none"><li>Meets between 1 and 4 Change Management Approach Requirements; and</li><li>Does not introduce a <b>Project Risk</b><sup>1</sup>.</li></ul>	
		<b>50</b>	The Bidder's proposed Change Management Approach: <ul style="list-style-type: none"><li>Introduces one or more <b>Project Risk</b><sup>1</sup>.</li></ul>	
		<b>0</b>	The Bidder's proposed Change Management Approach: <ul style="list-style-type: none"><li>Does not meet any Change Management Approach</li></ul>	

Point Rated Criteria Description	Max Pts	Point Allocation	Substantiation
		Requirements.	

R2.3 – Skill Development and Knowledge Transfer Approach (150 points)

Point Rated Criteria Description	Max Pts	Point Allocation	Substantiation
<p>The Bidder's proposed Skill Development and Knowledge Transfer Approach should demonstrate the Bidder's ability to meet the Skill Development and Knowledge Transfer Approach Requirements identified in Appendix 5 of the Point Rated Technical Evaluation Criteria without introducing a <b>Project Risk</b><sup>1</sup>.</p> <p>Note: The Bidder's response to R2.3 should be no more than twenty (20) pages.</p>	150	150	<p>The Bidder's proposed Skill Development and Knowledge Transfer Approach:</p> <ul style="list-style-type: none"> <li>Meets all eight Skill Development and Knowledge Transfer Approach Requirements; and</li> <li>Does not introduce a <b>Project Risk</b><sup>1</sup>.</li> </ul>
		100	<p>The Bidder's proposed Skill Development and Knowledge Transfer Approach:</p> <ul style="list-style-type: none"> <li>Meets between 5 and 7 Skill Development and Knowledge Transfer Approach Requirements; and</li> <li>Does not introduce a <b>Project Risk</b></li> </ul>

Point Rated Criteria Description	Max Pts	Point Allocation		Substantiation
			Risk <sup>1</sup> .	
		<b>75</b>	The Bidder's proposed Skill Development and Knowledge Transfer Approach: <ul style="list-style-type: none"><li>• Meets between 1 and 4 Skill Development and Knowledge Transfer Approach Requirements; and</li><li>• Does not introduce a <b>Project Risk</b><sup>1</sup>.</li></ul>	
		<b>50</b>	The Bidder's proposed Skill Development and Knowledge Transfer Approach: <ul style="list-style-type: none"><li>• Introduces one or more <b>Project Risk</b><sup>1</sup>.</li></ul>	
		<b>0</b>	The Bidder's proposed Skill Development and Knowledge Transfer Approach:	

Point Rated Criteria Description	Max Pts	Point Allocation	Substantiation
		<ul style="list-style-type: none"><li>Does not meet any Skill Development and Knowledge Transfer Approach Requirements.</li></ul>	

### R3 – Project Team (350 points)

#### R3.1 – Project Team Structure (100 points)

Point Rated Criteria Description	Max Pts	Point Allocation	Substantiation
<p>The Bidder should describe its proposed Project Team Structure and associated Resourcing Strategy for the Design and Implementation Stages.</p> <p>The Bidder's proposed Project Team Structure should demonstrate the Bidder's ability to meet the Project Team Structure Requirements identified in Appendix 6 of the Point Rated Technical Evaluation Criteria without introducing a <b>Project Risk</b><sup>1</sup>.</p> <p>Note: The Bidder's response to R3.1 should be no more than fifteen (15) pages.</p>	100	100	<p>The Bidder's proposed Project Team Structure:</p> <ul style="list-style-type: none"> <li>Meets all ten Project Team Structure Requirements; and</li> <li>Does not introduce a <b>Project Risk</b><sup>1</sup>.</li> </ul>
		75	<p>The Bidder's proposed Project Team Structure:</p> <ul style="list-style-type: none"> <li>Meets Project Team Structure Requirements TSR-1 and TSR-2;</li> <li>Meets between 4 and 7 Project Team Structure Requirements between TSR-3 and TSR-10; and</li> <li>Does not introduce a <b>Project Risk</b></li> </ul>



Point Rated Criteria Description	Max Pts	Point Allocation		Substantiation
			Risk <sup>1</sup> .	
		<b>50</b>	The Bidder's proposed Project Team Structure: <ul style="list-style-type: none"><li>• Meets Project Team Structure Requirements TSR-1 and TSR-2;</li><li>• Meets between 1 and 3 Project Team Structure Requirements between TSR-3 and TSR-10; and</li><li>• Does not introduce a <b>Project Risk</b><sup>1</sup>.</li></ul>	
		<b>25</b>	The Bidder's proposed Project Team Structure: <ul style="list-style-type: none"><li>• Meets Project Team Structure Requirements TSR-1 and TSR-2; and</li><li>• Introduces one or more <b>Project Risk</b><sup>1</sup>.</li></ul>	

Point Rated Criteria Description	Max Pts	Point Allocation	Substantiation
		<b>0</b> The Bidder's proposed Project Team Structure: <ul style="list-style-type: none"><li>Does not meet Project Team Structure Requirement TSR-1 or does not meet Project Team Structure Requirement TSR-2.</li></ul>	

R3.2 – Key Resources (250 points)

The Bidder should provide a resume for each of the Key Resources listed below. Descriptions of the key resource roles can be found in SOW Section 10.1.

Key Resources:

- Project Delivery Lead (PDL)
- Business Transformation Lead (BTL)
- Solution Architect Lead (SAL)
- Technical Lead (TL)
- Change Management Lead (CML)

Each resume should include the following information:

- Full name of the proposed resource;
- Certifications held, which must current and valid, and not expired; and
- Projects that demonstrate the proposed resources suitability against the assessment criteria identified in section **R3.2 – Key Resources**.

R3.2.1 Project Delivery Lead (50 points)

Point Rated Criteria Description	Point Allocation
<p>1) The Bidder should demonstrate that the proposed resource's experience in the 120 months preceding the date of the bid posting, as the Project Delivery Lead (PDL) responsible for <b>Large Scale Technology Enabled Projects</b><sup>7</sup>. To demonstrate this experience, the Bidder should identify <b>Reference Projects</b><sup>6</sup> in the proposed resource's resume. The <b>Reference Project</b><sup>6</sup> details should include:</p> <ul style="list-style-type: none"> <li>a) Name of the client organization;</li> <li>b) The start and end dates, and duration (in months) the proposed PDL worked on the project;</li> <li>c) A description of the proposed PDL's role and responsibilities;</li> </ul>	<p><b>Up to 20 points</b>, as follows:</p> <ul style="list-style-type: none"> <li>• <b>20 points:</b> The proposed resource has a minimum of 60 months of experience in the 120 months preceding the date of the bid posting.</li> <li>• <b>10 points:</b> The proposed resource has a between 12 months and 59 months of experience in the last 120 months preceding the date of the bid posting.</li> </ul>

