



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

**Bid Receiving - PWGSC / Réception des
soumissions - TPSGC**
11 Laurier St. / 11, rue Laurier
Place du Portage, Phase III
Core 0B2 / Noyau 0B2
Gatineau
Québec
K1A 0S5
Bid Fax: (819) 997-9776

**REQUEST FOR PROPOSAL
DEMANDE DE PROPOSITION**

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

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

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

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

Comments - Commentaires

Title - Sujet Digital Services-Urgent for COVID19	
Solicitation No. - N° de l'invitation B9220-210014/A	Date 2020-05-27
Client Reference No. - N° de référence du client B9220-210014	
GETS Reference No. - N° de référence de SEAG PW-\$\$ZM-626-37814	
File No. - N° de dossier 626zm.B9220-210014	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2020-06-08	Time Zone Fuseau horaire Eastern Daylight Saving Time EDT
F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input checked="" type="checkbox"/> Other-Autre: <input type="checkbox"/>	
Address Enquiries to: - Adresser toutes questions à: Holden, Carole	Buyer Id - Id de l'acheteur 626zm
Telephone No. - N° de téléphone (613) 858-9217 ()	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

Vendor/Firm Name and Address

**Raison sociale et adresse du
fournisseur/de l'entrepreneur**

Issuing Office - Bureau de distribution

Informatics Professional Services Division / Division des
services professionnels en informatique
Les Terrasses de la Chaudière
10, rue Wellington, 4ième
étage/Floor
Gatineau
Québec
K1A 0S5

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

**BID SOLICITATION
FOR CONTRACTS AGAINST A SUPPLY ARRANGEMENT FOR
TASK- BASED INFORMATICS PROFESSIONAL SERVICES (TBIPS)
(TIER 2 NCR)
FOR VARIOUS RESOURCE CATEGORIES FOR
CITIZENSHIP AND IMMIGRATION CANADA**

Table of Contents

PART 1 - GENERAL INFORMATION.....	4
1.1 Introduction.....	4
1.2 Summary	4
1.3 Debriefings	6
PART 2 - BIDDER INSTRUCTIONS.....	7
2.1 Standard Instructions, Clauses and Conditions	7
2.2 Submission of Bids.....	7
2.3 Enquiries - Bid Solicitation	7
2.4 Former Public Servant.....	8
2.5 Applicable Laws.....	9
PART 3 - BID PREPARATION INSTRUCTIONS.....	10
3.1 Bid Preparation Instructions.....	10
3.2 Section I: Technical Bid.....	12
3.3 Section II: Financial Bid.....	13
3.4 Section III: Certifications.....	13
PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION.....	14
4.1 Evaluation Procedures.....	14
4.2 Technical Evaluation.....	17
4.3 Financial Evaluation.....	19
4.4 Basis of Selection.....	24
PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION	26
5.1 Certifications Precedent to Contract Award and Additional Information.....	26
PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS	27

6.1	Security Requirement	27
6.2	Financial Capability	27
PART 7 - RESULTING CONTRACT CLAUSES		28
7.1	Requirement.....	28
7.2	Task Authorization	28
7.3	Minimum Work Guarantee	34
7.4	Standard Clauses and Conditions	35
7.5	Security Requirement	36
7.6	Contract Period.....	36
7.7	Authorities.....	36
7.8	Proactive Disclosure of Contracts with Former Public Servants.....	37
7.9	Payment.....	37
7.10	Invoicing Instructions	41
7.11	Certifications and Additional Information	41
7.12	Federal Contractors Program for Employment Equity - Default by Contractor	41
7.13	Applicable Laws.....	41
7.14	Priority of Documents	41
7.15	Foreign Nationals (Canadian Contractor).....	42
7.16	Foreign Nationals (Foreign Contractor)	42
7.17	Insurance Requirements	42
7.18	Limitation of Liability - Information Management/Information Technology	44
7.19	Joint Venture Contractor	45
7.20	Professional Services - General	46
7.21	Safeguarding Electronic Media	47
7.22	Representations and Warranties	47
7.23	Access to Canada's Property and Facilities.....	47
7.24	Implementation	48
7.25	Identification Protocol Responsibilities.....	48

List of Annexes to the Resulting Contract:

Annex A Statement of Work

- Appendix A to Annex A – Tasking Assessment Procedure
- Appendix B to Annex A – Task Authorization (TA) Form
- Appendix C to Annex A – Resources Assessment Criteria and Response Table
- Appendix D to Annex A – Certifications at the TA Stage

Annex B Basis of Payment

Annex C Security Requirements Check List

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

-Attachment 3.1: Bid Submission Form

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

-Attachment 4.1: Mandatory Technical Criteria
-Attachment 4.2: Point Rated Technical Criteria

List of Attachment to Part 5 (Certifications):

-Attachment 5.1: Federal Contractors Program for Employment Equity - Certification

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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 Citizenship and Immigration Canada (the "**Client**") for Task-Based Informatics Professional Services (TBIPS) under the TBIPS Supply Arrangement (SA) method of supply.
- (b) It is intended to result in the award of up to two contracts, each for one year plus four six-month irrevocable options allowing Canada to extend the term of the contract(s)
- (c) There are security requirements associated with this requirement. For additional information, consult Part 6 - Security, Financial and Other Requirements, and Part 7 – Resulting Contract Clauses. For more information on personnel and organization security screening or security clauses, Bidders should refer to the Contract Security Program of Public Works and Government Services Canada (<http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>) website.
- (d) The requirement is subject to the provisions of the World Trade Organization Agreement on Government Procurement (WTO-AGP), the North American Free Trade Agreement (NAFTA), the Canada-Chile Free Trade Agreement (CCFTA), the Canada-Peru Free Trade Agreement (CPFTA), the Canada-Colombia Free Trade Agreement (CColFTA), the Canada-Panama Free Trade Agreement (CPanFTA), the Canada-European Union Comprehensive Economic and Trade

Agreement (CETA), the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) and the Canadian Free Trade Agreement (CFTA).

- (e) 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."
- (f) Any requirement for deliveries within any Comprehensive Land Claims Agreements (CLCAs) areas within Yukon, Northwest Territories, Nunavut, Quebec, or Labrador are excluded from this bid solicitation and will be treated as a separate procurement, outside the resulting contracts.
- (g) Bidders must use the epost Connect service provided by Canada Post Corporation to transmit their bid electronically. Bidders must refer to Part 2 entitled "Bidder Instructions, and Part 3 entitled "Bid Preparation Instructions", of the bid solicitation, for further information.
- (h) Only TBIPS SA Holders holding a TBIPS SA for Tier 2 at the time of bid closing, 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.
- (i) SA Holders that are invited to compete as a joint venture must submit a bid as that joint venture SA Holder, forming no other joint venture to bid. Any joint venture must be already qualified under the SA #EN578-170432 as that joint venture at the time of bid closing in order to submit a bid.
- (j) 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
P.1 Change Management Consultant	Level 1, 2, 3
P.2 Enterprise Architect	Level 3
P.5 Project Executive	Level 3
P.8 Project Leader	Level 2, 3
P.9 Project Manager	Level 2, 3
A.1 Application / Software Architect	Level 1, 2, 3
A.6 Programmer / Software Developer	Level 1, 2, 3
A.11 Tester	Level 1, 2, 3
I.5 Information Management Architect	Level 3
I.9 System Administrator	Level 2
I.11 Technology Architect	Level 2, 3
B.3 Business Consultant	Level 1, 2, 3

Solicitation Number:
B9220-210014/A

Amendment Number:

Buyer ID:
626zm

1.3 Debriefings

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

PART 2 - BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

- (a) All instructions, clauses and conditions identified in the bid solicitation by number, date and title are set out in the *Standard Acquisition Clauses and Conditions Manual* (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.
- (b) Bidders who submit a bid agree to be bound by the instructions, clauses and conditions of the bid solicitation and accept the clauses and conditions of the resulting contract(s).
- (c) The 2003 (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 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 **via e-post Connect** by the date, time and at the PWGSC address indicated on page one of the bid solicitation.

Note: For bidders needing to register with e-post Connect the email address is: tpsgc.dgareceptiondessaoumissions-abbidreceiving.pwgsc@tpsgc-pwgsc.gc.ca. **Interested Bidders must register a few days prior to solicitation closing date.**

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

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

2.3 Enquiries - Bid Solicitation

- (a) All enquiries must be submitted in writing to the Contracting Authority **no later than 8 calendar days before the bid closing date.** Enquiries received after that time may not be answered.

- (b) Bidders should reference as accurately as possible the numbered item of the bid solicitation to which the enquiry relates. Care should be taken by Bidders to explain each question in sufficient detail in order to enable Canada to provide an accurate answer. Technical enquiries that are of a proprietary nature must be clearly marked "proprietary" at each relevant item. Items identified as "proprietary" will be treated as such except where Canada determines that the enquiry is not of a proprietary nature. Canada may edit the question(s) or may request that the Bidder do so, so that the proprietary nature of the question(s) is eliminated, and the enquiry can be answered with copies to all Bidders. Enquiries not submitted in a form that can be distributed to all Bidders may not be answered by Canada.

2.4 Former Public Servant

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

(b) Definitions

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

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

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

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

(c) Former Public Servant in Receipt of a Pension

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

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

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

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

(d) **Work Force Adjustment Directive**

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

If so, the Bidder must provide the following information:

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

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

2.5 Applicable Laws

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

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

PART 3 - BID PREPARATION INSTRUCTIONS

Remark to Contracting Authority: Before inserting additional bid preparation instructions or clauses, consult sections 05 to 10 of Standard Instructions 2003 to ensure there is no duplication or contradictory information.

3.1 Bid Preparation Instructions

(a) Epost Connect Bid Submission

- (i) Canada requires 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) Prices must appear in the financial bid only. No prices must be indicated in any other section of the bid.
- (iv) 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) Hard copy bid submissions will not be given any consideration.

(c) **Format for Bid:** Canada requests that Bidders follow the format instructions described below in the preparation of their bid:

- (i) use 8.5 x 11 inch (216 mm x 279 mm) page size;
- (ii) use a numbering system that corresponds to the bid solicitation;
- (iii) include a title page at the front of each volume of the bid that includes the title, date, bid solicitation number, bidder's name and address and contact information of its representative; and
- (iv) include a table of contents.

(d) **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>).

(e) **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.

(f) Joint Venture Experience:

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

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

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

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

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

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

- Contracts all signed by A;
- Contracts all signed by B; or

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

That show in total 100 billable days.

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

3.2 Section I: Technical Bid

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

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

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

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

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

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

- (A) The Bidder must provide customer references. The customer references must each confirm, if requested by PWGSC, the facts identified in the Bidder's bid, as required by MTC1, MTC2, and MTC5, in Attachment 4.1, and RTC2, RTC3, and RTC4 in Attachment 4.2

- (B) The form of question to be used to request confirmation from customer references is as follows:
- “Has the Bidder provided your organization with (details of MTC1, MTC2 MTC5, RTC2, RTC3, and RTC4 to be provided to the Customer Reference);”
- ___ Yes, the Bidder has provided my organization with the services described above.
- ___ No, the Bidder has not provided my organization with the services described above.
- ___ I am unwilling or unable to provide any information about the services described above.
- (C) For each customer reference, the Bidder must, at a minimum, provide the name and e-mail address for a contact person. If only the telephone number is provided, it will be used to call to request the e-mail address and the reference check will be done by e-mail.
- Bidders are also requested to include the title of the contact person. It is the sole responsibility of the Bidder to ensure that it provides a contact who is knowledgeable about the services the Bidder has provided to its customer and who is willing to act as a customer reference. Crown references will be accepted.

3.3 Section II: Financial Bid

- (a) **Pricing:** Bidders must submit their financial bid in accordance with the Basis of Payment provided in Annex B. 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) **No Variation in Resource Rates By Time Period:**
- For any given resource category, bidders must submit the same rate for the initial contract period and for all the option periods.
- (c) **Variation in Resource Rates By Level:** Where the financial tables provided by Canada allow different firm rates to be charged for different levels of experience within the same resource category, for any such resource category:
- (i) the rate bid for level three must be the same or higher than that bid for level two, and
- (ii) the rate bid for level two must be the same or higher than the rate bid for level one.
- (d) **All Costs to be Included:** The financial bid must include all costs for the requirement described in the bid solicitation for the entire Contract Period, including any option periods.
- (e) **Blank Prices:** Bidders are requested to insert "\$0.00" for any item for which it does not intend to charge or for items that are already included in other prices set out in the tables. If the Bidder leaves any price blank, Canada will treat the price as "\$0.00" for evaluation purposes and may request that the Bidder confirm that the price is, in fact, \$0.00. No bidder will be permitted to add or change a price as part of this confirmation. Any bidder who does not confirm that the price for a blank item is \$0.00 will be declared non-responsive.

Note to Bidders: If Canada receives 4 or fewer Bids by the bid solicitation closing date, the above sub-article entitled "Blank Prices" will not apply.

3.4 Section III: Certifications

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

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

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

4.1.1 Phased Bid Compliance Process

4.1.1.1 General

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

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

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

- (c) Canada may, in its discretion, request and accept at any time from a Bidder and consider as part of the Bid, any information to correct errors or deficiencies in the Bid that are clerical or administrative, such as, without limitation, failure to sign the Bid or any part or to checkmark a box in a form, or other failure of format or form or failure to acknowledge; failure to provide a procurement business number or contact information such as names, addresses and telephone numbers; inadvertent errors in numbers or calculations that do not change the amount the Bidder has specified as the price or of any component thereof that is subject to evaluation. This shall not limit Canada's right to request or accept any information after the bid solicitation closing in circumstances where the bid solicitation expressly provides for this right. The Bidder will have the time period specified in writing by Canada to provide the necessary documentation. Failure to meet this deadline will result in the Bid being declared non-responsive.
- (d) The PBCP does not limit Canada's rights under Standard Acquisition Clauses and Conditions (SACC) 2003 (2018-06-21) Standard Instructions – Goods or Services – Competitive Requirements nor Canada's right to request or accept any information during the solicitation period or after bid solicitation closing in circumstances where the bid solicitation expressly provides for this right, or in the circumstances described in subsection (c).
- (e) Canada will send any Notice or CAR by any method Canada chooses, in its absolute discretion. The Bidder must submit its response by the method stipulated in the Notice or CAR. Responses are deemed to be received by Canada at the date and time they are delivered to Canada by the method and at the address specified in the Notice or CAR. An email response permitted by the Notice or CAR is deemed received by Canada on the date and time it is received in Canada's email inbox at Canada's email address specified in the Notice or CAR. A Notice or CAR sent by Canada to the Bidder at any address provided by the Bidder in or pursuant to the Bid is deemed received by the Bidder on the date it is sent by Canada. Canada is not responsible for late receipt by Canada of a response, however caused.

4.1.1.2 Phase I: Financial Bid

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

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

4.1.1.3 Phase II: Technical Bid

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

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

4.1.1.4 Phase III: Final Evaluation of the Bid

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

4.2 Technical Evaluation

(a) Mandatory Technical Criteria:

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

(iii) If the Phased Bid Compliance Process applies, it will apply to all mandatory technical criteria.

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

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

(ii) The rated requirements are described in Attachment 4.2.

(c) **Resources Evaluated at TA Stage**

Resources will not be evaluated as part of this bid solicitation.

