



RETURN BIDS TO:

RETOURNER LES SOUMISSIONS À:

Bid Receiving - PWGSC / Réception des
soumissions – TPSGC

11 Laurier St. / 11, rue Laurier

Place du Portage, Phase III

Core 0B2 / Noyau 0B2

Gatineau

Quebec

K1A0S5

Bid Fax: (819) 997-9776

REQUEST FOR PROPOSAL

DEMANDE DE PROPOSITION

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

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

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

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

Comments - Commentaires

Vendor/Firm Name and Address

Raison sociale et adresse du

fournisseur/de l'entrepreneur

Issuing Office - Bureau de distribution

Informatics Professional Services Division/Division des
services professionnels en informatique

Terrasses de la Chaudière 4th Floor

10 Wellington Street

Gatineau

Quebec

K1A0S5

Title - Sujet DG Cyber with resources	
Solicitation No. - N° de l'invitation W6369-19CY05/A	Date 2020-01-19
Client Reference No. - N° de référence du client W6369-19CY05	
GETS Reference No. - N° de référence de SEAG PW-\$IPS-001-37255	
File No. - N° de dossier 001ips.W6369-19CY05	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2020-02-13	Time Zone Fuseau horaire Eastern Standard Time EST
F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input checked="" type="checkbox"/> Other-Autre: <input type="checkbox"/>	
Address Enquiries to: - Adresser toutes questions à: Mageau-David, Jérémie	Buyer Id - Id de l'acheteur 001ips
Telephone No. - N° de téléphone (873) 354-7368 ()	FAX No. - N° de FAX () -
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction: Specified Herein Précisé dans les présentes	

Instructions: See Herein

Instructions: Voir aux présentes

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

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BID SOLICITATION

FOR A CONTRACT AGAINST A SUPPLY ARRANGEMENT FOR TASK-BASED INFORMATICS PROFESSIONAL SERVICES (TBIPS) VARIOUS IT PROFESSIONAL SERVICES FOR THE DEPARTMENT OF NATIONAL DEFENCE

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Annex A Statement of Work

- Appendix A to Annex A – Tasking Assessment Procedure
- Appendix B to Annex A – Task Authorization Form
- Appendix C to Annex A – Resources Assessment Criteria and Response Table
- Appendix D to Annex A – Certification at the TA Stage
- Appendix E to Annex A – Embedded Contractor Letter of Acknowledgment
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List of Attachment to Part 3 (Bid Preparation Instructions):

- Attachment 3.1: Bid Submission Form
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BID SOLICITATION FOR A CONTRACT AGAINST A SUPPLY ARRANGEMENT FOR TASK- BASED INFORMATICS PROFESSIONAL SERVICES (TBIPS) VARIOUS IT PROFESSIONAL SERVICES FOR DEPARTMENT OF NATIONAL DEFENCE

PART 1 - GENERAL INFORMATION

1.1 Introduction

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

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

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

Part 3 Bid Preparation Instructions: provides Bidders with instructions on how to prepare their bid;

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

Part 5 Certifications and Additional Information: includes the certifications and additional information to be provided;

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

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

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

1.2 Summary

- (a) This bid solicitation is being issued to satisfy the requirement of **The Department of National Defence** (the "**Client**") for Task-Based Informatics Professional Services (TBIPS) under the TBIPS Supply Arrangement (SA) method of supply.
- (b) It is intended to result in the award of one (1) contract, for one (1) years plus four (4) one-year irrevocable options allowing Canada to extend the term of the contract.
- (c) There are security requirements associated with this requirement. For additional information, consult Part 6 - Security, Financial and Other Requirements, and Part 7 – Resulting Contract Clauses. For more information on personnel and organization security screening or security clauses, Bidders should refer to the Contract Security Program of Public Works and Government Services Canada (<http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>) website.

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- (d) The requirement is subject to the provisions of the World Trade Organization Agreement on Government Procurement (WTO-AGP), the North American Free Trade Agreement (NAFTA), the Canada-Chile Free Trade Agreement (CCFTA), the Canada-Peru Free Trade Agreement (CPFTA), the Canada-Colombia Free Trade Agreement (CColFTA), the Canada-Panama Free Trade Agreement (CPanFTA), the Canada-European Union Comprehensive Economic and Trade Agreement (CETA), the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) and the Canadian Free Trade Agreement (CFTA).
- (e) This procurement is subject to the Controlled Goods Program. The Defence production Act defines Canadian Controlled Goods as certain goods listed in Canada's Export Control List, a regulation made pursuant to the Export and Import Permits Act (EIPA).
- (f) The Federal Contractor's Program (FCP) for employment equity applies to this procurement; see Part 5 – Certifications and Additional Information, Part 7 – Resulting Contract Clauses and the attachment titled "Federal Contractors Program for Employment Equity – Certification."
- (g) This bid solicitation is to establish a contract with task authorizations for the delivery of the requirement detailed in the bid solicitation across Canada, excluding locations within Yukon, Northwest Territories, Nunavut, Quebec, and Labrador that are subject to Comprehensive Land Claims Agreements (CLCAs). Any requirement for deliveries within CLCAs areas within Yukon, Northwest Territories, Nunavut, Quebec, or Labrador will be treated as a separate procurement, outside the resulting contract.
- (h) This bid solicitation allows bidders to use the epost Connect service provided by Canada Post Corporation to transmit their bid electronically. Bidders must refer to Part 2 entitled "Bidder Instructions, and Part 3 entitled "Bid Preparation Instructions", of the bid solicitation, for further information.
- (i) Only TBIPS SA Holders currently holding a TBIPS SA for Tier 2, in all required resource categories in this solicitation and in the National Capital Region under the EN578-170432 series of SAs are eligible to compete. The TBIPS SA EN578-170432 is incorporated by reference and forms part of this bid solicitation, as though expressly set out in it, subject to any express terms and conditions contained in this bid solicitation. The capitalized terms not defined in this bid solicitation have the meaning given to them in the TBIPS SA.
- (j) SA Holders that are invited to compete as a joint venture must submit a bid as that joint venture SA Holder, forming no other joint venture to bid. Any joint venture must be already qualified under the SA #EN578-170432 as that joint venture at the time of bid closing in order to submit a bid.
- (k) The Resource Categories described below are required on an as and when requested basis in accordance with the TBIPS SA Annex "A":

RESOURCE CATEGORY	LEVEL OF EXPERTISE	ESTIMATED NUMBER OF RESOURCES REQUIRED
B.1 Business Analyst	3	1
B.7 Business Transformation Architect	3	1
P.2 Enterprise Architect	3	1
P.8 Project Leader	3	3

1.3 Debriefings

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

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PART 2 - BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

- (a) All instructions, clauses and conditions identified in the bid solicitation by number, date and title are set out in the [Standard Acquisition Clauses and Conditions Manual](https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.
- (b) Bidders who submit a bid agree to be bound by the instructions, clauses and conditions of the bid solicitation and accept the clauses and conditions of the resulting contract(s).
- (c) The 2003 (2019-03-04) Standard Instructions - Goods or Services - Competitive Requirements are incorporated by reference into and form part of the bid solicitation. If there is a conflict between the provisions of 2003 and this document, this document prevails.
- (d) Subsection 3.a. of Section 01, Integrity provisions - bid of Standard Instructions 2003 incorporated by reference above is deleted in its entirety and replaced with the following:
 - a. at the time of submitting an arrangement under the Request for Supply Arrangement (RFSA), the Bidder has already provided a list of names, as requested under the *Ineligibility and Suspension Policy*. During this procurement process, the Bidder must immediately inform Canada in writing of any changes affecting the list of names.
- (e) Subsection 4 of Section 05, Submission of bids of Standard Instructions 2003 incorporated by reference above, is amended as follows:
Delete: 60 days
Insert: 180 days
- (f) Subsection 1 of Section 08, Transmission by facsimile or by epost Connect of Standard Instructions 2003 incorporated by reference above, is deleted and replaced by the following:
 - 1. Facsimile

Due to the nature of the bid solicitation, bids transmitted by facsimile or electronic mail other than ePost Connect to PWGSC will not be accepted.

2.2 Submission of Bids

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

Note: For bidders choosing to submit using epost Connect for bids closing at the Bid Receiving Unit in the National Capital Region (NCR) the email address is:
tpsgc.dgareceptiondessoumissions-abbidreceiving.pwgsc@tpsgc-pwgsc.gc.ca

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

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2.3 Enquiries - Bid Solicitation

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

2.4 Former Public Servant

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

(b) Definitions

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

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

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

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

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R.S., 1985, c. R-11, the [Members of Parliament Retiring Allowances Act](#), R.S. 1985, c. M-5, and that portion of pension payable to the [Canada Pension Plan Act](#), R.S., 1985, c. C-8.

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

As per the above definitions, is the Bidder a FPS in receipt of a pension? **Yes () No ()**
If so, the Bidder must provide the following information, for all FPSs in receipt of a pension, as applicable:

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

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

(d) **Work Force Adjustment Directive**

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

If so, the Bidder must provide the following information:

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

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

2.5 Applicable Laws

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

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

2.6 Improvement of Requirement During Solicitation Period

Should bidders consider that the specifications or Statement of Work contained in the bid solicitation could be improved technically or technologically, bidders are invited to make suggestions, in writing, to the

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Contracting Authority named in the bid solicitation. Bidders must clearly outline the suggested improvement as well as the reasons for the suggestion. Suggestions that do not restrict the level of competition nor favour a particular bidder will be given consideration provided they are submitted to the Contracting Authority in accordance with the article entitled "Enquiries - Bid Solicitation". Canada will have the right to accept or reject any or all suggestions.

2.7 Volumetric Data

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

Initial Contract Period:

Initial Contract Period – Year #1		
Resource Category	Level of Expertise	Estimated Number of Days
B.1 Business Analyst	Level 3	220 days
B.7 Business Transformation Architect	Level 3	220 days
P.2 Enterprise Architect	Level 3	220 days
P.8 Project Leader	Level 3	660 days

Option Periods:

Option Period #1 – Year #2		
Resource Category	Level of Expertise	Estimated Number of Days
B.1 Business Analyst	Level 3	220 days
B.7 Business Transformation Architect	Level 3	220 days
P.2 Enterprise Architect	Level 3	220 days
P.8 Project Leader	Level 3	660 days

Option Period 2 – Year #3		
Resource Category	Level of Expertise	Estimated Number of Days
B.1 Business Analyst	Level 3	220 days
B.7 Business Transformation Architect	Level 3	220 days
P.2 Enterprise Architect	Level 3	220 days
P.8 Project Leader	Level 3	660 days

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Option Period 3 – Year #4

Resource Category	Level of Expertise	Estimated Number of Days
B.1 Business Analyst	Level 3	220 days
B.7 Business Transformation Architect	Level 3	220 days
P.2 Enterprise Architect	Level 3	220 days
P.8 Project Leader	Level 3	660 days

Option Period 4 – Year #5

Resource Category	Level of Expertise	Estimated Number of Days
B.1 Business Analyst	Level 3	220 days
B.7 Business Transformation Architect	Level 3	220 days
P.2 Enterprise Architect	Level 3	220 days
P.8 Project Leader	Level 3	660 days

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PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

(a) Epost Connect Bid Submission

- (i) If the Bidder chooses to submit its bid electronically, Canada requests that the Bidder submits its bid in accordance with section 08 of the 2003 Standard Instructions. The epost Connect system has a limit of 1GB per single message posted and a limit of 20GB per conversation.
- (ii) The bid must be gathered per section and separated as follows:
 - (A) Section I: Technical Bid
 - (B) Section II: Financial Bid
 - (C) Section III: Certifications
- (iii) For further information please refer to article 08 - Transmission by facsimile or by epost Connect at <https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual/1/2003/23#transmission-by-facsimile>.

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

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

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-
- (iii) include a title page at the front of each volume of the bid that includes the title, date, bid solicitation number, bidder's name and address and contact information of its representative; and
 - (iv) include a table of contents.
- (g) **Canada's Policy on Green Procurement:** In April 2006, Canada issued a policy directing federal departments and agencies to take the necessary steps to incorporate environmental considerations into the procurement process. See the Policy on Green Procurement (<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=32573>). To assist Canada in reaching its objectives, Bidders should:
- (i) use paper containing fibre certified as originating from a sustainably-managed forest and/or containing a minimum of 30% recycled content; and
 - (ii) use an environmentally-preferable format including black and white printing instead of colour printing, printing double sided/duplex, and using staples or clips instead of cerlox, duotangs or binders.
- (h) **Submission of Only One Bid:**
- (i) A Bidder, including related entities, will be permitted to submit only one bid in response to this bid solicitation. If a Bidder or any related entities participate in more than one bid (participating means being part of the Bidder, not being a subcontractor), Canada will provide those Bidders with 2 working days to identify the single bid to be considered by Canada. Failure to meet this deadline will result in all the affected bids being disqualified.
 - (ii) For the purposes of this Article, regardless of the jurisdiction where any of the entities concerned is incorporated or otherwise formed as a matter of law (whether that entity is a natural person, corporation, partnership, etc), an entity will be considered to be "**related**" to a Bidder if:
 - (A) they are the same legal entity (i.e., the same natural person, corporation, partnership, limited liability partnership, etc.);
 - (B) they are "related persons" or "affiliated persons" according to the Canada Income Tax Act;
 - (C) the entities have now or in the two years before bid closing had a fiduciary relationship with one another (either as a result of an agency arrangement or any other form of fiduciary relationship); or
 - (D) the entities otherwise do not deal with one another at arm's length, or each of them does not deal at arm's length with the same third party.
 - (iii) Individual members of a joint venture cannot participate in another bid, either by submitting a bid alone or by participating in another joint venture.
- (i) **Joint Venture Experience:**
- (i) Where the Bidder is a joint venture with existing experience as that joint venture, it may submit the experience that it has obtained as that joint venture.
- Example: A bidder is a joint venture consisting of members L and O. A bid solicitation requires that the bidder demonstrate experience providing maintenance and help desk services for a period of 24 months to a customer with at least 10,000 users. As a joint venture (consisting of members L and O), the bidder has previously done the work. This

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bidder can use this experience to meet the requirement. If member L obtained this experience while in a joint venture with a third party N, however, that experience cannot be used because the third party N is not part of the joint venture that is bidding.

- (ii) A joint venture bidder may rely on the experience of one of its members to meet any given technical criterion of this bid solicitation.

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

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

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

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

That show in total 100 billable days.

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

3.2 Section I: Technical Bid

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

- (i) **Bid Submission Form:** Bidders are requested to include the Attachment 3.1 - Bid Submission Form with their bids. It provides a common form in which bidders can provide information required for evaluation and contract award, such as a contact name and the Bidder's Procurement Business Number, etc. Using the form to provide this information is not mandatory, but it is recommended. If Canada determines that the information required

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by the Bid Submission Form is incomplete or requires correction, Canada will provide the Bidder with an opportunity to do so.

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

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

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

(iii) **Previous Similar Projects:** Where the bid must include a description of previous similar projects:

- (A) a Corporate qualifying project must have been completed by the Bidder itself (and cannot include the experience of any proposed subcontractor contracts or those of any affiliate of the Bidder);
- (B) a project must have been completed by the bid closing date;
- (C) each project description must include, at minimum, the name and either the telephone number or e-mail address of a customer reference; and
- (D) if more similar projects are provided than requested, Canada will decide in its discretion which projects will be evaluated. A project will be considered "similar" to the Work to be performed under any resulting contract if the project was for the

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performance of work that closely matches the descriptions of the Resource Categories identified in Annex A. Work will be considered to "closely match" if the work in the provided project is described in at least 50% of the points of responsibility listed in the description of the given Resource Category.

- (iv) **For Proposed Resources:** The technical bid must include the number of CVs identified in Attachment 4.1. The same individual must not be proposed for more than one Resource Category. The Technical bid must demonstrate that each proposed individual meets the qualification requirements described (including any educational requirements, work experience requirements, and professional designation or membership requirements). With respect to the proposed resources:
- (v)
 - (A) Proposed resources may be employees of the Bidder or employees of a subcontractor, or these individuals may be independent contractors to whom the Bidder would subcontract a portion of the Work (refer to Part 5, Certifications).
 - (B) For educational requirements for a particular degree, designation or certificate, Canada will only consider educational programs that were successfully completed by the resource by the time of bid closing. If the degree, designation or certification was issued by an educational institution outside of Canada, the Bidder is requested to provide a copy of the results of the academic credential assessment and qualification recognition service issued by an agency or organization recognized by the Canadian Information Centre for International Credentials (CICIC). If the Bidder has not included the copy of the results in its bid, the Contracting Authority will provide an opportunity to the Bidder to submit it during the evaluation period. If the Bidder has not submitted the copy of the results within 2 working days of the request by the Contracting Authority, its bid will be declared non-responsive.
 - (C) For requirements relating to professional designation or membership, the resource must have the required designation or membership by the time of bid closing and must continue, where applicable, to be a member in good standing of the profession or membership throughout the evaluation period and Contract Period. Where the designation or membership must be demonstrated through a certification, diploma or degree, such document must be current, valid and issued by the entity specified in this solicitation. If the entity is not specified, the issuer must have been an accredited or otherwise recognized body, institution or entity at the time the document was issued. If the degree, diploma or certification was issued by an educational institution outside of Canada, the Bidder is requested to provide a copy of the results of the academic credential assessment and qualification recognition service issued by an agency or organization recognized by the Canadian Information Centre for International Credentials (CICIC). If the Bidder has not included the copy of the results in its bid, the Contracting Authority will provide an opportunity to the Bidder to submit it during the evaluation period. If the Bidder has not submitted the copy of the results within 2 working days of the request by the Contracting Authority, its bid will be declared non-responsive.
 - (D) For work experience, Canada will not consider experience gained as part of an educational program, except for experience gained through a formal co-operative program at a post-secondary institution.

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- (E) For any requirements that specify a particular time period (e.g., 2 years) of work experience, Canada will disregard any information about experience if the technical bid does not include the relevant dates (month and year) for the experience claimed (i.e., the start date and end date). Canada will evaluate only the duration that the resource actually worked on a project or projects (from his or her start date to end date), instead of the overall start and end date of a project or a combination of projects in which a resource has participated.
- (F) For work experience to be considered by Canada, the technical bid must not simply indicate the title of the individual's position, but must demonstrate that the resource has the required work experience by explaining the responsibilities and work performed by the individual while in that position. Only listing experience without providing any supporting data to describe responsibilities, duties and relevance to the requirement, or reusing the same wording as the qualification requirements, will not be considered "demonstrated" for the purposes of the assessment. The Contractor should provide complete details as to where, when, month and year, and how, through which activities/responsibilities, the stated qualifications / experience were obtained. In situations in which a proposed resource worked at the same time on more than one project, the duration of any overlapping time period will be counted only once toward any requirements that relate to the individual's length of experience.
- (vi) **Customer Reference Contact Information:**
- (A) The Bidder must provide customer references. The customer references must each confirm, if requested by Canada, the facts identified in the Bidder's bid, as required by Attachment 4.1 and 4.2.
- (B) The form of question to be used to request confirmation from customer references is as follows:
- Sample Question to Customer Reference: *"Has [the Bidder/Resource] provided your organization with [description of the services and, if applicable, required time frame within which those services must have been provided]?"*
- ___ *Yes, the Bidder/Resource has provided my organization with the services described above.*
- ___ *No, the Bidder/Resource has not provided my organization with the services described above.*
- ___ *I am unwilling or unable to provide any information about the services described above.*
- (C) For each customer reference, the Bidder must, at a minimum, provide the name and either the telephone number or e-mail address for a contact person. If only the telephone number is provided, it will be used to call to request the e-mail address and the reference check will be done by e-mail. Bidders are also requested to include the title of the contact person. It is the sole responsibility of the Bidder to ensure that it provides a contact who is knowledgeable about the services the Bidder has provided to its customer and who is willing to act as a customer reference. Crown references will be accepted.

3.3 Section II: Financial Bid

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- (a) **Pricing:** Bidders must submit their financial bid in accordance with the Pricing Schedule provided in "Attachment 4.3: Pricing Schedule". The total amount of Applicable Taxes must be shown separately, if applicable. Unless otherwise indicated, bidders must include a single, firm, all-inclusive per diem rate quoted in Canadian dollars in each cell requiring an entry in the pricing tables.
- (b) **Variation in Resource Rates By Time Period:** For any given resource category, where the financial tables provided by Canada allow different firm rates to be charged for a resource category during different time periods:
- (i) the rate bid must not increase by more than 3% from one time period to the next; and
 - (ii) the rate bid for the same resource category during any subsequent time period must not be lower than the rate bid for the time period that includes the first month of the Initial Contract Period.
- (c) **All Costs to be Included:** The financial bid must include all costs for the requirement described in the bid solicitation for the entire Contract Period, including any option periods. The identification of all necessary equipment, software, peripherals, cabling and components required to meet the requirements of the bid solicitation and the associated costs of these items is the sole responsibility of the Bidder.
- (d) **Blank Prices:** Bidders are requested to insert "\$0.00" for any item for which it does not intend to charge or for items that are already included in other prices set out in the tables. If the Bidder leaves any price blank, Canada will treat the price as "\$0.00" for evaluation purposes and may request that the Bidder confirm that the price is, in fact, \$0.00. No bidder will be permitted to add or change a price as part of this confirmation. Any bidder who does not confirm that the price for a blank item is \$0.00 will be declared non-responsive.