Point Rated Criteria Description	Point Allocation
<p>d) The <b>Project Value</b><sup>8</sup> (CAD\$); and</p> <p>e) <b>Senior Client Reference</b><sup>9</sup> details, including name, title, telephone number and email address.</p> <p>All items (a) – (e) above should be provided for the <b>Reference Project</b><sup>6</sup> to be considered for evaluation.</p>	<ul style="list-style-type: none"> <li>• <b>0 points:</b> The proposed resource has less than 12 months of experience in the last 120 months preceding the date of the bid posting.</li> </ul>
<p>2) The Bidder should demonstrate that the proposed resource has implemented three (3) <b>SAP Financials Solution</b><sup>10</sup> projects, in the last 120 months preceding the date of the bid posting, which required integration with multiple non-SAP systems. To demonstrate this experience, the Bidder should identify <b>Reference Projects</b><sup>6</sup> in the proposed resource's resume. The <b>Reference Project</b><sup>6</sup> details should include:</p> <p>a) Name of the client organization;</p> <p>b) The start and end dates, and duration (in months) the proposed PDL worked on the project;</p> <p>c) A description of the proposed PDL's role and responsibilities;</p> <p>d) The <b>Project Value</b><sup>8</sup> (CAD\$); and</p> <p>e) <b>Senior Client Reference</b><sup>9</sup> details, including name, title, telephone number and email address.</p> <p>All items (a) – (e) above should be provided for the <b>Reference Project</b><sup>6</sup> to be considered for evaluation.</p>	<p><b>Up to 15 points</b>, as follows:</p> <ul style="list-style-type: none"> <li>• <b>15 points:</b> The proposed resource has implemented three (3) <b>SAP Financials Solution</b><sup>10</sup> projects, in the last 120 months preceding the date of the bid posting, which required integration with multiple non-SAP systems, of which one (1) project is an <b>SAP S/4HANA Implementation</b><sup>11</sup>.</li> <li>• <b>10 points:</b> The proposed resource has implemented three (3) <b>SAP Financials Solution</b><sup>10</sup> projects, in the last 120 months preceding the date of the bid posting, which required integration with multiple non-SAP systems.</li> <li>• <b>5 points:</b> The proposed resource has implemented between one (1) or two (2) <b>SAP Financials Solution</b><sup>10</sup> projects, in the last 120 months preceding the date of the bid posting, which required integration with multiple non-SAP legacy systems.</li> <li>• <b>0 points:</b> The proposed resource has implemented zero (0) <b>SAP Financials Solution</b><sup>10</sup> projects, in the last 120 months preceding the date of the bid posting, which required integration</li> </ul>

Point Rated Criteria Description		Point Allocation
		with multiple non-SAP systems.
3) The Bidder should demonstrate that the proposed resource holds a valid Project Management Professional (PMP), or Information Technology Infrastructure Library (ITIL), or PRINCE2 certification.		<p><b>Up to 10 points</b>, as follows:</p> <ul style="list-style-type: none"> <li><b>10 points:</b> The proposed resource holds a valid Project Management Professional (PMP), or Information Technology Infrastructure Library (ITIL), or PRINCE2 certification.</li> <li><b>0 points:</b> The proposed resource does not hold a valid Project Management Professional (PMP), or Information Technology Infrastructure Library (ITIL), or PRINCE2 certification.</li> </ul>
4) The Bidder should demonstrate that the proposed resource has completed accredited Agile Methodology training (e.g., SAP Activate Methodology training, Scrum Master training).		<p><b>Up to 5 points</b>, as follows:</p> <ul style="list-style-type: none"> <li><b>5 points:</b> The proposed resource has completed accredited Agile Methodology trainings.</li> <li><b>0 points:</b> The proposed resource has not completed accredited Agile Methodology trainings.</li> </ul>
<b>Maximum Available Points</b>		<b>50</b>
<b>Minimum Points Required</b>		<b>30</b>
<b>Note: Bids that do not meet the above Minimum Points Require will be found non-responsive.</b>		

R3.2.2 Business Transformation Lead (50 points)

Point Rated Criteria Description	Point Allocation
<p>1) The Bidder should demonstrate that the proposed resource's experience in the 72 months preceding the date of the bid posting, as the Business Transformation Lead (BTL) responsible for <b>Large Scale Technology Enabled Projects</b><sup>7</sup>. To demonstrate this experience, the Bidder should identify <b>Reference Projects</b><sup>6</sup> in the proposed resource's resume. The <b>Reference Project</b><sup>6</sup> details should include:</p> <ol style="list-style-type: none"> <li>Name of the client organization;</li> <li>The start and end dates, and duration (in months) the proposed BTL worked on the project;</li> <li>A description of the proposed BTL's role and responsibilities;</li> <li>The <b>Project Value</b><sup>8</sup> (CAD\$); and</li> <li><b>Senior Client Reference</b><sup>9</sup> details, including name, title, telephone number and email address.</li> </ol> <p>All items (a) – (e) above should be provided for the <b>Reference Project</b><sup>6</sup> to be considered for evaluation.</p>	<p><b>Up to 20 points</b>, as follows:</p> <ul style="list-style-type: none"> <li><b>20 points:</b> The proposed resource has a minimum of 36 months of experience in the 72 months preceding the date of the bid posting.</li> <li><b>10 points:</b> The proposed resource has a between 12 months and 35 months of experience in the last 72 months preceding the date of the bid posting.</li> <li><b>0 points:</b> The proposed resource has less than 12 months of experience in the last 72 months preceding the date of the bid posting.</li> </ul>
<p>2) The Bidder should demonstrate that the proposed resource's experience in the 72 months preceding the date of the bid posting, as the Business Transformation Lead (BTL) responsible for providing consulting services to client organizations in the domain of Financial Management and Accounting. To demonstrate this experience, the Bidder should identify <b>Reference Projects</b><sup>6</sup> in the proposed resource's resume. The <b>Reference Project</b><sup>6</sup> details should include:</p> <ol style="list-style-type: none"> <li>Name of the client organization;</li> <li>The start and end dates, and duration (in months) the proposed BTL worked on the project;</li> </ol>	<p><b>Up to 20 points</b>, as follows:</p> <ul style="list-style-type: none"> <li><b>20 points:</b> The proposed resource has a minimum of 36 months of experience in the 72 months preceding the date of the bid posting.</li> <li><b>10 points:</b> The proposed resource has a between 12 months and 35 months of experience in the last 72 months preceding the date of the bid posting.</li> </ul>