Resources will only be assessed after contract award once specific tasks are requested of the Contractor. After contract award, the Task Authorization process will be in accordance with Part 7 – Resulting Contract Clauses, the Article titled “Task Authorization”. When a Task Authorization Form (TA Form) is issued, the Contractor will be requested to propose a resource to satisfy the specific requirement based on the TA Form’s Statement of Work. The proposed resource will then be assessed against the criteria identified in the Contract’s Statement of Work in accordance with Appendix C of Annex A.

(d) **Reference Checks:**

(i) Whether or not to conduct reference checks is discretionary. However, if PWGSC chooses to conduct reference checks for any given rated or mandatory requirement, it will check the references for that requirement for all bidders 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 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 RESOURCE CATEGORY:** The Contracting Authority will establish, for each Resource Category, the median band limits based on the firm per diem rates provided by the technically responsive bids. For each such Resource Category the median will be calculated using the median function in Microsoft Excel and will represent a range that encompasses any rate to a value of minus (-) 10% of the median, and an upper median rate to a value of plus (+) 30% of the median. When an even number of technically responsive bids have been determined, an average of the middle two rates will be used to calculate the median band limits and for an odd number of technically responsive bids, the middle rate will be used.
 - (ii) **STEP 2 - POINTS ALLOCATION:** For each 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 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 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 1-Year Contract Period and Four 6-Month Option Periods
P.1 Change Management Consultant - Level 1	25
P.1 Change Management Consultant - Level 2	25
P.1 Change Management Consultant - Level 3	25
P.2 Enterprise Architect - Level 3	25
P.5 Project Executive - Level 3	25

P.8 Project Leader - Level 2	25
P.8 Project Leader - Level 3	25
P.9 Project Manager - Level 2	25
P.9 Project Manager - Level 3	25
A.1 Application/Software Architect - Level 1	25
A.1 Application/Software Architect - Level 2	25
A.1 Application/Software Architect - Level 3	25
A.6 Programmer/Software Developer - Level 1	25
A.6 Programmer/Software Developer - Level 2	25
A.6 Programmer/Software Developer - Level 3	25
A.11 Tester - Level 1	25
A.11 Tester - Level 2	25
A.11 Tester - Level 3	25
I.5 Information Management Architect - Level 3	25
I.9 System Administrator - Level 2	25
I.11 Technology Architect - Level 2	25
I.11 Technology Architect - Level 3	25
B.3 Business Consultant - Level 1	25
B.3 Business Consultant - Level 2	25
B.3 Business Consultant - Level 3	25
TOTAL	625

- (iii) **STEP 3 - FINANCIAL SCORE:** Points allocated under STEP 2 for each 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.
- (iv) **EXAMPLE OF A FINANCIAL EVALUATION USING METHOD A**

TABLE 2 - EXAMPLE OF A FINANCIAL EVALUATION USING METHOD A:

This example illustrates different rates across different periods. Its purpose is for illustration only. For this requirement, Canada is only accepting a single rate per resource category for the initial contract period and all option periods.

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)	\$750.00	\$750.00	\$600.00	\$610.00	\$700.00	\$710.00
Business Analyst	150 (75 pts. per year)	\$800.00	\$810.00	\$500.00	\$520.00	\$860.00	\$860.00
Project Manager	150 (75 pts. per year)	\$850.00	860.00	\$900.00	\$910.00	\$700.00	\$710.00
TOTAL	450						

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 \$700.00. The lower median band limit would be \$630.00 and higher median band limit would be \$910.00.
(Median 2)	For the Programmer Resource Category, the year 2 median would be \$710.00. The lower median band limit would be \$639.00 and higher median band limit would be \$923.00.
(Median 3)	For the Business Analyst Resource Category, the year 1 median would be \$800.00. The lower median band limit would be \$720.00 and higher median band limit would be \$1,040.00.
(Median 4)	For the Business Analyst Resource Category, the year 2 median would be \$810.00. The lower median band limit would be \$729.00 and higher median band limit would be \$1,053.00.
(Median 5)	For the Project Manager Resource Category, the year 1 median would be \$850.00. The lower median band limit would be \$765.00 and higher median band limit would be \$1,105.00.
(Median 6)	For the Project Manager Resource Category, the year 2 median would be \$860.00. The lower median band limit would be \$774.00 and higher median band limit would be \$1,118.00.
STEP 2 - Points Allocation:	
Bidder 1:	
Programmer Year 1 =	70 points (based on the following calculation = (Lowest rate of \$700.00/ Bidder's proposed rate of \$750.00) multiplied by 75 points
Programmer Year 2 =	71 points (based on the following calculation = (Lowest rate of \$710/ Bidders proposed rate of \$750) multiplied by 75 points
Business Analyst Year 1 =	75 points (lowest rate within the lower and upper median band limits)
Business Analyst Year 2 =	75 points (lowest rate within the lower and upper median band limits)
Project Manager Year 1 =	75 points (lowest rate within the lower and upper median band limits)
Project Manager Year 2 =	75 points (lowest rate within the lower and upper median band limits)
Bidder 2:	
Programmer Year 1 =	0 points (outside the lower and higher median band limits)
Programmer Year 2 =	0 points (outside the lower and higher median band limits)
Business Analyst Year 1 =	0 points (outside the lower and higher median band limits)
Business Analyst Year 2 =	0 points (outside the lower and higher median band limits)
Project Manager Year 1 =	70.83 points (based on the following calculation = (Lowest rate of \$850.00 / Bidder's proposed rate of \$900.00) Multiplied by 75 pts)
Project Manager Year 2 =	70.88 points (based on the following calculation = (Lowest rate of \$860.00/ Bidder's proposed rate of \$910.00) multiplied by 75 points)
Bidder 3:	
Programmer Year 1 =	75 points (lowest rate within the lower and upper median band limits)
Programmer Year 2 =	75 points (lowest rate within the lower and upper median band limits)
Business Analyst Year 1 =	69.77 points (based on the following calculation = (Lowest rate of \$800.00/ / Bidder's proposed rate of \$860.00) Multiplied by 75 pts)
Business Analyst Year 2 =	70.64 points ((based on the following calculation = (Lowest rate of \$810.00/ / Bidder's proposed rate of \$860.00) Multiplied by 75 pts)
Project Manager Year 1 =	0 points (outside the lower and higher median band limits)
Project Manager Year 2 =	0 points (outside the lower and higher median band limits)
STEP 3 - Financial Score:	
Bidder 1:	70 + 71 + 75 + 75 + 75+ 75 = Total Financial Score of 441.00 points out of a possible 450 points

Bidder 2:	$0 + 0 + 0 + 0 + 70.83 + 70.88 =$ Total Financial Score of 141.71 points out of a possible 450 points
Bidder 3:	$75 + 75 + 69.77 + 70.64 + 0 + 0 =$ Total Financial Score of 290.41 points out of a possible 450 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 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 1-Year Contract Period and Four 6-Month Option Periods
P.1 Change Management Consultant - Level 1	25
P.1 Change Management Consultant - Level 2	25
P.1 Change Management Consultant - Level 3	25
P.2 Enterprise Architect - Level 3	25
P.5 Project Executive - Level 3	25
P.8 Project Leader - Level 2	25
P.8 Project Leader - Level 3	25
P.9 Project Manager - Level 2	25
P.9 Project Manager - Level 3	25
A.1 Application/Software Architect - Level 1	25
A.1 Application/Software Architect - Level 2	25
A.1 Application/Software Architect - Level 3	25
A.6 Programmer/Software Developer - Level 1	25

A.6 Programmer/Software Developer - Level 2	25
A.6 Programmer/Software Developer - Level 3	25
A.11 Tester - Level 1	25
A.11 Tester - Level 2	25
A.11 Tester - Level 3	25
I.5 Information Management Architect - Level 3	25
I.9 System Administrator - Level 2	25
I.11 Technology Architect - Level 2	25
I.11 Technology Architect - Level 3	25
B.3 Business Consultant - Level 1	25
B.3 Business Consultant - Level 2	25
B.3 Business Consultant - Level 3	25
TOTAL	625

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

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

In Canada's experience, bidders will from time to time propose rates at the time of bidding for one or more categories of resources that they later refuse to honour, on the basis that these rates do not allow them to recover their own costs and/or make a profit. When evaluating the rates bid for professional services, Canada may, but will have no obligation to, require price support in accordance with this Article. If Canada requests price support, it will be requested from all otherwise responsive bidders who have proposed a rate that is at least 20% lower than the median rate bid by all responsive bidders for the relevant resource category or categories. If Canada requests price support, the Bidder must provide the following information:

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

4.4 Basis of Selection

(a) Evaluation of Bid – Multiple Contracts Awarded

Selection Process: The following selection process will be conducted:

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

(A) Calculation of Total Technical Score: 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:

$$\frac{\text{Technical Score}}{\text{Maximum Technical Points (Bidders, please refer to the maximum technical points at Attachment 4.2)}} \times 70 = \text{Total Technical Score}$$

(B) 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:

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

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

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

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

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

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

Bidder	Total Bidder Score	Fund Allocation Formula (%)	Total Funds Allocated
1 st ranked	98	98/187 x 100 = 52.41	\$5,241,000.00
2 nd ranked	89	89/187 x 100 = 47.59	\$4,759,000.00
Total	187		\$10,000,000.00
Total funds available: \$10,000,000.00			

NOTE: This is an example only. Actual numbers will be determined after bid evaluation.

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

PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

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

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

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

5.1 Certifications Precedent to Contract Award and Additional Information

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

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

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

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

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

The Bidder must provide the Contracting Authority with a completed Attachment 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.

(b) Submission of Only One Bid

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

PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS

6.1 Security Requirement

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

6.2 Financial Capability

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

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 Citizenship and Immigration Canada.
- (c) **Reorganization of Client:** The Contractor's obligation to perform the Work will not be affected by (and no additional fees will be payable as a result of) the renaming, reorganization, reconfiguration, or restructuring of any Client. The reorganization, reconfiguration and restructuring of the Client includes the privatization of the Client, its merger with another entity, or its dissolution, where that dissolution is followed by the creation of another entity or entities with mandates similar to the original Client. In connection with any form of reorganization, Canada may designate another department or government body as the Contracting Authority or Technical Authority, as required to reflect the new roles and responsibilities associated with the reorganization.
- (d) **Defined Terms:** Words and expressions defined in the General Conditions or Supplemental General Conditions and used in the Contract have the meanings given to them in the General Conditions or Supplemental General Conditions. Any reference to an Identified User in the Supply Arrangement is a reference to the Client. Also, any reference to a "deliverable" or "deliverables" includes all documentation outlined in this Contract. A reference to a "local office" of the Contractor means an office having at least one full time employee that is not a shared resource working at that location.

7.2 Task Authorization

- (a) **As-and-when-requested Task Authorizations:** The Work or a portion of the Work to be performed under the Contract will be on an "as-and-when-requested basis" using a Task Authorization (TA). The Work described in the TA must be in accordance with the scope of the Contract. The Contractor must not commence work until a validly issued TA has been issued by Canada and received by the Contractor. The Contractor acknowledges that any work performed before such issuance and receipt will be done at the Contractor's own risk.
- (b) **Allocation of Task Authorizations:** More than one contract has been awarded for this requirement. Canada reserves the right to allocate the issuance of any Task Authorizations issued under this series of contracts in accordance with Method A, Method B, or Method C described below. Canada reserves the right to modify these TA processes but will notify the Contractors in advance prior to making any changes.

METHOD A – Rotational Allocation of Task Authorization

- (i) When a Task Authorization is issued, Canada will use a rotational method to allocate the draft Task Authorizations where the rotation is based on the ranking obtained by the Contractor during the Bid Solicitation.
- (ii) Canada will send the first TA to the first ranked Contractor and the second TA to the second ranked Contractor. This rotational process will be repeated for each subsequent series of TAs issued by Canada.

- (iii) The Contractor sent a draft TA will have the time set out further below under the subparagraph entitled "Contractor's Response to Draft Task Authorization" to respond to the Contracting Authority.
- (iv) If the Contractor to whom the draft TA is first sent fails to respond on time, confirms in writing that it refuses to perform the task, or in the event that Canada determines the proposed resource(s) does not meet the minimum experience or other requirements of the category(ies) identified in the draft TA, the draft TA will then be forwarded to the next-ranked Contractor. The process of sending out a draft TA will continue until Canada either cancels the requirement for the task or it has been validly issued to one of the contractors. If none of the contractors can perform the task (in accordance with all the terms and conditions of this series of contracts), Canada may acquire the required Work by other means.
- (v) If the Contractor refuses a TA or fails to submit a valid response, the dollar value of the TA may be subtracted from the dollar value of the Contractor's Contract and may be re-allocated, at the Contracting Authority's sole discretion, in whole or in part, to the other contractor(s) (in that same Workstream). This decrease will be evidenced for administrative purposes only through a contract amendment issued by the Contracting Authority (which does not require the agreement of the Contractor).
- (vi) Any of the contractors may advise the Technical Authority and the Contracting Authority in writing that it is unable to carry out additional tasks as a result of previous commitments under one or more TAs issued under this series of contracts, and no draft TA will be sent to that contractor until that contractor has given notice in writing to the Technical Authority and the Contracting Authority that it is again available to perform additional tasks.
- (vii) If it is found that the allocation process described at part (ii) above has resulted in the award of a disproportionate dollar value of work between the Contractors, the Contractors agree that Canada, in its sole discretion, may deviate from the allocation process and issue TAs in the manner required to re-establish a proportional allocation.

METHOD B – Competitive TA Allocation Process:

Canada may request the Contractors compete for a TA. In these cases, Canada will request a response to the TA from all of the Contractors and may select the successful Contractor(s) for award of the TA in accordance with the provisions in article (d) (ii). Details of the competition will be outlined in the TA.

