



**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

This document contains a security requirement.
Ce document contient une exigence de sécurité.

Title - Sujet TBIPS - Tier 2	
Solicitation No. - N° de l'invitation 21120-194545/A	Date 2020-10-01
Client Reference No. - N° de référence du client 3154545	
GETS Reference No. - N° de référence de SEAG PW-\$\$ZM-626-38511	
File No. - N° de dossier 626zm.21120-194545	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2020-10-22	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: CORRECTIONAL SERVICE OF CANADA 340 LAURIER AVE W. OTTAWA Ontario K1A0P9 Canada	

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

WORKSTREAM 1 – APPLICATION SERVICES
WORKSTREAM 2 – IM/IT SERVICES
WORKSTREAM 3 – BUSINESS MANAGEMENT SERVICES
WORKSTREAM 4 – PROJECT MANAGEMENT SERVICES
WORKSTREAM 5 – CYBER PROTECTION SERVICES

FOR

CORRECTIONAL SERVICE OF CANADA**

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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 – Workstream 1
- Appendix C to Annex A – Resources Assessment Criteria and Response Table – Workstream 2
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- Appendix D to Annex A – Certifications at the TA Stage

Annex B Basis of Payment – Workstream 1

Annex B Basis of Payment – Workstream 2

Annex B Basis of Payment – Workstream 3

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Annex B Basis of Payment – Workstream 5

Annex C Security Requirements Check List

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

-Attachment 3.1: Bid Submission Form

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

-Attachment 4.1: Technical Criteria – Workstream 1

Part A Mandatory Corporate Experience – The Bidder

Part B Point Rated Corporate Experience – The Bidder

-Attachment 4.1: Technical Criteria – Workstream 2

Part A Mandatory Corporate Experience – The Bidder

Part B Point Rated Corporate Experience – The Bidder

-Attachment 4.1: Technical Criteria – Workstream 3

Part A Mandatory Corporate Experience – The Bidder

Part B Point Rated Corporate Experience – The Bidder

-Attachment 4.1: Technical Criteria – Workstream 4

Part A Mandatory Corporate Experience – The Bidder

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Part B Point Rated Corporate Experience – The Bidder

-Attachment 4.1: Technical Criteria – Workstream 5

Part A Mandatory Corporate Experience – The Bidder

Part B Point Rated Corporate Experience – The Bidder

List of Attachments to Part 5 (Certifications):

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

Forms:

-Form M1-A: Bidder's Experience

-Form M1-B: Bidder's Experience

-Form M2: Client Manager

-Form M3: Risk Mitigation Strategy

-Form M4: Contract Management Strategy

-Form M5: Technical Environment

-Form R1: Bidder's Experience

-Form R2: Client Manager

-Form R3: Risk Mitigation Strategy

-Form R4: Contract Management Strategy

-Form R5: Bidder's Experience with New Technologies

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

**WORKSTREAM 1 – APPLICATION SERVICES
WORKSTREAM 2 – IM/IT SERVICES
WORKSTREAM 3 – BUSINESS MANAGEMENT SERVICES
WORKSTREAM 4 – PROJECT MANAGEMENT SERVICES
WORKSTREAM 5 – CYBER PROTECTION SERVICES**

FOR

CORRECTIONAL SERVICE OF CANADA

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 Correctional Service of Canada (CSC) (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 in Workstream 1, up to two contracts in Workstream 2, up to two contracts in Workstream 3, up to two contracts in Workstream 4, and

one contract in Workstream 5, with each contract purchasing Work from only one Workstream. Each contract will be for three years plus two one-year irrevocable options allowing Canada to extend the term of the contract. Bidders do not have to submit a bid for each Workstream. In the event that a Bidder wants to bid on more than one Workstream, a separate technical bid should be submitted for each Workstream.