Note to Bidders: If Canada receives four (4) or fewer Bids by the bid solicitation closing date, the above sub-article (e) will not apply.

- (e) **Electronic Payment of Invoices – Bid:** If you are willing to accept payment of invoices by Electronic Payment Instruments, complete "Attachment 3.2 - Electronic Payment Instruments", to identify which ones are accepted. If "Attachment 3.2 - Electronic Payment Instruments" is not completed, it will be considered as if Electronic Payment Instruments are not being accepted for payment of invoices. Acceptance of Electronic Payment Instruments will not be considered as an evaluation criterion.

3.4 Section III: Certifications

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

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PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

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

the Bidder must provide the information requested by Canada within two (2) working days of a request by the Contracting Authority.
 - (iii) **Extension of Time:** If additional time is required by the Bidder, the Contracting Authority may grant an extension in his or her sole discretion.

4.1.1 Phased Bid Compliance Process

4.1.1.1 General

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

THE BIDDER ACKNOWLEDGES THAT THE REVIEWS IN PHASE I AND II OF THIS PBCP

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

- (c) Canada may, in its discretion, request and accept at any time from a Bidder and consider as part of the Bid, any information to correct errors or deficiencies in the Bid that are clerical or administrative, such as, without limitation, failure to sign the Bid or any part or to checkmark a box in a form, or other failure of format or form or failure to acknowledge; failure to provide a procurement business number or contact information such as names, addresses and telephone numbers; inadvertent errors in numbers or calculations that do not change the amount the Bidder has specified as the price or of any component thereof that is subject to evaluation. This shall not limit Canada's right to request or accept any information after the bid solicitation closing in circumstances where the bid solicitation expressly provides for this right. The Bidder will have the time period specified in writing by Canada to provide the necessary documentation. Failure to meet this deadline will result in the Bid being declared non-responsive.
- (d) The PBCP does not limit Canada's rights under Standard Acquisition Clauses and Conditions (SACC) 2003 (2019-03-04) Standard Instructions – Goods or Services – Competitive Requirements nor Canada's right to request or accept any information during the solicitation period or after bid solicitation closing in circumstances where the bid solicitation expressly provides for this right, or in the circumstances described in subsection (c).
- (e) Canada will send any Notice or CAR by any method Canada chooses, in its absolute discretion. The Bidder must submit its response by the method stipulated in the Notice or CAR. Responses are deemed to be received by Canada at the date and time they are delivered to Canada by the method and at the address specified in the Notice or CAR. An email response permitted by the Notice or CAR is deemed received by Canada on the date and time it is received in Canada's email inbox at Canada's email address specified in the Notice or CAR. A Notice or CAR sent by Canada to the Bidder at any address provided by the Bidder in or pursuant to the Bid is deemed received by the Bidder on the date it is sent by Canada. Canada is not responsible for late receipt by Canada of a response, however caused.

4.1.1.2 Phase I: Financial Bid

- (a) After the closing date and time of this bid solicitation, Canada will examine the Bid to determine whether it includes a Financial Bid and whether any Financial Bid includes all information required by the solicitation. Canada's review in Phase I will be limited to identifying whether any information that is required under the bid solicitation to be included in the Financial Bid is missing from the Financial Bid. This review will not assess whether the Financial Bid meets any standard or is responsive to all solicitation requirements.
- (b) Canada's review in Phase I will be performed by officials of the Department of Public Works and Government Services.
- (c) If Canada determines, in its absolute discretion that there is no Financial Bid or that the

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Financial Bid is missing all of the information required by the bid solicitation to be included in the Financial Bid, then the Bid will be considered non-responsive and will be given no further consideration.

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

4.1.1.3 Phase II: Technical Bid

- (a) Canada's review at Phase II will be limited to a review of the Technical Bid to identify any instances where the Bidder has failed to meet any Eligible Mandatory Criterion. This review will not assess whether the Technical Bid meets any standard or is responsive to all solicitation requirements. Eligible Mandatory Criteria are all mandatory technical criteria that are identified in this solicitation as being subject to the PBCP. Mandatory technical criteria that are not identified in the solicitation as being subject to the PBCP, will not be evaluated until Phase III.
- (b) Canada will send a written notice to the Bidder (Compliance Assessment Report or "CAR") identifying any Eligible Mandatory Criteria that the Bid has failed to meet. A Bidder whose Bid

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has been found responsive to the requirements that are reviewed at Phase II will receive a CAR that states that its Bid has been found responsive to the requirements reviewed at Phase II. Such Bidder shall not be entitled to submit any response to the CAR.

- (c) A Bidder shall have the period specified in the CAR (the "Remedy Period") to remedy the failure to meet any Eligible Mandatory Criterion identified in the CAR by providing to Canada in writing additional or different information or clarification in response to the CAR. Responses received after the end of the Remedy Period will not be considered by Canada, except in circumstances and on terms expressly provided for in the CAR.
- (d) The Bidder's response must address only the Eligible Mandatory Criteria listed in the CAR as not having been achieved, and must include only such information as is necessary to achieve such compliance. Any additional information provided by the Bidder which is not necessary to achieve such compliance will not be considered by Canada, except that, in those instances where such a response to the Eligible Mandatory Criteria specified in the CAR will necessarily result in a consequential change to other parts of the Bid, the Bidder shall identify such additional changes, provided that its response must not include any change to the Financial Bid.
- (e) The Bidder's response to the CAR should identify in each case the Eligible Mandatory Criterion in the CAR to which it is responding, including identifying in the corresponding section of the original Bid, the wording of the proposed change to that section, and the wording and location in the Bid of any other consequential changes that necessarily result from such change. In respect of any such consequential change, the Bidder must include a rationale explaining why such consequential change is a necessary result of the change proposed to meet the Eligible Mandatory Criterion. It is not up to Canada to revise the Bidder's Bid, and failure of the Bidder to do so in accordance with this subparagraph is at the Bidder's own risk. All submitted information must comply with the requirements of this solicitation.
- (f) Any changes to the Bid submitted by the Bidder other than as permitted in this solicitation, will be considered to be new information and will be disregarded. Information submitted in accordance with the requirements of this solicitation in response to the CAR will replace, in full, **only** that part of the original Bid as is permitted in this Section.
- (g) Additional or different information submitted during Phase II permitted by this section will be considered as included in the Bid, but will be considered by Canada in the evaluation of the Bid at Phase II only for the purpose of determining whether the Bid meets the Eligible Mandatory Criteria. It will not be used at any Phase of the evaluation to increase or decrease any score that the original Bid would achieve without the benefit of such additional or different information. For instance, an Eligible Mandatory Criterion that requires a mandatory minimum number of points to achieve compliance will be assessed at Phase II to determine whether such mandatory minimum score would be achieved with such additional or different information submitted by the Bidder in response to the CAR. If so, the Bid will be considered responsive in respect of such Eligible Mandatory Criterion, and the additional or different information submitted by the Bidder shall bind the Bidder as part of its Bid, but the Bidder's original score, which was less than the mandatory minimum for such Eligible Mandatory Criterion, will not change, and it will be that original score that is used to calculate any score for the Bid.
- (h) Canada will determine whether the Bid is responsive for the requirements reviewed at Phase II, considering such additional or different information or clarification as may have been

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provided by the Bidder in accordance with this Section. If the Bid is not found responsive for the requirements reviewed at Phase II to the satisfaction of Canada, then the Bid shall be considered non-responsive and will receive no further consideration.

- (i) Only Bids found responsive to the requirements reviewed in Phase II to the satisfaction of Canada, will receive a Phase III evaluation.

4.1.1.4 Phase III: Final Evaluation of the Bid

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

4.2 Technical Evaluation

(a) Mandatory Technical Criteria:

- (i) Each bid will be reviewed for compliance with the mandatory requirements of the bid solicitation. Any element of the bid solicitation that is identified specifically with the words "must" or "mandatory" is a mandatory requirement. Bids that do not comply with each and every mandatory requirement will be declared non-responsive and be disqualified.
- (ii) The mandatory technical criteria are described in Attachment 4.1.
- (iii) If the Phased Bid Compliance Process applies, it will apply only to mandatory technical criteria identified by the superscript (^{PB}). Mandatory technical criteria not identified by the superscript (^{PB}) will not be subject to the Phased Bid Compliance Process.

(b) Point-Rated Technical Criteria:

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

(c) Number of Resources Evaluated:

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

(d) Reference Checks:

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- (i) Whether or not to conduct reference checks is discretionary. However, if PWGSC chooses to conduct reference checks for any given rated or mandatory requirement, it will check the references for that requirement for all bidders who have not, at that point, been found non-responsive.
 - (ii) For reference checks, Canada will conduct the reference check in writing by email. Canada will send all email reference check requests to contacts supplied by all the Bidders within a 48-hour period using the email address provided in the bid. Canada will not award any points and/or a bidder will not meet the mandatory experience requirement (as applicable) unless the response is received within 5 working days of the date that Canada's email was sent.
 - (iii) On the third working day after sending out the reference check request, if Canada has not received a response, Canada will notify the Bidder by email, to allow the Bidder to contact its reference directly to ensure that it responds to Canada within 5 working days. If the individual named by a Bidder is unavailable when required during the evaluation period, the Bidder may provide the name and email address of an alternate contact person from the same customer. Bidders will only be provided with this opportunity once for each customer, and only if the originally named individual is unavailable to respond (i.e., the Bidder will not be provided with an opportunity to submit the name of an alternate contact person if the original contact person indicates that he or she is unwilling or unable to respond). The five (5) working days will not be extended to provide additional time for the new contact to respond.
 - (iv) Wherever information provided by a reference differs from the information supplied by the Bidder, the information supplied by the reference will be the information evaluated.
 - (v) Points will not be allocated and/or a bidder will not meet the mandatory experience requirement (as applicable) if (1) the reference customer states he or she is unable or unwilling to provide the information requested, or (2) the customer reference is not a customer of the Bidder itself (for example, the customer cannot be the customer of an affiliate of the Bidder instead of being a customer of the Bidder itself). Nor will points be allocated or a mandatory met if the customer is itself an affiliate or other entity that does not deal at arm's length with the Bidder.

4.3 Financial Evaluation

- (a) The financial evaluation will be conducted using the firm per diem rates provided by the responsive bid(s).
- (b) There are two possible financial evaluation methods for this requirement. The first method will be used if three or more bids are determined responsive (see (c) Financial Evaluation - Method A below). The second method will be used if fewer than three bids are determined responsive (see (d) Financial Evaluation - Method B below).
- (c) **Financial Evaluation - Method A:** The following financial evaluation method will be used if three or more bids are determined responsive:
 - (i) **STEP 1 - ESTABLISHING THE LOWER AND UPPER MEDIAN BAND LIMITS FOR EACH PERIOD AND EACH RESOURCE CATEGORY:** The Contracting Authority will establish, for each period and each Resource Category, the median band limits based on the firm per diem rates provided by the technically responsive bids. For each such

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Resource Category the median will be calculated using the median function in Microsoft Excel and will represent a range that encompasses any rate to a value of minus (-) 20% of the median, and an upper median rate to a value of plus (+) 30% of the median. When an even number of technically responsive bids have been determined, an average of the middle two rates will be used to calculate the median band limits and for an odd number of technically responsive bids, the middle rate will be used.

(ii) **STEP 2 - POINTS ALLOCATION:** For each period and each Resource Category points will be allocated as follows:

- (A) A Bidder's proposed firm per diem rate that is either lower than the established lower median band limit or higher than the established upper median band limit for that period and Resource Category will be allocated 0 points.
- (B) A Bidder's proposed firm per diem rate falling within the upper and lower median band limits, for that period and Resource Category, will be allocated points using the following calculation, which will be rounded to two decimal places:

$$\frac{\text{Lowest proposed firm per diem rate within the median band limits}}{\text{Bidder's proposed firm per diem rate within the median band limits}} \times \text{Maximum Points Assigned at Table 1 below}$$

- (C) A Bidder's proposed firm per diem rate falling within the established median band limits which is the lowest proposed firm per diem rate will be allocated the applicable maximum points assigned at Table 1 below.

TABLE 1 - MAXIMUM POINTS ASSIGNED						
RESOURCE CATEGORIES	INITIAL CONTRACT PERIOD	OPTION PERIOD 1	OPTION PERIOD 2	OPTION PERIOD 3	OPTION PERIOD 4	TOTAL POINTS
B.1 Business Analyst, Level 3	50	50	50	50	50	250
B.7 Business Transformation Architect, Level 3	50	50	50	50	50	250
P.2 Enterprise Architect, Level 3	50	50	50	50	50	250
P.8 Project Leader, Level 3	150	150	150	150	150	750
TOTAL	300	300	300	300	300	1500

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

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

TABLE 2 - EXAMPLE OF A FINANCIAL EVALUATION USING METHOD A:							
Resource Category	Max. Points	Bidder 1		Bidder 2		Bidder 3	
		Year 1	Year 2	Year 1	Year 2	Year 1	Year 2
Programmer	150 (75 pts. per year)	\$400.00	\$400.00	\$420.00	\$450.00	\$450.00	\$450.00
Business Analyst	100 (50 pts. per year)	\$600.00	\$600.00	\$600.00	\$620.00	\$650.00	\$820.00
Project Manager	50 (25 pts. per year)	\$555.00	\$900.00	\$750.00	\$800.00	\$700.00	\$800.00
TOTAL	300						
STEP 1 - Establishing the lower and upper median band limits for each year and each resource category							
(Median 1)	For the Programmer Resource Category, the year 1 median would be \$420.00. The lower median band limit would be \$336.00 and higher median band limit would be \$546.00.						
(Median 2)	For the Programmer Resource Category, the year 2 median would be \$450.00. The lower median band limit would be \$360.00 and higher median band limit would be \$585.00.						
(Median 3)	For the Business Analyst Resource Category, the year 1 median would be \$600.00. The lower median band limit would be \$480.00 and higher median band limit would be \$780.00.						
(Median 4)	For the Business Analyst Resource Category, the year 2 median would be \$620.00. The lower median band limit would be \$496.00 and higher median band limit would be \$806.00.						
(Median 5)	For the Project Manager Resource Category, the year 1 median would be \$700.00. The lower median band limit would be \$560.00 and higher median band limit would be \$910.00.						
(Median 6)	For the Project Manager Resource Category, the year 2 median would be \$800.00. The lower median band limit would be \$640.00 and higher median band limit would be \$1,040.00.						

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STEP 2 - Points Allocation:

Bidder 1:

75 points (lowest rate within the lower and upper median band limits)

Programmer Year 1 = 75 points (lowest rate within the lower and upper median band limits)
 Business Analyst Year 1 = 50 points (lowest rate within the lower and upper median band limits)
 Business Analyst Year 2 = 50 points (lowest rate within the lower and upper median band limits)
 Project Manager Year 1 = 0 points (outside the lower and higher median band limits)
 Project Manager Year 2 = 22.22 points (based on the following calculation = (Lowest rate of \$800.00 / Bidder's proposed rate of \$900.00) Multiplied by 25 pts)

Bidder 2:

71.43 points (based on the following calculation = (Lowest rate of \$400.00 / Bidder's proposed rate of \$420.00) Multiplied by 75 pts)

Programmer Year 1 = 66.67 points (based on the following calculation = (Lowest rate of \$400.00 / Bidder's proposed rate of \$450.00) Multiplied by 75 pts)
 Business Analyst Year 1 = 50 points (lowest price within the lower and upper median band limits)
 Business Analyst Year 2 = 48.39 points (based on the following calculation = (Lowest rate of \$600.00 / Bidder's proposed rate of \$620.00) Multiplied by 50 pts)
 Project Manager Year 1 = 23.33 points (based on the following calculation = (Lowest rate of \$700.00 / Bidder's proposed rate of \$750.00) Multiplied by 25 pts)
 Project Manager Year 2 = 25 points (lowest price within the lower and upper median band limits)

Bidder 3:

66.67 points (based on the following calculation = (Lowest rate of \$400.00 / Bidder's proposed rate of \$450.00) Multiplied by 75 pts)

Programmer Year 1 = 66.67 points (based on the following calculation = (Lowest rate of \$400.00 / Bidder's proposed rate of \$450.00) Multiplied by 75 pts)
 Business Analyst Year 1 = 46.15 points (based on the following calculation = (Lowest rate of \$600.00 / Bidder's proposed rate of \$650.00) Multiplied by 75 pts)
 Business Analyst Year 2 = 0 points (outside the lower and higher median band limits)
 Project Manager Year 1 = 25 points (lowest price within the lower and upper median band limits)
 Project Manager Year 2 = 25 points (lowest price within the lower and upper median band limits)

STEP 3 - Financial Score:

Bidder 1: 75 + 75 + 50 + 50 + 0 + 22.22 = Total Financial Score of 272.22 points out of a possible 300 points
Bidder 2: 71.43 + 67.67 + 50 + 48.39 + 23.33 + 25 = Total Financial Score of 284.82 points out of a possible 300 points

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Bidder 3: $66.67 + 66.67 + 46.15 + 0 + 25 + 25 =$ Total Financial Score of 229.49 points out of a possible 300 points

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

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

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

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

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

TABLE 3 - MAXIMUM POINTS ASSIGNED						
RESOURCE CATEGORIES	INITIAL CONTRACT PERIOD	OPTION PERIOD 1	OPTION PERIOD 2	OPTION PERIOD 3	OPTION PERIOD 4	TOTAL POINTS
B.1 Business Analyst, Level 3	50	50	50	50	50	250
B.7 Business Transformation Architect, Level 3	50	50	50	50	50	250
P.2 Enterprise Architect, Level 3	50	50	50	50	50	250
P.8 Project Leader, Level 3	150	150	150	150	150	750
TOTAL	300	300	300	300	300	1500

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

(e) **Substantiation of Professional Services Rates**

In Canada's experience, bidders will from time to time propose rates at the time of bidding for one or more categories of resources that they later refuse to honour, on the basis that these rates do not allow them to recover their own costs and/or make a profit. When evaluating the rates bid for professional services, Canada may, but will have no obligation to, require price support in

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accordance with this Article. If Canada requests price support, it will be requested from all otherwise responsive bidders who have proposed a rate that is at least 20% lower than the median rate bid by all responsive bidders for the relevant resource category or categories. If Canada requests price support, the Bidder must provide the following information:

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

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

(f) Formulae in Pricing Tables

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

4.4 Basis of Selection

- (a) A bid must comply with the requirements of the bid solicitation, meet all mandatory evaluation criteria and obtain the required pass marks for the point rated criteria identified in this bid solicitation to be declared responsive.
- (b) The responsive bid that obtains the highest Total Bidder Score will be recommended for award of a contract. For any given Bidder, the greatest possible Total Technical Score is 70 while the greatest possible Total Financial Score is 30.
 - (i) Calculation of Total Technical Score: The Total Technical Score will be computed for each responsive bid by converting the Technical Score obtained for the point-rated technical criteria using the following formula, rounded to two decimal places:

$$\frac{\text{Technical Score}}{\text{Maximum Technical Points (bidders, please refer to the maximum technical points in}} \times 70 = \text{Total Technical Score}$$

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Attachment 4.2).

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

$$\frac{\text{Financial Score}}{\text{Total Maximum Points Assigned (Bidders, please refer to the total maximum points assigned)}} \times 30 = \text{Total Financial Score}$$
- (iii) Calculation of the Total Bidder Score: The Total Bidder Score will be computed for each responsive bid in accordance with the following formula:

$$\text{Total Technical Score} + \text{Total Financial Score} = \text{Total Bidder Score}$$
- (c) In the event of identical Total Bidder Scores occurring, then the bid with the highest Total Financial Score will become the top-ranked bidder.
- (d) One contract may be awarded in total as a result of this bid solicitation.
- (e) Bidders should note that all contract awards are subject to Canada's internal approvals process, which includes a requirement to approve funding in the amount of any proposed contract. Despite the fact that the Bidder may have been recommended for contract award, a contract will only be awarded if internal approval is granted according to Canada's internal policies. If approval is not granted, no contract will be awarded.

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PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

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

The Contracting Authority will have the right to ask for additional information to verify Bidder's certifications. Failure to comply and to cooperate with any request or requirement imposed by the Contracting Authority will render the bid non-responsive or constitute a default under the Contract. The certifications and additional information listed below should be submitted with the bid, but may be submitted afterwards. If any of these required certifications or additional information is not completed and submitted as requested, the Contracting Authority will inform the Bidder of a time frame within which to provide the information. Failure to provide the certifications or the additional information listed below within the time frame provided will render the bid non-responsive.