METHOD C – Directed TA Allocation Process:

- (i) Where Canada intends to issue a TA for the same or similar work to all contractors, Canada will request a response to the TA from all of the contractors and may direct a TA to each; or
 - (ii) Where Canada intends to issue a TA to one or more but not all Contractors, Canada will request a response to the TA from the Contractor(s) and may direct a TA to one or more Contractors. If applicable, this will be done in only an exceptional basis and Canada will endeavour to ensure principals of fairness will apply such as to make such TAs count as a "turn" taken by the contractor in the TA rotation process described above.
- (c) **Assessment of Resources Proposed at TA Stage:** Processes for issuing, responding to and assessing Task Authorizations are further detailed in Appendices A, B, C and D of Annex A.
 - (d) **Form and Content of draft Task Authorization:**

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- (i) Canada will provide the Contractors with a TA containing such information and materials as Canada determines are appropriate, which may include:
- (A) the details of the required professional services, including the activities and tasks to be performed by each party, the required deliverables and outcomes, as applicable to the TA;
 - (B) the categories of resources and the number required, if known (in other cases, Canada may ask the contractors to propose the appropriate categories of resources and the number required to achieve certain outcomes, for example);
 - (C) a description of the Work that must be delivered or outcomes that must be achieved;
 - (D) a schedule indicating completion dates for the major activities or submission dates and inspection and acceptance procedures for the deliverables;
 - (E) the applicable basis or bases and methods of payment for the TA or an indication that the contractors are being requested to propose the applicable basis or bases of payment;
 - (F) whether the task requires on-site activities and, if so, the location(s);
 - (G) the language profile of any resources required;
 - (H) the level of security clearance required for any resources;
 - (I) the qualifications of any Key Resources and any requirements for résumés to be submitted;
 - (J) whether or not the contractors' responses with respect to the task must be based on existing prices in the Contract for all or part of the task;
 - (K) which of the Work described in the Statement of Work is required under that specific TA;
 - (L) any items that Canada is willing to negotiate with either all the contractors or the top-ranked contractor responding to the TA, as described in the Statement of Work, but Canada may wish to adjust what has been proposed by the Contractor;
 - (M) the period within which the Contractor must respond to the TA; and
 - (N) any other requirements identified by Canada.
- (ii) Canada will provide the Contractor with a description of the task in a draft Task Authorization using the form specified in Annex A. Where Canada intends to issue the TA to one or more but not all Contractors, Canada will also specify in writing the way in which it will select the successful contractor for that TA, if Canada decides to proceed to issue the TA after receiving the responses. Canada may, for example, choose to select the successful contractor based entirely on price, based on the technical solution, or based on other criteria that Canada will identify on a TA-by-TA basis. The process for development of the TA and selection of the successful contractor(s) may involve stages where input from multiple contractors are also contemplated, including in respect of the Work, the terms of the TA, allocation of risk, the financial model or such other areas as Canada determines to be appropriate. Canada may also contemplate gates or other stages where there is a refinement in the number of contractors involved in the process. TAs may include mandatory or optional Government Furnished Equipment and Services (GFEs). In the case of optional GFEs (such as existing software licenses), Canada may assess transition costs (i.e., costs to Canada associated with not continuing to use existing property) in selecting the successful contractor for the TA or include transition work in the TA (e.g., transition work might include training).
- (iii) The draft Task Authorization will contain the details of the activities to be performed, and must also contain the following information:
- (A) the contract number;
 - (B) the task number;
 - (C) 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);

- (D) the categories of resources and the number required;
- (E) a description of the work for the task outlining the activities to be performed and identifying any deliverables (such as reports);
- (F) the start and completion dates;
- (G) any option(s) to extend initial end date (if applicable);
- (H) milestone dates for deliverables and payments (if applicable);
- (I) the number of person-days of effort required;
- (J) whether the work requires on-site activities and the location;
- (K) the language profile of the resources required;
- (L) the level of security clearance required of resources;
- (M) the price payable to the Contractor for performing the task, with an indication of whether it is a firm price or a maximum TA price (and, for maximum price task authorizations, the TA must indicate how the final amount payable will be determined; where the TA does not indicate how the final amount payable will be determined, the amount payable is the amount, up to the maximum, that the Contractor demonstrates was actually worked on the project, by submitting time sheets filled in at the time of the work by the individual resources to support the charges); and
- (N) any other constraints that might affect the completion of the task.

(iv.) In addition to the foregoing, it is expected that TAs may include additional contractual terms related to the Work.

- (e) Canada will provide all the Contractors who respond to any given competitive TA notice of:
 - (i) the successful Contractor; and
 - (ii) Canada's decision not to issue a TA, in which case the draft TA notice will be deemed to be cancelled.

- (f) Contractor's Response to Draft Task Authorization:

The Contractor must provide to the Technical Authority, within two working days of receiving the draft Task Authorization (or within any longer time period specified in the draft TA), confirmation that it accepts the request, as follows. The Contractor will not be paid for preparing or providing its response or for providing other information required to prepare and validly issue the TA.

- (i) Method A Rotational Method of TA Allocation:

- (A) the total estimated cost proposed for performing the task or, as applicable, revised task;
- (B) a breakdown of that cost established in accordance with the Basis of Payment; and
- (C) for each resource proposed by the Contractor for the performance of the Work required:
 - the proposed resource in accordance with Appendix A to Annex A;
 - the resume of the proposed resource;
 - the signed Appendix D to Annex A;
 - the proposed resource's PWGSC Security Clearance File Number and date of birth.

- (ii) Method B Competitive TA Method of TA Allocation and Method C Directed TA Allocation Process:

While Canada desires the Contractor to respond to Task Authorizations for which it has the capability to respond, the Contractor is not required to respond to any individual TA. However, should Canada not receive any compliant responses to a TA, Canada may consult with all Contractors and may modify the TA, as appropriate, before reissuing it to all Contractors. Should no compliant responses to a TA be received in either case, Canada may direct the TA to any of the Contractors.

Where requested, the Contractor should provide Canada with a response to the TA, including the proposed total estimated cost for performing the task, a breakdown of that cost and any other required information, within the period specified in the TA.

(g) Task Authorization Limit and Authorities for Validly Issuing Task Authorizations:

To be validly issued, a TA must be signed by the Technical Authority, the Contracting Authority and the Contractor. Any TA that does not bear the appropriate signature(s) is not validly issued by Canada. Any work performed by the Contractor without receiving a validly issued TA is done at the Contractor's own risk. If the Contractor receives a TA that is not appropriately signed, the Contractor must notify the Contracting Authority.

(h) Price Support:

(i) On Canada's request and before the award of any directed Task Authorization or when only one response is received in response to a competitive TA, the Contractor must provide one or more of the following price support, as identified by Canada:

- (A) a price breakdown showing the cost of direct labor, direct materials, purchased items, engineering and plant overheads, general and administrative overhead, transportation, level of effort, etc.; or
- (B) price or rate certifications (as identified in article h), (ii); or
- (C) any other supporting documentation as requested by Canada.

(ii) Price and Rate Certifications

The Contractor must provide one of the following if Canada requests price support in accordance with (h), (i),(B):

(A) The Contractor certifies that the price proposed:

- i. is not in excess of the lowest price charged by the Canadian Contractor to anyone else for the like quality and quantity of the goods, services or both;
- ii. does not include an element of profit on the sale in excess of that normally obtained by the Canadian Contractor on the sale of goods, services or both of like quality and quantity; and
- iii. does not include any provision for discounts to selling agents.

(B) The Contractor certifies that the rate proposed:

- i. is not in excess of the lowest rate charged by the Canadian Contractor to anyone else for the like quality and quantity of the service;
- ii. does not include an element of profit on the sale in excess of that normally obtained by the Canadian Contractor on the sale of services of like quality and quantity, and
- iii. does not include any provision for discounts to selling agents.

(i) Discretionary Audit

(i) For any directed TA or when only one response is received in response to a competitive TA, and in accordance with the price support requested by Canada and provided by the Contractor, one of the following Discretionary Audit Clauses will apply to the applicable Task Authorization.

- (A) Discretionary Audit - Goods and/or Services (to be used with Price or Rate Certification (h) (ii) (A) and (B))

The Contractor's certification that the price or rate is not in excess of the lowest price or rate charged by the Canadian Contractor to anyone else, for the like quality and quantity of the goods, services or both, is subject to verification by government audit, at the discretion of Canada, before or after payment is made to the Contractor.

If the audit demonstrates that the certification is in error after payment is made to the Contractor, the Contractor must, at the discretion of Canada, make repayment to Canada in the amount found to be in excess of the lowest price or rate or authorize the retention by Canada of that amount by way of deduction from any sum of money that may be due or payable to the Contractor pursuant to the Contract.

If the audit demonstrates that the certification is in error before payment is made, the Contractor agrees that any pending invoice will be adjusted by Canada in accordance with the results of the audit. It is further agreed that if the Contract is still in effect at the time of the verification, the price or rate will be lowered in accordance with the results of the audit.

- or -

- (B) Discretionary Audit - Goods and/or Services (to be used with Price Support (h), (i))

The estimated price breakdown/level of effort is subject to audit by Canada, before or after payment is made to the Contractor under the conditions of the Contract.

If the audit demonstrates that the actual price breakdown/level of effort is less than the estimated price breakdown/level of effort, after payment is made to the

Contractor, at the discretion of Canada, the Contractor must repay Canada the amount found to be in excess of the actual price breakdown/level of effort, or authorize the retention by Canada of that amount by way of deduction from any sum of money that may be due or payable to the Contractor pursuant to the Contract.

If the audit demonstrates that the actual price breakdown/level of effort is less than the estimated price breakdown/level of effort before payment is made, the Contractor agrees that any pending invoice will be adjusted by Canada in accordance with the results of the audit. It is further agreed that if the Contract is still in effect at the time of the verification, the price will be lowered in accordance with the results of the audit.

- (j) Periodic Usage Reports:

- (i) The Contractor must compile and maintain records on its provision of services to the federal government under Task Authorizations validly issued under the Contract. The Contractor must provide this data to Canada in accordance with the reporting requirements detailed below. If some data is not available, the reason must be indicated. If services are not provided during a given period, the Contractor must still provide a "NIL" report. The data must be submitted on a quarterly basis to the Contracting Authority. From time to time, the Contracting Authority may also require an interim report during a reporting period.

- (ii) The quarterly periods are defined as follows:

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

The data must be submitted to the Contracting Authority no later than 10 calendar days after the end of the reporting period.

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

(k) **Refusal of Task Authorizations or Submission of a Response which is not Valid (not applicable to Method B Competitive TA Allocation Process):** The Contractor is not required to submit a response to every draft TA sent to it by Canada. However, in addition to Canada's other rights to terminate the Contract, Canada may immediately, and without further notice, terminate the Contract for default in accordance with the General Conditions if the Contractor has either not responded or has not submitted a valid response in at least six instances when sent a draft TA each year, starting on the date the Contract is awarded. In addition, if any of the six instances relate to the provision of resources in a single resource category, the Contractor may not be sent future TAs for the provision of services in that resource category. For greater clarity, each draft TA, which is identifiable by its task number, will only count as one instance. A valid response is one that is submitted within the required time period set out under Appendix A to Annex A "Tasking Assessment Procedure" and meets all requirements of the draft TA issued, including proposing the required number of resources who each meet the minimum experience and other requirements of the categories identified in the draft TA at pricing not exceeding the rates set out in Annex B.

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

7.3 Minimum Work Guarantee

- (a) In this clause,
 - (i) **"Maximum Contract Value"** means the amount specified in the **"Limitation of Expenditure"** clause set out in the Contract; and
 - (ii) **"Minimum Contract Value"** means \$20,000.00 (excluding Applicable Taxes).

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

7.4 Standard Clauses and Conditions

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

(a) **General Conditions:**

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

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

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

(b) **Supplemental General Conditions:**

The following Supplemental General Conditions:

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

apply to and form part of the Contract.

7.5 Security Requirement

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

- (a) The Contractor must, at all times during the performance of the Contract, hold a valid Designated Organization Screening (DOS), issued by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC)
- (b) The Contractor personnel requiring access to protected information, assets or sensitive work site(s) must EACH hold a valid Reliability Status, granted or approved by CISD/PWGSC
- (c) The Contractor must not remove any protected information or assets from the identified work site(s), and the Contractor must ensure that its personnel are made aware of and comply with this restriction
- (d) Subcontracts which contain security requirements are not to be awarded without the prior written permission of CISD/PWGSC
- (e) The Contractor must comply with the provisions of the:
 - (i) Security Requirements Check List and security guide (if applicable), attached at Annex C
 - (ii) 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 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:**
 - (i) The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to four additional six-month periods under the same terms and conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions set out in the Basis of Payment.
 - (ii) Canada may exercise this option at any time by sending a written notice to the Contractor before the expiry date of the Contract. The option may only be exercised by the Contracting Authority, and will be evidenced, for administrative purposes only, through a contract amendment.

7.7 Authorities

(a) Contracting Authority

The Contracting Authority for the Contract is:

Carole Holden
Public Works and Government Services Canada
Acquisitions Branch
Professional Services Procurement Directorate
10 Wellington St., Gatineau, Québec
Telephone: 613-858-9217
E-mail address: carole.holden@tpsgc-pwgsc.gc.ca

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

(b) **Technical Authority**

The Technical Authority for the Contract is:

(TO BE INSERTED UPON CONTRACT AWARD)

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

(c) **Contractor's Representative**

(TO BE INSERTED UPON CONTRACT AWARD)

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) For any TA issued under this Contract, Canada will pay the Contractor in accordance with one or more of the following basis of payment. Canada retains the right to select any of the following methods, or a combination thereof, but may consult the Contractor at time of issuance of the TA:

(A) TA with a Maximum Ceiling Price:

The Contractor will be paid for the Work specified in the authorized TA, in accordance with the Basis of Payment specified in the authorized TA.

While the Contractor is obligated to deliver all the Work under the authorized TA, Canada's liability to the Contractor under the authorized TA must not exceed the ceiling price specified in the authorized TA.

Canada will not pay the Contractor for any design changes, modifications or interpretations of the Work unless they have been approved, in writing, by the Contracting Authority before their incorporation into the Work.

(B) TA with a Firm Price:

In consideration of the Contractor completing all of its obligations under the authorized TA and after Canada has accepted the Work, the Contractor will be paid the firm price(s) as specified in the authorized TA.

Canada will not pay the Contractor for any design changes, modifications or interpretations of the Work, unless they have been authorized, in writing, by the Contracting Authority before their incorporation into the Work.

(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 the National Capital Region. The Contractor will be paid for actual time spent travelling at half the hourly rate. The hourly rate will be determined by dividing the firm per diem rate set out in Annex B by 7.5 hours. All payments are subject to government audit.

- (iii) **Competitive Award:** The Contractor acknowledges that the Contract has been awarded as a result of a competitive process. No additional charges will be allowed to compensate for errors, oversights, misconceptions or underestimates made by the Contractor when bidding for the Contract.
- (iv) **Contractor’s Firm Per Diem Rates:** The Contractor agrees that the rates set out in Annex B remain firm throughout the Contract Period, except as may be provided for in the express terms of the contract. In reference to Article 18(1) of SACC General Conditions 2035, the Contractor acknowledges that its obligation to provide services in accordance with the firm rates set out in Annex B is unaffected by the application of any existing law or any new law which may come into effect during the Contract Period.
- (v) **Professional Services Rates:** In Canada’s experience, bidders from time to time propose rates at the time of bidding for one or more Resource Categories that they later refuse to honour, on the basis that these rates do not allow them to recover their own costs and/or make a profit. This denies Canada of the benefit of the awarded contract. If the Contractor does not respond or refuses to provide an individual with the qualifications described in the Contract within the time described in the Contract (or proposes instead to provide someone from an alternate category at a different rate), whether or not Canada terminates the Contract as a whole or in part or chooses to exercise any of the rights provided to it under the general conditions, Canada may impose sanctions or take other measures in accordance with the PWGSC Vendor Performance Corrective Measure Policy (or equivalent) then in effect, which measures may include an assessment that results in conditions applied against the Contractor to be fulfilled before doing further business with Canada, or full debarment of the Contractor from bidding on future requirements.

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

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

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.

- (iv) For any directed or competitive TA, Canada may decide to:
 - (A) increase the total funding; or
 - (B) at its sole discretion, take any other reasonable action, as required.