Point Rated Criteria Description		Point Allocation
<p>c) A description of the proposed BTL's role and responsibilities; d) The <b>Project Value</b><sup>8</sup> (CAD\$); and e) <b>Senior Client Reference</b><sup>9</sup> details, including name, title, telephone number and email address.</p> <p>All items (a) – (e) above should be provided for the <b>Reference Project</b><sup>6</sup> to be considered for evaluation.</p>		<ul style="list-style-type: none"> <li><b>0 points:</b> The proposed resource has less than 12 months of experience in the last 72 months preceding the date of the bid posting.</li> </ul>
<p>3) The Bidder should demonstrate that the proposed resource's experience in the 72 months preceding the date of the bid posting, as the Business Transformation Lead (BTL) responsible for <b>Large Scale Technology Enabled Projects</b><sup>7</sup>, which utilized an Enterprise Resource Planning (ERP) solution. To demonstrate this experience, the Bidder should identify <b>Reference Projects</b><sup>6</sup> in the proposed resource's resume. The <b>Reference Project</b><sup>6</sup> details should include:</p> <p>a) Name of the client organization; b) The start and end dates, and duration (in months) the proposed BTL worked on the project; c) A description of the proposed BTL's role and responsibilities; d) The <b>Project Value</b><sup>8</sup> (CAD\$); and e) <b>Senior Client Reference</b><sup>9</sup> details, including name, title, telephone number and email address.</p> <p>All items (a) – (e) above should be provided for the <b>Reference Project</b><sup>6</sup> to be considered for evaluation.</p>		<p><b>Up to 10 points</b>, as follows:</p> <ul style="list-style-type: none"> <li><b>10 points:</b> The proposed resource has a minimum of 36 months of experience in the 72 months preceding the date of the bid posting.</li> <li><b>5 points:</b> The proposed resource has a between 12 months and 35 months of experience in the last 72 months preceding the date of the bid posting.</li> <li><b>0 points:</b> The proposed resource has less than 12 months of experience in the last 72 months preceding the date of the bid posting.</li> </ul>
<b>Maximum Available Points</b>		<b>50</b>
<b>Minimum Points Required</b>		<b>30</b>
<b>Note: Bids that do not meet the above Minimum Points Require will be found non-responsive.</b>		

R3.2.3 Solution Architect Lead (50 points)

Point Rated Criteria Description	Point Allocation
<p>1) The Bidder should demonstrate that the proposed resource's experience in the 72 months preceding the date of the bid posting, as the Solution Architect Lead (SAL) responsible for <b>Large Scale Technology Enabled Projects</b><sup>7</sup>. To demonstrate this experience, the Bidder should identify <b>Reference Projects</b><sup>6</sup> in the proposed resource's resume. The <b>Reference Project</b><sup>6</sup> details should include:</p> <ul style="list-style-type: none"> <li>a) Name of the client organization;</li> <li>b) The start and end dates, and duration (in months) the proposed SAL worked on the project;</li> <li>c) A description of the proposed SAL's role and responsibilities;</li> <li>d) The <b>Project Value</b><sup>8</sup> (CAD\$); and</li> <li>e) <b>Senior Client Reference</b><sup>9</sup> details, including name, title, telephone number and email address.</li> </ul> <p>All items (a) – (e) above should be provided for the <b>Reference Project</b><sup>6</sup> to be considered for evaluation.</p>	<p><b>Up to 20 points</b>, as follows:</p> <ul style="list-style-type: none"> <li>• <b>20 points:</b> The proposed resource has a minimum of 36 months of experience in the 72 months preceding the date of the bid posting.</li> <li>• <b>10 points:</b> The proposed resource has a between 12 months and 35 months of experience in the last 72 months preceding the date of the bid posting.</li> <li>• <b>0 points:</b> The proposed resource has less than 12 months of experience in the last 72 months preceding the date of the bid posting.</li> </ul>
<p>2) The Bidder should demonstrate that the proposed resource's experience in the 72 months preceding the date of the bid posting, as the Solution Architect Lead (SAL) responsible for <b>SAP Financials Solution</b><sup>10</sup> projects. To demonstrate this experience, the Bidder should identify <b>Reference Projects</b><sup>6</sup> in the proposed resource's resume. The <b>Reference Project</b><sup>6</sup> details should include:</p> <ul style="list-style-type: none"> <li>a) Name of the client organization;</li> <li>b) The start and end dates, and duration (in months) the proposed SAL worked on the project;</li> </ul>	<p><b>Up to 20 points</b>, as follows:</p> <ul style="list-style-type: none"> <li>• <b>20 points:</b> The proposed resource has a minimum of 24 months of experience in the 72 months preceding the date of the bid posting.</li> <li>• <b>10 points:</b> The proposed resource has a between 12 months and 23 months of experience in the last 72 months preceding the date of the bid posting.</li> </ul>



Point Rated Criteria Description		Point Allocation
<p>c) A description of the proposed SAL's role and responsibilities; d) The <b>Project Value</b><sup>8</sup> (CAD\$); and e) <b>Senior Client Reference</b><sup>9</sup> details, including name, title, telephone number and email address.</p> <p>All items (a) – (e) above should be provided for the <b>Reference Project</b><sup>6</sup> to be considered for evaluation.</p>		<p>posting.</p> <ul style="list-style-type: none"> <li><b>0 points:</b> The proposed resource has less than 12 months of experience in the last 72 months preceding the date of the bid posting.</li> </ul>
<p>3) The Bidder should demonstrate that the proposed resource's experience in the 72 months preceding the date of the bid posting, as the Solution Architect Lead (SAL) responsible for <b>SAP S/4HANA Implementation</b><sup>11</sup> projects. To demonstrate this experience, the Bidder should identify <b>Reference Projects</b><sup>6</sup> in the proposed resource's resume. The <b>Reference Project</b><sup>6</sup> details should include:</p> <p>a) Name of the client organization; b) The start and end dates, and duration (in months) the proposed SAL worked on the project; c) A description of the proposed SAL's role and responsibilities; d) The <b>Project Value</b><sup>8</sup> (CAD\$); and e) <b>Senior Client Reference</b><sup>9</sup> details, including name, title, telephone number and email address.</p> <p>All items (a) – (e) above should be provided for the <b>Reference Project</b><sup>6</sup> to be considered for evaluation.</p>		<p><b>Up to 10 points</b>, as follows:</p> <ul style="list-style-type: none"> <li><b>10 points:</b> The proposed resource has a minimum of 12 months of experience in the 72 months preceding the date of the bid posting.</li> <li><b>0 points:</b> The proposed resource has less than 12 months of experience in the last 72 months preceding the date of the bid posting.</li> </ul>
<b>Maximum Available Points</b>		<b>50</b>
<b>Minimum Points Required</b>		<b>30</b>
<b>Note: Bids that do not meet the above Minimum Points Required will be found non-responsive.</b>		