5.1 Federal Contractors Program for Employment Equity - Bid Certification

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "[FCP Limited Eligibility to Bid](#)" list available at the bottom of the page of the [Employment and Social Development Canada \(ESDC\) - Labour's website](#).

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

Canada will also have the right to terminate the Contract for default if a Contractor, or any member of the Contractor if the Contractor is a Joint Venture, appears on the "[FCP Limited Eligibility to Bid](#)" list during the period of the Contract.

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

5.2 Professional Services Resources

- (i) By submitting a bid, the Bidder certifies that all the information provided in the CVs and supporting material submitted with its bid, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Bidder to be true and accurate. Furthermore, the Bidder warrants that every individual proposed by the Bidder for the requirement is capable of performing the Work described in the resulting contract.
- (ii) If a Bidder has proposed any individual who is not an employee of the Bidder, by submitting a bid, the Bidder certifies that it has the permission from that individual to propose his/her services in relation to the Work to be performed and to submit his/her CV to Canada. The Bidder must, upon request from the Contracting Authority, provide a written confirmation, signed by the individual, of the permission given to the Bidder and of

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his/her availability. Failure to comply with the request may result in the bid being declared non-responsive.

5.3 Submission of Only One Bid

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

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PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS

6.1 Security Requirement

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

6.2 Controlled Goods Requirement

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

6.3 Foreign Ownership Control and Influence

- (a) The Contractor must complete and submit a Foreign Ownership, Control and Influence (FOCI) Questionnaire and associated documentation identified in the FOCI Guidelines for Organizations prior to contract award to identify whether a third party individual, firm or government can gain unauthorized access to information/assets. Public Works and Government Services Canada (PWGSC) will determine if the company is "Not Under FOCI" or "Under FOCI". When an organization is determined to be Under FOCI, PWGSC will ascertain if mitigation measures exist or must be put in place by the company so it can be deemed "Not Under FOCI through Mitigation"

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PART 7 - RESULTING CONTRACT CLAUSES

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

7.1 Requirement

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

7.2 Task Authorization

- (a) **As-and-when-requested Task Authorizations:** The Work or a portion of the Work to be performed under the Contract will be on an "as-and-when-requested basis" using a Task Authorization. The Work described in the Task Authorization must be in accordance with the scope of the Contract. The Contractor must not commence work until a validly issued Task Authorization has been issued by Canada and received by the Contractor. The Contractor acknowledges that any work performed before such issuance and receipt will be done at the Contractor's own risk.
- (b) **Assessment of Resources Proposed at Task Authorization Stage:** Processes for issuing, responding to and assessing Task Authorizations are further detailed in Appendices A, B, C, D, E and F of Annex A.
- (c) **Form and Content of draft Task Authorization:**
 - (i) The Procurement Authority will provide the Contractor with a description of the task in a draft Task Authorization using the form specified in Annex A.
 - (ii) The draft Task Authorization will contain the details of the activities to be performed, and must also contain the following information:

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- (A) the task number;
 - (B) The date by which the Contractor's response must be received (which will appear in the draft Task Authorization, but not the issued Task Authorization);
 - (C) the categories of resources and the number required;
 - (D) a description of the work for the task outlining the activities to be performed and identifying any deliverables (such as reports);
 - (E) the start and completion dates;
 - (F) any option(s) to extend initial end date (if applicable);
 - (G) milestone dates for deliverables and payments (if applicable);
 - (H) the number of person-days of effort required;
 - (I) whether the work requires on-site activities and the location;
 - (J) the language profile of the resources required;
 - (K) the level of security clearance required of resources;
 - (L) the price payable to the Contractor for performing the task, with an indication of whether it is a firm price or a maximum Task Authorization price (and, for maximum price task authorizations, the Task Authorization must indicate how the final amount payable will be determined; where the Task Authorization does not indicate how the final amount payable will be determined, the amount payable is the amount, up to the maximum, that the Contractor demonstrates was actually worked on the project, by submitting time sheets filled in at the time of the work by the individual resources to support the charges); and
 - (M) any other constraints that might affect the completion of the task.
- (d) **Contractor's Response to Draft Task Authorization:** The Contractor must provide to the Procurement Authority, within two (2) working days of receiving the draft Task Authorization (or within any longer time period specified in the draft Task Authorization), a quotation with the proposed total price for performing the task and a breakdown of that cost, established in accordance with the Basis of Payment specified in the Contract, as well as its corresponding proposed resource(s) in accordance with Appendix C to Annex A of the Contract. The Contractor's quotation must be based on the rates set out in the Contract. The Contractor will not be paid for preparing or providing its response or for providing other information required to prepare and validly issue the Task Authorization.
- (e) **Task Authorization Limit and Authorities for Validly Issuing Task Authorizations:**
- (i) To be validly issued, a Task Authorization must include the following signatures:
 - (A) for any Task Authorization, inclusive of revisions, with a value less than or equal to \$400,000.00 (excluding Applicable Taxes), the Task Authorization must be signed by a representative from Directorate Electronic Systems Procurement, DES Proc 6.
 - (B) for any Task Authorization, inclusive of revisions, with a value greater than this amount, a Task Authorization must include the following signatures:
 - (1) a representative from Directorate Electronic Systems Procurement, DES Proc 6; and
 - (2) the Contracting Authority.

Any Task Authorization that does not bear the appropriate signatures is not validly issued by Canada. Any work performed by the Contractor without receiving a validly issued Task

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Authorization is done at the Contractor's own risk. If the Contractor receives a Task Authorization that is not appropriately signed, the Contractor must notify the Contracting Authority. By providing written notice to the Contractor, the Contracting Authority may suspend the Client's ability to issue Task Authorizations at any time, or reduce the dollar value threshold described in sub article (A) above; any suspension or reduction notice is effective upon receipt.

- (f) **Administration of Task Authorization Process for DND:** The administration of the Task Authorization process will be carried out by DES Proc 6. This process includes monitoring, controlling and reporting on expenditures of the contract with task authorizations to the Contracting Authority.
- (g) **Periodic Usage Reports:**
- (i) The Contractor must compile and maintain records on its provision of services to the federal government under Task Authorizations validly issued under the Contract. The Contractor must provide this data to Canada in accordance with the reporting requirements detailed below. If some data is not available, the reason must be indicated. If services are not provided during a given period, the Contractor must still provide a "NIL" report. The data must be submitted on a quarterly basis to the Contracting Authority. From time to time, the Contracting Authority may also require an interim report during a reporting period.
- (ii) The quarterly periods are defined as follows:
- (A) 1st quarter: April 1 to June 30;
 - (B) 2nd quarter: July 1 to September 30;
 - (C) 3rd quarter: October 1 to December 31; and
 - (D) 4th quarter: January 1 to March 31.
- The data must be submitted to the Contracting Authority no later than fifteen (15) calendar days after the end of the reporting period.
- (iii) Each report must contain the following information for each validly issued Task Authorization (as amended):
- (A) the Task Authorization number and the Task Authorization Revision number(s), if applicable;
 - (B) a title or a brief description of each authorized task;
 - (C) the name, Resource category and level of each resource involved in performing the Task Authorization, as applicable;
 - (D) the total estimated cost specified in the validly issued Task Authorization of each task, exclusive of Applicable Taxes;
 - (E) the total amount, exclusive of Applicable Taxes, expended to date against each authorized task;
 - (F) the start and completion date for each authorized task; and
 - (G) the active status of each authorized task, as applicable (e.g., indicate whether work is in progress or if Canada has cancelled or suspended the Task Authorization, etc.).
- (iv) Each report must also contain the following cumulative information for all the validly issued Task Authorizations (as amended):

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

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

7.3 Minimum Work Guarantee

- (a) In this clause,
- (i) **"Maximum Contract Value"** means the amount specified in the **"Limitation of Expenditure"** clause set out in the Contract; and
 - (ii) **"Minimum Contract Value"** means CAD \$20,000.00 (excluding Applicable Taxes).
- (b) Canada's obligation under the Contract is to request Work in the amount of the Minimum Contract Value or, at Canada's option, to pay the Contractor at the end of the Contract in accordance with sub-article (c), subject to sub-article (d). In consideration of such obligation, the Contractor agrees to stand in readiness throughout the Contract Period to perform the Work described in the Contract. Canada's maximum liability for work performed under the Contract must not exceed the Maximum Contract Value, unless an increase is authorized in writing by the Contracting Authority.
- (c) In the event that Canada does not request work in the amount of the Minimum Contract Value during the Contract Period, Canada must pay the Contractor the difference between the Minimum Contract Value and the total cost of the Work requested.
- (d) Canada will have no obligation to the Contractor under this article if Canada terminates the entire Contract
- (i) for default;
 - (ii) for convenience as a result of any decision or recommendation of a tribunal or court that the contract be cancelled, re-tendered or awarded to another supplier; or
 - (iii) for convenience within ten (10) business days of Contract award.

7.4 Standard Clauses and Conditions

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

(a) **General Conditions:**

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

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

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4. The total of the amounts, to which the Contractor is entitled to be paid under this section, together with any amounts paid, due or becoming due to the Contractor must not exceed the Contract Price.
5. Where the Contracting Authority terminates the entire Contract and the Articles of Agreement include a Minimum Work Guarantee, the total amount to be paid to the Contractor under the Contract will not exceed the greater of:
 - (a) the total amount the Contractor may be paid under this section, together with any amounts paid, becoming due other than payable under the Minimum Work Guarantee, or due to the Contractor as of the date of termination, or
 - (b) the amount payable under the Minimum Work Guarantee, less any amounts paid, due or otherwise becoming due to the Contractor as of the date of termination.
6. The Contractor will have no claim for damages, compensation, loss of profit, allowance arising out of any termination notice given by Canada under this section except to the extent that this section expressly provides. The Contractor agrees to repay immediately to Canada the portion of any advance payment that is unliquidated at the date of the termination.

(b) **Supplemental General Conditions:**

The following Supplemental General Conditions apply to and form part of the Contract:

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

7.5 Security Requirement

The following security requirements (SRCL #W6369-19CY05 – Amendment #1 and related clauses provided by the Contract Security Program), applies to and forms part of the Contract.

1. The Contractor must, at all times during the performance of the Contract/Standing Offer, hold a valid Facility Security Clearance at the level of **NATO SECRET**, issued by the Contract Security Program (CSP) of the Industrial Security Sector (ISS), Public Works and Government Services (PWGSC).
2. This contract includes access to **Controlled Goods**. Prior to access, the contractor must be registered in the Controlled Goods Program of Public Works and Government Services Canada (PWGSC).
3. The Contractor personnel requiring access to **PROTECTED/CLASSIFIED** information, assets or sensitive work site(s) **must be a citizen of Canada and/or United States and must EACH hold a valid personnel security screening at the level of NATO SECRET**, granted or approved by CISC/PWGSC.
4. The Contractor personnel requiring access to **NATO UNCLASSIFIED** information or assets do not require to hold a personnel security clearance; however, the Contractor must ensure that the NATO Unclassified information is not releasable to third parties and that the "need to know" principle is applied to personnel accessing this information.

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5. The Contractor personnel requiring access to **NATO RESTRICTED** information or assets **must be a citizen of Canada and/or United States and must EACH hold a valid personnel security screening at the level of NATO SECRET** or its equivalent, granted or approved by the appropriate delegated NATO Security Authority.
6. The Contractor personnel requiring access to **NATO CLASSIFIED** information, assets or sensitive work site(s) **must be a citizen of Canada and/or United States and must EACH hold a valid personnel security screening at the level of NATO SECRET**, granted or approved by the appropriate delegated NATO Security Authority
7. The Contractor personnel requiring access to **FOREIGN PROTECTED/CLASSIFIED** information, assets or sensitive work site(s) must EACH hold a valid personnel security screening at the level of **NATO SECRET**, granted or approved by the CSP/ISS/PWGSC.
8. The Contractor MUST NOT remove any **PROTECTED/CLASSIFIED** information or assets from the identified work site(s), and the Contractor must ensure that its personnel are made aware of and comply with this restriction.
9. The Contractor must complete and submit a **Foreign Ownership, Control and Influence (FOCI)** Questionnaire and associated documentation identified in the FOCI Guidelines for Organizations prior to contract award to identify whether a third party individual, firm or government can gain unauthorized access to **CLASSIFIED NATO/FOREIGN** information/assets. **Public Works and Government Services Canada (PWGSC)** will determine if the company is "*Not Under FOCI*" or "*Under FOCI*". When an organization is determined to be *Under FOCI*, PWGSC will ascertain if mitigation measures exist or must be put in place by the company so it can be deemed "*Not Under FOCI through Mitigation*".
10. The contractor shall at all times during the performance of the contract possess a letter from PWGSC identifying the results of the FOCI assessment with a FOCI designation of *Not Under FOCI* or *Not Under FOCI through Mitigation*.
11. All changes to Questionnaire and associated FOCI evaluation factors must immediately be submitted to the Industrial Security Sector (ISS) to determine if the changes impact the FOCI designation.
12. The Contractor must also comply with the provisions of the:
 - (a) Security Requirements Check List and the security guide, attached at Annex C;
 - (b) Industrial Security Manual (latest edition).

7.6 Contract Period

- (a) **Contract Period:** The "**Contract Period**" is the entire period of time during which the Contractor is obliged to perform the Work, which includes:
 - (i) The "**Initial Contract Period**", which begins on the date the Contract is awarded and ends one (1) year later; and
 - (ii) The period during which the Contract is extended, if Canada chooses to exercise any options set out in the Contract.
- (b) **Option to Extend the Contract:**

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- (i) The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to four (4) additional one (1) -year period(s) under the same terms and conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions set out in Annex B, Basis of Payment.
- (ii) Canada may exercise this option at any time by sending a written notice to the Contractor before the expiry date of the Contract. The option may only be exercised by the Contracting Authority, and will be evidenced, for administrative purposes only, through a contract amendment.

7.7 Authorities

(a) Contracting Authority

The Contracting Authority for the Contract is:

Name: Jérémie Mageau-David
Title: Supply Specialist
Public Works and Government Services Canada
Acquisitions Branch
Directorate: Professional Services Procurement Directorate
Address: 10 rue Wellington, Gatineau, Québec
Telephone: (873)-354-7368
E-mail address: jeremie.mageau-david@tpsgc-pwgsc.gc.ca

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

(b) Procurement Authority

The Procurement Authority for the Contract is:

Name: _____
Title: _____
Organization: Department of National Defence, DES Proc 6-2-3
Address: _____
Telephone: _____
E-mail address: _____

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

(c) Technical Authority

The Technical Authority for the Contract is:

Name: _____

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

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

(d) **Contractor's Representative**

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

7.8 Proactive Disclosure of Contracts with Former Public Servants

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

7.9 Payment

(a) **Basis of Payment**

- (i) **Professional Services provided under a Task Authorization with a Maximum Price:** For professional services requested by Canada, in accordance with a validly issued Task Authorization, Canada will pay the Contractor, in arrears, up to the Maximum Price for the Task Authorization, for actual time worked and any resulting deliverables in accordance with the firm all-inclusive per diem rates set out in Annex B, Basis of Payment, Applicable Taxes extra. Partial days will be prorated based on actual hours worked based on a 7.5-hour workday.
- (ii) **Travel and Living Expenses – National Joint Council Travel Directive:** The Contractor will be reimbursed its authorized travel and living expenses reasonably and properly incurred in the performance of the Work, at cost, without any allowance for profit and/or administrative overhead, in accordance with the meal and private vehicle expenses provided in Appendices B, C and D of the [National Joint Council Travel Directive](#) and with the other provisions of the directive referring to “travellers”, rather than those referring to “employees”. All travel must have the prior authorization of the Technical Authority. Travel requests will only be considered for a work location which is located more than 100 kilometers from Ottawa. The Contractor will be paid for actual time spent travelling at half the hourly rate. The hourly rate will be determined by dividing the

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firm per diem rate set out in Annex B by 7.5 hours. All payments are subject to government audit.

- (iii) **Competitive Award:** The Contractor acknowledges that the Contract has been awarded as a result of a competitive process. No additional charges will be allowed to compensate for errors, oversights, misconceptions or underestimates made by the Contractor when bidding for the Contract.
 - (iv) **Contractor's Firm Per Diem Rates:** The Contractor agrees that the rates set out in Annex B remain firm throughout the Contract Period, except as may be provided for in the express terms of the contract. In reference to Article 18(1) of SACC General Conditions 2035, the Contractor acknowledges that its obligation to provide services in accordance with the firm rates set out in Annex B is unaffected by the application of any existing law or any new law which may come into effect during the Contract Period.
 - (v) **Professional Services Rates:** In Canada's experience, bidders from time to time propose rates at the time of bidding for one or more Resource Categories that they later refuse to honour, on the basis that these rates do not allow them to recover their own costs and/or make a profit. This denies Canada of the benefit of the awarded contract. If the Contractor does not respond or refuses to provide an individual with the qualifications described in the Contract within the time described in the Contract (or proposes instead to provide someone from an alternate category at a different rate), whether or not Canada terminates the Contract as a whole or in part or chooses to exercise any of the rights provided to it under the general conditions, Canada may impose sanctions or take other measures in accordance with the PWGSC Vendor Performance Corrective Measure Policy (or equivalent) then in effect, which measures may include an assessment that results in conditions applied against the Contractor to be fulfilled before doing further business with Canada, or full debarment of the Contractor from bidding on future requirements.
- (b) **Limitation of Expenditure – Cumulative Total of all Task Authorizations**
- (i) Canada's total liability to the Contractor under the Contract for all validly issued Task Authorizations (TAs), inclusive of any revisions, must not exceed the amount set out on page 1 of the Contract, less any Applicable taxes. With respect to the amount set out on page 1 of the Contract, Customs duties are included and Applicable Taxes are included.
 - (ii) No increase in the total liability of Canada will be authorized or paid to the Contractor unless an increase has been approved, in writing, by the Contracting Authority.
 - (iii) The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:
 - (A) when it is 75 percent committed, or
 - (B) 4 months before the contract expiry date, or
 - (C) As soon as the Contractor considers that the sum is inadequate for the completion of the Work required in all authorized TAs, inclusive of any revisions,
 whichever comes first.

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- (i) If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority a written estimate for the additional funds required. Providing this information does not increase Canada's liability.

(c) **Method of Payment for Task Authorizations with a Maximum Price:**

For each Task Authorization validly issued under the Contract that contains a maximum price:

- (i) Canada will pay the Contractor no more frequently than once a month in accordance with the Basis of Payment. The Contractor must submit time sheets for each resource showing the days and hours worked to support the charges claimed in the invoice.
- (ii) Once Canada has paid the maximum Task Authorization price, Canada will not be required to make any further payment, but the Contractor must complete all the work described in the TA, all of which is required to be performed for the maximum Task Authorization price. If the work described in the Task Authorization is completed in less time than anticipated, and the actual time worked (as supported by the time sheets) at the rates set out in the Contract is less than the maximum Task Authorization price, Canada is only required to pay for the time spent performing the work related to that TA.

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

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

- (i) Visa Acquisition Card;
- (ii) MasterCard Acquisition Card;
- (iii) Direct Deposit (Domestic and International);
- (iv) Electronic Data Interchange (EDI);
- (v) Wire Transfer (International Only);

Note to Bidders: *If applicable, the Electronic Payment Instrument(s) indicated by the Bidder in Attachment 3.2 will be included in any resulting contract.*

(e) **Time Verification**

Time charged and the accuracy of the Contractor's time recording system are subject to verification by Canada, before or after payment is made to the Contractor. If verification is done after payment, the Contractor must repay any overpayment, at Canada's request.

(f) **No Responsibility to Pay for Work not performed due to Closure of Government Offices**

- (i) Where the Contractor, its employees, subcontractors, or agents are providing services on government premises under the Contract and those premises are inaccessible because of the evacuation or closure of government offices, and as a result no work is performed, Canada is not responsible for paying the Contractor for work that otherwise would have been performed if there had been no evacuation or closure.
- (ii) If, as a result of any strike or lock-out, the Contractor or its employees, subcontractors or agents cannot obtain access to government premises and, as a result, no work is performed, Canada is not responsible for paying the Contractor for work that otherwise would have been performed if the Contractor had been able to gain access to the premises

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7.10 Invoicing Instructions

- (a) The Contractor must submit invoices in accordance with the information required in the General Conditions.
- (b) The Contractor's invoice must include a separate line item for each subparagraph in the Basis of Payment provision, and must show all applicable Task Authorization numbers.
- (c) By submitting invoices, the Contractor is certifying that the goods and services have been delivered and that all charges are in accordance with the Basis of Payment provision of the Contract, including any charges for work performed by subcontractors.
- (d) The Contractor must provide the original and two copies of each invoice to the Procurement Authority, and a copy to the Contracting Authority. The original must be submitted electronically to the following email addresses:
 - (i) DESProc6-DOSE6@forces.gc.ca
 - (ii) The email address of the Contracting Authority identified under the section entitled "Authorities" of the Contract.
 - (iii) the email address of the Procurement Authority identified under the section entitled "Authorities" of the Contract.