(c) **Method of Payment for Task Authorizations** For any TA issued under this Contract, Canada will pay the Contractor in accordance with one of the following methods. Canada retains the right to select any of the following methods, or a combination thereof, but may consult the Contractor at time of issuance of the TA:

- (i) **Maximum Ceiling Price – Monthly Payment:** The Contractor will be paid for the Work specified in the TA, in arrears, for actual time worked and any resulting deliverables up to a maximum ceiling price, in accordance with the all-inclusive per diem rates specified in the authorized TA. Partial days will be prorated based on actual hours worked based on a 7.5-hour workday, exclusive of all breaks. No payments will be made for annual leave, statutory holidays or sick leave. If time worked is more or less than a day, the daily rate shall be prorated to reflect the actual time worked. If time worked is more or less than a day, the daily rate shall be prorated to reflect the actual time worked. Canada will pay the Contractor on a monthly basis for work performed during the month covered by the invoice if:

- (A) an accurate and complete invoice and any other documents required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- (B) all such documents have been verified by Canada;
- (C) the Work performed has been accepted by Canada.

- (ii) **Firm Price – Milestone Payment:** Canada will make milestone payments in accordance with the schedule of milestones detailed in that TA and the payment provisions in the Contract, if:

- (A) an accurate and complete invoice for milestone payment and any other documents requested by the Contracting Authority have been submitted in accordance with the invoicing instructions provided in the Contract; and
- (B) all work associated with the milestone and any deliverable requested have been completed, delivered, and accepted by Canada.

- (iii) **Firm Price – Single Payment:** Canada will pay the Contractor upon completion and delivery of all the Work associated with the TA in accordance with payment provisions in the Contract, if:

- (A) an accurate and complete invoice and any other documents requested by the Contracting Authority have been submitted in accordance with the invoicing instructions provided in the Contract;
- (B) all such documents have been verified by Canada; and,
- (C) the Work delivered has been accepted by Canada.

(d) **Time Verification**

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

(e) **Payment Credits**

(i) **Failure to Provide Resource** (not applicable to Method B Competitive TA Allocation Process):

(A) If the Contractor does not provide a required professional services resource that has all the required qualifications within the time prescribed by the Contract, the Contractor must credit to Canada an amount equal to the per diem rate (based on a 7.5-hour workday) of the required resource for each day (or partial day) of delay in providing the resource, up to a maximum of 10 days.

(B) **Corrective Measures:** If credits are payable under this Article for two consecutive months or for three months in any 12-month period, the Contractor must submit a written action plan describing measures it will implement or actions it will undertake to eliminate the recurrence of the problem. The Contractor will have five working days to deliver the action plan to the Client and the Contracting Authority and 20 working days to rectify the underlying problem.

(C) **Termination for Failure to Meet Availability Level:** In addition to any other rights it has under the Contract, Canada may terminate the Contract for default in accordance with the General Conditions by giving the Contractor three months' written notice of its intent, if any of the following apply:

- i. the total amount of credits for a given monthly billing cycle reach a level of 10% of the total billing for that month; or
- ii. the corrective measures required of the Contractor described above are not met.

This termination will be effective when the three month notice period expires, unless Canada determines that the Contractor has implemented the corrective measures to Canada's satisfaction during those three months.

(ii) **Credits Apply during Entire Contract Period:** The Parties agree that the credits apply throughout the Contract Period.

(iii) **Credits represent Liquidated Damages:** The Parties agree that the credits are liquidated damages and represent their best pre-estimate of the loss to Canada in the event of the applicable failure. No credit is intended to be, nor will it be construed as, a penalty.

(iv) **Canada's Right to Obtain Payment:** The Parties agree that these credits are a liquidated debt. To collect the credits, Canada has the right to hold back, draw back, deduct or set off from and against any money Canada owes to the Contractor from time to time.

(v) **Canada's Rights & Remedies not Limited:** The Parties agree that nothing in this Article limits any other rights or remedies to which Canada is entitled under the Contract (including the right to terminate the Contract for default) or under the law generally.

(vi) **Audit Rights:** The Contractor's calculation of credits under the Contract is subject to verification by government audit, at the Contracting Authority's discretion, before or after payment is made to the Contractor. The Contractor must cooperate fully with Canada during the conduct of any audit by providing Canada with access to any records and systems that Canada considers necessary to ensure that all credits have been accurately credited to Canada in the Contractor's invoices. If an audit demonstrates that past invoices contained errors in the calculation of the credits, the Contractor must pay to Canada the amount the audit reveals was required to be credited to Canada, plus

interest, from the date Canada remitted the excess payment until the date of the refund (the interest rate is the Bank of Canada's discount annual rate of interest in effect on the date the credit was first owed to Canada, plus 1.25% per year). If, as a result of conducting an audit, Canada determines that the Contractor's records or systems for identifying, calculating or recording the credits are inadequate, the Contractor must implement any additional measures required by the Contracting Authority.

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

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

7.10 Invoicing Instructions

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

7.11 Certifications and Additional Information

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

7.12 Federal Contractors Program for Employment Equity - Default by Contractor

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

7.13 Applicable Laws

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

7.14 Priority of Documents

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

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

7.15 Foreign Nationals (Canadian Contractor)

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

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

7.16 Foreign Nationals (Foreign Contractor)

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

7.17 Insurance Requirements

(a) Compliance with Insurance Requirements

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

if requested by the Contracting Authority, forward to Canada a certified true copy of all applicable insurance policies.

(b) Commercial General Liability Insurance

- (i) The Contractor must obtain Commercial General Liability Insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature, but for not less than \$2,000,000 per accident or occurrence and in the annual aggregate.
- (ii) The Commercial General Liability policy must include the following:
 - (A) Additional Insured: Canada is added as an additional insured, but only with respect to liability arising out of the Contractor's performance of the Contract. The interest of Canada should read as follows: Canada, as represented by Public Works and Government Services Canada.
 - (B) Bodily Injury and Property Damage to third parties arising out of the operations of the Contractor.
 - (C) Products and Completed Operations: Coverage for bodily injury or property damage arising out of goods or products manufactured, sold, handled, or distributed by the Contractor and/or arising out of operations that have been completed by the Contractor.
 - (D) Personal Injury: While not limited to, the coverage must include Violation of Privacy, Libel and Slander, False Arrest, Detention or Imprisonment and Defamation of Character.
 - (E) Cross Liability/Separation of Insureds: Without increasing the limit of liability, the policy must protect all insured parties to the full extent of coverage provided. Further, the policy must apply to each Insured in the same manner and to the same extent as if a separate policy had been issued to each.
 - (F) Blanket Contractual Liability: The policy must, on a blanket basis or by specific reference to the Contract, extend to assumed liabilities with respect to contractual provisions.
 - (G) Employees and, if applicable, Volunteers must be included as Additional Insured.
 - (H) Employers' Liability (or confirmation that all employees are covered by Worker's compensation (WSIB) or similar program)
 - (I) Broad Form Property Damage including Completed Operations: Expands the Property Damage coverage to include certain losses that would otherwise be excluded by the standard care, custody or control exclusion found in a standard policy.
 - (J) Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of policy cancellation.
 - (K) If the policy is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.
 - (L) Owners' or Contractors' Protective Liability: Covers the damages that the Contractor becomes legally obligated to pay arising out of the operations of a subcontractor.
 - (M) Advertising Injury: While not limited to, the endorsement must include coverage for piracy or misappropriation of ideas, or infringement of copyright, trademark, title or slogan.

(c) Errors and Omissions Liability Insurance

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

7.18 Limitation of Liability - Information Management/Information Technology

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

terminated either in whole or in part for default, up to an aggregate maximum for this subparagraph (B) of the greater of .75 times the total estimated cost (meaning the dollar amount shown on the first page of the Contract in the cell titled "Total Estimated Cost" or shown on each call-up, purchase order or other document used to order goods or services under this instrument), or \$1,000,000.00.

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

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

(c) **Third Party Claims:**

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

7.19 Joint Venture Contractor

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

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

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

7.20 Professional Services - General

- (a) The Contractor must provide professional services on request as specified in this Contract. All resources provided by the Contractor must meet the qualifications described in the Contract (including those relating to previous experience, professional designation, education, language proficiency and security clearance) and must be competent to provide the required services by any delivery dates described in the Contract.
- (b) If the Contractor fails to deliver any deliverable (excluding delivery of a specific individual) or complete any task described in the Contract on time, in addition to any other rights or remedies available to Canada under the Contract or the law, Canada may notify the Contractor of the deficiency, in which case the Contractor must submit a written plan to the Technical Authority within five working days detailing the actions that the Contractor will undertake to remedy the deficiency. The plan is subject to the approval of the Technical Authority. The Contractor must prepare and implement the plan at its own expense. If after 20 days, the plan has not been implemented to the satisfaction of the Technical Authority, Canada reserves the right to apply remedial actions, including but not limited to implementing Payment Credits from the Contractor and/or amending the Contract to reduce the Contract value.
- (c) In General Conditions 2035, the Article titled "Replacement of Specific Individuals" is deleted and the following applies instead:

Replacement of Specific Individuals

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

The replacement must have qualifications and experience that meet or exceed those obtained for the original resource.
- (ii) Subject to an Excusable Delay, where Canada becomes aware that a specific individual identified under the Contract to provide services has not been provided or is not performing, the Contracting Authority may elect to:

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

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

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

7.21 Safeguarding Electronic Media

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

7.22 Representations and Warranties

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

7.23 Access to Canada's Property and Facilities

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

7.24 Implementation

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

7.25 Identification Protocol Responsibilities

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

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

ANNEX A STATEMENT OF WORK

1. Title

Digital Services and System Integration Services – Emergency Response to COVID-19

2. Objective

Immigration, Refugees and Citizenship Canada (IRCC) is seeking the services of a global organization(s) (the “Contractor”) with expertise in rapidly developing and implementing Digital solutions and supporting technologies in response to the emergency situation created by COVID-19. The Contractor will bring knowledge, capabilities, and experience to support IRCC’s response to the COVID-19 situation.

Citizenship and Immigration Canada (CIC) is the legal name of Immigration, Refugees and Citizenship Canada (IRCC).

3. Background

On March 11, 2020, the World Health Organization (WHO) declared the newly discovered Corona virus (COVID-19) as a global pandemic. With COVID-19, rapidly spreading and creating serious health threats across the globe, citizens, businesses, and governments have been significantly disrupted creating an unprecedented economic impact.

The Government of Canada has taken unprecedented action in an effort to slow the spread of this virus. It has implemented significant international travel restrictions, significantly reduced in-person interactions with Government personnel, recalled citizens and staff from abroad and implemented strict guidelines for physical distancing and remote working.

IRCC provides a critical array of services in support of temporary residents (temporary foreign workers, international students and visitors), permanent residents, citizenship seekers, refugees and asylum claimants and directly to Canadian citizens for passports and other travel documentation. IRCC also directly supports a multitude of partner organizations such as Global Affairs, the Immigration and Refugee Board and CBSA that are undergoing their own changes.

Many of the above programs are currently supported by in-person or paper-based processes. Those processes that do include some automation are supported by aging IT systems that are not readily able to be adapted to support this new way of working or at the pace of change required to respond to the rapidly evolving response to the COVID-19 emergency.

COVID-19 is also having immediate, significant impacts on IRCC Operation centres and personnel. Many of the processing and contact centres have been shut down or significantly reduced both globally and within Canada. This has severely limited our ability to process foreign nationals coming to Canada to work, study or live permanently as well as supporting Canadians directly. Operations are not expected to return to normal for quite some time. When they do, there will be a “new normal” with new and evolving policies, procedures and digital solutions. When travel restrictions begin to ease, a significant surge of applications and support requirements is anticipated putting tremendous demand on our global operations and supporting branches.

IRCC needs to act quickly to develop (i) updated and new strategies, and (ii) processes and digital systems to cope with the rapid change it is undergoing. These include updating systems and processes for internal staff, partner organizations and re-thinking and re-designing how IRCC provides its services to its clients within Canada and around the world, leveraging digital processes wherever possible thus minimizing the need for in-person interaction or paper-processes for the safety of IRCC’s staff, our clients and community.

Key technology capabilities urgently required as a result of COVID-19 include:

- Tools and technologies to rapidly increase our operational capacities to address immediate manual processing limitations and to contend with the anticipated surges in volumes;
- Digital tools to address new physical distancing requirements, reducing physical presence requirements with digital alternatives (i.e. online citizenship testing, online visa and citizenship applications)
- Technology solutions to integrate digital solutions with our legacy case management system environment (GCMS Integration).
- Robotic Process Automation (RPA) capabilities to deal with reduction in agent capacity, address anticipated surge in volumes and allow agents to address more complex situations.

4. Scope of Work

The Contractor must provide informatics professional services to IRCC on an ‘as and when’ requested basis as initiated through Task Authorizations (TAs). TAs may be fixed price or effort-based to a ceiling. For non-fixed price TA’s, the Contractor must use the Resource Categories identified in this Statement of Work.

Resource Categories	Level
Project Management Services	
P.1 Change Management Consultant	1,2,3
P.2 Enterprise Architect	3
P.5 Project Executive	3
P.8 Project Leader	2,3
P.9 Project Manager	2,3
Application Services	
A.1 Application / Software Architect	1, 2, 3
A.6 Programmer / Software Developer	1, 2, 3
A.11 Tester	1, 2, 3
IM/IT Services	
I.5 Information Management Architect	3
I.9 System Administrator	2
I.11 Technology Architect	2, 3
Business Services	
B.3 Business Consultant	1, 2, 3

5. Methodologies, Tools, Processes, Technical Capabilities, Solutions, and Team of Qualified Resources

5.1 Overview

The Contractor must provide methodologies, tools, processes, technical capabilities, solutions and a team of qualified resources, as and when requested, to:

- a) **Develop Digital Intake Solutions** – including the provision and implementation of digital intake tools to reduce/replace physical presence and paper based requirements for client services and processing with digital alternatives;
- b) **Develop and Implement Physical Distancing Required Digital Tools** - including the provision and implementation of tools to address new physical distancing requirements, reducing physical presence requirements of both our clients and employees with digital alternatives (i.e. online citizenship testing, virtual interviewing, etc.);

- c) **Implement Robotic Process Automation (RPA)** – including RPA solutions to rapidly automate simple, high volume processes, dealing with employee shortages as well as allowing employees to focus on more complex and sensitive cases.
- d) **Analytics Solutions** – including data analytics solutions to provide insights into operational volumes and processing capacities to allow IRCC to effectively respond to rapid changes in the Canadian and Global situation.
- e) **Cybersecurity Strategy and Services** – including the provision of tools and strategic advice to address IRCC's increased Cybersecurity threat as a result of COVID-19.
- f) **Legacy Integration Solutions** – including the provision of technology solutions to integrate digital tools and solutions with our legacy case management system environment (GCMS Integration); and
- g) **Advisory Services** – including the provision of advisory services to help manage the initiatives and respond to emerging operational challenges as a result of COVID-19.

5.2 Develop Digital Intake Solutions

The Contractor must develop digital intake solutions that, will demonstrate the ability to accept IRCC applicants for entry into Canada digitally. The Contractor will first develop prototype solutions with the intent of production implementation. Following IRCC acceptance of the prototype solution and roadmap the Contractor will work jointly with IRCC to implement the solution into production.

The Contractor must provide the methodology, the approach, the project plan and the resources to manage and perform all activities required to develop the digital intake prototype.

Deliverables include but are not limited to:

- a) Project plan;
- b) Weekly status updates;
- c) Digital intake tools prototype;
- d) Digital intake tools roadmap;
- e) Digital intake tools production solution development (phased approach to be defined and approved by client as part of the roadmap deliverable);
- f) Deployment including training, communications and stakeholder management (phased approach to be defined and approved as part of the roadmap deliverable);
- g) Additional digital intake development and deployment; and
- h) Ongoing post deployment managed services.