#### R3.2.4 Technical Lead (50 points)

Point Rated Criteria Description	Point Allocation
<p>1) The Bidder should demonstrate that the proposed resource's project experience in the 60 months preceding the date of the bid posting, as the Technical Lead (TL) responsible for overall <b>Systems Integration</b><sup>12</sup>. To demonstrate this experience, the Bidder should identify <b>Reference Projects</b><sup>6</sup> in the proposed resource's resume. The <b>Reference Project</b><sup>6</sup> details should include:</p> <ol style="list-style-type: none"> <li>Name of the client organization;</li> <li>The start and end dates, and duration (in months) the proposed TL worked on the project;</li> <li>A description of the proposed TL's role and responsibilities;</li> <li>The strategies, decisions, techniques, and technologies that the TL leveraged to overcome <b>Systems Integration</b><sup>12</sup> challenges; and</li> <li><b>Senior Client Reference</b><sup>9</sup> details, including name, title, telephone number and email address.</li> </ol> <p>All items (a) – (e) above should be provided for this element to be considered "met".</p>	<p><b>Up to 10 points</b>, as follows:</p> <ul style="list-style-type: none"> <li><b>10 points:</b> The proposed resource has a minimum of 36 months of experience in the 60 months preceding the date of the bid posting.</li> <li><b>5 points:</b> The proposed resource has a between 24 months and 35 months of experience in the 60 months preceding the date of the bid posting.</li> <li><b>0 points:</b> The proposed resource has less than 24 months of experience in the last 60 months preceding the date of the bid posting.</li> </ul>
<p>2) The Bidder should demonstrate that the proposed resource has implemented three (3) <b>SAP Financials Solution</b><sup>10</sup> projects, in the last 60 months preceding the date of the bid posting, which required integration with multiple non-SAP systems. To demonstrate this experience, the Bidder should identify <b>Reference Projects</b><sup>6</sup> in the proposed resource's resume. The <b>Reference Project</b><sup>6</sup> details should include:</p> <ol style="list-style-type: none"> <li>Name of the client organization;</li> <li>The start and end dates, and duration (in months) the proposed TL worked on the project;</li> <li>A description of the proposed TL's role and responsibilities;</li> <li>The strategies, decisions, techniques, and technologies that the TL</li> </ol>	<p><b>Up to 20 points</b>, as follows:</p> <ul style="list-style-type: none"> <li><b>20 points:</b> The proposed resource has <b>Systems Integration</b><sup>12</sup> experience gained from three (3) <b>SAP Financials Solution</b><sup>10</sup> projects, in the last 60 months preceding the date of the bid posting, which required integration with multiple non-SAP systems, of which one (1) project is an SAP <b>S/4HANA Implementation</b><sup>11</sup>, and one (1) project included integration with services deployed on a Microsoft Azure cloud infrastructure.</li> </ul>

Point Rated Criteria Description	Point Allocation
<p>leveraged to overcome <b>Systems Integration</b><sup>12</sup> challenges; and</p> <p>e) <b>Senior Client Reference</b><sup>9</sup> details, including name, title, telephone number and email address.</p> <p>All items (a) – (e) above should be provided for this element to be considered "met".</p>	<ul style="list-style-type: none"><li>• <b>15 points:</b> The proposed resource has <b>Systems Integration</b><sup>12</sup> experience gained from one (1) or two (2) <b>SAP Financials Solution</b><sup>10</sup> projects, in the last 60 months preceding the date of the bid posting, which required integration with multiple non-SAP systems, of which one (1) project is an <b>SAP S/4HANA Implementation</b><sup>11</sup>, and one (1) project included integration with services deployed on a Microsoft Azure cloud infrastructure.</li><li>• <b>10 points:</b> The proposed resource has <b>Systems Integration</b><sup>12</sup> experience gained from one (1) or two (2) <b>SAP Financials Solution</b><sup>10</sup> projects, in the last 60 months preceding the date of the bid posting, which required integration with multiple non-SAP systems, of which one (1) project is an <b>SAP S/4HANA Implementation</b><sup>11</sup>, or one (1) project included integration with services deployed on a Microsoft Azure cloud infrastructure.</li><li>• <b>5 points:</b> The proposed resource has <b>Systems Integration</b><sup>12</sup> experience gained from three (3) projects, in the last 60 months preceding the date of the bid posting, which required integration with multiple non-SAP systems, of which one (1) project included integration with services deployed on a Microsoft Azure cloud infrastructure.</li><li>• <b>0 points:</b> The proposed resource has no <b>Systems Integration</b><sup>12</sup> experience gained from either an <b>SAP Financials Solution</b><sup>10</sup> project, or from a project which included integration with services deployed on a Microsoft Azure cloud infrastructure, in the last 60 months preceding the</li></ul>

Point Rated Criteria Description		Point Allocation
		date of the bid posting, which required integration with multiple non-SAP systems.
3) The Bidder should demonstrate that the proposed resource holds a valid Microsoft Azure certification.		<p><b>Up to 15 points</b>, as follows:</p> <ul style="list-style-type: none"> <li><b>15 points:</b> The proposed resource holds a valid Microsoft Azure certification at the Expert level.</li> <li><b>10 points:</b> The proposed resource holds a valid Microsoft Azure certification at the Associate level.</li> <li><b>5 points:</b> The proposed resource holds a valid Microsoft Azure certification at the Fundamentals level.</li> <li><b>0 points:</b> The proposed resource does not hold a valid Microsoft Azure certification at any level.</li> </ul>
4) The Bidder should demonstrate that the proposed resource has completed accredited Agile Methodology training (e.g., SAP Activate Methodology training, Scrum Master training).		<p><b>Up to 5 points</b>, as follows:</p> <ul style="list-style-type: none"> <li><b>5 points:</b> The proposed resource has completed accredited Agile Methodology trainings.</li> <li><b>0 points:</b> The proposed resource has not completed accredited Agile Methodology trainings.</li> </ul>
<b>Maximum Available Points</b>		<b>50</b>
<b>Minimum Points Required</b>		<b>30</b>
<b>Note: Bids that do not meet the above Minimum Points Require will be found non-responsive.</b>		

R3.2.5 Change Management Lead (50 points)

Point Rated Criteria Description	Point Allocation
<p>1) The Bidder should demonstrate that the proposed resource's experience in the 120 months preceding the date of the bid posting, as the Change Management Lead (CML) responsible for <b>Large Scale Technology Enabled Projects</b><sup>7</sup>. To demonstrate this experience, the Bidder should identify <b>Reference Projects</b><sup>6</sup> in the proposed resource's resume. The <b>Reference Project</b><sup>6</sup> details should include:</p> <ul style="list-style-type: none"> <li>a) Name of the client organization;</li> <li>b) The start and end dates, and duration (in months) the proposed CML worked on the project;</li> <li>c) A description of the proposed CML's role and responsibilities;</li> <li>d) The <b>Project Value</b><sup>8</sup> (CAD\$); and</li> <li>e) <b>Senior Client Reference</b><sup>9</sup> details, including name, title, telephone number and email address.</li> </ul> <p>All items (a) – (e) above should be provided for the <b>Reference Project</b><sup>6</sup> to be considered for evaluation.</p>	<p><b>Up to 20 points</b>, as follows:</p> <ul style="list-style-type: none"> <li>• <b>20 points:</b> The proposed resource has a minimum of 60 months of experience in the 120 months preceding the date of the bid posting.</li> <li>• <b>10 points:</b> The proposed resource has a between 12 months and 59 months of experience in the last 120 months preceding the date of the bid posting.</li> <li>• <b>0 points:</b> The proposed resource has less than 12 months of experience in the last 120 months preceding the date of the bid posting.</li> </ul>
<p>2) The Bidder should demonstrate that the proposed resource's experience in the 120 months preceding the date of the bid posting, as the Change Management Lead (CML) responsible for <b>Large Scale Technology Enabled Projects</b><sup>7</sup>, which utilized an Enterprise Resource Planning (ERP) solution. To demonstrate this experience, the Bidder should identify <b>Reference Projects</b><sup>6</sup> in the proposed resource's resume. The <b>Reference Project</b><sup>6</sup> details should include:</p> <ul style="list-style-type: none"> <li>a) Name of the client organization;</li> <li>b) The start and end dates, and duration (in months) the proposed CML worked on the project;</li> <li>c) A description of the proposed CML's role and responsibilities;</li> <li>d) The <b>Project Value</b><sup>8</sup> (CAD\$); and</li> <li>e) <b>Senior Client Reference</b><sup>9</sup> details, including name, title, telephone number</li> </ul>	<p><b>Up to 20 points</b>, as follows:</p> <ul style="list-style-type: none"> <li>• <b>20 points:</b> The proposed resource has a minimum of 36 months of experience in the 120 months preceding the date of the bid posting.</li> <li>• <b>10 points:</b> The proposed resource has a between 12 months and 35 months of experience in the last 120 months preceding the date of the bid posting.</li> <li>• <b>0 points:</b> The proposed resource has less than 12 months of experience in the last 120 months</li> </ul>