Individual e-mails exceeding five (5) megabytes, or those that include other factors such as embedded macros and/or links, may be rejected by Canada's e-mail system and/or firewall(s) without notice to the Contractor.

Larger invoices may be submitted through more than one e-mail. The Procurement Authority will confirm receipt of documents. It is the Contractor's responsibility to ensure that the Procurement Authority has received the entire invoice.

The Contractor should not assume that all documents have been received unless the Procurement Authority confirms receipt of each document.

7.11 Certifications and Additional Information

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

7.12 Federal Contractors Program for Employment Equity - Default by Contractor

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

7.13 Applicable Laws

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

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7.14 Priority of Documents

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

- (a) these Articles of Agreement, including any individual SACC clauses incorporated by reference in these Articles of Agreement;
- (b) Supplemental General Conditions, in the following order:
 - (i) 4007 (2010-08-16), Supplemental General Conditions - Canada to Own Intellectual Property Rights in Foreground Information;
- (c) General Conditions 2035 (2018-06-21), Higher Complexity - Services;
- (d) Annex A, Statement of Work, including its Appendices as follows:
 - (i) Appendix A to Annex A - Tasking Assessment Procedure;
 - (ii) Appendix B to Annex A - Task Authorization Form;
 - (iii) Appendix C to Annex A - Resource Assessment Criteria and Response Table;
 - (iv) Appendix D to Annex A - Certifications at the Task Authorization stage;
 - (v) Appendix E to Annex A – Embedded Contractor Letter of Acknowledgment
 - (vi) Appendix F to Annex A – Non-Disclosure Agreement
- (e) Annex B, Basis of Payment;
- (f) Annex C, Security Requirements Check List;
- (g) the validly issued Task Authorizations and any required certifications (including all of their annexes, if any); and
- (h) the Contractor's bid dated _____ (*insert date of bid*) (*if the bid was clarified or amended, insert the time of contract award*), as clarified on _____ "or" as amended _____ (*insert date(s) of clarification(s) or amendment(s) if applicable.*)

7.15 Defence Contract

The Contract is a defence contract within the meaning of the [Defence Production Act](#), R.S.C. 1985, c. D-1, and must be governed accordingly.

Title to the Work or to any materials, parts, work-in-process or finished work must belong to Canada free and clear of all claims, liens, attachments, charges or encumbrances. Canada is entitled, at any time, to remove, sell or dispose of the Work or any part of the Work in accordance with section 20 of the [Defence Production Act](#).

7.16 Foreign Nationals (Canadian Contractor)

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

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

7.17 Foreign Nationals (Foreign Contractor)

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

7.18 Insurance Requirements

(a) Compliance with Insurance Requirements

- (i) The Contractor must comply with the insurance requirements specified in this Article. The Contractor must maintain the required insurance coverage for the duration of the Contract. Compliance with the insurance requirements does not release the Contractor from or reduce its liability under the Contract.
- (ii) The Contractor is responsible for deciding if additional insurance coverage is necessary to fulfill its obligation under the Contract and to ensure compliance with any applicable law. Any additional insurance coverage is at the Contractor's expense, and for its own benefit and protection.
- (iii) The Contractor should forward to the Contracting Authority within ten (10) days after the date of award of the Contract a Certificate of Insurance evidencing the insurance coverage. Coverage must be placed with an Insurer licensed to carry out business in Canada and the Certificate of Insurance must confirm that the insurance policy complying with the requirements is in force. If the Certificate of Insurance has not been completed and submitted as requested, the Contracting Authority will so inform the Contractor and provide the Contractor with a time frame within which to meet the requirement. Failure to comply with the request of the Contracting Authority and meet the requirement within the time period will constitute a default under the General Conditions. The Contractor must, if requested by the Contracting Authority, forward to Canada a certified true copy of all applicable insurance policies.

(b) Commercial General Liability Insurance

- (i) The Contractor must obtain Commercial General Liability Insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature, but for not less than \$2,000,000 per accident or occurrence and in the annual aggregate.
- (ii) The Commercial General Liability policy must include the following:
 - (A) Additional Insured: Canada is added as an additional insured, but only with respect to liability arising out of the Contractor's performance of the Contract. The interest of Canada should read as follows: Canada, as represented by Public Works and Government Services Canada.
 - (B) Bodily Injury and Property Damage to third parties arising out of the operations of the Contractor.
 - (C) Products and Completed Operations: Coverage for bodily injury or property damage arising out of goods or products manufactured, sold, handled, or distributed by the Contractor and/or arising out of operations that have been completed by the Contractor.

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

(c) **Errors and Omissions Liability Insurance**

- (i) The Contractor must obtain Errors and Omissions Liability (a.k.a. Professional Liability) insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature but for not less than \$1,000,000 per loss and in the annual aggregate, inclusive of defence costs.
- (ii) If the Professional Liability insurance is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.
- (iii) The following endorsement must be included:
Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of cancellation.

7.19 Controlled Goods Program

- (a) SACC Manual clause A9131C (2014-11-27) Controlled Goods Program - Contract
- (b) The Contract involves controlled goods as defined in the Schedule to the [Defence Production Act](#). The Contractor must identify those controlled goods to the Department of National Defence.
- (c) Because the Contract involves Controlled Goods and the entirety of the contracting activities are performed in a facility operated by the Department of National Defence (DND), the Contractor must sign an acknowledgement letter, attached at Annex A, Appendix E, or follow any other requirements as prescribed by the Contracting Authority.

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7.20 Limitation of Liability - Information Management/Information Technology

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

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In any case, the total liability of the Contractor under subparagraph (v) will not exceed the total estimated cost (as defined above) for the Contract or \$1,000,000.00, whichever is more.

- (vi) If Canada's records or data are harmed as a result of the Contractor's negligence or willful act, the Contractor's only liability is, at the Contractor's own expense, to restore Canada's records and data using the most recent back-up kept by Canada. Canada is responsible for maintaining an adequate back-up of its records and data.

(c) **Third Party Claims:**

- (i) Regardless of whether a third party makes its claim against Canada or the Contractor, each Party agrees that it is liable for any damages that it causes to any third party in connection with the Contract as set out in a settlement agreement or as finally determined by a court of competent jurisdiction, where the court determines that the Parties are jointly and severally liable or that one Party is solely and directly liable to the third party. The amount of the liability will be the amount set out in the settlement agreement or determined by the court to have been the Party's portion of the damages to the third party. No settlement agreement is binding on a Party unless its authorized representative has approved the agreement in writing.
- (ii) If Canada is required, as a result of joint and several liability or joint and solidarily liable, to pay a third party in respect of damages caused by the Contractor, the Contractor must reimburse Canada by the amount finally determined by a court of competent jurisdiction to be the Contractor's portion of the damages to the third party. However, despite Sub-article (i), with respect to special, indirect, and consequential damages of third parties covered by this Section, the Contractor is only liable for reimbursing Canada for the Contractor's portion of those damages that Canada is required by a court to pay to a third party as a result of joint and several liability that relate to the infringement of a third party's intellectual property rights; physical injury of a third party, including death; damages affecting a third party's real or tangible personal property; liens or encumbrances on any portion of the Work; or breach of confidentiality.
- (iii) The Parties are only liable to one another for damages to third parties to the extent described in this Sub-article (c).

7.21 Joint Venture Contractor

- (a) The Contractor confirms that the name of the joint venture is [REDACTED] and that it is comprised of the following members: *[list all the joint venture members named in the Contractor's original bid]*.
- (b) With respect to the relationship among the members of the joint venture Contractor, each member agrees, represents and warrants (as applicable) that:
 - (i) [REDACTED] has been appointed as the "representative member" of the joint venture Contractor and has fully authority to act as agent for each member regarding all matters relating to the Contract;
 - (ii) by giving notice to the representative member, Canada will be considered to have given notice to all the members of the joint venture Contractor; and
 - (iii) all payments made by Canada to the representative member will act as a release by all the members.

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- (c) All the members agree that Canada may terminate the Contract in its discretion if there is a dispute among the members that, in Canada's opinion, affects the performance of the Work in any way.
- (d) All the members are jointly and severally or solidarily liable for the performance of the entire Contract.
- (e) The Contractor acknowledges that any change in the membership of the joint venture (i.e., a change in the number of members or the substitution of another legal entity for an existing member) constitutes an assignment and is subject to the assignment provisions of the General Conditions.
- (f) The Contractor acknowledges that all security and controlled goods requirements in the Contract, if any, apply to each member of the joint venture Contractor.

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

7.22 Professional Services – General

- (a) The Contractor must provide professional services on request as specified in this Contract. All resources provided by the Contractor must meet the qualifications described in the Contract (including those relating to previous experience, professional designation, education, language proficiency and security clearance) and must be competent to provide the required services by any delivery dates described in the Contract.
- (b) If the Contractor fails to deliver any deliverable (excluding delivery of a specific individual) or complete any task described in the Contract on time, in addition to any other rights or remedies available to Canada under the Contract or the law, Canada may notify the Contractor of the deficiency, in which case the Contractor must submit a written plan to the Contracting Authority and the Procurement Authority within ten working days detailing the actions that the Contractor will undertake to remedy the deficiency. The Contractor must prepare and implement the plan at its own expense.
- (c) In General Conditions 2035, the Article titled "Replacement of Specific Individuals" is deleted and the following applies instead:

Replacement of Specific Individuals

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

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

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

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

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

7.23 Safeguarding Electronic Media

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

7.24 Representations and Warranties

The Contractor made statements regarding its own and its proposed resources' experience and expertise in its bid that resulted in the award of the Contract and the issuance of Task Authorizations. The Contractor represents and warrants that all those statements are true and acknowledges that Canada relied on those statements in awarding the Contract and adding work to it through Task Authorizations. The Contractor also represents and warrants that it has, and all its resources and subcontractors that perform the Work have, and at all times during the Contract Period they will have and maintain, the skills, qualifications, expertise and experience necessary to perform and manage the Work in accordance with

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the Contract, and that the Contractor (and any resources or subcontractors it uses) has previously performed similar services for other customers.

7.25 Access to Canada's Property and Facilities

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

7.26 Government Property

Canada agrees to make computerized workstations (the "Government Property") available to the Contractor. The section of the General Conditions entitled "Government Property" also applies to the use of the Government Property by the Contractor.

7.27 Transition Services at End of Contract Period

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

The Contracting Authority will advise the Contractor of the extension by sending a written notice to the Contractor at least 20 calendar days before the contract expiry date. The extension will be evidenced for administrative purposes only, through a contract amendment.

7.28 Identification Protocol Responsibilities

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

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

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- five working days to deliver the action plan to the Client and the Contracting Authority, and twenty working days to rectify the underlying problem.
- (e) In addition to any other rights it has under the Contract, Canada may terminate the Contract for default if the corrective measures required of the Contractor described above are not met.

7.29 Conflict of Interest – Other Work – Unfair Advantage

In order to protect the integrity of any future procurement process related to this contract, The contractor is advised and agree that Canada may reject any future Bid related to this contract in any future procurement in the following circumstances:

- a) If the Contractor, his employees, any Contractor Team Member, any of its subcontractors, any of their respective employees or former employees advisors, consultants or representatives engaged in respect of this contract and any person controlled by or that is under common control of the Contractor was involved in any manner in the following:

Preparation, review, participation, information providing, or advice on procurement related activities, including, but not limited to procurement documents, such as Statement Of Work (SOW), Statement Of Requirement (SOR), Evaluation Criteria, or any additional activities related to a project or procurement process or strategy.
- b) If the Contractor or any Contractor Team Member, any of his respective employees or former employees, any of its subcontractors, any of their respective employees or former employees had access to information related to future RFP that was not available to other and that would, in Canada's opinion, give or appear to give the Contractor an unfair advantage;
- c) If the Contractor acts as an advisor or provide any third party with privileged information obtained in the performance of its work. Canada will disqualify any bid from the Contractor (or any entity that either controls or is controlled by the Contractor or, together with the Contractor, is under the common control of a third party, as well as such third party) (for contracts or categories described in this clause), in respect to which Canada determines, at its sole discretion, that the Contractor's involvement in this Contract, whether direct or indirect, has resulted in a real or apparent conflict of interest or unfair advantage over other suppliers for the work subject to the solicitation;
- d) If its work under the subject Contract involved access to information that would for any reason create a real or apparent conflict of interest or unfair advantage over other potential suppliers for any resulting contract(s), on any other work stream for the Work performed under its Contract, the Contractor, its employees, subcontractors or affiliates;
- e) The experience acquired by any Contractor Team Member, any of his respective employees or former employees, any of its subcontractors, any of their respective employees or former employees who is providing or has provided the goods and services describe in the Response will not, in itself, be considered by Canada as conferring an unfair advantage or creating a conflict of interest. This Contractor remains however subject to the criteria established above;
- f) Where Canada intends to reject a Bid under Clause 7.29, the Contracting Authority will inform the Bidder and provide the Bidder an opportunity to respond before making a final decision. Bidders who are in doubt about a particular situation should contact the Contracting Authority before consider itself to be in Conflict of interest nor to have an unfair advantage. By submitting a bid,

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Bidder represents that it does not consider itself to be in Conflict of Interest nor to have an unfair advantage. The Bidder acknowledges that it is within Canada's sole discretion to determine whether a conflict of interest, unfair advantage or an appearance of Conflict of Interest or unfair advantage exists.

7.30 Non-Disclosure Agreement

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

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ANNEX A STATEMENT OF WORK

1. REQUIREMENT

- 1.1. The Assistant Deputy Minister for Information Management (ADM IM), Director General Cyberspace (DG Cyber) requires Information Management/Information Technology (IM/IT) services of Level 3, B.7 Business Transformation Architect resource, Level 3, P.8 Project Leaders resource, Level 3, B.1 Business Analyst and Level 3, P.2 Enterprise Architect resources to assist in the commencement and continued development of projects and initiatives under the Joint Command and Control and Information Systems, Concepts Experimentation and Projects (JC2IS CEP) section of Director Cyber Coordination.

2. BACKGROUND

- 2.1. DG Cyber, along with a wide range of Command, Control, Communications, Computers, Intelligence, Surveillance and Reconnaissance (C4ISR) stakeholders across the Department of National Defence (DND), are developing JC2IS concepts, capability development work packages, analysis products, and establishing and directing projects that are C4ISR related. In the context of this Statement of Work (SOW), C4ISR is a concept that integrates command, communication and intelligence activities to enhance decision making and the objective is to align C4ISR solutions with Allies, reuse existing C4ISR capabilities and initiate project and procurement approvals for identified C4ISR capabilities that will support Canadian Armed Forces (CAF) future requirements.
- 2.2. The JC2IS CEP Section program is responsible for developing and managing the execution of Cyber and Command and Control Information System (C2IS) force development activities including the analysis, experimentation and validation of joint capabilities, enablers and force structures to be integrated and implemented into the CAF, while ensuring interoperability with our domestic and international allies and partners. It provides focused expertise to develop and introduce new capabilities and resource capacities, develops and integrates new knowledge from internal and external sources through research and experimentation, assesses the future operating and security environments, develops new concepts and doctrine that provide operational advantage to joint military activities and manages project requirements. The cohesion of the CAF cyber force development program will provide the agility and flexibility to respond to strategic initiatives, operational needs and the pace of changing technology.
- 2.3. Some of the initiatives that currently fall within JC2IS CEP Section include:
 - 2.3.1. Alignment of DND and CAF capabilities to the Federated Mission Networking (FMN) framework including elements of the Mission Partner Environment (MPE);
 - 2.3.2. JC2IS concept development and experimentation;
 - 2.3.3. Information Technology Infrastructure (ITI) in support of Command and Control (C2) project coordination;
 - 2.3.4. Data Centric Security Services (DCSS) application;
 - 2.3.5. Identity Credential and Access Management (ICAM) implementation; and

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2.3.6. Corporate and operational biometric capabilities implementation.

3. RESOURCE REQUIREMENTS

RESOURCE CATEGORY	LEVEL OF EXPERTISE	ESTIMATED NUMBER OF RESOURCES REQUIRED
B.1 Business Analyst	3	1
B.7 Business Transformation Architect	3	1
P.2 Enterprise Architect	3	1
P.8 Project Leader	3	3

All resources listed in this Section will be required on an “as-and-when-requested” basis through the issue of Task Authorizations. These tasks may be issued for work that is limited in scope or is of a fixed duration. Specific task and deliverables will be identified in each validly issued Task Authorization and may include, but are not limited to those identified under each Resource Category below.

4. TASKS AND DELIVERABLES

4.1. B.7 Business Transformation Architect – Level 3

4.1.1. Tasks

Working with DG Cyber staff and other stakeholders from the CAF, DND, Government of Canada (GC) and Allied partners, as appropriate, the resources must complete tasks including but not limited to the following:

- a. plan and provide reports on work to be completed to the Project Director;
- b. develop and validate C4ISR interoperability processes, roles and concepts including those related to requirement management and governance frameworks;
- c. facilitate key leadership and Industry engagements;
- d. plan and execute exercise and experimentation, such as coordinating, assembling, administering, managing, analysing experimental objectives and requirements, and generate specific experiments that contribute to the maturity of final C4ISR solutions;
- e. review, assess and document organizational business architecture;
- f. provide specific technical advice on C2IS capability developments;
- g. work with CAF, DND, GC and Allied partners and stakeholders to coordinate, assemble, administer, manage, analyse and generate specific technical documentation;
- h. consult with multinational, multilateral and Other Government Department (OGD) stakeholders to ensure interoperability of mission activities in coalition-based missions;
- i. create and maintain technical reports relating to technical architectures, interoperability functional specifications and end-user requirements;
- j. analyse issues found in solution development documents and advise on project development and creation of project management documents;
- k. ensure stakeholder input and client relationships are reflected in the change management process and act as caretaker of the change management process;
- l. develop and maintain architectural frameworks for C2IS initiatives; and

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m. provide verbal briefs and presentations at meetings.

4.1.2 Deliverables

All deliverables specified herein must be provided to the Project Director and/or Technical Authority and delivered in an agreeable form upon request.

Deliverable
<p>Work Plans:</p> <p>Create a work plan. Based on the agreed upon approach and priorities provided by the TA, the Work Plan must include proposed work activities, consultations, timelines/due dates of deliverables, priorities and estimated level of effort.</p> <p>The resource must maintain the Work Plan and provide an updated version upon request of the Technical Authority (TA).</p>
<p>JC2IS Interoperability, Security and Information and Communications Technology (ICT) infrastructure requirement documents, including but not limited to:</p> <ul style="list-style-type: none"> • Concept of Operations (CONOPS); • Use Cases; • Functional and non-functional requirements; and • High Level Architecture.
<p>JC2IS Concept Development and Experimentation documents including but not limited to:</p> <ul style="list-style-type: none"> • Concept Proposal and Concepts • Experiment Campaign Plan • Yearly Experiment Plan • Exercise Experimentation Plan • Exercise and Experiment reports
<p>JC2IS Interoperability, Security and ICT infrastructure Technical, Strategic and Project Documentation including but not limited to:</p> <ul style="list-style-type: none"> • Reference Architecture; • Taxonomy; • Enterprise Mapping; • Standards and Technical specifications; • Position Paper; • Environmental Scan; • Transformational Capability Development Strategy; • Stakeholder Impact Assessment and Engagement Plan; • Business Case Analysis; • Reports on the review of key documents
Meeting agenda and invitations at least 5 working days prior to each meeting
Meeting presentations and verbal briefs at least 5 days prior to meetings in with the technical authority (TA) is being briefed.
Meeting minutes, Records of Decisions (RODs) from meeting with partners and stakeholders and Trip Reports within 5 working days after each meeting.
Final contract report on deliverables five working days prior to contract completion

4.2 P.8 Project Leader – Level 3

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4.2.1 Tasks

Working with DG Cyber staff and other stakeholders from the CAF, DND, GC and Allied partners, as appropriate, the resources must complete tasks including but not limited to the following:

- a. plan and provide reports on work to be completed to the Project Director and/or Technical Authority;
- b. develop early phases' project schedules and budgets;
- c. specify the general requirements of systems, develop broad alternatives, and assess their initial viability with respect to current and evaluative technical, economic, policy and organizational perspectives;
- d. elicit, coordinate, analyse, document and manage project requirements;
- e. identify, document, and manage project risks;
- f. analyse and evaluate capability alternatives based on make/buy, impact and cost/benefit considerations, and propose, justify, plan and cost the implementation of the selected alternative;
- g. develop and/or support the development of Strategic Context Documents, Project Complexity and Risk Assessments (PCRA), Project Charters, Options Analysis Phase Plans, Statements of Requirements (SOR), project risk registries, Business Case Analyses (BCA), Treasury Board (TB) submissions, and other formal project documentation as required;
- h. coordinate, prepare and support or lead Key Leadership Engagements (KLE) needed to achieve project gate approvals;
- i. facilitate stakeholder engagements including, but not limited to, maintaining on-going communication with relevant ones and by coordinating, supporting and generating presentations and records of discussions for engagement and management meetings;
- j. liaise with industry as required, including support to Industry Days organization and execution, while ensuring that DND remains within the bounds of fair competition; and
- k. ensure stakeholder input is reflected in the formal change management process and act as caretaker for the change management process.