5.3 Develop and Implement Digital Tools to Support Physical Distancing Requirements

The Contractor must develop prototypes that, will demonstrate the ability to facilitate physical distancing requirements and continue to meet operational mandate of IRCC. Initial focus being online citizenship testing. The Contractor will first develop prototype solutions with the intent of production implementation. Following IRCC acceptance of the prototype solution and the roadmap the Contractor will work jointly with IRCC to implement the solution into production.

The Contractor must provide the methodology, the approach, the project plan and the resources to manage and perform all activities required to develop the tools.

Deliverables include but are not limited to:

- a) Project plan;
- b) Weekly status updates;
- c) Online citizenship test prototype;
- d) Online citizenship test and additional digital services tool roadmap;
- e) Online citizenship test production solution development (phased approach to be defined and approved by client as part of the roadmap deliverable);
- f) Deployment including training, communications and stakeholder management (phased approach to be defined and approved as part of the roadmap deliverable);

- g) Additional digital services development and deployment; and
- h) Ongoing post deployment managed services.

5.4 Implement Robotic Process Automation (RPA)

The Contractor must develop prototypes using client approved technologies that, will demonstrate the ability to automate/support processes and decision making. Initial focus being the Access to Information Process (ATIP). The Contractor will first develop prototype solutions with the intent of production implementation. Following IRCC acceptance of the prototype solution and the roadmap the Contractor will work jointly with IRCC to implement the solution into production.

The Contractor must provide the methodology, the approach, the project plan and the resources to manage and perform all activities required to implement the tools.

Deliverables include but are not limited to:

- a) Project plan;
- b) Weekly status updates;
- c) ATIP RPA Prototype;
- d) ATIP RPA and additional RPA services roadmap;
- e) RPA production solution development (phased approach to be defined and approved by client as part of the roadmap deliverable);
- f) Deployment including training, communications and stakeholder management (phased approach to be defined and approved as part of the roadmap deliverable);
- g) Additional RPA development and deployment; and
- h) Ongoing post deployment managed services.

5.5 Implement Analytics Solutions

The Contractor must develop prototypes using client approved technologies that, will demonstrate the ability to leverage analytics and data insights into operational and planning decision making.

The Contractor must provide the methodology, the approach, the project plan and the resources to manage and perform all activities required to implement the tools.

Deliverables include but are not limited to:

- a) Project plan;
- b) Weekly status updates;
- c) Analytics prototype(s);
- d) Analytics services roadmap;
- e) Analytics production solution development (phased approach to be defined and approved by client as part of the roadmap deliverable);
- f) Deployment including training, communications and stakeholder management (phased approach to be defined and approved as part of the roadmap deliverable);
- g) Additional analytics development and deployment; and
- h) Ongoing post deployment managed services.

5.6 Cybersecurity Strategy and Services

The Contractor must provide methodologies, tools, processes, strategic advice and a team of qualified resources to:

- a) Perform a cybersecurity assessment to identify current gaps and vulnerabilities as a result of COVID-19;
- b) Provide recommendations to address the gaps taking into consideration immediate and long term requirements; and
- c) Provide technical services.

Deliverables include but are not limited to:

- a) Project plan;
- b) Cybersecurity assessment, gap analysis and roadmap to address; and
- c) Weekly status updates.

5.7 Legacy Application Integration Assessment and Solution Roadmap

The Contractor must assess IRCC's current ability to integrate digital solutions to its back end legacy technology environment (GCMS). The Contractor must provide recommended solutions to address any gaps identified as well as an implementation plan and estimated costs.

The Contractor must provide the methodology, the approach, the project plan and the resources to manage and perform all activities required to develop the tools.

Deliverables include but are not limited to:

- a) Project plan;
- b) Weekly status updates;
- c) Legacy environment integration current state assessment;
- d) Recommended solutions, roadmap and estimated costs; and
- e) Production implementation of roadmap based upon client acceptance and authorization.

5.8 Advisory Services

The Contractor must provide advisory services on an as and when requested basis. The Contractor must provide expert advice and guidance related to the technical response to IRCC operational challenges as a result of COVID-19 and its impact on IRCC's ability to execute its mandate.

Deliverables include but are not limited to:

- a) Executive advisory services;
- b) Best practice reviews and industry benchmarking services;
- c) Risk assessment and mitigation services;
- d) Process integrity strategies;
- e) Data quality analysis and improvement strategies;
- f) Project management services;
- g) Change management services;
- h) Review and guidance of technology strategies; and
- i) Benefit analysis.

6. Resource Category Tasks

Where different levels of the same resource category may be required, the Level of Resource required will be identified on the Task Authorization (TA). While the tasks that are identified for the levels may be the same, it is expected that the Level 3 resources will take on a leadership role and will be required for more complex requirements.

6.1 P.1 Change Management Consultant - Level 1, 2, and 3

Tasks include but are not limited to:

- a) Analysis and development of business "critical success factors";
- b) Analysis and development of architecture requirements design, process development, process mapping and training;
- c) Responsible for leading other functional staff to define business strategy and processes in support of transformation and change management activities;
- d) Participate in change impact analysis and change management activities;
- e) Participate in organizational realignment (job re-design organizational re-structuring);
- f) Coordinate development of training and coordination with other stakeholders; and

- g) Create presentations and present to various stakeholders, and facilitate meetings and discussions.

6.2 P.2 Enterprise Architect, Level 3

Tasks include but are not limited to:

- a) Evaluate the IRCC's business/Information and Communications Technology (ICT) architecture, determine its consistency and integration with the organization's business/ICT strategies, assess the degree of its alignment with Treasury Board CIO Business Transformation Enablement Program (BTEP) and Federated Architecture Program (FAP) and recommend changes to the business/ICT architecture to improve its alignment with these external factors;
- b) Identify future business/ICT requirements against the current enterprise architecture, perform gaps analyses, develop Requirements for Technology Architectures (RTA), and prepare migration strategies;
- c) Assess the feasibility of migrating from the current state to the target business architecture and enabling technologies and identify the risks associated with migrating to the target business architecture and technologies and make recommendations for risk mitigation;
- d) Identify business and technology trends that create opportunities for business improvement, advise business and ICT senior executives on ICT trends and emerging technologies and the impact on the organization's and government ICT architectures and business strategies, model "What if" scenarios and recommend appropriate changes to the existing architecture and ICT infrastructure, and recommend alternative solutions, methodologies and strategies;
- e) Produce an architectural evolution plan, recommend prioritization of architecture evolution initiatives, and develop and/or implement an architecture evolution plan;
- f) Manage the development and implementation of an architectural improvement plan; and
- g) Coach, mentor and train IRCC to perform any of the above.

6.3 P.5 Project Executive - Level 3

Tasks include but are not limited to:

- a) Manage several project managers, each responsible for an element of the project and its associated project team;
- b) Define and document project objectives, determine budget requirements;
- c) Meet with other organizational executives to ensure all organizational (internal and external) stakeholders are committed and moving forward on project and organizational goals;
- d) Resolve issues related to the project;
- e) Prepare plans, charts, tables and diagrams to assist in analyzing or displaying problems; work with a variety of project management tools; and
- f) Project sign-off.

6.4 P.8 Project Leader - Level 2, and 3

Tasks include but are not limited to:

- a) Specify the general requirements of the system, develop broad system alternatives and identify their administrative, economic and technical feasibility and practicality as well as associated policy and organizational change requirements;
- b) Analyse and evaluate each alternative based on make/buy, impact and cost/benefit considerations, and propose, justify, plan and cost the implementation of the selected alternative;
- c) Produce overall plan, a detailed plan for the functional analysis phase, and obtain approval of preliminary analysis;
- d) Plan, direct and control the activities of a system development team within scheduled time and cost parameters;
- e) Evaluate proposed computer applications to determine technical, operational and economic feasibility;
- f) Design and test systems to ensure that the objectives of the system are met and that the outputs produced are in accordance with client requirements; and

- g) Monitor the design, implementation and operations start-up of the proposed system against established goals, objectives and milestones.

6.5 P.9 Project Manager - Level 2 and 3

Tasks include but are not limited to:

- a) Manage several project managers, each responsible for an element of the project and its associated project team;
- b) Manage the project during the development, implementation and operations start up by ensuring that resources are made available and that the project is developed and is fully operational within previously agreed time, cost and performance parameters;
- c) Formulate statements of problems; establishes procedures for the development and implementation of significant, new or modified project elements to solve these problems, and obtains approval thereof;
- d) Define and document the objectives for the project; determine budgetary requirements, the composition, roles and responsibilities and terms of reference for the project team;
- e) Report progress of the project on an ongoing basis and at scheduled points in the life cycle;
- f) Meets in conference with stakeholders and other project managers and states problems in a form capable of being solved;
- g) Prepare plans, charts, tables and diagrams to assist in analyzing or displaying problems; work with a variety of project management tools; and
- h) Project sign-off.

6.6 A.1 Application/Software Architect - Level 1, 2, and 3

Tasks include but are not limited to:

- a) Develop technical architectures, frameworks and strategies, either for an organization or for a major application area, to meet the business and application requirements;
- b) Identify the policies and requirements that drive out a particular solution;
- c) Analyze and evaluate alternative technology solutions to meet business problems;
- d) Ensure the integration of all aspects of technology solutions;
- e) Monitor industry trends to ensure that solutions fit with government and industry directions for technology;
- f) Analyze functional requirements to identify information, procedures and decision flows;
- g) Evaluate existing procedures and methods, identify and document database content, structure, and application sub-systems, and develop data dictionary;
- h) Define and document interfaces of manual to automated operations within application sub-systems, to external systems and between new and existing systems;
- i) Define input/output sources, including detailed plan for technical design phase, and obtain approval of the system proposal; and
- j) Identify and document system specific standards relating to programming, documentation and testing, covering program libraries, data dictionaries, naming conventions, etc.

6.7 A.6 Programmer/Software Developer - Level 1, 2, and 3

Tasks include but are not limited to:

- a) Develop and prepare diagrammatic plans for solution of business, scientific and technical problems by means of computer systems of significant size and complexity;
- b) Analyze the problems outlined by the systems analysts/designers in terms of such factors as style and extent of information to be transferred to and from storage units, variety of items to be processed, extent of sorting, and format of final printed results;
- c) Select and incorporate available software programs;
- d) Design detailed programs, flow charts, and diagrams indicating mathematical computation and sequence of machine operations necessary to copy and process data and print the results;

- e) Translate detailed flow charts into coded machine instructions and confer with technical personnel in planning programs;
- f) Verify accuracy and completeness of programs by preparing sample data, and testing them by means of system acceptance test runs made by operating personnel;
- g) Correct program errors by revising instructions or altering the sequence of operations; and
- h) Test instructions, and assemble specifications, flow charts, diagrams, layouts, programming and operating instructions to document applications for later modification or reference.

6.8 A.11 Tester – Level 1, 2, and 3

Tasks include but are not limited to:

- a) Test planning and coordination;
- b) Supervise testing in accordance with the plan;
- c) Manage and monitor test plans for all levels of testing;
- d) Manage walkthroughs and reviews related to testing and implementation readiness;
- e) Prepare and provide status reports;
- f) Develop test scenarios and test scripts;
- g) Establish and maintain source and object code libraries for a multi-platform, multi-operating system environment;
- h) Establish software testing procedures for unit test, integration testing and regression testing with emphasis on automating the testing procedures;
- i) Establish and operate "interoperability" testing procedures to ensure that the interaction and co-existence of various software elements, which are proposed to be distributed on the common infrastructure, conform to appropriate departmental standards (e.g. for performance, compatibility, etc.) and have no unforeseen detrimental effects on the shared infrastructure; and
- j) Establish a validation and verification capability which assumes functional and performance compliance.

6.9 I.5 Information Management Architect – Level 3

Tasks include but are not limited to:

- a) Analyse existing capabilities and requirements; develop redesigned frameworks and recommend areas for improved capability and integration; and develop and document detailed statements of requirements;
- b) Evaluate existing procedures and methods, identify and document database content, structure, and application subsystems, and develop data dictionary;
- c) Define and document interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems;
- d) Prototype potential solutions, provide trade-off information and suggest recommended courses of action;
- e) Perform information modelling in support of BPR implementation;
- f) Perform cost/benefit analysis of implementing new processes and solutions;
- g) Provide advice in developing and integrating process and information models between business processes to eliminate information and process redundancies; and
- h) Provide advice in defining new requirements and opportunities for applying efficient and effective solutions; identify and provide preliminary costs of potential options.

6.10 I.9 System Administrator – Level 2

Tasks include but are not limited to:

- a) Install, monitor, upgrade and maintain operating systems;
- b) Install, monitor, upgrade and maintain hardware and software;
- c) Work with business analysts, project managers, developers, and clients/stakeholders to maintain and improve software performance;
- d) Apply problem solving skills to troubleshoot and resolve technical problems;

- e) Ensure timely and reliable system administration procedures, such as backup and/or recovery; and
- f) Analyze system performance and recommend improvements.

6.11 I.11 Technology Architect - Level 2 and 3

Tasks include but are not limited to:

- a) Develop technical architectures, frameworks and strategies, either for an organization or for a major application area, to meet the business and application requirements;
- b) Identify the policies and requirements that drive out a particular solution;
- c) Analyze and evaluate alternative technology solutions to meet business problems;
- d) Ensure the integration of all aspects of technology solutions;
- e) Monitor industry trends to ensure that solutions fit with government and industry directions for technology;
- f) Provide information, direction and support for emerging technologies;
- g) Perform impact analysis of technology changes;
- h) Provide support to applications and/or technical support teams in the proper application of existing infrastructure; and
- i) Review application and program design or technical infrastructure design to ensure adherence to standards and to recommend performance improvements.

6.12 B.3 Business Consultant – Level 1, 2, and 3

Tasks include but are not limited to:

- a) Analyze, evaluate, and develop business processes (including financial, operational, and systems)
- b) Identify organizational and/or project business opportunities for improvement and streamlining of business processes;
- c) Identify and evaluate critical success parameters, factors and performance measurements; and
- d) Assist other stakeholders in development and implementation of business improvement processes and programs.

7. Licensed Software:

It is anticipated that the following licensed software may be utilized by the Contractor in the delivery of services, such as but not limited to:

- a) Red Hat
- b) UiPath
- c) Adobe

8. Work:

Work will be assigned on an “as-and-when requested basis” through a valid Task Authorization(s). The work may include but is not limited to:

8.1. Development of Prototype Applications: The Contractor may be requested to develop prototype applications to support or deliver current CIC mandated activities using the Licensed Software listed in Section 7 above. All prototype must be scalable to meet peak demands/application without performance degradation.

8.2. Implementation of Software Applications: The Contractor may be requested to implement software applications such as, but not limited to Red Hat, UiPath, Adobe, which may include journey mapping, data integration, configuration, integration, interoperability and testing. The Task Authorization will explicitly identify the requested services where appropriate.

8.3. Integration work: The Contractor may be requested to integrate software applications developed by the Contractor to Canada/CIC Legacy systems, infrastructures and other applications. The Task Authorization will explicitly identify the requested services.