Point Rated Criteria Description	Point Allocation
and email address.  All items (a) – (e) above should be provided for the <b>Reference Project<sup>6</sup></b> to be considered for evaluation.	preceding the date of the bid posting.
3) The Bidder should demonstrate that the proposed resource's experience in the 120 months preceding the date of the bid posting, as the Change Management Lead (CML) responsible for <b>SAP Financials Solution<sup>10</sup></b> projects. To demonstrate this experience, the Bidder should identify <b>Reference Projects<sup>6</sup></b> in the proposed resource's resume. The <b>Reference Project<sup>6</sup></b> details should include:  a) Name of the client organization; b) The start and end dates, and duration (in months) the proposed CML worked on the project; c) A description of the proposed CML's role and responsibilities; d) The <b>Project Value<sup>8</sup></b> (CAD\$); and e) <b>Senior Client Reference<sup>9</sup></b> details, including name, title, telephone number and email address.  All items (a) – (e) above should be provided for the <b>Reference Project<sup>6</sup></b> to be considered for evaluation.	<b>Up to 10 points</b> , as follows: <ul style="list-style-type: none"><li>• <b>10 points:</b> The proposed resource has a minimum of 12 months of experience in the 120 months preceding the date of the bid posting.</li><li>• <b>0 points:</b> The proposed resource has less than 12 months of experience in the last 120 months preceding the date of the bid posting.</li></ul>
<b>Maximum Available Points</b>	<b>50</b>
<b>Minimum Points Required</b>	<b>30</b>
<b>Note: Bids that do not meet the above Minimum Points Require will be found non-responsive.</b>	

#### R4 – Project Plans (200 points)

##### R4.1 – Design Stage Plan (100 points)

Point Rated Criteria Description	Max Pts	Point Allocation	Substantiation
<p>The Bidder's Design Stage Plan should describe its proposed approach to the Design Stage, and provide the Level 4 Work Breakdown Structure (WBS) work plan for completing the Design Stage, as outlined in SOW Section 7.</p>	100	<p>The Bidder's proposed Design Stage Plan:</p> <ul style="list-style-type: none"> <li>Meets all ten Design Stage Project Plan Requirements; and</li> <li>Does not introduce a <b>Project Risk</b><sup>1</sup>.</li> </ul>	<p>The Bidder should propose an approach to the Design Stage that is aligned with SOW Section 7, and provides the sequence of work to complete the Design Stage.</p>
<p>The Level 4 Work Breakdown Structure (WBS) is defined in SOW Section 9.2.3: Schedule Management, where:</p> <ul style="list-style-type: none"> <li>Level 0 – Project: The DFO Financial System Renewal Initiative</li> <li>Level 1 – Sub-Project: Design Stage</li> <li>Level 2 – Phase: For the Design Stage, identify and describe the Phases required to complete the Design Stage.</li> <li>Level 3 – Deliverable: For each Phase, identify and describe all Deliverables required to be produced in the Phase.</li> </ul>	75	<p>The Bidder's proposed Design Stage Plan:</p> <ul style="list-style-type: none"> <li>Meets Design Stage Project Plan Requirements DPR-1 and DPR-2;</li> <li>Meets between 4 and 7 Design Stage Project Plan Requirements between DPR-3 and DPR-10; and</li> <li>Does not introduce a <b>Project Risk</b><sup>1</sup>.</li> </ul>	<p>The Bidder's Level 4 WBS should include a written explanation supporting each Phase of the WBS.</p>

Point Rated Criteria Description	Max Pts	Point Allocation	Substantiation
<p>o Level 4 – Work Package (WP): For each Deliverable, identify all independent and discrete Work Packages and their interrelationships required to produce the Deliverable.</p> <p>The Bidder's proposed approach to completing the Design Stage should demonstrate the Bidder's ability to meet the Design Stage Project Plan Requirements identified in Appendix 7 of the Point Rated Technical Evaluation Criteria without introducing a <b>Project Risk</b><sup>1</sup>.</p>		<b>50</b>	<p>The Bidder's proposed Design Stage Plan:</p> <ul style="list-style-type: none"><li>• Meets Design Stage Project Plan Requirements DPR-1 and DPR-2;</li><li>• Meets between 1 and 3 Design Stage Project Plan Requirements between DPR-3 and DPR-10; and</li><li>• Does not introduce a <b>Project Risk</b><sup>1</sup>.</li></ul>
		<b>25</b>	<p>The Bidder's proposed Design Stage Plan:</p> <ul style="list-style-type: none"><li>• Meets Design Stage Project Plan Requirements DPR-1 and DPR-2; and</li><li>• Introduces one or more <b>Project Risk</b><sup>1</sup>.</li></ul>
		<b>0</b>	<p>The Bidder's proposed Design Stage Plan:</p>



Point Rated Criteria Description	Max Pts	Point Allocation	Substantiation
		<ul style="list-style-type: none"><li>Does not meet Design Stage Project Plan Requirement DPR-1 or does not meet Design Stage Project Plan Requirement DPR-2</li></ul>	

R4.2 – Implementation Stage Plan (100 points)

Point Rated Criteria Description	Max Pts	Point Allocation	Substantiation
<p>The Bidder's Implementation Stage Plan should describe its proposed approach to the Implementation Stage, and provide the Level 4 Work Breakdown Structure (WBS) work plan for completing the Implementation Stage, as outlined in SOW Section 8.</p> <p>The Level 4 Work Breakdown Structure (WBS) is defined in SOW Section 9.2.3: Schedule Management, where:</p> <ul style="list-style-type: none"> <li>Level 0 – Project: The DFO Financial System Renewal Initiative</li> <li>Level 1 – Sub-Project: Implementation Stage</li> <li>Level 2 – Phase: For the Implementation Stage, identify and describe the Phases required to complete the Implementation Stage.</li> <li>Level 3 – Deliverable: For each Phase, identify and describe all Deliverables required to be produced in the Phase.</li> <li>Level 4 – Work Package (WP):</li> </ul>	100	<p>The Bidder's proposed Implementation Stage Plan:</p> <ul style="list-style-type: none"> <li>Meets all ten Implementation Stage Project Plan Requirements; and</li> <li>Does not introduce a <b>Project Risk</b><sup>1</sup>.</li> </ul>	<p>The Bidder should propose an approach to the Implementation Stage that is aligned with SOW Section 8, and provides the sequence of work to complete the Implementation Stage.</p>
	75	<p>The Bidder's proposed Implementation Stage Plan:</p> <ul style="list-style-type: none"> <li>Meets Implementation Stage Project Plan Requirements IPR-1 and IPR-2;</li> <li>Meets between 4 and 7 Implementation Stage Project Plan Requirements between IPR-3 and IPR-10; and</li> <li>Does not introduce a <b>Project Risk</b><sup>1</sup>.</li> </ul>	<p>The Bidder's Level 4 WBS should include a written explanation supporting each Phase of the WBS.</p>