4.2.2 Deliverables.

All deliverables specified herein must be provided to the Project Director and/or Technical Authority and delivered in an agreeable form upon request.

	Deliverable
a.	Create a work plan within 15 working days of Kick-Off meeting
b.	Early project budgets and schedules
c.	Project documents, including but not limited to: <ul style="list-style-type: none"> • Strategic Context Documents; • PCRA's; • Project Charters;

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	Deliverable
	<ul style="list-style-type: none"> Options Analysis Phase Plan; SORs; Risk registries; BCAs; and TB submissions.
d.	Meeting agendas and presentations At least 5 working days prior to each meeting
e.	Meeting minutes, Records of Decisions (RODs) from meeting with partners and stakeholders and Trip Reports. Within 5 working days after each meeting
f.	Final contract report on deliverables. Five working days prior to contract completion

4.3 B.1 Business Analyst – Level 3

4.3.1 Tasks

Working with DG Cyber staff and other stakeholders from the CAF, DND, GC and Allied partners, as appropriate, the resources must complete tasks including but not limited to the following:

- a. plan and provide reports on work to be completed to the Project Director and/or Technical Authority;
- b. elicit, coordinate, analyse, document and manage project operational and business requirements, ensuring requirements remain linked to business goals and objectives;
- c. analyse and model project requirements in accordance with the DND Architecture Framework (DNDAF) using Qualiware for both the “as-is” and “to-be” architectures, to include but not be limited to:
 1. identification of information, procedures, and decision flows pertaining to the management and configuration of the system;
 2. identification and documentation of items such as database content, structure, application subsystems;
 3. definition and documentation of interfaces to the systems; and
 4. recommendations and documentation of acceptance test criteria.
- d. provide impact assessments as part of change management workflows;
- e. support the analysis of viable project options, include through performing:
 1. benchmark analyses;
 2. cost analyses;
 3. High Level Mandatory Requirements (HLMR)/requirements fulfillment analyses; and

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4. implementation and capacity analyses for human resources, business processes, knowledge, materials, and infrastructure.
- f. prepare initial Statement of Requirements (SOR) using IBM's Rational DOORS;
- g. prepare initial Requirements Management Plans and conduct traceability and configuration management of requirements and requirements artifacts;
- h. contribute inputs to the production of project documents, including the Business Case Analysis, System Requirements Specification, Project Complexity and Risk Assessment, and others as directed; and
- i. support stakeholder engagements including, but not limited to, maintaining on-going communication with relevant ones and by supporting and generating presentations and records of discussions for engagement and management meetings.

4.3.2 Deliverables

All deliverables specified herein must be provided to the Project Director and/or Technical Authority and delivered in an agreeable form upon request.

	Deliverable
a.	Create a work plan within 15 working days of Kick-Off meeting
b.	As-is and to-be architectures
c.	Project documents, including but not limited to: <ul style="list-style-type: none"> • Strategic Context Documents; • PCRA's; • Project Charters; • Options Analysis Phase Plan; • SORs; • Risk registries; • BCAs; and • TB submissions.
d.	Meeting minutes, Records of Decisions (RODs) from meeting with partners and stakeholders and Trip Reports. At least 5 working days prior to each meeting
e.	Final contract report on deliverables. Five working days prior to contract completion

4.4 P.2 Enterprise Architect – Level 3

4.4.1 Tasks

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Working with DG Cyber staff and other stakeholders from the CAF, DND, Government of Canada (GC) and Allied partners, as appropriate, the resources must complete tasks including but not limited to the following:

- a. plan and provide reports on work to be completed to the Project Director and/or Technical Authority;
- b. identify As-Is and To-Be business architecture analyses;
- c. using the information at sub-paragraph b. above, develop and document specified As-Is and To-Be architecture views for the capability option selected for implementation, using the DND Qualiware Lifecycle Manager (QLM);
- d. create and maintain technical reports relating to architectures;
- e. facilitate stakeholder engagements including, but not limited to, maintaining on-going communication with relevant ones and by coordinating, supporting and generating agendas, presentations and records of discussions for architecture engagement and management meetings;
- f. review the As-Is and To-Be enterprise architectures to determine their efficiency and effectiveness, and make recommendations for scoping, improvements and re-designing;
- g.
- h. standardization, integration and consolidation, and prioritization of project deliverables; and
- i. prepare other reports and presentations as required by the PD and TA.

4.4.2 Deliverables

	Deliverable
a.	<p>Work Plan</p> <p>Create a work plan within 15 working days of Kick-Off meeting. Based on the agreed upon approach and priorities provided by the PD, the Work Plan must include proposed work activities, consultations, timelines/due dates of deliverables, priorities and estimated level of effort.</p> <p>The resource must maintain the Work Plan and provide an updated version upon request of the PD and TA.</p>
b.	<p>As-Is and To-Be business architecture analyses documentation, including but not limited to:</p> <ul style="list-style-type: none"> ▪ business functions, capabilities, services, and processes, ▪ user and system entity roles, ▪ organizational structure, ▪ database content and structure, ▪ application, ▪ data flows, and • computing, storage and networking infrastructure capabilities, requirements, and gaps
c.	<p>As-Is and To-Be architectures for some or all of the following, in accordance with the priorities agreed to in the Work Plan:</p> <ol style="list-style-type: none"> a. As-Is enterprise architecture views: <ul style="list-style-type: none"> • SV-1 - Systems Interface Description, • SV-2 - System Communications Description, • SV-6 - Systems Data Exchange Matrix, and • StratV-1 - Business Strategy and Motivation

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	b. To-Be enterprise architecture views: <ul style="list-style-type: none"> • CV-1 - Overview and Summary Information, • CV-2 - Integrated Data Dictionary, • IV-1 – Strategic Information Model • CapV-1 - Capability Taxonomy, • CapV-2 – Capability Scenario Analysis Matrix • CapV-3 - Capability to Operational Activities Mapping, • OV-1 - High-Level Operational Concept Graphic, • OV-2 - Operational Node Connectivity Description, • OV-3 - Operational Information Exchange Matrix, • OV-4a – Organizational Relationships • OV-5a - Functional Model, • SV-1 - Systems Interface Description, • SV-7 – System Performance Parameters Matrix, • SecV-1 - Asset Categorization • SecV-2 – Data Element Security Matrix • Sec V-3 – Aggregated Information Security Matrix • Sec V-5 – Tailored Security Control Profile • Sec V-6 – Security Mitigation Package, • TV-1 - Standards Profile, and • TV-2 – Standards Forecast
d.	Technical architecture reports
e.	Architecture meeting agenda and invitations and presentations
e.	RODs within 5 working days after each meeting
f.	Enterprise architecture-based recommendations on project deliverables
g.	Architecture status reports
g.	Trip Reports (as required) For review and approval no later than 5 working days after return from the trip;
g.	Final contract report on deliverables at least 5 working days prior to contract completion

5. FORMAT OF DELIVERABLES

- a. Unless otherwise specified, one (1) electronic copy of all deliverables listed in this section must be provided by email to the TA in the format specified below:

<i>Data Type</i>	<i>Electronic Format</i>
Text	Microsoft Word 2010 (*.doc, *.rtf, *.txt)
Spreadsheets	Microsoft Excel 2010 (*.xls)
Databases	Microsoft Access 2010 (*.mdb, *.adp)
Presentations	Microsoft PowerPoint 2010(*.ppt, *.pps)
Schedules	Microsoft Project 2010
Drawings	AutoCAD (*.dxf, *.dwg, *.igs) Rhinoceros3D (*.3dm)
Organization Charts	Visio (*.vsd)

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Flow Charts	Visio (*.vsd)
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6. MONTHLY STATUS REPORTS

- a. The Contractor resources must submit monthly Status Reports which must contain the following information:
 1. Description of progress made to date;
 2. Problem areas, with background and any recommendations for solutions;
 3. Task schedule status; and
 4. Plans for activities during the following reporting period.

7. LANGUAGE OF WORK

All work products under this contract must be produced in English. The Contractor resources must be fluent in English. Fluent means that the individual can communicate orally and in writing without any assistance and with minimal errors

8. TRAVEL REQUIREMENTS

- a. Travel inside and within 100km of the National Capital Region (NCR), will not be reimbursed by DND.
- b. All travel will require prior approval of the TA or their authorized representative, and must, in all cases, be in accordance with the contract and the current Treasury Board guidelines.
- c. Travel outside the NCR to attend meetings with partners in NATO, the 5EYES (AUSCANUKUS) nations and other partners may be required.
- d. Travel frequency is not expected to exceed six (6) times per year and may include International travel for periods of one week, with occasional longer periods for experimentation requirements.

9. GOVERNMENT FURNISHED EQUIPMENT

- a. DND will provide the Contractor resources with work space or continuous access to computer equipment and other software applications required to perform the work.

10. LOCATION OF WORK

- a. The work will primarily be performed at various DND facilities within the NCR and is subject to the hours of operation of the building. The location of the Work will be identified on each TA.
- b. In addition, the Contractor resources may be required to work at their own place of business. If the Contractor resources do work outside of DND controlled properties, no protected or classified documents will be removed from DND premises.

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11. SECURITY

It is the responsibility of the Contractor to have an approved Visit Clearance Request (VCR) prior to the start of work.

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APPENDIX A TO ANNEX A TASKING ASSESSMENT PROCEDURE

1. Where a requirement for a specific task is identified, a draft Task Authorization Form as attached at Appendix B to Annex A will be provided to the Contractor in accordance with the allocation methodology stated in the Contract Article titled "Allocation of Task Authorizations". Once a draft Task Authorization Form is received, the Contractor must submit to the Technical Authority a quotation of rates to supply the requested Resource Categories based on the information identified in the Task Authorization Form, as well as its corresponding proposed resource(s). The quotation must be signed and submitted to Canada within the time for response identified in the Task Authorization Form. The Contractor will be given a minimum of two 2 working days (or any longer time period specified in the draft Task Authorization) turnaround time to submit a quotation.

2. With each quotation the Contractor must propose the required number of resources and for each proposed resource the Contractor must supply a CV, the requested security clearance information and must complete the Response Tables at Appendix C of Annex A applicable to the Resource Categories identified in the draft Task Authorization. The same individual must not be proposed for more than one Resource Category. The CVs must demonstrate that each proposed individual meets the qualification requirements described (including any educational requirements, work experience requirements, and professional designation or membership requirements). With respect to the proposed resources:
 - (i) Proposed resources may be employees of the Contractor or employees of a subcontractor, or these individuals may be independent contractors to whom the Contractor would subcontract a portion of the Work. (Refer to Appendix D to Annex A, Certifications).
 - (ii) For educational requirements for a particular degree, designation or certificate, Canada will only consider educational programmes that were successfully completed by the resource before the date the draft Task Authorization was first issued to the Contractor.
 - (iii) For requirements relating to professional designation or membership, the resource must have the required designation or membership by the time of draft Task Authorization issuance and must continue, where applicable, to be a member in good standing of the profession or membership throughout the assessment period and Contract Period. Where the designation or membership must be demonstrated through a certification, diploma or degree, such document must be current, valid and issued by the entity specified in this Contract or if the entity is not specified, the issuer must have been an accredited or otherwise recognized body, institution or entity at the time the document was issued.
 - (iv) For work experience, Canada will not consider experience gained as part of an educational programme, except for experience gained through a formal co-operative programme at a post-secondary institution.
 - (v) For any requirements that specify a particular time period (e.g., 2 years) of work experience, Canada will disregard any information about experience if the CV does not include the relevant dates (month and year) for the experience claimed (i.e., the start date and end date). Canada will evaluate only the duration that the resource actually worked on a project or projects (from his or her start date to end date), instead of the overall start and end date of a project or a combination of projects in which a resource has participated.
 - (vi) A CV must not simply indicate the title of the individual's position, but must demonstrate that the resource has the required work experience by explaining the responsibilities and work performed by the individual while in that position. Only listing experience without providing any supporting data to describe responsibilities, duties and relevance to the

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requirement, or reusing the same wording as the Task Authorization Form, will not be considered "demonstrated" for the purposes of the assessment. The Contractor should provide complete details as to where, when, month and year, and how, through which activities/responsibilities, the stated qualifications / experience were obtained. In situations in which a proposed resource worked at the same time on more than one project, the duration of any overlapping time period will be counted only once toward any requirements that relate to the individual's length of experience.

3. The qualifications and experience of the proposed resources will be assessed against the requirements set out in Appendix C to Annex A to determine each proposed resource's compliance with the mandatory and rated criteria. Canada may request proof of successful completion of formal training, as well as reference information. Canada may conduct reference checks to verify the accuracy of the information provided. If reference checks are done, they will be conducted in writing by e-mail (unless the contact at the reference is only available by telephone). Canada will not assess any points or consider a mandatory criterion met unless the response is received within 5 working days. On the third working day after sending out the e-mails, if Canada has not received a response, Canada will notify the Contractor by e-mail, to allow the Contractor to contact its reference directly to ensure that it responds to Canada within 5 working days. Wherever information provided by a reference differs from the information supplied by the Contractor, the information supplied by the reference will be the information assessed. Points will not be allocated or a mandatory criteria considered as met if the reference customer is not a customer of the Contractor itself (for example, the customer cannot be the customer of an affiliate of the Contractor). Nor will points be allocated or a mandatory criteria considered as met if the customer is itself an affiliate or other entity that does not deal at arm's length with the Contractor. Crown references will be accepted.
4. During the assessment of the resources proposed, should the references for two or more resources required under that Task Authorization either be unavailable or fail to substantiate the required qualifications of the proposed resources to perform the required services, the Contractor's quotation may be found to be non-responsive.
5. Only quotations that meet all of the mandatory criteria will be considered for assessment of the point rated criteria. Each resource proposed must attain the required minimum score for the point rated criteria for the applicable Resource Category. If the minimum score for any proposed resource is less than what is required, the Contractor's quotation will be found to be non-responsive.
6. The minimum score for the point rated criteria for each resource category will be determined based on the score obtained by the Contractor's proposed resource at the bid evaluation stage (minus 10%), using the following formula, rounded to the nearest whole number.
Minimum Score (Passmark) = Resource's technical score at bid evaluation X 0.90
7. Once the quotation has been accepted by the Technical Authority, the Task Authorization Form will be signed by Canada and provided to the Contractor for signature. The Task Authorization Form must be appropriately signed by Canada prior to commencement of any work. The Contractor must not commence work until a validly issued Task Authorization Form has been received, and any work performed in its absence is done at the Contractor's own risk.

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Instructions for completing DND 626 - Task Authorization

Contract no.
Enter the PWGSC contract number in full.

Task no.
Enter the sequential Task number.

Amendment no.
Enter the amendment number when the original Task is amended to change the scope or the value.

Increase/Decrease
Enter the increase or decrease total dollar amount including taxes.

Previous value
Enter the previous total dollar amount including taxes.

To
Name of the contractor.

Delivery location
Location where the work will be completed, if other than the contractor's location.

Delivery/Completion date
Completion date for the task.

for the Department of National Defence
Signature of the DND person who has delegated Authority for signing DND 626 (level of authority based on the dollar value of the task and the equivalent signing authority in the PAM 1.4). **Note:** the person signing in this block ensures that the work is within the scope of the contract, that sufficient funds remain in the contract to cover this task and that the task is affordable within the Project/Unit budget.

Services
Define the requirement briefly (attach the SOW) and identify the cost of the task using the contractor's quote on the level of effort. The Task must use the basis of payment stipulated in the contract. If there are several basis of payment then list here the one(s) that will apply to the task quote (e.g. milestone payments; per diem rates/labour category hourly rates; travel and living rates; firm price/ceiling price, etc.). All the terms and conditions of the contract apply to this Task Authorization and cannot be ignored or amended for this task. Therefore it is not necessary to restate these general contract terms and conditions on the DND 626 Task form.

Cost
The cost of the Task broken out into the individual costed items in **Services**.

GST/HST
The GST/HST cost as appropriate.

Total
The total cost of the task. The contractor may not exceed this amount without the approval of DND indicated on an amended DND 626. The amendment value may not exceed 50% (or the percentage for amendments established in the contract) of the original value of the task authorization. The total cost of a DND 626, including all amendments, may not exceed the funding limit identified in the contract.

Applicable only to PWGSC contracts
This block only applies to those Task Authorization contracts awarded by PWGSC. The contract will include a specified threshold for DND sole approval of the DND 626 and a percentage for DND to approve amendments to the original DND 626. Tasks that will exceed these thresholds must be passed to the PWGSC Contracting Authority for review and signature prior to authorizing the contractor to begin work.

Note:
Work on the task may not commence prior to the date this form is signed by the DA Authority - for tasks within the DND threshold; and by both DND and PWGSC for those tasks over the DND threshold.

Instructions pour compléter le formulaire DND 626 - Autorisation des tâches

N° du contrat
Inscrivez le numéro du contrat de TPSGC en entier.

N° de la tâche
Inscrivez le numéro de tâche séquentiel.

N° de la modification
Inscrivez le numéro de modification lorsque la tâche originale est modifiée pour en changer la portée.

Augmentation/Réduction
Inscrivez le montant total de l'augmentation ou de la diminution, y compris les taxes.

Valeur précédente
Inscrivez le montant total précédent, y compris les taxes.

A
Nom de l'entrepreneur.

Expédiez à
Endroit où le travail sera effectué, si celui-ci diffère du lieu d'affaires de l'entrepreneur.

Date de livraison/d'achèvement
Date d'achèvement de la tâche.

pour le ministère de la Défense nationale
Signature du représentant du MDN auquel on a délégué le pouvoir d'approbation en ce qui a trait à la signature du formulaire DND 626 (niveau d'autorité basé sur la valeur de la tâche et le signataire autorisé équivalent mentionné dans le MAA 1.4). **Nota :** la personne qui signe cette attache de signature confirme que les travaux respectent la portée du contrat, que suffisamment de fonds sont prévus au contrat pour couvrir cette tâche et que le budget alloué à l'unité ou pour le projet le permet.

Services
Définissez brièvement le besoin (joignez l'ET) et établissez le coût de la tâche à l'aide de la soumission de l'entrepreneur selon le niveau de difficulté de celle-ci. Les modalités de paiement stipulées dans le contrat s'appliquent à la tâche. Si plusieurs d'entre elles sont prévues, énumérez ici celle/celles qui s'appliquera/ont à la soumission pour la tâche à accomplir (p.ex. acompte fondé sur les étapes franchies; taux quotidien ou taux horaire établi selon la catégorie de main-d'œuvre; frais de déplacement et de séjour; prix fixe ou prix plafond; etc.). Toutes les modalités du contrat s'appliquent à cette autorisation de tâche et ne peuvent être négligées ou modifiées quant à la tâche en question. Il n'est donc pas nécessaire de répéter ces modalités générales afférentes au contrat sur le formulaire DND 626.

Prix
Mentionnez le coût de la tâche en le répartissant selon les frais afférents à chaque item mentionné dans la rubrique **Services**.

TPS/TVH
Mentionnez le montant de la TPS/TVH, s'il y a lieu.

Total
Mentionnez le coût total de la tâche. L'entrepreneur ne peut dépasser ce montant sans l'approbation du MDN, formulaire DND 626 modifié à l'appui. Le coût de la modification ne peut pas être supérieur à 50 p. 100 du montant initial prévu dans l'autorisation de tâche (ou au pourcentage prévu dans le contrat pour les modifications). Le coût total spécifié dans le formulaire DND 626, y compris toutes les modifications, ne peut dépasser le plafond de financement mentionné dans le contrat.

Ne s'applique qu'aux contrats de TPSGC
Le présent paragraphe s'applique uniquement aux autorisations de tâche accordées par TPSGC. On inscrira dans le formulaire DND 626 un plafond précis qui ne pourra être approuvé que par le MDN et un pourcentage selon lequel le MDN pourra approuver des modifications au formulaire DND 626 original. Les tâches dont le coût dépasse ces plafonds doivent être soumises à l'autorité contractante de TPSGC pour examen et signature avant qu'on autorise l'entrepreneur à débiter les travaux.

Nota :
Les travaux ne peuvent commencer avant la date de signature de ce formulaire par le responsable du MDN, pour les tâches dont le coût est inférieur au plafond établi par le MDN, et par le MDN et TPSGC pour les tâches dont le coût dépasse le plafond établi par le MDN.