8.4. Hosting services: The Contractor may be requested to host applications it has developed either in a free environment or in a production environment. Should hosting services be used, the Contractor must meet the most stringent industry security requirements (if not specified in the TA) for the Licensed Software; access to CIC/Canada's IT infrastructures; and any data in transit or at rest. Should a Cloud hosting model be used, it must meet, at a minimum, the Government of Canada security requirements for Protected B information.

8.5. Managed Services: The Contractor may be requested to stand up and manage a contact centre on behalf of Canada, including but not limited to, telephony, tools, technology, and resources. The Task Authorization will explicitly identify the requested services and contract requirements.

8.6. Professional Resources: The Contractor may be requested on an "as and when requested basis", to provide professional resources to perform Work described in this statement of work or as further required in a TA. Any professional services will be requested through a validly issued TA.

8.7. General Consultancy Services: Professional service support such as but not limited to project management services, business services, application services, information management/information technology services, telecommunication services as outlined in the issued TA.

8.8. Maintenance and Support Services: The Contractor may be requested to provide maintenance and support services. Should these services differ from the Contract requirements, the Task Authorization will explicitly identify the requested services.

8.9. Training: The Contractor may be requested to provide training to CIC personnel on any applications or services developed as a result of this Contract.

8.10. Meeting and Reports: The Contractor may be requested to attend meetings virtually to discuss progress, timelines, cost and any other subject required by Canada. Such meetings and their frequency will be defined in the Task Authorization(s).

8.11. Any other Work required by CIC in support of Canada's response to the COVID-19 virus within the general scope of this Contract. All Work will be authorized through a validly issued Task Authorization. Each Task Authorization will outline in detail the scope of the work to be carried out by the Contractor. The location of the work and contractor facilities will be determined prior to the authorization of the Task Authorization.

8.12. Government Furnished Equipment (GFE): Unless otherwise specified in a Task Authorization, Canada will not provide the Contractor any GFE.

9. Government Support:

Where Canada has a responsibilities related to the objectives stated in this Statement of Work, against which the Contractor will rely, it will be stated in the TA as appropriate.

10. Deliverables:

Deliverables shall be in accordance with the Task Authorization. The Licensed Software, prototype applications and any Work under this Contract must be delivered with its required functionality, configuration, customization, and this includes any other changes as may be required.

11. Reporting

In addition to the timely submission of all deliverables and fulfillment of obligations specified within the Contract, it is the responsibility of the Contractor to facilitate and maintain regular communication with the Project Contact(s). Status updates, verbal or written, will be requested on a monthly basis over the course of the contract. Communication is defined as all reasonable effort to inform all parties of plans, decisions, proposed approaches, implementation, and results of work, to ensure that the project is progressing well and in accordance with expectations. Communication may include: phone calls; electronic mail; and meetings. In addition, the Contractor is to immediately notify the Project Contact(s) of any issues, problems or areas of concern in relation to any work completed under the contract, as they arise.

12. Limitations and Constraints

The Contractor must be ready to work with the Project Authority and other departmental personnel as required. Meetings between the Contractor and the Project and Technical authorities will be held at IRCC facilities located in the National Capital Region. Availability of IRCC personnel will be between the hours of 9 am and 5 pm, Monday to Friday.

The Contractor must keep all documents and proprietary Crown information confidential and return all materials, including documents and files, belonging to IRCC upon completion of the contract to IRCC.

All work performed will be subject to the inspection and acceptance by the Project Authority. All draft and final documents will be approved by the Project Authority prior to distribution. Should the work not meet the expectations of the Project Authority, the Contractor must re-submit revised (acceptable work) at no additional cost to IRCC.

13. Official Languages

The primary language of work is English, however work may be conducted in either Official Language (English and/or French). The deliverables (presentation and written report) will be in English. In-person presentations may be presented in either English or French. Any translations, if required, of materials created by the Contractor shall be the responsibility of the Project Authority.

14. Travel

Travel to, from or within the National Capital Region (NCR) will not be reimbursed for work being performed in the NCR. However, travel outside of the NRC may be required from time to time to perform some parts of the work. All such travel expenses must have the prior authorization of the Technical Authority and will be reimbursed in accordance with the Treasury Board Travel Directive.

15. Availability of Personnel

The Contractor certifies that he/she, its employees and subcontractors will be available to commence performance of the work from the Contract award date and will remain available to perform the work in relation to the fulfillment of this requirement.

16. Client Support

IRCC will provide access to departmental personnel in a timely manner, providing access to boardrooms and meeting rooms, and providing access to relevant documents.

17. Work Location

Work may be performed at either designed GC facilities in the NCR or at the Contractor's locations. However, the Contractor will be required to attend telephony or in-person meetings from time-to-time as requested by the Technical Authority on location at a designated GC facility. IRCC will provide work locations and meeting spaces within its facility for all onsite work and meetings.

APPENDIX A TO ANNEX A

TASKING ASSESSMENT PROCEDURE

[Not applicable to Method B Competitive TA Process]

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

considered "demonstrated" for the purposes of the assessment. The Contractor should provide complete details as to where, when, month and year, and how, through which activities/responsibilities, the stated qualifications / experience were obtained. In situations in which a proposed resource worked at the same time on more than one project, the duration of any overlapping time period will be counted only once toward any requirements that relate to the individual's length of experience.

3. The qualifications and experience of the proposed resources will be assessed against the requirements set out in Appendix C to Annex A to determine each proposed resource's compliance with the mandatory 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 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. A mandatory criteria will not be 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 a mandatory criteria be considered met if the customer is itself an affiliate or other entity that does not deal at arm's length with the Contractor. Crown references will be accepted.
4. During the assessment of the resources proposed, should the references for two or more resources required under that TA either be unavailable or fail to substantiate the required qualifications of the proposed resources to perform the required services, the Contractor's quotation may be found to be non-responsive.
5. Only quotations that meet all of the mandatory criteria will be considered responsive.
6. Once the quotation has been accepted by the Technical Authority, the TA Form will be signed by Canada and provided to the Contractor for signature. The TA Form must be appropriately signed by Canada prior to commencement of any work. The Contractor must not commence work until a validly issued TA Form (the Task Authorization) has been received, and any work performed in its absence is done at the Contractor's own risk.

**APPENDIX B TO ANNEX A
TASK AUTHORIZATION FORM**

TASK AUTHORIZATION (TA) FORM				
Contractor:		Contract Number:		
Commitment Number (PR#):		Financial Coding:		
Task Number:		Amendment Number:		
Issue Date:		Response required by:		
1. STATEMENT OF WORK (WORK ACTIVITIES, CERTIFICATIONS AND DELIVERABLES)				
Description of the Project / Work Required:				
BACKGROUND				
TASKS				
DELIVERABLES				
2. PERIOD OF SERVICES		FROM (DATE):	TO (DATE):	
3. Work Location:				
4. Invoice sent to:				
5. Travel Requirements:				
6. Language Requirements:				
7. Other Conditions / Constraints:				
8. Level of Security Clearance Required for the Contractor Personnel:				
9. Contractor's Response:				
Category and Name of Proposed Resource	PWGSC Security File Number	Firm Per Diem Rate	Estimated # of Days	Total cost
		Estimated Cost (A):		
		Applicable Taxes (B):		
		Total Labour Cost (C= A + B):		
		Total Travel & Living Cost (D):		
		Maximum TA Price (E = C + D):		

Solicitation Number:
B9220-210014/A

Amendment Number:

Buyer ID:
626ZM

Please note that consultants **must** not exceed the maximum number of days allocated in the TA.

10. Contractor's Signature

Name, Title and Signature of Individual Authorized to Sign on Behalf of **Contractor**

Signature: _____

Date: _____

(type or print)

11. Approval – Signing Authority

Signatures (Client)

Name, Title and Signature of **Technical Authority** to Sign on Behalf of CIC

Signature: _____

Date: _____

(type or print)

Name, Title and Signature of **CIC Procurement Representative** to Sign on Behalf of CIC

Signature: _____

Date: _____

(type or print)

Signatures (PWGSC)

Name, Title and Signature of ***Contracting Authority** to Sign on Behalf of Public Works and Government Services Canada

Signature: _____

Date: _____

(type or print)

You are requested to sell to her Majesty the Queen in Right of Canada, in accordance with the terms and conditions set out herein, referred to herein, or attached hereto, the services listed herein and in any attached sheets at the price set out there of.

APPENDIX C TO ANNEX A

RESOURCES ASSESSMENT CRITERIA AND RESPONSE TABLE

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

P.1 Change Management Consultant, Level 1, 2 and 3

Mandatory Technical Criteria	Met/ Not Met	Contractor's Response (Cross Reference to Résumé)
<p>MTC1 The Contractor must demonstrate using projects, that the proposed resource has the minimum number of years of experience specified below for the resource category identified in the Task Authorization (TA).</p> <p>a) Level 1 Resource: Three years within the past six years b) Level 2 Resource: Five years within the past ten years c) Level 3 Resource: Ten years within the past fifteen years.</p> <p>The Project must demonstrate that the resource provided services the same or similar to the tasks listed in the Statement of Work, Section 6.1 for the resource category identified in the TA.</p>		
<p>MTC2 The Contractor must demonstrate, using project descriptions, that the proposed resource has demonstrated experience in each of the technologies, software, tools and techniques identified in the TA as essential within the last ten years, as follows:</p> <p>a) Level 1 Resource: Two projects each with a minimum duration of six months. If the project involved "new technologies, then one project with a minimum duration of four months is acceptable. b) Level 2 Resource: Three projects each with a minimum duration of six months. If the project involved "new technologies, then one project with a minimum duration of four months is acceptable. c) Level 3 Resource: Five projects each with a minimum duration of six months. If the project involved "new technologies", then one project with a minimum duration of four months is acceptable.</p>		

P.2 Enterprise Architect, Level 3

Mandatory Technical Criteria	Met/ Not Met	Contractor's Response (Cross Reference to Résumé)
<p>MTC1 The Contractor must demonstrate using projects, that the proposed resource has the minimum number of years of experience specified below for the resource category identified in the Task Authorization (TA).</p> <p>a) Level 3 Resource: Ten years within the past fifteen years.</p> <p>The Project must demonstrate that the resource provided services the same or similar to the tasks listed in the Statement of Work, Section 6.2 for the resource category identified in the TA.</p>		
<p>MTC2 The Contractor must demonstrate, using project descriptions, that the proposed resource has demonstrated experience in each of the technologies, software, tools and techniques identified in the TA as essential within the last ten years, as follows:</p> <p>a) Level 3 Resource: Five projects each with a minimum duration of six months. If the project involved "new technologies", then one project with a minimum duration of four months is acceptable.</p>		

P.5 Project Executive, Level 3

Mandatory Technical Criteria	Met/ Not Met	Contractor's Response (Cross Reference to Résumé)
<p>MTC1 The Contractor must demonstrate using projects, that the proposed resource has the minimum number of years of experience specified below for the resource category identified in the Task Authorization (TA).</p> <p>a) Level 3 Resource: Ten years within the past fifteen years.</p> <p>The Project must demonstrate that the resource provided services the same or similar to the tasks listed in the Statement of Work, Section 6.3 for the resource category identified in the TA.</p>		
<p>MTC2 The Contractor must demonstrate, using project descriptions, that the proposed resource has demonstrated experience in each of the technologies, software, tools and techniques identified in the TA as essential within the last ten years, as follows:</p> <p>a) Level 3 Resource: Five projects each with a minimum duration of six months. If the project involved "new technologies", then one project with a minimum duration of four months is acceptable.</p>		

P.8 Project Leader, Level 2 and 3

Mandatory Technical Criteria	Met/ Not Met	Contractor's Response (Cross Reference to Résumé)
<p>MTC1 The Contractor must demonstrate using projects, that the proposed resource has the minimum number of years of experience specified below for the resource category identified in the Task Authorization (TA).</p> <p>a) Level 2 Resource: Five years within the past ten years b) Level 3 Resource: Ten years within the past fifteen years.</p> <p>The Project must demonstrate that the resource provided services the same or similar to the tasks listed in the Statement of Work, Section 6.4 for the resource category identified in the TA.</p>		
<p>MTC2 The Contractor must demonstrate, using project descriptions, that the proposed resource has demonstrated experience in each of the technologies, software, tools and techniques identified in the TA as essential within the last ten years, as follows:</p> <p>a) Level 2 Resource: Three projects each with a minimum duration of six months. If the project involved "new technologies, then one project with a minimum duration of four months is acceptable. b) Level 3 Resource: Five projects each with a minimum duration of six months. If the project involved "new technologies", then one project with a minimum duration of four months is acceptable.</p>		

P.9 Project Manager, Level 2 and 3

Mandatory Technical Criteria	Met/ Not Met	Contractor's Response (Cross Reference to Résumé)
<p>MTC1 The Contractor must demonstrate using projects, that the proposed resource has the minimum number of years of experience specified below for the resource category identified in the Task Authorization (TA).</p> <p>a) Level 2 Resource: Five years within the past ten years b) Level 3 Resource: Ten years within the past fifteen years.</p> <p>The Project must demonstrate that the resource provided services the same or similar to the tasks listed in the Statement of Work, Section 6.5 for the resource category identified in the TA.</p>		

<p>MTC2 The Contractor must demonstrate, using project descriptions, that the proposed resource has demonstrated experience in each of the technologies, software, tools and techniques identified in the TA as essential within the last ten years, as follows:</p> <ul style="list-style-type: none"> a) Level 2 Resource: Three projects each with a minimum duration of six months. If the project involved “new technologies, then one project with a minimum duration of four months is acceptable. b) Level 3 Resource: Five projects each with a minimum duration of six months. If the project involved “new technologies”, then one project with a minimum duration of four months is acceptable. 		

A.1 Application / Software Architect, Level 1, 2 and 3

Mandatory Technical Criteria	Met/ Not Met	Contractor’s Response (Cross Reference to Résumé)
<p>MTC1 The Contractor must demonstrate using projects, that the proposed resource has the minimum number of years of experience specified below for the resource category identified in the Task Authorization (TA).</p> <ul style="list-style-type: none"> a) Level 1 Resource: Three years within the past six years b) Level 2 Resource: Five years within the past ten years c) Level 3 Resource: Ten years within the past fifteen years. <p>The Project must demonstrate that the resource provided services the same or similar to the tasks listed in the Statement of Work, Section 6.6 for the resource category identified in the TA.</p>		
<p>MTC2 The Contractor must demonstrate, using project descriptions, that the proposed resource has demonstrated experience in each of the technologies, software, tools and techniques identified in the TA as essential within the last ten years, as follows:</p> <ul style="list-style-type: none"> a) Level 1 Resource: Two projects each with a minimum duration of six months. If the project involved “new technologies, then one project with a minimum duration of four months is acceptable. b) Level 2 Resource: Three projects each with a minimum duration of six months. If the project involved “new technologies, then one project with a minimum duration of four months is acceptable. 		