Point Rated Criteria Description	Max Pts	Point Allocation	Substantiation
<p>For each Deliverable, identify all independent and discrete Work Packages and their interrelationships required to produce the Deliverable.</p> <p>The Bidder's proposed approach to completing the Implementation Stage should demonstrate the Bidder's ability to meet the Implementation Stage Project Plan Requirements identified in Appendix 8 of the Point Rated Technical Evaluation Criteria without introducing a <b>Project Risk<sup>1</sup></b>.</p>		<p><b>50</b></p> <p>The Bidder's proposed Implementation Stage Plan:</p> <ul style="list-style-type: none"> <li>Meets Implementation Stage Project Plan Requirements IPR-1 and IPR-2;</li> <li>Meets between 1 and 3 Implementation Stage Project Plan Requirements between IPR-3 and IPR-10; and</li> <li>Does not introduce a <b>Project Risk<sup>1</sup></b>.</li> </ul>	
		<p><b>25</b></p> <p>The Bidder's proposed Implementation Stage Plan:</p> <ul style="list-style-type: none"> <li>Meets Implementation Stage Project Plan Requirements IPR-1 and IPR-2; and</li> <li>Introduces one or more <b>Project Risk<sup>1</sup></b>.</li> </ul>	
		<p><b>0</b></p> <p>The Bidder's proposed Implementation Stage Plan:</p> <ul style="list-style-type: none"> <li>Does not meet Implementation</li> </ul>	

Point Rated Criteria Description	Max Pts	Point Allocation	Substantiation
		Stage Project Plan Requirement IPR-1 or does not meet Implementation Stage Project Plan Requirement IPR-2.	

## Appendix 1 to Point Rated Technical Evaluation Criteria: Definitions

The following definitions apply to the Point Rated Technical Evaluation Criteria.

- 1. Project Risk:** An event or condition that could have an impact on achieving the **DFSR Project Objectives**<sup>2</sup>. The categories of risks evaluated are:
  - o Project schedule;
  - o Project cost;
  - o Project benefit realization;
  - o Communications and **Stakeholder**<sup>3</sup> engagement;
  - o Disruption to DFO, **Other Government Departments (OGDs)**<sup>4</sup>, or **External Third Parties**<sup>5</sup> operations and/or business; and
  - o Reputational risks.
- 2. DFSR Project Objectives:** Referenced in this RFP Attachment refers to the project DFO Financial System Renewal (DFSR) project objectives identified in SOW Section 3.
- 3. Stakeholder:** DFO internal stakeholder groups, including but not limited to the CFO Sector, Canadian Coast Guard, Human Resources and Corporate Services, and DFO regions under the Regional Director Generals.
- 4. Other Government Departments (OGDs):** ODGs which DFO interacts with, including but not limited to the Department of Finance, Public Services and Procurement Canada (PSPC), and Treasury Board Secretariat Office of the Controller General (TBS-OCG).
- 5. External Third Parties:** External third parties that DFO interacts with, including but not limited to the Bank of Montreal, Newfoundland Power, and ARI Canada.
- 6. Reference Project(s):** A Reference Project is a client-defined project for which the Key Resource provided consulting services to assist the client in delivering the project.
- 7. Large Scale Technology Enabled Projects:** Projects with a **Project Value**<sup>6</sup> greater than \$25M (CAD) to design and implement fundamental changes that impact business processes, organization, people and technology. The project must:
  - o Have a project duration of over twelve (12) months;
  - o Have a peak project team size of over 50 full time resources (client employees and contractors);

- o Supports an organization of over 10,000 employees;
  - o Impact multiple internal **Stakeholder**<sup>3</sup> groups;
  - o Impact an end user community of greater than 3,000 individuals across multiple functional areas,
  - o Involve at least one **Other Government Department (ODG)**<sup>4</sup> or **External Third Party**<sup>5</sup>; and
  - o Have an impact across multiple geographical locations, in a decentralized, multi-regional environment.
8. **Project Value:** Total cost of the project, in Canadian dollars (CAD\$), including the client organization's internal costs, external professional services costs, hardware costs, and software costs.
9. **Senior Client Reference:** Defined as Chief Executive Officer (CEO), Chief Information Officer (CIO), Associate Deputy Minister (ADM), Vice President (VP), General Manager (GM), Director General (DG), Chief Operations Officer (COO), Chief Financial Officer (CFO), Chief Information Officer (CIO). In the private sector, Senior Client Reference is defined as President, Vice President (VP), and Chief Executive Officer (CEO).
10. **SAP Financials Solution:** A project involving the implementation of an SAP financial management solution using the SAP Financial Accounting (FI) and Controlling (CO) modules, using SAP Enterprise Resource Planning (ERP) Financials, or using SAP S/4HANA Finance.
11. **SAP S/4HANA Implementation:** A project that implemented SAP S/4HANA. SAP Business Suite 4 SAP HANA (SAP S/4HANA) is a business suite that is built on SAP's proprietary operational database system and in-memory computing platform called SAP HANA. SAP S/4HANA is the successor of SAP R/3 and SAP ERP and is optimized for SAP's in-memory database SAP HANA.
12. **Systems Integration:** Architecture, design, development, and testing for the purposes of unifying disparate Information Technology (IT) component sub-systems into a cohesive solution to deliver business capability.

## Appendix 2 to Point Rated Technical Evaluation Criteria: Methodology Requirements

Methodology Requirement (MR)	Requirement Description
MR-1	The Bidder's proposed Methodology should be an Agile Development Methodology which employs iterative and incremental development methods.
MR-2	The Bidder's proposed Methodology should be collaborative*.  *For the purpose of this methodology requirement, collaborative is defined as: a methodology that accounts for interactions with stakeholders, governance structure and project leader.
MR-3	The Bidder's proposed Methodology should include early and ongoing stakeholder engagement.
MR-4	The Bidder's proposed Methodology should detail the methods, techniques and processes by which the Contractor will work with DFO's project team members and Subject Matter Experts (SMEs) who will be distributed in locations across Canada.
MR-5	The Bidder's proposed Methodology should include collaboration technology tools and solutions** that will be used to engage DFO's project team members and SMEs who will be distributed in locations across Canada. These collaboration tools and solutions** must be employed during the Design and Implementation Stages.  **For the purpose of MR-5, collaboration technology tools and solutions refers to web enabled technology that enable, at a minimum, more than two users to have real time discussions, videoconferencing, document sharing and editing all while providing an auditable history to track changes.
MR-6	The Bidder's proposed Methodology should detail the methods, techniques and processes by which the Contractor will work with DFO Project Resources during Design and Implementation Stages in order for DFO to build capacity as detailed in SOW Section 8.2.7: Implementation Stage Wrap-up.
MR-7	The Bidder's proposed Methodology should use conceptual solutions such as proofs of concept and prototypes to develop, analyze, and confirm key solution requirements with stakeholders.
MR-8	The Bidder's proposed Methodology should leverage the standard off-the-shelf SAP software functionality to avoid custom development, unless the DFO business process cannot be modified, as determined by the Technical Authority.