- (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 Canada-Chile Free Trade Agreement (CCFTA), the Canada-Peru Free Trade Agreement (CPFTA), the Canada-Colombia Free Trade Agreement (CCoFTA), 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), the Canadian Free Trade Agreement (CFTA), the Canada-Ukraine Free Trade Agreement (CUFTA) and the Canada-Korea Free Trade Agreement (CKFTA).
- (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 of a given Workstream 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 competing as a joint venture must submit a bid as that joint venture SA Holder, forming no other joint venture to bid. Any joint venture must be already qualified under the SA #EN578-170432 as that joint venture at the time of bid closing in order to submit a bid.
- (j) For each Workstream, the Resource Categories described below are required on an as and when requested basis in accordance with the TBIPS SA Annex "A":

WORKSTREAM 1 – APPLICATION SERVICES

RESOURCE CATEGORY	LEVEL OF EXPERTISE	ESTIMATED NUMBER OF RESOURCES REQUIRED
A.1 Application/Software Architect	Level 2	2

A.1 Application/Software Architect	Level 3	2
A.1 Application/Software Architect – Specialist	Level 3	1
A.2 ERP Functional Analyst	Level 3	3
A.4 ERP System Analyst	Level 3	3
A.6 Programmer/Software Developer	Level 2	2
A.6 Programmer/Software Developer	Level 3	1
A.7 Programmer/Analyst	Level 2	4
A.7 Programmer/Analyst	Level 3	1
A.8 System Analyst	Level 3	3
A.9 System Auditor	Level 3	2
A.11 Tester	Level 3	1
A.16 Web Multi-media Content Consultant	Level 3	1

WORKSTREAM 2 – INFORMATION MANAGEMENT AND INFORMATION TECHNOLOGY SERVICES

RESOURCE CATEGORY	LEVEL OF EXPERTISE	ESTIMATED NUMBER OF RESOURCES REQUIRED
I.2 Database Administrator	Level 3	1
I.3 Database Analyst/Information Management Administrator	Level 2	6
I.3 Database Analyst/Information Management Administrator	Level 3	1
I.5 Information Management Architect	Level 3	2
I.9 System Administrator	Level 3	1
I.10 Technical Architect	Level 2	3

I.10 Technical Architect	Level 3	1
I.11 Technology Architect	Level 2	2
I.11 Technology Architect	Level 3	4

WORKSTREAM 3 – BUSINESS MANAGEMENT SERVICES

RESOURCE CATEGORY	LEVEL OF EXPERTISE	ESTIMATED NUMBER OF RESOURCES REQUIRED
B.1 Business Analyst	Level 3	3
B.4 Business Continuity/Disaster Recovery Specialist	Level 3	1
B.6 Business System Analyst	Level 2	2
B.6 Business System Analyst	Level 3	5
B.9 Courseware Developer	Level 2	1
B.10 Help Desk Specialist	Level 1	3
B.11 Instructor, Information Technology	Level 2	1
B.13 Operations Support Specialist	Level 2	2
B.13 Operations Support Specialist	Level 3	1
B.14 Technical Writer	Level 1	1

WORKSTREAM 4 – PROJECT MANAGEMENT SERVICES

RESOURCE CATEGORY	LEVEL OF EXPERTISE	ESTIMATED NUMBER OF RESOURCES REQUIRED
P.1 Change Management Consultant	Level 3	3
P.1 Change Management Consultant - Specialist	Level 3	1
P.2 Enterprise Architect	Level 2	3
P.2 Enterprise Architect	Level 3	1

P.2 Enterprise Architect - Specialist	Level 3	1
P.4 Organizational Development Consultant	Level 3	1
P.5 Project Executive	Level 3	1
P.5 Project Executive - Specialist	Level 3	1
P.8 Project Leader	Level 3	1
P.9 Project Manager	Level 2	3
P.9 Project Manager	Level 3	4
P.9 Project Manager - Specialist	Level 3	2
P.11 Quality Assurance Specialist/Analyst	Level 3	2

WORKSTREAM 5 – CYBER PROTECTION SERVICES

RESOURCE CATEGORY	LEVEL OF EXPERTISE	ESTIMATED NUMBER OF RESOURCES REQUIRED
C.3 Information Technology Security Threat and Risk Assessment (TRA) and Certification and Accreditation (C&A) Analyst	Level 3	1
C.6 IT Security Engineer	Level 3	1
C.8 Network Security Analyst	Level 3	1

1.3 Debriefings

Bidders may request a debriefing on the results of the bid solicitation process. Bidders should make the request to the Contracting Authority within 15 working days from receipt of the results of the bid solicitation process. The debriefing 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 (2020-05-28) 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.dgareceptiondessoumissions-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 10 calendar days before the bid closing date. Enquiries received after that time may not be answered.