<p>c) Level 3 Resource: Five projects each with a minimum duration of six months. If the project involved "new technologies", then one project with a minimum duration of four months is acceptable.</p>		
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A.6 Programmer / Software Developer, Level 1, 2 and 3

Mandatory Technical Criteria	Met/ Not Met	Contractor's Response (Cross Reference to Résumé)
<p>MTC1 The Contractor must demonstrate using projects, that the proposed resource has the minimum number of years of experience specified below for the resource category identified in the Task Authorization (TA).</p> <p>a) Level 1 Resource: Three years within the past six years b) Level 2 Resource: Five years within the past ten years c) Level 3 Resource: Ten years within the past fifteen years.</p> <p>The Project must demonstrate that the resource provided services the same or similar to the tasks listed in the Statement of Work, Section 6.7 for the resource category identified in the TA.</p>		
<p>MTC2 The Contractor must demonstrate, using project descriptions, that the proposed resource has demonstrated experience in each of the technologies, software, tools and techniques identified in the TA as essential within the last ten years, as follows:</p> <p>a) Level 1 Resource: Two projects each with a minimum duration of six months. If the project involved "new technologies, then one project with a minimum duration of four months is acceptable.</p> <p>b) Level 2 Resource: Three projects each with a minimum duration of six months. If the project involved "new technologies, then one project with a minimum duration of four months is acceptable.</p> <p>c) Level 3 Resource: Five projects each with a minimum duration of six months. If the project involved "new technologies", then one project with a minimum duration of four months is acceptable.</p>		

A.11 Tester, Level 1, 2 and 3

Mandatory Technical Criteria	Met/ Not Met	Contractor's Response (Cross Reference to Résumé)

<p>MTC1 The Contractor must demonstrate using projects, that the proposed resource has the minimum number of years of experience specified below for the resource category identified in the Task Authorization (TA).</p> <ul style="list-style-type: none">a) Level 1 Resource: Three years within the past six yearsb) Level 2 Resource: Five years within the past ten yearsc) Level 3 Resource: Ten years within the past fifteen years. <p>The Project must demonstrate that the resource provided services the same or similar to the tasks listed in the Statement of Work, Section 6.8 for the resource category identified in the TA.</p>		
<p>MTC2 The Contractor must demonstrate, using project descriptions, that the proposed resource has demonstrated experience in each of the technologies, software, tools and techniques identified in the TA as essential within the last ten years, as follows:</p> <ul style="list-style-type: none">a) Level 1 Resource: Two projects each with a minimum duration of six months. If the project involved "new technologies, then one project with a minimum duration of four months is acceptable.b) Level 2 Resource: Three projects each with a minimum duration of six months. If the project involved "new technologies, then one project with a minimum duration of four months is acceptable.c) Level 3 Resource: Five projects each with a minimum duration of six months. If the project involved "new technologies", then one project with a minimum duration of four months is acceptable.		

I.5 Information Management Architect, Level 3

Mandatory Technical Criteria	Met/ Not Met	Contractor's Response (Cross Reference to Résumé)
<p>MTC1 The Contractor must demonstrate using projects, that the proposed resource has the minimum number of years of experience specified below for the resource category identified in the Task Authorization (TA).</p> <p>a) Level 3 Resource: Ten years within the past fifteen years.</p> <p>The Project must demonstrate that the resource provided services the same or similar to the tasks listed in the Statement of Work, Section 6.9 for the resource category identified in the TA.</p>		
<p>MTC2 The Contractor must demonstrate, using project descriptions, that the proposed resource has demonstrated experience in each of the technologies, software, tools and techniques identified in the TA as essential within the last ten years, as follows:</p> <p>a) Level 3 Resource: Five projects each with a minimum duration of six months. If the project involved "new technologies", then one project with a minimum duration of four months is acceptable.</p>		

I.9 System Administrator, Level 2

Mandatory Technical Criteria	Met/ Not Met	Contractor's Response (Cross Reference to Résumé)
<p>MTC1 The Contractor must demonstrate using projects, that the proposed resource has the minimum number of years of experience specified below for the resource category identified in the Task Authorization (TA).</p> <p>a) Level 2 Resource: Five years within the past ten years</p> <p>The Project must demonstrate that the resource provided services the same or similar to the tasks listed in the Statement of Work, Section 6.10 for the resource category identified in the TA.</p>		
<p>MTC2 The Contractor must demonstrate, using project descriptions, that the proposed resource has demonstrated experience in each of the technologies, software, tools and</p>		

<p>techniques identified in the TA as essential within the last ten years, as follows:</p> <p>a) Level 2 Resource: Three projects each with a minimum duration of six months. If the project involved “new technologies, then one project with a minimum duration of four months is acceptable.</p>		
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I.11 Technology Architect, Level 2 and 3

Mandatory Technical Criteria	Met/ Not Met	Contractor’s Response (Cross Reference to Résumé)
<p>MTC1 The Contractor must demonstrate using projects, that the proposed resource has the minimum number of years of experience specified below for the resource category identified in the Task Authorization (TA).</p> <p>a) Level 2 Resource: Five years within the past ten years b) Level 3 Resource: Ten years within the past fifteen years.</p> <p>The Project must demonstrate that the resource provided services the same or similar to the tasks listed in the Statement of Work, Section 6.11 for the resource category identified in the TA.</p>		
<p>MTC2 The Contractor must demonstrate, using project descriptions, that the proposed resource has demonstrated experience in each of the technologies, software, tools and techniques identified in the TA as essential within the last ten years, as follows:</p> <p>a) Level 2 Resource: Three projects each with a minimum duration of six months. If the project involved “new technologies, then one project with a minimum duration of four months is acceptable.</p> <p>b) Level 3 Resource: Five projects each with a minimum duration of six months. If the project involved “new technologies”, then one project with a minimum duration of four months is acceptable.</p>		

B.3 Business Consultant, Level 1, 2 and 3

Mandatory Technical Criteria	Met/ Not Met	Contractor's Response (Cross Reference to Résumé)
<p>MTC1 The Contractor must demonstrate using projects, that the proposed resource has the minimum number of years of experience specified below for the resource category identified in the Task Authorization (TA).</p> <ul style="list-style-type: none"> a) Level 1 Resource: Three years within the past six years b) Level 2 Resource: Five years within the past ten years c) Level 3 Resource: Ten years within the past fifteen years. <p>The Project must demonstrate that the resource provided services the same or similar to the tasks listed in the Statement of Work, Section 6.12 for the resource category identified in the TA.</p>		
<p>MTC2 The Contractor must demonstrate, using project descriptions, that the proposed resource has demonstrated experience in each of the technologies, software, tools and techniques identified in the TA as essential within the last ten years, as follows:</p> <ul style="list-style-type: none"> a) Level 1 Resource: Two projects each with a minimum duration of six months. If the project involved "new technologies, then one project with a minimum duration of four months is acceptable. b) Level 2 Resource: Three projects each with a minimum duration of six months. If the project involved "new technologies, then one project with a minimum duration of four months is acceptable. c) Level 3 Resource: Five projects each with a minimum duration of six months. If the project involved "new technologies", then one project with a minimum duration of four months is acceptable. 		

**APPENDIX D TO ANNEX A
CERTIFICATIONS AT THE TA STAGE**

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

1. CERTIFICATION OF EDUCATION AND EXPERIENCE

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

Print name of authorized individual & sign above

Date

2. CERTIFICATION OF AVAILABILITY OF PERSONNEL

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

Print name of authorized individual & sign above

Date

3. CERTIFICATION OF STATUS OF PERSONNEL

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

Print name of authorized individual & sign above

Date

Solicitation Number:
B9220-210014/A

Amendment Number:

Buyer ID:
626zM

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

ANNEX B
BASIS OF PAYMENT

The rates paid by Canada during the initial contract period will be the same as the rates paid during the contract option periods. All applicable taxes are extra.

Resource Category	Level of Expertise	Firm Per Diem Rate
		Initial 1-Year Contract Period and Four 6-Month Option Periods
P.1 Change Management Consultant	Level 1	
P.1 Change Management Consultant	Level 2	
P.1 Change Management Consultant	Level 3	
P.2 Enterprise Architect	Level 3	
P.5 Project Executive	Level 3	
P.8 Project Leader	Level 2	
P.8 Project Leader	Level 3	
P.9 Project Manager	Level 2	
P.9 Project Manager	Level 3	
A.1 Application / Software Architect	Level 1	
A.1 Application / Software Architect	Level 2	
A.1 Application / Software Architect	Level 3	
A.6 Programmer / Software Developer	Level 1	
A.6 Programmer / Software Developer	Level 2	
A.6 Programmer / Software Developer	Level 3	
A.11 Tester	Level 1	
A.11 Tester	Level 2	
A.11 Tester	Level 3	
I.5 Information Management Architect	Level 3	
I.9 System Administrator	Level 2	
I.11 Technology Architect	Level 2	
I.11 Technology Architect	Level 3	
B.3 Business Consultant	Level 1	
B.3 Business Consultant	Level 2	
B.3 Business Consultant	Level 3	

ANNEX C SECURITY REQUIREMENTS CHECK LIST

COMMON-PS-SRCL#6



Contract Number / Numéro du contrat 89220-210014
Security Classification / Classification de sécurité UNCLASSIFIED

SECURITY REQUIREMENTS CHECK LIST (SRCL) LISTE DE VÉRIFICATION DES EXIGENCES RELATIVES À LA SÉCURITÉ (LVERS)

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

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité
UNCLASSIFIED



COMMON-PS-SRCL#6



Government of Canada
Gouvernement du Canada

Contract Number / Numéro du contrat B9220-210014
Security Classification / Classification de sécurité UNCLASSIFIED

ART A (continued) / PARTIE A (suite)

- 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 / Non Yes / Oui
- If Yes, indicate the level of sensitivity:
Dans l'affirmative, indiquer le niveau de sensibilité:
- Will the supplier require access to extremely sensitive INFOSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate? No / Non Yes / Oui

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

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

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

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

Special comments:
Commentaires spéciaux:

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

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

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

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

PRODUCTION

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

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

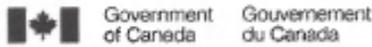
1. d) Will the supplier be required to use its IT systems to electronically process, produce or store PROTECTED and/or CLASSIFIED information or data?
Le fournisseur sera-t-il tenu d'utiliser ses propres systèmes informatiques pour traiter, produire ou stocker électroniquement des renseignements ou des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

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité
UNCLASSIFIED

Canada

COMMON-PS-SRCL#6



Contract Number / Numéro du contrat B9220-210014
Security Classification / Classification de sécurité UNCLASSIFIED

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

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

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

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

SUMMARY CHART / TABLEAU RÉCAPITULATIF

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

12. a) Is the description of the work contained **within this SRCL** PROTECTED and/or CLASSIFIED?
La description du travail visé par le présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE? No / Non Yes / Oui
- If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification".
Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire.
12. b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED?
La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE? No / Non Yes / Oui
- If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification" and indicate with attachments (e.g. SECRET with Attachments).
Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire et indiquez qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).

**ATTACHMENT 3.1
BID SUBMISSION FORM**

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

Security Clearance Level of Bidder [include both the level and the date it was granted] [Note to Bidders: <i>Please ensure that the security clearance matches the legal name of the Bidder. If it does not, the security clearance is not valid for the Bidder.</i>	
On behalf of the Bidder, by signing below, I confirm that I have read the entire bid solicitation including the documents incorporated by reference into the bid solicitation and I certify that: <ol style="list-style-type: none">1. The Bidder considers itself and its proposed resources able to meet all the mandatory requirements described in the bid solicitation;2. This bid is valid for the period requested in the bid solicitation;3. All the information provided in the bid is complete, true and accurate; and4. If the Bidder is awarded a contract, it will accept all the terms and conditions set out in the resulting contract clauses included in the bid solicitation.	
Signature of Authorized Representative of Bidder	

**ATTACHMENT 4.1
MANDATORY TECHNICAL CRITERIA**

Note to Bidders: A Word version of this document is available by sending a request by email to carole.holden@tpsgc-pwgsc.gc.ca

MTC#	Mandatory Technical Criteria	Bidder's Response (Reference to Substantiating Materials Included in Bid)
MTC1	<p>Corporate Experience with Governmental Organizations</p> <p>1.0 Using two separate projects, the Bidder must demonstrate that it has provided informatics professional services to governmental organizations in a *large and complex operation, in the last ten years as of the initial publication date of this solicitation.</p> <p>The identified projects must at a minimum meet the following requirements:</p> <ul style="list-style-type: none"> i. Each project must have been delivered to a different government organization; ii. Each project must demonstrate digital transformation of governmental processes from design to implementation; iii. Each project must have an aggregate project value of at least \$25M (excluding taxes); and iv. Each project must have been completed, or has been ongoing for at least 6 months (or, if not, each project must demonstrate digital transformation experience on government processes from design to implementation) in the last ten years as of the initial publication date of this solicitation. v. Each project must demonstrate that at least 10% of the total aggregate value of the project has been invoiced. <p>* A large and complex operation is defined as a country's federal organization responsible for admissibility and case processing for that country, and at least one of the following:</p> <ul style="list-style-type: none"> i. operations regarding matters of immigration; or ii. customs; or iii. international trade <p>2.0 The Bidder must provide with its bid the following information for each project identified:</p>	

MTC#	Mandatory Technical Criteria	Bidder's Response (Reference to Substantiating Materials Included in Bid)
	<ul style="list-style-type: none"> i. Name of the government organization and details demonstrating how it meets the definition of a *large and complex operation; ii. Project Title; iii. Aggregate value of the Project (overall cost of the project to the client); iv. Detailed description of the project; v. Description of activities performed by the Bidder (or resource as applicable); vi. Start and end date of project (dates must include month and year). vii. Describe how the project meets the definition of a *large and complex operation; and, viii. An explanation on how the project meets articles 1.0 iv. and v. above, including a clear statement that at least 10% of the total aggregate value of the project has been invoiced. Bidders must provide invoices during the evaluation of the bid, if requested by Canada. <p>3.0 The Bidder must provide the following customer reference contact information for each project identified. If any of the customer contact information is not submitted, the Contracting Authority will inform the Bidder of a time frame within which to provide the information. Failure to provide the requested information within the time frame provided will render the bid non-responsive.</p> <ul style="list-style-type: none"> i. Name; ii. Title; iii. Email address iv. Telephone Number <p>It is the Bidder's responsibility to ensure that sufficient details demonstrating compliance with all of the requirements of this criterion are submitted with the bid.</p>	
MTC2	<p>Experience providing digital solutions</p> <p>1.0 The Bidder must demonstrate experience providing digital solutions including the assessment, design, integration, and deployment into production, in the last five years as of the initial publication date of this solicitation. In demonstrating this experience, the Bidder must identify two separate projects for each of the following five areas. However the same project may be used for more than one area):</p>	

MTC#	Mandatory Technical Criteria	Bidder's Response (Reference to Substantiating Materials Included in Bid)
	<p>a) Digital Solutions - Provide and implement digital tools to reduce/replace paper based and/or physical presence requirements of both clients and employees with digital alternatives (i.e. digital case intake and management solutions);</p> <p>b) Robotic Process Automation (RPA) Solutions– RPA solutions to rapidly automate simple, high volume processes, address employee capacity issues as well as allowing employees to focus on more complex and sensitive cases.</p> <p>c) Analytics Solutions - Data analytics solutions to provide insights into operational volumes and processing capacities to allow IRCC to effectively respond to rapid changes in the Canadian and Global situation.</p> <p>d) Cybersecurity Strategy and Services – Provide tools and strategic advice to address IRCC's increased cybersecurity threat as a result of COVID-19.</p> <p>e) Legacy Integration Solutions - Provide technology solutions to integrate digital tools and solutions with our legacy case management system environment (GCMS Integration);</p> <p>1.1 In addition for each project demonstrating the experience in the five areas above, the:</p> <p>a) Bidder must have performed at a minimum the following activities:</p> <ul style="list-style-type: none"> (i) Diagnosed current situation; (ii) Assessed business requirements; (iii) Executed an agile approach; (iv) Developed solution roadmap; and (v) Executed solution roadmap; <p>b) Project must have been completed or ongoing in the last five years as of the initial publication date of this solicitation; and</p> <p>c) Project must have an aggregate project value of at least \$5M (excluding taxes).</p> <p>2.0 The Bidder must provide with its bid the following information for each project identified:</p> <ul style="list-style-type: none"> a) Name of client organization; b) Project Title; c) Aggregate value of Project (overall cost of the project to the client); 	