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APPENDIX C TO ANNEX A RESOURCES ASSESSMENT CRITERIA AND RESPONSE TABLE

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

1. B.7 Business Transformation Architect (Level 3)

B.7 Business Transformation Architect- Level 3 - MANDATORY				
ID	Mandatory Criteria for Supplier's Proposed Resource	Required Supporting Information	Met? (Y/N)	Bidder's response (Cross reference to proposal)
BTM1	The Bidder must clearly demonstrate that the proposed resource has a minimum of ten (10) years' experience, within the last fifteen (15) years, as a Business Transformation Architect in an Information Management / Information Technology (IM/IT) environment.	The bidder must provide examples within the proposed resource's résumé, supported by dates (MM/YY) and details of tasks performed demonstrating that the proposed resource meets the requirement.		
BTM2	The Bidder must clearly demonstrate that the proposed resource has a minimum of three (3) years of experience in the last seven (7) years as a Business Transformation Architect, working on Command, Control, Information System (C2IS) project(s). The proposed resource must have worked a minimum of six (6) months on each project referenced.	<p>The bidder must provide examples within the proposed resource's résumé, supported by dates (MM/YY) and details of tasks performed demonstrating that the proposed resource meets the requirement.</p> <p>For each referenced project the bidder must provide a valid client reference:</p> <p>Name: Title: Phone #: Email Address:</p>		
BTM3	<p>The bidder must clearly demonstrate that the proposed resource has a minimum of two (2) years of experience in at least two (2) of the following activities:</p> <ul style="list-style-type: none"> Reviewing, assessing and documenting an organization's business architecture; Developing and validating C2IS interoperability concepts; Providing technical advice on C2IS interoperability architecture in a multi-national environment; and Developing Processes for management or governance of an interoperability initiative. 	<p>The bidder must provide examples within the proposed resource's résumé, supported by dates (MM/YY) and details of tasks performed demonstrating that the proposed resource meets the requirement.</p> <p>For each referenced project the bidder must provide a valid client reference:</p> <p>Name: Title: Phone #: Email Address:</p>		

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BTM4	<p>The Bidder must clearly demonstrate that the proposed resource has one of the following academic credentials:</p> <ul style="list-style-type: none"> A degree from a recognized university in the sciences, engineering or information management, <p>OR</p> <ul style="list-style-type: none"> A diploma (minimum 2 years) from a recognized college in the sciences, engineering or information management. 	The bidder must provide a copy of the degree or diploma with their bid.		
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B.7 Business Transformation Architect - Level 3 - POINT RATED				
ID	Point-Rated Technical Criterion	Maximum Points	Points Scale	Bidder's response (Cross reference to proposal)
BTR1	<p>The proposed resource should have demonstrated experience working as a Business Transformation Architect, on C2IS projects, in a government or private sector environment, within the last ten (10) years.</p> <p>Each referenced project must have a minimum duration of twelve (12) months.</p> <p>Each project referenced, the proposed resource must have worked a minimum of six (6) consecutive months.</p>	10	<p>0 Projects = 0 pts 1 Project = 2 pts 2 Projects = 5 pts 3 projects = 7 pts 4 projects = 10 pts</p>	
BTR2	<p>The proposed resource should have experience with facilitating and leading workshops to elicit and document requirements, capabilities and gaps within the context of supporting the section's (JC2IS CEP) program.</p>	5	<p><1 year = 0 pts ≥1 to 3 years = 2 pts > 3 to 5 years = 4 pts > 5 years = 5 pts</p>	
BTR3	<p>The proposed resource should have experience with the development and delivery of IM/IT architecture documents; different forms may including the following :</p> <ul style="list-style-type: none"> Business Requirements; Business Impact Analysis; Workflow/Process development; Reference Architecture; Taxonomy; Concept ; Experiment Campaign Plan; Standards and Technical Specifications; and Data and information modeling. 	10	<p><1 different documents = 0 pts ≥1 to 3 different documents = 2 pts > 3 to 5 different documents = 5 pts > 5 different documents = 10 pts</p>	

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BTR4	The proposed resource should have experience working within a Canadian Armed Forces (CAF), Department of National Defence (DND) and/or Defence Research and Development Canada (DRDC) project team.	10	<p>≤ 1 year = 0 pts</p> <p>> 1 to 5 years = 2 pts</p> <p>> 5 to 7 years = 4 pts</p> <p>> 7 to 10 years = 8 pts</p> <p>> 10 years = 10 pts</p>	
BTR5	<p>The proposed resource should have experience in military writing with knowledge in IM/IT. Document samples including the following:</p> <ul style="list-style-type: none"> - Developing Concept of Operations (CONOPS), - Developing use cases, - Developing mission threads, - Developing functional and non-functional requirements; - Developing and implementing architecture frameworks - Developing architecture views including but not limited to operational process models, - Developing organizational node models, - Developing information exchange models, - Developing logical data models and - Developing use case models using MS Visio and/or Qualiware architectural tools. 	10	<p>0 documents = 0 pts</p> <p>> 1 to 2 different documents = 2 pts</p> <p>> 2 to 3 different documents = 4 pts</p> <p>> 3 to 5 different documents = 5 pts</p> <p>> 5 different documents = 10 pts</p>	
BTR6	<p>The proposed resource should have experience developing Treasury Board project approval documentation for IM/IT project(s) including all of the following:</p> <ul style="list-style-type: none"> • Treasury Board Business Case Analysis Strategic Context document; • Project Charter; and • Project Complexity and Risk Assessment document. 		<p>0 Projects = 0 pts</p> <p>1 Project = 2 pts</p> <p>2 Projects = 5 pts</p>	
Maximum Points Available		50	Proposed Resource Score	_____
MINIMUM SCORE (PASSMARK) : (To be inserted at Contract award - Refer to section 6. of Appendix A to Annex A)				

2. P.8 Project Leader (Level 3)

P.8 Project Leader- Level 3 - MANDATORY

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ID	Mandatory Criteria for Supplier's Proposed Resource	Required Supporting Information	Met? (Y/N)	Bidder's response (Cross reference to proposal)
PLM1	The Bidder must clearly demonstrate that the proposed resource has a minimum of ten (10) years of experience, within the last fifteen (15) years, as a Project Leader in an Information Management / Information Technology (IM/IT) environment.	The bidder must provide examples within the proposed resource's résumé, supported by dates (MM/YY) and details of tasks performed demonstrating that the proposed resource meets the requirement.		
PLM2	The Bidder must clearly demonstrate that the proposed resource has a minimum of three (3) years in the last five (5) years of experience leading the development of Command, Control, Communications, Computers, Intelligence, Surveillance and Reconnaissance (C4ISR) project(s) within a Government of Canada department/agency, as well as at least one of the following: North Atlantic Treaty Organization (NATO) partners, Five Eyes (FVEYs) partners and Other Government Departments (OGD). Each project referenced must be a minimum of six (6) months duration.	The bidder must provide examples within the proposed resource's résumé, supported by dates (MM/YY) and details of tasks performed demonstrating that the proposed resource meets the requirement. For each referenced project the bidder must provide a valid client reference: Name: Title: Phone #: Email Address:		
PLM3	The Bidder must clearly demonstrate that the proposed resource has produced at least two (2) of the following IM/IT project documents within the last four (4) years: <ul style="list-style-type: none"> • Business Case Strategic Context; • Project Charter; • Project Complexity and Risk Assessment; and • Vision and Scope. 	The bidder must provide examples within the proposed resource's résumé, supported by dates (MM/YY) and details of tasks performed demonstrating that the proposed resource meets the requirement. For each referenced project the bidder must provide a valid client reference: Name: Title: Phone #: Email Address:		
PLM4	The Bidder must clearly demonstrate that the proposed resource has at least one of the following academic credentials: <ul style="list-style-type: none"> • A degree from a recognized university in the sciences, engineering or information management; OR <ul style="list-style-type: none"> • A diploma (minimum 2 years) from a recognized college in the sciences, engineering or information management. 	The bidder must provide a copy of the degree or diploma with their bid.		
PLM5	The Bidder must clearly demonstrate that the proposed resource has either a.) or b.):	The bidder must provide a copy of the proposed resource's certification with their bid.		

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<p>a) A professional Project Management recognized certification.</p> <p>Recognized certification could include but is not limited to:</p> <ul style="list-style-type: none"> • Project Management Professional (PMP); • PRINCE2; • CAPM; • MPM; • CPM; • CPD; • MITS; • APM; and • PPM. <p>OR</p> <p>b) Two (2) years of experience in the past five (5) years as a Project Director or a Deputy Project Director responsible for developing C2IS or C4ISR Project(s).</p>	<p>OR</p> <p>The bidder must provide examples within the proposed resource's résumé, supported by dates (MM/YY) and details of tasks performed demonstrating that the proposed resource meets the requirement.</p> <p>For each referenced project the bidder must provide a valid client reference:</p> <p>Name: Title: Phone #: Email Address:</p>		
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P.8 Project Leader - Level 3 - POINT RATED				
ID	Point-Rated Technical Criterion	Maximum Points	Points Scale	Bidder's response (Cross reference to proposal)
PLR1	The proposed resource should have experience in leading the effort to assess the feasibility of migrating from a current state to a target business architecture, including the enabling of technologies and identification of the risks associated with migrating to the target business architecture and technologies.	10	≤ 1 year = 0 pts > 1 to 5 years = 2 pts > 5 to 10 years = 4 pts > 10 to 14 years = 8 pts > 14 years = 10 pts	
PLR2	The proposed resource should have experience working within a Canadian Armed Forces (CAF), Department of National Defence (DND) and/or Defence Research and Development Canada (DRDC) project team.	10	≤ 1 year = 0 pts > 1 year to 5 years = 2 pts > 5 to 7 years = 4 pts > 7 to 10 years = 8 pts > 10 years = 10 pts	
PLR3	The proposed resource should have experience working as a Project Leader managing a Government of Canada Content Based Information Cyber Security project(s).	10	≤ 1 year = 0 pts > 1 to 5 years = 2 pts > 5 to 7 years = 4 pts > 7 to 10 years = 8 pts > 10 years = 10 pts	
PLR4	<p>The proposed resource should have experience working on C2IS Project(s) for the Government of Canada as part of an international collaboration.</p> <p>The referenced project(s) should</p>	10	< 2 elements = 0 pts 2 to 3 elements = 2 pts 4 to 5 elements = 4 pts 6 elements = 8 pts > 6 elements = 10 pts	

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include the following elements;			
<ul style="list-style-type: none"> - Authentication; - Privilege Management; - Identity Management; - Data Labelling; - Digital Rights Management; - Policy Management; - Biometrics; and - Networking. <p>Note: Repeated elements will only be counted once and not as several elements.</p>			
Maximum Points Available	40	Proposed Resource Score	_____
MINIMUM SCORE (PASSMARK) : (To be inserted at Contract award - Refer to section 6. of Appendix A to Annex A)			

3. B.1 Business Analyst (Level 3)

B.1 Business Analyst- Level 3 - MANDATORY				
ID	Mandatory Criteria for Supplier's Proposed Resource	Required Supporting Information	Met? (Y/N)	Bidder's response (Cross reference to proposal)
BAM1	The Bidder must clearly demonstrate that the proposed resource has a minimum of ten (10) years' experience, within the last fifteen (15) years, as a Business Analyst in an Information Management / Information Technology (IM/IT) environment.	The bidder must provide examples within the proposed resource's résumé, supported by dates (MM/YY) and details of tasks performed demonstrating that the proposed resource meets the requirement.		
BAM2	<p>The bidder must clearly demonstrate the proposed resource has a minimum of five (5) years' experience within the last ten (10) years as a Business Analyst working on Command, Control, Information Systems (C2IS) project(s).</p> <p>Resource must have worked a minimum of six (6) months on each project referenced.</p>	<p>The bidder must provide examples within the proposed resource's résumé, supported by dates (MM/YY) and details of tasks performed demonstrating that the proposed resource meets the requirement.</p> <p>For each referenced project the bidder must provide a valid client reference:</p> <p>Name: Title: Phone #: Email Address:</p>		
BAM3	<p>The bidder must clearly demonstrate that the proposed resource has a minimum of two (2) years of experience within the last five (5) years as a Business Analyst working on at least one of the following C2IS activities:</p> <ul style="list-style-type: none"> - Elicitation and analysis of interoperability functional and non-functional requirements; <p>or</p>	<p>The bidder must provide examples within the proposed resource's résumé, supported by dates (MM/YY) and details of tasks performed demonstrating that the proposed resource meets the requirement.</p> <p>For each referenced project the bidder must provide a valid client reference:</p>		

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	- Elicitation and analysis of use-cases or mission threads in a multi-national environment such as NATO or Five Eyes (FVEYs).	Name: Title: Phone #: Email Address:		
BAM4	The Bidder must clearly demonstrate that the proposed resource has one of the following academic credentials: <ul style="list-style-type: none"> A degree from a recognized university in the sciences, engineering or information management, OR <ul style="list-style-type: none"> A diploma (minimum 2 years) from a recognized college in the sciences, engineering or information management. 	The bidder must provide a copy of the proposed resource's degree or diploma with their bid.		
BAM5	The bidder must clearly demonstrate that the proposed resource has prepared and submitted at least five (5) of the following documents in the IM/IT field: <ul style="list-style-type: none"> Business and Functional Requirements; Options Analysis; As-Is processes; To-Be processes; Business Cases; Change Requests; and Traceability Matrices. 	The bidder must provide examples within the proposed resource's résumé, supported by dates (MM/YY) and details of tasks performed demonstrating that the proposed resource meets the requirement. For each referenced project the bidder must provide a valid client reference: Name: Title: Phone #: Email Address:		

B.1 Business Analyst - Level 3 - POINT RATED				
ID	Point-Rated Technical Criterion	Maximum Points	Points Scale	Bidder's response (Cross reference to proposal)
BAR1	The proposed resource should have experience as a Business Analyst performing all of the following: <ul style="list-style-type: none"> Requirements gathering, review of existing systems or applications, business process descriptions, use cases, scenarios, business analysis, task and workflow analysis; Evaluating and analyzing information, decomposing high-level information into details; and Identifying potential sources of data and developing data models to support general analysis. 	10	≤ 1 year = 0 pts >1 to 2 years = 2 pts > 2 to 4 years = 4 pts > 4 to 6 years = 8 pts > 6 years = 10 pts	
BAR2	The proposed resource should have experience working within a Canadian Armed Forces (CAF) and/or Department of National Defence (DND) project team.	10	≤ 1 year = 0 pts >1 to 2 years = 2 pts > 2 to 4 years = 4 pts >4 years to 5 years = 6 pts	

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			> 5 to 6 years = 8 pts > 6 years = 10 pts	
BAR3	The proposed resource should have experience working on a Government of Canada Content Based IM/IT project(s) as part of an international collaboration.	10	≤ 1 year = 0 pts >1 to 2 years = 4 pts >2 to 3 years = 6 pts >3 years = 10 pts	
BAR4	The proposed resource should have experience working on C2IS Project(s) as part of an international collaboration.	10	≤ 1 year = 0 pts >1 to 2 years = 4 pts > 2 to 3 years = 6 pts > 3 years = 10 pts	
Maximum Points Available		40	Proposed Resource Score	_____
MINIMUM SCORE (PASSMARK) : (To be inserted at Contract award - Refer to section 6. of Appendix A to Annex A)				

4. P.2 Enterprise Architect (Level 3)

P.2 Enterprise Architect - Level 3 - MANDATORY				
ID	Mandatory Criteria for Supplier's Proposed Resource	Required Supporting Information	Met? (Y/N)	Bidder's response (Cross reference to proposal)
EAM1	The Bidder must clearly demonstrate that the proposed resource has a minimum of ten (10) years' experience, within the last fifteen (15) years, as an Enterprise Architect in an Information Management / Information Technology (IM/IT) environment.	The bidder must provide examples within the proposed resource's résumé, supported by dates (MM/YY) and details of tasks performed demonstrating that the proposed resource meets the requirement.		
EAM2	The Bidder must clearly demonstrate the proposed resource holds a university degree from a recognized university in Information Management, Business, Business Administration, Science or Engineering.	The bidder must provide a copy of the proposed resource's degree with their bid.		
EAM3	<p>The Bidder must clearly demonstrate the proposed resource has a minimum of three (3) years of experience in the last seven (7) years as an Enterprise Architect, working on C4ISR project(s) within a Government of Canada department/agency, as well as at least one of the following:</p> <ul style="list-style-type: none"> - NATO partners, - Five Eyes (FVEYs) partners; or - Other Government Departments (OGD). <p>The proposed resource must have worked a minimum of six consecutive months on each project referenced.</p>	<p>The bidder must provide examples within the proposed resource's résumé, supported by dates (MM/YY) and details of tasks performed demonstrating that the proposed resource meets the requirement.</p> <p>For each referenced project the bidder must provide a valid client reference:</p> <p>Name: Title: Phone #: Email Address:</p>		
EAM4	The bidder must clearly demonstrate that the proposed resource has a minimum of two (2) years of experience within the last five (5) years in at least two (2) of the following activities:	The bidder must provide examples within the proposed resource's résumé, supported by dates (MM/YY) and details of tasks performed		

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	<ul style="list-style-type: none">identifying and evaluating against organizational performance and mission objectives enterprise's business, information and/or IT architectures;identifying future enterprise's business, information and/or IT architectures against the current enterprise architecture(s), performing of gap analyses, and developing requirements for new IT architectures and migration strategies;assessing feasibility of migrating from current to target architectures, including identification of migration risks and recommendations for risk mitigation;identifying business and technology trends that create opportunities for business improvement;providing advice to senior project leaders, Project Directors (PD), Project Managers (PM) or Technical Authority (TA) on IT trends and emerging technologies, and their potential impacts on the organization's and government Information and Communications Technology (ICT) architectures and business strategies;performing "What if" scenarios and providing change recommendations to existing architecture and IT infrastructure, including but not limited to alternative solutions, methodologies and strategies; andproducing and/or managing architectural evolution plans.	demonstrating that the proposed resource meets the requirement. For each referenced project the bidder must provide a valid client reference: Name: Title: Phone #: Email Address:		
EAM5	<ul style="list-style-type: none">The bidder must clearly demonstrate that the proposed resource has a minimum of two (2) years of experience within the last five (5) years in developing and documenting As-Is and/or To-Be enterprise architectures views.	The bidder must provide examples within the proposed resource's résumé, supported by dates (MM/YY) and details of tasks performed demonstrating that the proposed resource meets the requirement. For each referenced project the bidder must provide a valid client reference: Name: Title: Phone #: Email Address:		

P.2 Enterprise Architect - Level 3 - POINT RATED

ID	Point-Rated Technical Criterion	Maximum Points	Points Scale	Bidder's response (Cross reference to proposal)
EAR1	The proposed resource should have demonstrated experience working as an Enterprise Architect on DND/CAF C2IS projects within the last ten (10) years, with demonstrated work experience in this context meaning at least six	10	0 Projects = 0 pts 1 Project = 2 pts 2 Projects = 5 pts 3 projects = 8 pts 4+ projects = 10 pts	

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	consecutive months per individual project.			
EAR2	The proposed resource should have demonstrated experience formally documenting a least three architectural views from the following for As-Is and/or To-Be enterprise architectures within project confines: <ul style="list-style-type: none"> As-Is Architectures: OV-1, SV-1, SV-6; and To-Be architectures: CV-2, OV-1, OV-2, OV-3, SV-1. 	10	0 Projects = 0 pts 1 Project = 2 pts 2 Projects = 5 pts 3 projects = 8 pts 4+ projects = 10 pts	
EAR3	The proposed resource should have experience analysing interoperability functions and identifying concerns within project confines.	10	0 Projects = 0 pts 1 Project = 2 pts 2 Projects = 5 pts 3 projects = 8pts 4+ projects = 10 pts	
Maximum Points Available		30	Proposed Resource Score	_____
MINIMUM SCORE (PASSMARK) : (To be inserted at Contract award - Refer to section 6. of Appendix A to Annex A)				

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APPENDIX D TO ANNEX A CERTIFICATIONS AT THE TASK AUTHORIZATION STAGE

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

1. CERTIFICATION OF EDUCATION AND EXPERIENCE

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

Print name of authorized individual & sign above

Date

2. CERTIFICATION OF AVAILABILITY OF PERSONNEL

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

Print name of authorized individual & sign above

Date

3. CERTIFICATION OF STATUS OF PERSONNEL

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

Print name of authorized individual & sign above

Date

4. CERTIFICATION OF LANGUAGE -

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

Print name of authorized individual & sign above

Date

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APPENDIX E TO ANNEX A EMBEDDED CONTRACTOR LETTER OF ACKNOWLEDGMENT

Reference: Defence Administrative Orders and Directives (DAOD) Series 3003
(<http://www.forces.gc.ca/en/about-policies-standards-defence-admin-orders-directives/index.page>)

Name of Person (Contractor): _____

Name of Company: _____

DND Contract Number: **W6369-19CY05/001**

You have been identified by the Canadian Department of National Defence (DND) as an “embedded contractor” with a need to examine, possess or transfer controlled goods and/or controlled technical data as defined in the DAOD 3003-0 regarding controlled goods. “Embedded contractors” are specifically identified individuals under contract to DND working under the day-to-day direction and control of the DND, within a DND establishment.