Methodology Requirement (MR)	Requirement Description
MR-9	The Bidder's proposed Methodology should leverage the functionality of the GCfm Digital Core to avoid new configuration or development, unless specific GCfm Digital Core functionality is not suitable for DFO, as determined by the Technical Authority.
MR-10	The Bidder's proposed Methodology should follow the SAP's best practices and guidelines*** for all software configurations and enhancements, and not limit Canada's ability to upgrade to future software releases in any manner.  ***SAP best practices and guidelines can be found at: <a href="https://www.sap.com/services/rapid-deployment.html">https://www.sap.com/services/rapid-deployment.html</a>
MR-11	The Bidder's proposed Methodology should detail the Contactor's approach, methods and processes by which the DFO GCfm-B solution will be kept in sync and aligned with the TBS-OCG GCfm Digital Core template.
MR-12	The Bidder's proposed Methodology should detail how the Contractor will engage TBS-OCG to ensure the DFO GCfm-B solution will be aligned with the TBS-OCG GCfm Digital Core template.
MR-13	The Bidder's proposed Methodology should detail how the Contractor will engage TBS-OCG SAP configurators and developers during design and development of the DFO GCfm-B solution.
MR-14	The Bidder's proposed Methodology should detail how the Contractor will fulfill legacy reporting requirements using new reporting capabilities
MR-15	The Bidder's proposed Methodology should detail how the Contractor will perform successful application integration between legacy systems and the DFO Financial Systems Solution.
MR-16	The Bidder's proposed Methodology should detail how the Contractor will perform successful system integration between legacy systems and cloud -deployed GCfm and the DFO Financial Systems Solution components.



### Appendix 3 to Point Rated Technical Evaluation Criteria: Business Transformation Approach Requirements

Business Transformation Approach Requirement (BTR)	Requirement Description
BTR-1	The Bidder should describe how the Bidder's proposed Business Transformation Approach will enable the DFO to achieve the <b>DFSR Project Objectives</b> <sup>2</sup> .
BTR-2	The Bidder should describe how the Bidder's proposed Business Transformation Approach will engage <b>Stakeholders</b> <sup>3</sup> throughout the Design and Implementation Stages.
BTR-3	The Bidder should describe how the Bidder has tailored its standard Business Transformation Approach to the DFSR Project.
BTR-4	The Bidder should describe how the Bidder's proposed Business transformation Approach will leverage and involve its corporate-wide knowledge, expertise and experience in <b>Large Scale Technology Enabled Projects</b> <sup>7</sup> .
BTR-5	The Bidder should describe how the Bidder's proposed Business transformation Approach will leverage and involve its corporate-wide knowledge, expertise and experience in <b>SAP Financials Solution</b> <sup>10</sup> projects.
BTR-6	The Bidder's proposed Skill Development and Business Transformation Approach should identify any risks associated with the proposed approach, along with proposed mitigation strategies for any identified risks.
BTR-7	The Bidder should describe how the Bidder's proposed Business Transformation Approach will coordinate and integrate business transformation activities across Bidder Resources, DFO Resources, <b>Stakeholders</b> <sup>3</sup> , <b>Other Government Departments (ODGs)</b> <sup>4</sup> and <b>External Third Parties</b> <sup>5</sup> .
BTR-8	The Bidder should describe how the Bidder's proposed Business Transformation Approach will use conceptual solutions and innovative concepts.

#### Appendix 4 to Point Rated Technical Evaluation Criteria: Change Management Approach Requirements

Change Management Approach Requirement (CMR)	Requirement Description
CMR-1	The Bidder should describe how the Bidder's proposed Change Management Approach will enable the DFO to achieve the <b>DFSR Project Objectives</b> <sup>2</sup> .
CMR-2	The Bidder should describe how the Bidder's proposed Change Management Approach will engage <b>Stakeholders</b> <sup>3</sup> throughout the Design and Implementation Stages.
CMR-3	The Bidder should describe how the Bidder has tailored its standard Change Management Approach to the DFSR Project.
CMR-4	The Bidder should describe how the Bidder's proposed Change Management Approach will leverage and involve its corporate-wide knowledge, expertise and experience in <b>Large Scale Technology Enabled Projects</b> <sup>7</sup> .
CMR-5	The Bidder should describe how the Bidder's proposed Change Management Approach will leverage and involve its corporate-wide knowledge, expertise and experience in <b>SAP Financials Solution</b> <sup>10</sup> projects.
CMR-6	The Bidder's proposed Change Management Approach should identify any risks associated with the proposed approach, along with proposed mitigation strategies for any identified risks.
CMR-7	The Bidder should describe how the Bidder's proposed Change Management Approach will coordinate and integrate change management activities across Bidder Resources, DFO Resources, <b>Stakeholders</b> <sup>3</sup> , <b>Other Government Departments (ODGs)</b> <sup>4</sup> and <b>External Third Parties</b> <sup>5</sup> .
CMR-8	The Bidder should describe how the Bidder's proposed Change Management Approach will use conceptual solutions and innovative concepts.

## Appendix 5 to Point Rated Technical Evaluation Criteria: Skill Development and Knowledge Transfer Approach Requirements

Skill Development and Knowledge Transfer Approach Requirement (SKR)	Requirement Description
SKR-1	The Bidder should describe how the Bidder's proposed Skill Development and Knowledge Transfer Approach will enable the DFO to achieve the <b>DFSR Project Objectives</b> <sup>2</sup> .
SKR-2	The Bidder should describe how the Bidder's proposed Skill Development and Knowledge Transfer Approach will engage DFO Resources throughout the Design and Implementation Stages.
SKR-3	The Bidder should describe how the Bidder has tailored its standard Skill Development and Knowledge Transfer Approach to the DFSR Project.
SKR-4	The Bidder should describe how the Bidder's proposed Skill Development and Knowledge Transfer Approach will leverage and involve its corporate-wide knowledge, expertise and experience in <b>SAP Financials Solution</b> <sup>10</sup> projects.
SKR-5	The Bidder should describe how the Bidder's proposed Skill Development and Knowledge Transfer Approach will leverage and involve its corporate-wide knowledge, expertise and experience in <b>SAP S/4HANA Implementation</b> <sup>11</sup> projects.
SKR-6	The Bidder's proposed Skill Development and Knowledge Transfer Approach should identify any risks associated with the proposed approach, along with proposed mitigation strategies for any identified risks.
SKR-7	The Bidder should describe how the Bidder's proposed Skill Development and Knowledge Transfer Approach will coordinate and integrate skill development and knowledge transfer activities across Bidder Resources and DFO Resources.
SKR-8	The Bidder should describe how the Bidder's proposed Skill Development and Knowledge Transfer Approach will use conceptual solutions and innovative concepts.