MTC#	Mandatory Technical Criteria	Bidder's Response (Reference to Substantiating Materials Included in Bid)
	<p>d) Description of the project that includes at a minimum, the:</p> <ul style="list-style-type: none"> (i) activities performed by the Bidder (or resource as applicable); (ii) details on how the project's digital solution included the assessment, the design, the integration, and the deployment to production; and (iii) Details demonstrating the bidder performed the following activities: <ul style="list-style-type: none"> 1. Diagnose current situation; 2. Assess business requirements; 3. Executed an agile approach; 4. Develop Solution Roadmap; and 5. Execute solution roadmap; <p>e) Start and end date of project (dates must include month and year).</p> <p>3.0 The Bidder must provide the following customer reference contact information for each project identified. If any of the customer contact information is not submitted, the Contracting Authority will inform the Bidder of a time frame within which to provide the information. Failure to provide the requested information within the time frame provided will render the bid non-responsive.</p> <ul style="list-style-type: none"> i. Name; ii. Title; iii. Email address iv. Telephone Number <p>It is the Bidder's responsibility to ensure that sufficient details demonstrating compliance with all of the requirements of this criterion are submitted with the bid.</p>	
MTC3	<p>Innovation Lab in Canada</p> <p>The Bidder must own and operate at least one innovation lab in Canada that is accessible for use on this project. The innovation lab must:</p> <ul style="list-style-type: none"> a) Be part of a global network of innovation hubs with functional and industry focus; b) Use a repeatable set of integrated talents, methods and assets under one roof to co-create solutions with clients; and, 	

MTC#	Mandatory Technical Criteria	Bidder's Response (Reference to Substantiating Materials Included in Bid)
	<p>c) Have pre-arranged access to multiple technology and ecosystem partners and has made use of this access to develop solutions to business or government needs.</p> <p>*Innovation Lab is defined as a location where an organization can perform cutting edge research and incubate new concepts through applied R&D projects that have a significant near-term impact on clients business.</p> <p>The Bidder must provide the following information with its bid for the innovation lab identified:</p> <ul style="list-style-type: none"> i. Name of client organizations that currently use the innovation lab; ii. Name of the innovation lab or project title; iii. Description of the innovation lab including details to demonstrate how a), b), and c) above are met; iv. Date the innovation lab was implemented (month and year). <p>It is the Bidder's responsibility to ensure that sufficient details demonstrating compliance with all of the requirements of this criterion are submitted with the bid.</p>	
MTC4	<p>Global Alliances</p> <p>The Bidder must demonstrate that it has Global Alliances* with all of the following software companies: Amazon Web Services, Oracle, SAP, and Microsoft by the closing date of this bid solicitation.</p> <p>The Bidder must provide the following information for each alliance:</p> <ul style="list-style-type: none"> i. Name of the software company; ii. Name and description of the alliance; iii. Date the alliance was formed (month and year). <p>*Global Alliance is defined as a formal agreement between the subject organizations which provides access to and brings together dedicated professionals from each company with expertise in the specific software.</p>	
MTC5	<p>Experience Providing Global Subject Matter Expertise</p>	

MTC#	Mandatory Technical Criteria	Bidder's Response (Reference to Substantiating Materials Included in Bid)
	<p>1.0 The Bidder must demonstrate project experience where skilled resources were provided. In demonstrating this experience, the Bidder must identify one project for each of the following two areas. The same project can be used to meet both sets of requirements.</p> <ul style="list-style-type: none"> a) A project where the bidder provided a resource that has: <ul style="list-style-type: none"> i. a minimum of ten years within the past 15 years as of the initial publication date of this solicitation of transformation project experience at a government immigration organization*; and ii. performed at least two speaking engagements at national or international conferences on the topic of immigration transformation. b) A project where the bidder provided a resource that has: <ul style="list-style-type: none"> i. A minimum of ten years of experience within the past 15 years as of the initial publication date of this solicitation working on enterprise digital transformations; and ii. Performed at least two speaking engagements at national or international conferences on the topic of digital transformation. <p>2.0 The Bidder must provide the following customer reference contact information for each project identified. If any of the customer contact information is not submitted, the Contracting Authority will inform the Bidder of a time frame within which to provide the information. Failure to provide the requested information within the time frame provided will render the bid non-responsive.</p> <ul style="list-style-type: none"> i. Name; ii. Title; iii. Email address iv. Telephone Number <p>* A government immigration organization is defined as a country's federal organization responsible for matters of:</p> <ul style="list-style-type: none"> i. immigration policy, or ii. admissibility and case processing for that country. 	

ATTACHMENT 4.2

Point Rated Technical Criteria

Note to Bidders: A Word version of this document is available by sending a request by email to carole.holden@tpsgc-pwgsc.gc.ca

Point Rated Technical Criteria

RTC#	Rated Technical Criteria	Max Points	Points Allocation	Bidder's Response (Reference to Substantiating Materials included in Bid)
RTC1	<p>The Bidder should clearly describe the approach it will take to provide the services described in article 5. of the Statement of Work (SOW).</p> <p>The approach should include the following:</p> <ul style="list-style-type: none"> A. Description of the project plan that includes approach to activities, meetings, timelines, and key deliverables that will support the outcome of the work; B. Description of the governance, management and coordination approach to support the outcomes; C. Description of the digital enablement methodologies and tools proposed to support the described approach; D. Description of the innovation framework to be leveraged in the project; E. Description of the global practice experience in the areas of digital transformation, cyber security, analytics and insights, robotic process automation and case management; F. Description of the approach to the development of a roadmap indicating envisioned outcomes, timelines and tools; and G. Description of the stakeholder engagement approach. 	70	<p>Maximum: 70 Points Minimum: 40 Points</p> <p>These elements will be evaluated in accordance with Table 1 below. Maximum score per element is 10 points</p> <ul style="list-style-type: none"> A. Maximum of 10 points B. Maximum of 10 points C. Maximum of 10 points D. Maximum of 10 points E. Maximum of 10 points F. Maximum of 10 points G. Maximum of 10 points 	

RTC#	Rated Technical Criteria	Max Points	Points Allocation	Bidder's Response (Reference to Substantiating Materials included in Bid)
RTC2	In addition to the two projects identified in the Bidder's response to MTC1, points will be allocated for additional project(s) identified that meet the requirements described in MTC1.	40	Maximum Score: 40 Points Minimum Score: 0 Points 10 points for each project identified that meets the criterion.	
RTC3	In addition to the two projects identified in the Bidder's response to MTC2, points will be allocated for additional project(s) identified that meet the requirements described in MTC2.	40	Maximum Score: 40 Points Minimum Score: 0 Points 10 points for each project identified that meets the criterion.	
RTC4	<p>The Bidder should demonstrate the degree to which it has a strong ability to execute and innovate work successfully; how it has demonstrated vision aligned with how work in the IT field is evolving; and how it has adopted strong standards that support excellence.</p> <p>The bidder should demonstrate this by:</p> <ul style="list-style-type: none"> a) providing with its bid, one or more professional, non-affiliated third party independent assessment(s), evaluation(s) or certification(s)/accreditations(s) that have been completed or maintained (and are still in place) in the last five years as of the initial publication date of this solicitation, such as: ISO 9000, IDC (International Data Corporation), Forrester, and Gartner Magic Quadrant; b) Providing with its bid details for one project where the Bidder demonstrates a strong ability to execute and innovate work successfully; how its vision is aligned with how work in the IT field is evolving; and how it has adopted strong standards that support excellence. 	20	<p>Maximum Score: 20 Points Minimum Score: 0 Points</p> <ul style="list-style-type: none"> a) The elements of a) will be evaluated in accordance with: 5 points for each professional, non-affiliated third party independent assessment, evaluation or certification/ accreditation identified that meets this criterion for a maximum score of 10 points b) The elements of b) will be evaluated in accordance with Table 2 below for a maximum score of 10 points 	

RTC#	Rated Technical Criteria	Max Points	Points Allocation	Bidder's Response (Reference to Substantiating Materials included in Bid)
	<p>(i) The Bidder must provide the following customer reference contact information for the project identified in b) above. If any of the customer contact information is not submitted, the Contracting Authority will inform the Bidder of a time frame within which to provide the information. Failure to provide the requested information within the time frame provided will render the bid non-responsive.</p> <p>i. Name; i. Title; iii. Email address iv. Telephone Number</p> <p>It is the Bidder's responsibility to ensure that sufficient details demonstrating compliance with all of the requirements of this criterion are submitted with the bid.</p>			

Maximum Points Available	170
Minimum Points Required	110
Bidder's Score	

Table 1 – Scoring for RTC1

The following scale will be used to evaluate the Bidders' responses to RTC1. These terms are used in the Scoring Method on RTC 1 only. Bidders should note that the assessment of RTC1 will vary based on the level of relevant detail provided to substantiate a Bidder's response and on the impact of not explicitly addressing a component of the requirement as set out.

10pts A **clear, complete, and comprehensive** response:

- a. meets the requirement or condition set out in the criterion; and
- b. demonstrates a clear understanding of the requirement by providing information that is relevant to the requirement within the context of this Project; and
- c. is complete and clearly addresses each point of the criterion and each element thereof demonstrating knowledge or expertise related to the criterion; and
- d. is comprehensive and detailed, substantiating all points of the requirement; and
- e. includes relevant documentation or reference material where requested.

6pts A **clear and complete** response:

- a. meets the requirement or condition set out in the criterion; and
- b. demonstrates a clear understanding of the requirement by providing information that is relevant to the requirement within the context of this Project; and
- c. is complete and clearly addresses each point of the criterion and each element thereof demonstrating knowledge or expertise related to the criterion; and
- d. is complete but lacks some substantiating detail as to how the response meets the requirement (e.g. does not address some detailed elements thereof, lacks details substantiating one or more points as set out in the criterion scoring method); and
- e. includes relevant documentation or reference material where requested.

3pts A **complete or satisfactory** response is as follows:

A **complete** response:

- a. meets the requirement or condition set out in the criterion; and
- b. demonstrates an understanding of the requirement by providing a response but not clearly relevant to the requirement within the context of this Project (e.g. a generic response); and
- c. addresses each point of the criterion but not clearly and lacks some substantiating detail as to how the response meets the requirement (e.g. does not address some detailed elements thereof, lacks detail substantiating one or more points as set out in the criterion scoring method); and
- d. includes relevant documentation or reference material where requested.

A **satisfactory** response:

- a. meets the requirement or condition set out in the criterion; and
- b. has demonstrated an understanding of the requirement by providing a response but not clearly relevant to the requirement within the context of this Project (e.g. a generic response); and
- c. has addressed most points of the criterion (missing at most 1 point) and response for other criteria are complete as demonstrated by clearly addressing each point of the criterion and each element thereof demonstrating knowledge or expertise of the criteria; and
- d. has provided relevant documentation or reference material where requested.

0pts An incomplete or unsatisfactory response is as follows:

An **incomplete** response:

- a. does not provide a relevant response demonstrating an understanding of the requirement; and
- b. does not address all points of the criterion where the number of missed points is **low or none** and set out in the criterion scoring method.

An **unsatisfactory** response:

- a. does not provide a relevant response demonstrating an understanding of the requirement; and
- b. does not address all points of the criterion where the number of missed points is **high** and set out in the criterion scoring method.

Where documentation or reference material is required to substantiate the response:

- a. providing limited or **incomplete** documentation or reference material will automatically render the response **incomplete**
- b. not providing the required documentation or reference material will automatically render the response **unsatisfactory**

Addressing a point means that the response directly explains how the Bidder satisfies the requirements described in a point and provides substantiating materials in the response.

Clear or clearly means that the response is easy to understand and does not leave the evaluators with any unanswered questions. Minimal or no interpretation is required.

Complete means that the response addresses each point of the criterion are addressed and, where relevant, includes documentation / reference material to substantiate the response provided.

Comprehensive means that the response deals with all parts and aspects of each point of the criterion and elements thereof.

Relevant means that the information provided in the response is pertinent and responds directly to the requirement of the criterion.

To substantiate means to provide the required documentation or reference material to support the information included in the response. Acceptable forms of documentation / reference material may include but are not limited to:

- i. a plan or technology blueprint (e.g. level of effort in a plan, number and configuration of devices in a blueprint)
- ii. screen captures, clearly legible, with text explanations
- iii. technical or end-user documentation; if this documentation is stored on a website, the Bidder must extract the supporting information and insert it within their response, or attach the documentation as an annex; the Bidder should clearly indicate what portions of the text (pages and paragraphs) provide the required explanation or demonstration

Bids will be evaluated against the point-rated technical criterion RTC1 using the evaluation factors and weighting indicators specified for RTC1.

	Table 2 – Scoring for RTC4 b)
	The following scale will be used to evaluate the Bidders’ responses to RTC4 b). These terms are used in the Scoring Method on RTC 4 b) only. Bidders should note that the assessment of RTC4 b) will vary based on the level of relevant detail provided to substantiate a Bidder’s response and on the impact of not explicitly addressing a component of the requirement as set out.
0 pts	Not Addressed - Respondent’s information submitted was not relevant to the criterion or the Respondent failed to submit a Response.
0 pts	Minimally Addressed - The Response demonstrates little understanding of the criterion requirements and the proposed response does not address important factors or The proposed response has significant weaknesses and is not likely to support the RFP requirements and does not demonstrate value that could benefit Canada, or The Response poses a perceived large residual risk to Canada.
0 pts	Partially Addressed – The Response demonstrates some understanding of the criterion requirements and the proposed response addresses some important factors, or The proposed response has weaknesses and is not likely to support the RFP requirements and demonstrates some value that could benefit Canada, or, The Response poses a perceived medium risk to Canada.
4 pts	Satisfactorily Addressed – The Response demonstrates adequate understanding of the criterion requirements and the proposed response addresses many important factors, or, The proposed response has minor to moderate weaknesses and is likely to support the RFP requirements and demonstrates adequate value that could benefit Canada, or, The Response poses a perceived medium-low risk to Canada.
8 pts	Very Well Addressed – The Response demonstrates very good understanding of the criterion requirements and the proposed response addresses all important factors, or, The proposed response has no significant weaknesses and is very likely to support the RFP requirements and demonstrates very good value that could benefit Canada, or,

	The Response poses a perceived low risk to Canada.
10 pts	Excellent Addressed – The Response demonstrates an excellent understanding of the criterion requirements and the proposed response addresses all important factors, or, The proposed response has no apparent weaknesses and is highly likely to strongly support the RFP requirements and demonstrates excellent value that could benefit Canada, or, The Response poses very little or no apparent risk to Canada.

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).