In accordance with the DAOD 3003-1, Management, Security and Access Requirements Relating to Controlled Goods, “embedded contractors” are permitted to have access to controlled goods and/or controlled technical data on the same basis as DND personnel on the condition that certain criteria are met. Your initials are required next to each of the following items to confirm that you, as an individual, meet these criteria:

_____ (a) You, or your parent company, is registered, or exempt from registration, with the Controlled Goods Directorate at Public Works and Government Services Canada (PWGSC – CGD);
 (i) Company Name: _____
 (ii) Registration No.: _____
 (iii) Registration Expiry Date: _____

_____ (b) You have a specific need to know; and

_____ (c) You maintain a Level II (Secret) clearance issued by the Government of Canada.

By receiving this permission to access controlled material within DND when such access is required, you are under an obligation to comply with all elements of the DAOD 3003-1 with respect to the handling and safeguarding of controlled goods. You are also required to complete all applicable training on controlled goods.

As an “embedded contractor” in DND, you are not permitted to disclose controlled goods or technical data to anyone other than authorized DND personnel who have a need to know, and have a minimum SECRET level clearance. This includes other individuals who have been identified as embedded contractors. You **MUST NOT** disclose or transfer controlled goods including controlled technical data to any outside third parties, including the company employing you or contracting for your services, unless authorized by the CTAT Office.

Non-compliance with the terms of the DAOD 3003-1 and this letter may result in the denial to access controlled goods/technical data and/or may be considered a default under your current contract and may be subject to violations under the *Defence Production Act* (DPA).

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By signing below, you acknowledge your obligations and responsibilities as an embedded contractor in DND with respect to controlled goods.

I, the undersigned, hereby agree to abide by the terms of this letter and the DAOD 3003.

Signature:

Name of Contractor (Print):

Date:

Name of DND/CAF Commanding Officer/
Manager (Print):

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APPENDIX F TO ANNEX A NON-DISCLOSURE AGREEMENT

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

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

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

I agree that the obligation of this agreement will survive the completion of the Contract Serial No.: _____.

Signature of resource
(include printed name)

Date (yy/mm/dd)

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ANNEX B BASIS OF PAYMENT

During the period of the Contract, the Contractor will be paid as specified below.

INITIAL CONTRACT PERIOD:

Initial Contract Period		
Resource Category	Level of Expertise	Firm Per Diem Rate
B.1 Business Analyst	3	
B.7 Business Transformation Architect	3	
P.2 Enterprise Architect	3	
P.8 Project Leader	3	

Option to Extend the Term of the Contract: This section is only applicable if the optional period is exercised by Canada. During the option period(s) specified below, the Contractor will be paid as follows:

OPTION PERIODS:

Option Period 1		
Resource Category	Level of Expertise	Firm Per Diem Rate
B.1 Business Analyst	Level 3	
B.7 Business Transformation Architect	Level 3	
P.2 Enterprise Architect	Level 3	
P.8 Project Leader	Level 3	

Option Period 2		
Resource Category	Level of Expertise	Firm Per Diem Rate
B.1 Business Analyst	Level 3	
B.7 Business Transformation Architect	Level 3	
P.2 Enterprise Architect	Level 3	
P.8 Project Leader	Level 3	

Option Period 3		
Resource Category	Level of Expertise	Firm Per Diem Rate
B.1 Business Analyst	Level 3	
B.7 Business Transformation Architect	Level 3	
P.2 Enterprise Architect	Level 3	
P.8 Project Leader	Level 3	

Option Period 4		
Resource Category	Level of Expertise	Firm Per Diem Rate
B.1 Business Analyst	Level 3	
B.7 Business Transformation Architect	Level 3	
P.2 Enterprise Architect	Level 3	
P.8 Project Leader	Level 3	

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ANNEX C SECURITY REQUIREMENTS CHECK LIST



Government of Canada
Gouvernement du Canada

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SECURITY REQUIREMENTS CHECK LIST (SRCL)

LISTE DE VÉRIFICATION DES EXIGENCES RELATIVES À LA SÉCURITÉ (LVERS)

PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE		
1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine Department of National Defence	2. Branch or Directorate / Direction générale ou Direction ADM IM - DG Cyber	
3. a) Subcontract Number / Numéro du contrat de sous-traitance	3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant	
4. Brief Description of Work / Brève description du travail Commencement and continued development of projects and initiatives under the Joint Command and Control and Information Systems Concepts Experimentation and Projects (JC2IS CEP) section of Director Joint Communications and Information Systems (DJCIS).		
5. a) Will the supplier require access to Controlled Goods? / Le fournisseur aura-t-il accès à des marchandises contrôlées?	No / Non <input type="checkbox"/> Yes / Oui <input checked="" type="checkbox"/>	
5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? / Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques?	Yes / Oui <input checked="" type="checkbox"/> No / Non <input type="checkbox"/>	
6. Indicate the type of access required / Indiquer le type d'accès requis		
6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? / Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? (Specify the level of access using the chart in Question 7. c) / (Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c)	No / Non <input type="checkbox"/> Yes / Oui <input checked="" type="checkbox"/>	
6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. / Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé.	Yes / Oui <input checked="" type="checkbox"/> No / Non <input type="checkbox"/>	
6. c) Is this a commercial courier or delivery requirement with no overnight storage? / S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit?	Yes / Oui <input checked="" type="checkbox"/> No / Non <input type="checkbox"/>	
7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès		
Canada <input checked="" type="checkbox"/>	NATO / OTAN <input checked="" type="checkbox"/>	Foreign / Étranger <input checked="" type="checkbox"/>
7. b) Release restrictions / Restrictions relatives à la diffusion	7. b) Release restrictions / Restrictions relatives à la diffusion	7. b) Release restrictions / Restrictions relatives à la diffusion
No release restrictions / Aucune restriction relative à la diffusion	All NATO countries / Tous les pays de l'OTAN <input checked="" type="checkbox"/>	No release restrictions / Aucune restriction relative à la diffusion <input checked="" type="checkbox"/>
Not releasable / À ne pas diffuser	Restricted to: / Limité à: <input checked="" type="checkbox"/>	Restricted to: / Limité à: <input checked="" type="checkbox"/>
Specify country(ies): / Préciser le(s) pays: CAN/US	Specify country(ies): / Préciser le(s) pays: CAN/US	Specify country(ies): / Préciser le(s) pays:
7. c) Level of information / Niveau d'information		
PROTECTED A / PROTÉGÉ A <input checked="" type="checkbox"/>	NATO UNCLASSIFIED / NATO NON CLASSIFIÉ <input checked="" type="checkbox"/>	PROTECTED A / PROTÉGÉ A <input checked="" type="checkbox"/>
PROTECTED B / PROTÉGÉ B <input checked="" type="checkbox"/>	NATO RESTRICTED / NATO DIFFUSION RESTREINTE <input checked="" type="checkbox"/>	PROTECTED B / PROTÉGÉ B <input checked="" type="checkbox"/>
PROTECTED C / PROTÉGÉ C <input checked="" type="checkbox"/>	NATO CONFIDENTIAL / NATO CONFIDENTIEL <input checked="" type="checkbox"/>	PROTECTED C / PROTÉGÉ C <input checked="" type="checkbox"/>
CONFIDENTIAL / CONFIDENTIEL <input checked="" type="checkbox"/>	NATO SECRET / NATO SECRET <input checked="" type="checkbox"/>	CONFIDENTIAL / CONFIDENTIEL <input checked="" type="checkbox"/>
SECRET <input checked="" type="checkbox"/>	CCSMC TOP SECRET / CCSMC TRÈS SECRET	SECRET <input checked="" type="checkbox"/>
TOP SECRET		TOP SECRET
TRÈS SECRET		TRÈS SECRET
TOP SECRET (SIGINT)		TOP SECRET (SIGINT)
TRÈS SECRET (SIGINT)		TRÈS SECRET (SIGINT)

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PART A (continued) / PARTIE A (suite)

8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS? ☒ No / Oui
If Yes, indicate the level of sensitivity:
Dans l'affirmative, indiquer le niveau de sensibilité:
9. Will the supplier require access to extremely sensitive INFOSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate? ☒ No / Oui
Short Title(s) of material / Titres abrégé(s) du matériel:
Document Number / Numéro du document:

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

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

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

Special comments:
Commentaires spéciaux:

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

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

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

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

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

PRODUCTION

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

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

11. d) Will the supplier be required to use its IT systems to electronically process, produce or store PROTECTED and/or CLASSIFIED information or data?
La fournisseur sera-t-il tenu d'utiliser ses propres systèmes informatiques pour traiter, produire ou stocker électroniquement des renseignements ou des données PROTÉGÉS et/ou CLASSIFIÉS? ☒ No / Oui
11. e) Will there be an electronic link between the supplier's IT systems and the government department or agency?
Disposera-t-on d'un lien électronique entre le système informatique du fournisseur et celui du ministère ou de l'agence gouvernementale? ☒ No / Oui

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

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

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

SUMMARY CHART / TABLEAU RÉCAPITULATIF

Category Catégorie	PROTECTED PROTÉGÉ			CLASSIFIED CLASSIFIÉ		NATO					COMSEC					
	A	B	C	CONFIDENTIAL	SECRET	TOP SECRET	NATO RESTRICTED	NATO CONFIDENTIAL	NATO SECRET	COMSEC TOP SECRET	PROTECTED PROTÉGÉ			CONFIDENTIAL	SECRET	TOP SECRET
				CONFIDENTIAL	TOP SECRET	NATO DIFFUSION RESTRICTED	NATO CONFIDENTIAL	SECRET	TOP SECRET	A	B	C	CONFIDENTIAL	TOP SECRET		
Information / Assets Designation(s) / Plans Production																
IT Media / Support TI																
IT Link / Lien électronique																

12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED?
La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE?

☒ No
Non

☐ Yes
Oui

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

12. b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED?
La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE?

☒ No
Non

☐ Yes
Oui

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

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PART D - AUTHORIZATION / PARTIE D - AUTORISATION

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

Name (prin) - Nom (en lettres moulées)	Title - Titre	Signature
[Redacted]	[Redacted]	[Redacted]
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel
[Redacted]	[Redacted]	[Redacted]
Date		15 Nov 19

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

Name (prin) - Nom (en lettres moulées)	Title - Titre	Signature
SASA MEDJOVIC	Senior Security Analyst	MEDJOVIC, SASA-IA 234
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel
613-996-0286	[Redacted]	sasa.medjovic@forces.gc.ca
Date		

15. Are there additional instructions (e.g. Security Guide, Security Classification Guide) attached?
Des instructions supplémentaires (p. ex. Guide de sécurité, Guide de classification de la sécurité) sont-elles jointes?

No Yes
Non Oui

16. Procurement Officer / Agent d'approvisionnement

Name (prin) - Nom (en lettres moulées)	Title - Titre	Signature
[Redacted]	[Redacted]	[Redacted]
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel
[Redacted]	[Redacted]	[Redacted]
Date		

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

Name (prin) - Nom (en lettres moulées)	Title - Titre	Signature
C. Jason Quade Contract Security Officer Jason.Quade@pwgsc-tpsgc.gc.ca	[Redacted]	Quade, Clarence
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel
[Redacted]	[Redacted]	[Redacted]
Date		

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Security Requirement Checklist (SRCL) Supplemental Security Guide

Part A - Multiple Release Restrictions: Security Guide							
To be completed in addition to SRCL question 7.b) when release restrictions are therein identified. Indicate to which levels of information release restrictions apply. Make note in the chart if a level of information bears multiple restrictions (e.g. a portion of the SECRET information bears the caveat Canadian Eyes Only while the remainder of the SECRET information has no release restrictions.)							
Canadian Information							
Citizenship Restriction	PROTECTED			CLASSIFIED			
	A	B	C	CONFIDENTIAL	SECRET	TOP SECRET	TOP SECRET (SIGINT)
No Release Restrictions							
Not Releasable							
Restricted to: CAN/USA citizens only	✓	✓		✓	✓		
Permanent Residents Not Included*							
NATO Information							
Citizenship Restriction	NATO UNCLASSIFIED		NATO RESTRICTED	NATO CONFIDENTIAL	NATO SECRET	COSMIC TOP SECRET	
All NATO Countries	✓		✓	✓	✓		
Restricted to:							
Permanent Residents Not Included*							
Foreign Information							
Citizenship Restriction	PROTECTED			CLASSIFIED			
	A	B	C	CONFIDENTIAL	SECRET	TOP SECRET	TOP SECRET (SIGINT)
No Release Restrictions	✓	✓		✓	✓		
Restricted to:							
Permanent Residents Not Included*							
COMSEC Information							
Citizenship Restriction	PROTECTED			CLASSIFIED			
	A	B	C	CONFIDENTIAL	SECRET	TOP SECRET	TOP SECRET (SIGINT)
Not Releasable							
Restricted to:							
DND ONLY Embedded Contractor (Access to Controlled Goods)							
Restriction				✓			
SECRET clearance with CEO applies							

*When release restrictions are indicated, specify if permanent residents are allowed to be included.

To be completed in addition to SCL question 10.a) when multiple levels of personnel screening are therein identified. Indicate which personnel screening levels are required for which portions of the work/access involved in the contract.

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ATTACHMENT 3.1

BID SUBMISSION FORM

Bidder's full legal name		
Authorized Representative of Bidder for evaluation purposes (e.g., clarifications)	Name	
	Title	
	Address	
	Telephone #	
	Email	
Bidder's Contract Security Officer (CSO)	Name	
	Title	
	Address	
	Telephone #	
	Email	
Bidder's Procurement Business Number (PBN) [see the Standard Instructions 2003] [Note to Bidders: Please ensure that the PBN you provide matches the legal name under which you have submitted your bid. If it does not, the Bidder will be determined based on the legal name provided, not based on the PBN, and the Bidder will be required to submit the PBN that matches the legal name of the Bidder.]		
Jurisdiction of Contract: Province or territory in Canada the Bidder wishes to be the legal jurisdiction applicable to any resulting contract (if other than as specified in solicitation)		
Former Public Servants See the Article in Part 2 of the bid solicitation entitled Former Public Servant for a definition of "Former Public Servant".	Is the Bidder a FPS in receipt of a pension as defined in the bid solicitation? Yes _____ No _____ If yes, provide the information required by the Article in Part 2 entitled "Former Public Servant"	
	Is the Bidder a FPS who received a lump sum payment under the terms of the Work Force Adjustment Directive? Yes _____ No _____ If yes, provide the information required by the Article in Part 2 entitled "Former Public Servant"	
Security Clearance Level of Bidder [include both the level and the date it was granted] [Note to Bidders: Please ensure that the security clearance matches the legal name of the Bidder. If it does not, the security clearance is not valid for the Bidder.]	LEVEL	DATE GRANTED
Controlled Goods Registration Number [Note to Bidders: Please enter the Controlled Goods Registration number assigned to the legal entity submitting a bid.]		
Bidder's Board of Directors	The following is a list of the Bidder's Board of Directors. In the event of a Joint Venture, a list of	

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ATTACHMENT 3.2 ELECTRONIC PAYMENT INSTRUMENTS

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

- () VISA Acquisition Card;
- () MasterCard Acquisition Card;
- () Direct Deposit (Domestic and International);
- () Electronic Data Interchange (EDI);
- () Wire Transfer (International Only);

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ATTACHMENT 4.1 MANDATORY TECHNICAL CRITERIA

1. Definitions

C4ISR: C4ISR is a concept that integrates command, communication and intelligence activities to enhance decision making

Project: For evaluation purpose, unless indicated otherwise, the definition of a "Project" is as follows: A temporary endeavour (project/contract) of a minimum of one (1) year in length undertaken to create a unique product, service or result.

Concept: a description of future operational problems and proposed solutions in a coherent framework.

C2IS: Command and Control Information System

2. Notes

A) Where experience is required within a stipulated time period, the Bidder is to calculate from the original bid closing date of this solicitation.

B) Terminology used in the Mandatory Evaluation Criteria shall be in accordance with the SOW.

3. Corporate Mandatory Criteria

Bidder - Mandatory Requirements				
ID	Corporate Mandatory Criteria	Required Supporting Information	Met? (Y/N)	Bidder's response (Cross reference to proposal)
CM1 ^{PB}	<p>The Bidder MUST propose:</p> <ul style="list-style-type: none"> - one (1) resource for the Business Transformation Architect - Level 3 (B.7) category; - one (1) resource for the Project Leader - Level 3 (P.8) category; - one (1) resource for the Business Analyst - Level 3 (B.1) category; and - one (1) resource for the Enterprise Architect - Level 3 (P.2) category <p>Notes:</p> <ul style="list-style-type: none"> - A resource cannot be proposed for more than one category - The Bidder cannot propose more than one resource per category. 	Name of the proposed resource for each category.		

4. Mandatory Resource Assessment Criteria

4.1 B.7 Business Transformation Architect - Level 3

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B.7 Business Transformation Architect- Level 3 - MANDATORY				
ID	Mandatory Criteria for Supplier's Proposed Resource	Required Supporting Information	Met? (Y/N)	Bidder's response (Cross reference to proposal)
BTM1	The Bidder must clearly demonstrate that the proposed resource has a minimum of ten (10) years' experience, within the last fifteen (15) years, as a Business Transformation Architect in an Information Management / Information Technology (IM/IT) environment.	The bidder must provide examples within the proposed resource's résumé, supported by dates (MM/YY) and details of tasks performed demonstrating that the proposed resource meets the requirement.		
BTM2	The Bidder must clearly demonstrate that the proposed resource has a minimum of three (3) years of experience in the last seven (7) years as a Business Transformation Architect, working on Command, Control, Information System (C2IS) project(s). The proposed resource must have worked a minimum of six (6) months on each project referenced.	<p>The bidder must provide examples within the proposed resource's résumé, supported by dates (MM/YY) and details of tasks performed demonstrating that the proposed resource meets the requirement.</p> <p>For each referenced project the bidder must provide a valid client reference:</p> <p>Name: Title: Phone #: Email Address:</p>		
BTM3	<p>The bidder must clearly demonstrate that the proposed resource has a minimum of two (2) years of experience in at least two (2) of the following activities:</p> <ul style="list-style-type: none"> Reviewing, assessing and documenting an organization's business architecture; Developing and validating C2IS interoperability concepts; Providing technical advice on C2IS interoperability architecture in a multi-national environment; and Developing Processes for management or governance of an interoperability initiative. 	<p>The bidder must provide examples within the proposed resource's résumé, supported by dates (MM/YY) and details of tasks performed demonstrating that the proposed resource meets the requirement.</p> <p>For each referenced project the bidder must provide a valid client reference:</p> <p>Name: Title: Phone #: Email Address:</p>		
BTM4	<p>The Bidder must clearly demonstrate that the proposed resource has one of the following academic credentials:</p> <ul style="list-style-type: none"> A degree from a recognized university in the sciences, engineering or information management, <p>OR</p> <ul style="list-style-type: none"> A diploma (minimum 2 years) from a recognized college in the sciences, engineering or information management. 	The bidder must provide a copy of the degree or diploma with their bid.		

4.2 P.8 Project Leader - Level 3

P.8 Project Leader- Level 3 - MANDATORY

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ID	Mandatory Criteria for Supplier's Proposed Resource	Required Supporting Information	Met? (Y/N)	Bidder's response (Cross reference to proposal)
PLM1	The Bidder must clearly demonstrate that the proposed resource has a minimum of ten (10) years of experience, within the last fifteen (15) years, as a Project Leader in an Information Management / Information Technology (IM/IT) environment.	The bidder must provide examples within the proposed resource's résumé, supported by dates (MM/YY) and details of tasks performed demonstrating that the proposed resource meets the requirement.		
PLM2	The Bidder must clearly demonstrate that the proposed resource has a minimum of three (3) years in the last five (5) years of experience leading the development of Command, Control, Communications, Computers, Intelligence, Surveillance and Reconnaissance (C4ISR) project(s) within a Government of Canada department/agency, as well as at least one of the following: North Atlantic Treaty Organization (NATO) partners, Five Eyes (FVEYs) partners and Other Government Departments (OGD). Each project referenced must be a minimum of six (6) months duration.	The bidder must provide examples within the proposed resource's résumé, supported by dates (MM/YY) and details of tasks performed demonstrating that the proposed resource meets the requirement. For each referenced project the bidder must provide a valid client reference: Name: Title: Phone #: Email Address:		
PLM3	The Bidder must clearly demonstrate that the proposed resource has produced at least two (2) of the following IM/IT project documents within the last four (4) years: <ul style="list-style-type: none"> • Business Case Strategic Context; • Project Charter; • Project Complexity and Risk Assessment; and • Vision and Scope. 	The bidder must provide examples within the proposed resource's résumé, supported by dates (MM/YY) and details of tasks performed demonstrating that the proposed resource meets the requirement. For each referenced project the bidder must provide a valid client reference: Name: Title: Phone #: Email Address:		
PLM4	The Bidder must clearly demonstrate that the proposed resource has at least one of the following academic credentials: <ul style="list-style-type: none"> • A degree from a recognized university in the sciences, engineering or information management; OR <ul style="list-style-type: none"> • A diploma (minimum 2 years) from a recognized college in the sciences, engineering or information management. 	The bidder must provide a copy of the degree or diploma with their bid.		
PLM5	The Bidder must clearly demonstrate that the proposed resource has either a.) or b.):	The bidder must provide a copy of the proposed resource's certification with their bid.		