## Appendix 6 to Point Rated Technical Evaluation Criteria: Project Team Structure Requirements

Project Team Structure Requirement (TSR)	Requirement Description
TSR-1	The Bidder should describe provide a Project Team Structure organization chart, and describe how it will employ the use of Bidder and DFO Co-Leads to oversee the project work streams and/or project sub-teams.
TSR-2	The Bidder should describe how the Bidder's proposed Project Team Structure and associated Resource Strategy will be used to work with DFO Project Resources during Design and Implementation Stages in order for DFO to build capacity and skills as detailed in SOW Section 8.2.7: Implementation Stage Wrap-up.
TSR-3	The Bidder should describe how the Bidder's proposed Project Team Structure and associated Resource Strategy will enable the DFO to achieve the <b>DFSR Project Objectives</b> <sup>2</sup> .
TSR-4	The Bidder should provide a Project Team Structure organization chart, and describe its alignment with Department of Fisheries and Oceans Project Governance bodies described in SOW Section 6.1.
TSR-5	The Bidder should describe the key roles identified in the Bidder's Project Team Structure organization chart, including responsibilities, authorities and role interactions and how these key roles evolve during the Design and Implementation Stages.
TSR-6	The Bidder should describe its approach to leverage and involve its corporate-wide knowledge, expertise and experience in <b>SAP Financials Solution</b> <sup>10</sup> projects.
TSR-7	The Bidder should describe its approach to leverage and involve its corporate-wide knowledge, expertise and experience in <b>SAP S/4HANA Implementation</b> <sup>11</sup> projects.
TSR-8	The Bidder should describe its planned resource availability (e.g. full time, part time, as required, etc.) and resource locations.
TSR-9	The Bidder should describe its resource selection, retention and replacement strategies.
TSR-10	The Bidder should describe how the Bidder's proposed Project Team Structure and associated Resource Strategy will integrate and work with TBS-OCG as it relates to the GCfm Digital Core template.

## Appendix 7 to Point Rated Technical Evaluation Criteria: Design Stage Project Plan Requirements

Design Stage Project Plan Requirement (DPR)	Requirement Description
DPR-1	The Bidder's Level 4 WBS should include all of the Tasks and Deliverables identified in SOW Section 7.2, and should include a written explanation supporting each Phase of the WBS (i.e., explanation for each Level 2 – Phase in the WBS)
DPR-2	The Bidder's proposed approach to the Design Stage and the Bidder's Level 4 WBS should identify all Bidder Resources, using the professional services categories found in SOW Section 10.1, and associated levels of effort required by each resource to complete the Tasks and Deliverables identified in SOW Section 7.2 and 9.2. The levels of effort provided must include all Bidder risk contingencies necessary for the Bidder to accept a firm fixed price Task Authorization to perform the Design Stage as proposed.
DPR-3	The Bidder's should describe how the Bidder's proposed approach to the Design Stage will enable the DFO to achieve the <b>DFSR Project Objectives</b> <sup>2</sup> .
DPR-4	The Bidder's proposed approach to the Design Stage should describe how the Bidder will engage <b>Stakeholders</b> <sup>3</sup> throughout the Design Stage.
DPR-5	The Bidder's proposed approach to the Design Stage should describe how it will ensure it accounts for the Government of Canada and Department of Fisheries and Oceans Technology Governance bodies described in SOW Section 6.2.
DPR-6	The Bidder's proposed approach to the Design Stage should describe how alignment to the DFO Gate Review Committee's Phases and TBS gating as describe in SOW Section 6.2.4 will be achieved.
DPR-7	The Bidder's proposed approach to the Design Stage should identify all Work Packages where Canada's Resources are required, and demonstrate that the Bidder has provided sufficient time for planning and scheduling of Canada's Resources.
DPR-8	The Bidder's Level 4 WBS should identify the Critical Path for the Design Stage, and the Bidder's proposed approach to the Design Stage should identify any risks to the Critical Path that are outside of the Bidder's control, along with proposed mitigation strategies for any identified risks.
DPR-9	The Bidder's Level 4 WBS should identify the constraints and dependencies between Work Packages.
DPR-10	The Bidder's Level 4 WBS should identify the major milestones for the Design Stage.

## Appendix 8 to Point Rated Technical Evaluation Criteria: Implementation Stage Project Plan Requirements

Implementation Stage Project Plan Requirement (IPR)	Requirement Description
IPR-1	The Bidder's Level 4 WBS should include all of the Tasks and Deliverables identified in SOW Section 8.2, and should include a written explanation supporting each Phase of the WBS (i.e., explanation for each Level 2 – Phase in the WBS)
IPR-2	The Bidder's proposed approach to the Implementation Stage and the Bidder's Level 4 WBS should identify all Bidder Resources, using the professional services categories found in SOW Section 10.1, and associated levels of effort required by each resource to complete the Tasks and Deliverables identified in SOW Section 8.2 and 9.2. The levels of effort provided must include all Bidder risk contingencies necessary for the Bidder to accept a firm fixed price Task Authorization to perform the Implementation Stage as proposed.
IPR-3	The Bidder's should describe how the Bidder's proposed approach to the Implementation Stage will enable the DFO to achieve the <b>DFSR Project Objectives</b> <sup>2</sup> .
IPR-4	The Bidder's proposed approach to the Implementation Stage should describe how the Bidder will engage <b>Stakeholders</b> <sup>3</sup> throughout the Implementation Stage.
IPR-5	The Bidder's proposed approach to the Implementation Stage should describe how it will ensure it accounts for the Government of Canada and Department of Fisheries and Oceans Technology Governance bodies described in SOW Section 6.2.
IPR-6	The Bidder's proposed approach to the Implementation Stage should describe how alignment to the DFO Gate Review Committee's Phases and TBS gating as describe in SOW Section 6.2.4 will be achieved.
IPR-7	The Bidder's proposed approach to the Implementation Stage should identify all Work Packages where Canada's Resources are required, and demonstrate that the Bidder has provided sufficient time for planning and scheduling of Canada's Resources.
IPR-8	The Bidder's Level 4 WBS should identify the Critical Path for the Implementation Stage, and the Bidder's proposed approach to the Implementation Stage should identify any risks to the Critical Path that are outside of the Bidder's control, along with proposed mitigation strategies for any identified risks.
IPR-9	The Bidder's Level 4 WBS should identify the constraints and dependencies between Work Packages.

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Implementation Stage Project Plan Requirement (IPR)	Requirement Description
IPR-10	The Bidder's Level 4 WBS should identify the major milestones for the Implementation Stage.

## Technical Proposal Evaluation: Oral Presentation

### Oral Presentation (300 points)

Bidders that meet the Mandatory Criteria and the minimum points required for the Rated Criteria will be invited to participate in the Oral Presentation stage of the evaluation process. Bidders will be provided written notification at least 10 business days in advance of the Bidder's Oral Presentation specifying the date, time and location in the National Capital Region.

During the Oral Presentation, Bidders will be required to address three project scenarios (100 points each). The project scenario themes and Oral Presentation Evaluation Criteria will be provided in the RFP. The details of the scenarios will be provided to Bidders 2 business days in advance of the Bidder's Oral Presentation.

All Key Resources identified in the Bidder's response must participate in the presentation of the scenario responses; each Key Resource must participate in the presentation of at least one scenario response. No other resources may participate in the scenario response presentations.

During the scenario response presentations, Canada will not ask any questions or request clarifications and Bidders are not permitted to ask questions of Canada. If a Bidder wishes to ask a clarification question during the scenario response preparation period, the Bidder must email the question to the Contract Authority.