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<p>a) A professional Project Management recognized certification.</p> <p>Recognized certification could include but is not limited to:</p> <ul style="list-style-type: none"> • Project Management Professional (PMP); • PRINCE2; • CAPM; • MPM; • CPM; • CPD; • MITS; • APM; and • PPM. <p>OR</p> <p>b) Two (2) years of experience in the past five (5) years as a Project Director or a Deputy Project Director responsible for developing C2IS or C4ISR Project(s).</p>	<p>OR</p> <p>The bidder must provide examples within the proposed resource's résumé, supported by dates (MM/YY) and details of tasks performed demonstrating that the proposed resource meets the requirement.</p> <p>For each referenced project the bidder must provide a valid client reference:</p> <p>Name: Title: Phone #: Email Address:</p>		
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4.3 B.1 Business Analyst - Level 3

B.1 Business Analyst- Level 3 - MANDATORY				
ID	Mandatory Criteria for Supplier's Proposed Resource	Required Supporting Information	Met? (Y/N)	Bidder's response (Cross reference to proposal)
BAM1	The Bidder must clearly demonstrate that the proposed resource has a minimum of ten (10) years' experience, within the last fifteen (15) years, as a Business Analyst in an Information Management / Information Technology (IM/IT) environment.	The bidder must provide examples within the proposed resource's résumé, supported by dates (MM/YY) and details of tasks performed demonstrating that the proposed resource meets the requirement.		
BAM2	<p>The bidder must clearly demonstrate the proposed resource has a minimum of five (5) years' experience within the last ten (10) years as a Business Analyst working on Command, Control, Information Systems (C2IS) project(s).</p> <p>Resource must have worked a minimum of six (6) months on each project referenced.</p>	<p>The bidder must provide examples within the proposed resource's résumé, supported by dates (MM/YY) and details of tasks performed demonstrating that the proposed resource meets the requirement.</p> <p>For each referenced project the bidder must provide a valid client reference:</p> <p>Name: Title: Phone #: Email Address:</p>		

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BAM3	<p>The bidder must clearly demonstrate that the proposed resource has a minimum of two (2) years of experience within the last five (5) years as a Business Analyst working on at least one of the following C2IS activities:</p> <ul style="list-style-type: none"> - Elicitation and analysis of interoperability functional and non-functional requirements; <p>or</p> <ul style="list-style-type: none"> - Elicitation and analysis of use-cases or mission threads in a multi-national environment such as NATO or Five Eyes (FVEYs). 	<p>The bidder must provide examples within the proposed resource's résumé, supported by dates (MM/YY) and details of tasks performed demonstrating that the proposed resource meets the requirement.</p> <p>For each referenced project the bidder must provide a valid client reference:</p> <p>Name: Title: Phone #: Email Address:</p>		
BAM4	<p>The Bidder must clearly demonstrate that the proposed resource has one of the following academic credentials:</p> <ul style="list-style-type: none"> • A degree from a recognized university in the sciences, engineering or information management, <p>OR</p> <ul style="list-style-type: none"> • A diploma (minimum 2 years) from a recognized college in the sciences, engineering or information management. 	<p>The bidder must provide a copy of the proposed resource's degree or diploma with their bid.</p>		
BAM5	<p>The bidder must clearly demonstrate that the proposed resource has prepared and submitted at least five (5) of the following documents in the IM/IT field:</p> <ul style="list-style-type: none"> • Business and Functional Requirements; • Options Analysis; • As-Is processes; • To-Be processes; • Business Cases; • Change Requests; and • Traceability Matrices. 	<p>The bidder must provide examples within the proposed resource's résumé, supported by dates (MM/YY) and details of tasks performed demonstrating that the proposed resource meets the requirement.</p> <p>For each referenced project the bidder must provide a valid client reference:</p> <p>Name: Title: Phone #: Email Address:</p>		

4.4 P.2 Enterprise Architect - Level 3

P.2 Enterprise Architect - Level 3 - MANDATORY				
ID	Mandatory Criteria for Supplier's Proposed Resource	Required Supporting Information	Met? (Y/N)	Bidder's response (Cross reference to proposal)
EAM1	The Bidder must clearly demonstrate that the proposed resource has a minimum of ten (10) years' experience, within the last fifteen (15) years, as an Enterprise	The bidder must provide examples within the proposed resource's résumé, supported by dates (MM/YY) and details		

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	Architect in an Information Management / Information Technology (IM/IT) environment.	of tasks performed demonstrating that the proposed resource meets the requirement.		
EAM2	The Bidder must clearly demonstrate the proposed resource holds a university degree from a recognized university in Information Management, Business, Business Administration, Science or Engineering.	The bidder must provide a copy of the proposed resource's degree with their bid.		
EAM3	<p>The Bidder must clearly demonstrate the proposed resource has a minimum of three (3) years of experience in the last seven (7) years as an Enterprise Architect, working on C4ISR project(s) within a Government of Canada department/agency, as well as at least one of the following:</p> <ul style="list-style-type: none"> - NATO partners, - Five Eyes (FVEYs) partners; or - Other Government Departments (OGD). <p>The proposed resource must have worked a minimum of six consecutive months on each project referenced.</p>	<p>The bidder must provide examples within the proposed resource's résumé, supported by dates (MM/YY) and details of tasks performed demonstrating that the proposed resource meets the requirement.</p> <p>For each referenced project the bidder must provide a valid client reference:</p> <p>Name: Title: Phone #: Email Address:</p>		
EAM4	<p>The bidder must clearly demonstrate that the proposed resource has a minimum of two (2) years of experience within the last five (5) years in at least two (2) of the following activities:</p> <ul style="list-style-type: none"> • identifying and evaluating against organizational performance and mission objectives enterprise's business, information and/or IT architectures; • identifying future enterprise's business, information and/or IT architectures against the current enterprise architecture(s), performing of gap analyses, and developing requirements for new IT architectures and migration strategies; • assessing feasibility of migrating from current to target architectures, including identification of migration risks and recommendations for risk mitigation; • identifying business and technology trends that create opportunities for business improvement; • providing advice to senior project leaders, Project Directors (PD), Project Managers (PM) or Technical Authority (TA) on IT trends and emerging technologies, and their potential impacts on the organization's and government Information and Communications Technology (ICT) architectures and business strategies; • performing "What if" scenarios and providing change recommendations to existing architecture and IT infrastructure, including but not limited to alternative solutions, methodologies and strategies; and • producing and/or managing architectural evolution plans. 	<p>The bidder must provide examples within the proposed resource's résumé, supported by dates (MM/YY) and details of tasks performed demonstrating that the proposed resource meets the requirement.</p> <p>For each referenced project the bidder must provide a valid client reference:</p> <p>Name: Title: Phone #: Email Address:</p>		

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EAM5	<ul style="list-style-type: none"> The bidder must clearly demonstrate that the proposed resource has a minimum of two (2) years of experience within the last five (5) years in developing and documenting As-Is and/or To-Be enterprise architectures views. 	<p>The bidder must provide examples within the proposed resource's résumé, supported by dates (MM/YY) and details of tasks performed demonstrating that the proposed resource meets the requirement.</p> <p>For each referenced project the bidder must provide a valid client reference:</p> <p>Name: Title: Phone #: Email Address:</p>		
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ATTACHMENT 4.2 POINT-RATED TECHNICAL CRITERIA

1. Definitions

C4ISR: C4ISR is a concept that integrates command, communication and intelligence activities to enhance decision making

Project: For evaluation purpose, unless indicated otherwise, the definition of a "Project" is as follows: A temporary endeavour (project/contract) of a minimum of one (1) year in length undertaken to create a unique product, service or result.

Concept: a description of future operational problems and proposed solutions in a coherent framework.

C2IS: Command and Control Information System

2. Notes

A) Where experience is required within a stipulated time period, the Bidder is to calculate from the original bid closing date of this solicitation.

B) Terminology used in the Point-Rated Evaluation Criteria shall be in accordance with the SOW.

C) Proposal(s) that do not meet the minimum score (passmark) identified for each resource category will be found non-compliant.

3. Point Rated Criteria

3.1 Resource #1 - B.7 Business Transformation Architect - Level 3

B.7 Business Transformation Architect - Level 3 - POINT RATED				
ID	Point-Rated Technical Criterion	Maximum Points	Points Scale	Bidder's response (Cross reference to proposal)
BTR1	<p>The proposed resource should have demonstrated experience working as a Business Transformation Architect, on C2IS projects, in a government or private sector environment, within the last ten (10) years.</p> <p>Each referenced project must have a minimum duration of twelve (12) months.</p> <p>Each project referenced, the proposed resource must have worked a minimum of six (6) consecutive months.</p>	10	<p>0 Projects = 0 pts 1 Project = 2 pts 2 Projects = 5 pts 3 projects = 7 pts 4 projects = 10 pts</p>	
BTR2	<p>The proposed resource should have experience with facilitating and leading workshops to elicit and document requirements, capabilities</p>	5	<p><1 year = 0 pts ≥1 to 3 years = 2 pts > 3 to 5 years = 4 pts > 5 years = 5 pts</p>	

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	and gaps within the context of supporting the section's (JC2IS CEP) program.			
BTR3	<p>The proposed resource should have experience with the development and delivery of IM/IT architecture documents; different forms may including the following :</p> <ul style="list-style-type: none">• Business Requirements;• Business Impact Analysis;• Workflow/Process development;• Reference Architecture;• Taxonomy;• Concept ;• Experiment Campaign Plan;• Standards and Technical Specifications; and• Data and information modeling.	10	<p><1 different documents = 0 pts</p> <p>≥1 to 3 different documents = 2 pts</p> <p>> 3 to 5 different documents = 5 pts</p> <p>> 5 different documents = 10 pts</p>	
BTR4	<p>The proposed resource should have experience working within a Canadian Armed Forces (CAF), Department of National Defence (DND) and/or Defence Research and Development Canada (DRDC) project team.</p>	10	<p>≤ 1 year = 0 pts</p> <p>> 1 to 5 years = 2 pts</p> <p>> 5 to 7 years = 4 pts</p> <p>> 7 to 10 years = 8 pts</p> <p>> 10 years = 10 pts</p>	
BTR5	<p>The proposed resource should have experience in military writing with knowledge in IM/IT. Document samples including the following:</p> <ul style="list-style-type: none">- Developing Concept of Operations (CONOPS),- Developing use cases,- Developing mission threads,- Developing functional and non-functional requirements;- Developing and implementing architecture frameworks- Developing architecture views including but not limited to operational process models,- Developing organizational node models,- Developing information exchange models,- Developing logical data models and- Developing use case models using MS Visio and/or Qualiware architectural tools.	10	<p>0 documents = 0 pts</p> <p>> 1 to 2 different documents = 2 pts</p> <p>> 2 to 3 different documents = 4 pts</p> <p>> 3 to 5 different documents = 5 pts</p> <p>> 5 different documents = 10 pts</p>	

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BTR6	The proposed resource should have experience developing Treasury Board project approval documentation for IM/IT project(s) including all of the following: <ul style="list-style-type: none"> Treasury Board Business Case Analysis Strategic Context document; Project Charter; and Project Complexity and Risk Assessment document. 		0 Projects = 0 pts 1 Project = 2 pts 2 Projects = 5 pts	
Maximum Points Available		50	Proposed Resource Technical Score	_____
MINIMUM SCORE (PASSMARK) : 30 POINTS				

3.2 Resource #2 - P.8 Project Leader - Level 3

P.8 Project Leader - Level 3 - POINT RATED				
ID	Point-Rated Technical Criterion	Maximum Points	Points Scale	Bidder's response (Cross reference to proposal)
PLR1	The proposed resource should have experience in leading the effort to assess the feasibility of migrating from a current state to a target business architecture, including the enabling of technologies and identification of the risks associated with migrating to the target business architecture and technologies.	10	≤ 1 year = 0 pts > 1 to 5 years = 2 pts > 5 to 10 years = 4 pts > 10 to 14 years = 8 pts > 14 years = 10 pts	
PLR2	The proposed resource should have experience working within a Canadian Armed Forces (CAF), Department of National Defence (DND) and/or Defence Research and Development Canada (DRDC) project team.	10	≤ 1 year = 0 pts > 1 year to 5 years = 2 pts > 5 to 7 years = 4 pts > 7 to 10 years = 8 pts > 10 years = 10 pts	
PLR3	The proposed resource should have experience working as a Project Leader managing a Government of Canada Content Based Information Cyber Security project(s).	10	≤ 1 year = 0 pts > 1 to 5 years = 2 pts > 5 to 7 years = 4 pts > 7 to 10 years = 8 pts > 10 years = 10 pts	
PLR4	The proposed resource should have experience working on C2IS Project(s) for the Government of Canada as part of an international collaboration. The referenced project(s) should include the following elements;	10	< 2 elements = 0 pts 2 to 3 elements = 2 pts 4 to 5 elements = 4 pts 6 elements = 8 pts > 6 elements = 10 pts	

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	<ul style="list-style-type: none"> - Authentication; - Privilege Management; - Identity Management; - Data Labelling; - Digital Rights Management; - Policy Management; - Biometrics; and - Networking. <p>Note: Repeated elements will only be counted once and not as several elements.</p>			
Maximum Points Available		40	Proposed Resource Technical Score	_____
MINIMUM SCORE (PASSMARK) : 24 Points				

3.3 Resource #3 - B.1 Business Analyst - Level 3

B.1 Business Analyst - Level 3 - POINT RATED				
ID	Point-Rated Technical Criterion	Maximum Points	Points Scale	Bidder's response (Cross reference to proposal)
BAR1	<p>The proposed resource should have experience as a Business Analyst performing all of the following:</p> <ul style="list-style-type: none"> • Requirements gathering, review of existing systems or applications, business process descriptions, use cases, scenarios, business analysis, task and workflow analysis; • Evaluating and analyzing information, decomposing high-level information into details; and • Identifying potential sources of data and developing data models to support general analysis. 	10	<p>≤ 1 year = 0 pts >1 to 2 years = 2 pts > 2 to 4 years = 4 pts > 4 to 6 years = 8 pts > 6 years = 10 pts</p>	
BAR2	The proposed resource should have experience working within a Canadian Armed Forces (CAF) and/or Department of National Defence (DND) project team.	10	<p>≤ 1 year = 0 pts >1 to 2 years = 2 pts > 2 to 4 years = 4 pts >4 years to 5 years = 6 pts > 5 to 6 years = 8 pts > 6 years = 10 pts</p>	
BAR3	The proposed resource should have experience working on a Government of Canada Content Based IM/IT project(s) as part of an international collaboration.	10	<p>≤ 1 year = 0 pts >1 to 2 years = 4 pts >2 to 3 years = 6 pts >3 years = 10 pts</p>	
BAR4	The proposed resource should have experience working on C2IS Project(s) as part of an international collaboration.	10	<p>≤ 1 year = 0 pts >1 to 2 years = 4 pts > 2 to 3 years = 6 pts > 3 years = 10 pts</p>	
Maximum Points Available		40	Proposed Resource Technical Score	_____

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MINIMUM SCORE (PASSMARK) : 24 Points

3.4 P.2 Resource #4 - Enterprise Architect - Level 3

P.2 Enterprise Architect - Level 3 - POINT RATED				
ID	Point-Rated Technical Criterion	Maximum Points	Points Scale	Bidder's response (Cross reference to proposal)
EAR1	The proposed resource should have demonstrated experience working as an Enterprise Architect on DND/CAF C2IS projects within the last ten (10) years, with demonstrated work experience in this context meaning at least six consecutive months per individual project.	10	0 Projects = 0 pts 1 Project = 2 pts 2 Projects = 5 pts 3 projects = 8 pts 4+ projects = 10 pts	
EAR2	The proposed resource should have demonstrated experience formally documenting a least three architectural views from the following for As-Is and/or To-Be enterprise architectures within project confines: <ul style="list-style-type: none"> As-Is Architectures: OV-1, SV-1, SV-6; and To-Be architectures: CV-2, OV-1, OV-2, OV-3, SV-1. 	10	0 Projects = 0 pts 1 Project = 2 pts 2 Projects = 5 pts 3 projects = 8 pts 4+ projects = 10 pts	
EAR3	The proposed resource should have experience analysing interoperability functions and identifying concerns within project confines.	10	0 Projects = 0 pts 1 Project = 2 pts 2 Projects = 5 pts 3 projects = 8pts 4+ projects = 10 pts	
Maximum Points Available		30	Proposed Resource Technical Score	_____
MINIMUM SCORE (PASSMARK) : 18 Points				

4. Rated Technical Criteria Evaluation Summary

4.1 Calculation of the Bidder's Technical Score: the Bidder's Technical Score will be computed by adding the Technical score of each proposed resource.

Technical Score for Resource #1 + Technical Score for Resource #2 + Technical Score for Resource #3 + Technical Score for Resource #4 = Bidder's Technical Score

5.3 Summary Table

Item	Reference	Minimum Score (Passmark) (A)	Maximum Points Available (B)	Technical Score (C)
1	Resource #1 Business Transformation Architect Level 3	30	50	C1
2	Resource #2 Project Leader Level 3	24	40	C2
3	Resource #3	24	40	C3

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	Business Analyst Level 3			
4	Resource #4 Enterprise Architect Level 3	18	30	C4
BIDDER'S TECHNICAL SCORE (C1 + C2 + C3 + C4)				_____
MAXIMUM TECHNICAL POINTS				160

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ATTACHMENT 4.3 PRICING SCHEDULE

Initial Contract Period:

Initial Contract Period – Year #1		
Resource Category	Level of Expertise	Firm Per Diem Rate
B.1 Business Analyst	Level 3	(Bidder to insert)
B.7 Business Transformation Architect	Level 3	(Bidder to insert)
P.2 Enterprise Architect	Level 3	(Bidder to insert)
P.8 Project Leader	Level 3	(Bidder to insert)

Option Periods:

Option Period 1 – Year #2		
Resource Category	Level of Expertise	Firm Per Diem Rate
B.1 Business Analyst	Level 3	(Bidder to insert)
B.7 Business Transformation Architect	Level 3	(Bidder to insert)
P.2 Enterprise Architect	Level 3	(Bidder to insert)
P.8 Project Leader	Level 3	(Bidder to insert)

Option Period 2 – Year #3		
Resource Category	Level of Expertise	Firm Per Diem Rate
B.1 Business Analyst	Level 3	(Bidder to insert)
B.7 Business Transformation Architect	Level 3	(Bidder to insert)
P.2 Enterprise Architect	Level 3	(Bidder to insert)
P.8 Project Leader	Level 3	(Bidder to insert)

Option Period 3 – Year #4		
Resource Category	Level of Expertise	Firm Per Diem Rate
B.1 Business Analyst	Level 3	(Bidder to insert)
B.7 Business Transformation Architect	Level 3	(Bidder to insert)
P.2 Enterprise Architect	Level 3	(Bidder to insert)
P.8 Project Leader	Level 3	(Bidder to insert)

Option Period 4 Year #5		
Resource Category	Level of Expertise	Firm Per Diem Rate
B.1 Business Analyst	Level 3	(Bidder to insert)
B.7 Business Transformation Architect	Level 3	(Bidder to insert)
P.2 Enterprise Architect	Level 3	(Bidder to insert)
P.8 Project Leader	Level 3	(Bidder to insert)

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ATTACHMENT 5.1 FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY – CERTIFICATION

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

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

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

Complete both A and B.

A. Check only one of the following:

- ☐ A1. The Bidder certifies having no work force in Canada.
- ☐ A2. The Bidder certifies being a public sector employer.
- ☐ A3. The Bidder certifies being a federally regulated employer being subject to the [Employment Equity Act](#).
- ☐ A4. The Bidder certifies having a combined work force in Canada of less than 100 permanent full-time and/or permanent part-time employees.
- A5. The Bidder has a combined workforce in Canada of 100 or more employees; and
- ☐ A5.1 The Bidder certifies already having a valid and current [Agreement to Implement Employment Equity](#) (AIEE) in place with ESDC-Labour.

OR

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

B. Check only one of the following:

- ☐ B1. The Bidder is not a Joint Venture.
- OR
- ☐ B2. The Bidder is a Joint venture and each member of the Joint Venture must provide the Contracting Authority with a completed annex Federal Contractors Program for Employment Equity - Certification. (Refer to the Joint Venture section of the Standard Instructions).