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

2.4 Former Public Servant

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

(b) **Definitions**

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

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

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

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

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

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

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

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

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

(d) **Work Force Adjustment Directive**

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*

2.6 Volumetric Data

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

2.7 Bid Challenge and Recourse Mechanisms

- (a) Several mechanisms are available to potential suppliers to challenge aspects of the procurement process up to and including contract award.

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- (b) Canada encourages suppliers to first bring their concerns to the attention of the Contracting Authority. Canada's Buy and Sell website, under the heading "Bid Challenge and Recourse Mechanisms" contains information on potential complaint bodies such as:
- Office of the Procurement Ombudsman (OPO)
 - Canadian International Trade Tribunal (CITT)
- (c) Suppliers should note that there are strict deadlines for filing complaints, and the time periods vary depending on the complaint body in question. Suppliers should therefore act quickly when they want to challenge any aspect of the procurement process.

PART 3 - BID PREPARATION INSTRUCTIONS

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. A single bid may contain bids to be awarded a contract in one or more Workstreams. However, a bid may not contain a bid from the Bidder, including related entities to be awarded more than one contract in any given Workstream.
- (ii) For the purposes of this Article, regardless of the jurisdiction where any of the entities concerned is incorporated or otherwise formed as a matter of law (whether that entity is a natural person, corporation, partnership, etc), an entity will be considered to be "**related**" to a Bidder if:

- (A) they are the same legal entity (i.e., the same natural person, corporation, partnership, limited liability partnership, etc.);
 - (B) they are "related persons" or "affiliated persons" according to the Canada Income Tax Act;
 - (C) the entities have now or in the two years before bid closing had a fiduciary relationship with one another (either as a result of an agency arrangement or any other form of fiduciary relationship); or
 - (D) the entities otherwise do not deal with one another at arm's length, or each of them does not deal at arm's length with the same third party.
- (iii) Individual members of a joint venture cannot participate in another bid, either by submitting a bid alone or by participating in another joint venture.

(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 Part A, 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 Part A, 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 4.1 Part B, 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 4.1 Part B, 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 reference must each confirm, if requested by PWGSC, the facts identified in the Bidder's bid, as required by MTC1-A, MTC1-B, and MTC5 in Attachment 4.1 Part A, and RTC1, RTC3, RTC4, and RTC5 in Attachment 4.1 Part B

- (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-A, MTC1-B MTC5, RTC1, RTC3, RTC4, and RTC5 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) **Variation in Resource Rates By Time Period:** For any given resource category, where the financial tables provided by Canada allow different firm rates to be charged for a resource category during different time periods:
- (i) the rate bid must not increase by more than 5% from one time period to the next, and
 - (ii) the rate bid for the same resource category during any subsequent time period must not be lower than the rate bid for the time period that includes the first month of the Initial Contract Period.
- (c) **Variation in Resource Rates By Level:** Where the financial tables provided by Canada allow different firm rates to be charged for different levels of experience within the same resource category and time period,
- (i) the rate bid for level three must be the same or higher than that bid for level two, and
- (d) **All Costs to be Included:** The financial bid must include all costs for the requirement described in the bid solicitation for the entire Contract Period, including any option periods. The identification of all necessary equipment, software, peripherals, cabling and components required to meet the requirements of the bid solicitation and the associated costs of these items is the sole responsibility of the Bidder.
- (e) **Blank Prices:** Bidders are requested to insert "\$0.00" for any item for which it does not intend to charge or for items that are already included in other prices set out in the tables. If the Bidder leaves any price blank, Canada will treat the price as "\$0.00" for evaluation purposes and may request that the Bidder confirm that the price is, in fact, \$0.00. No bidder will be permitted to add or change a price as part of this confirmation. Any bidder who does not confirm that the price for a blank item is \$0.00 will be declared non-responsive.

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

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

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

- (c) Canada may, in its discretion, request and accept at any time from a Bidder and consider as part of the Bid, any information to correct errors or deficiencies in the Bid that are clerical or administrative, such as, without limitation, failure to sign the Bid or any part or to checkmark a box in a form, or other failure of format or form or failure to acknowledge; failure to provide a procurement business number or contact information such as names, addresses and telephone numbers; inadvertent errors in numbers or calculations that do not change the amount the Bidder has specified as the price or of any component thereof that is subject to evaluation. This shall not limit Canada's right to request or accept any information after the bid solicitation closing in circumstances where the bid solicitation expressly provides for this right. The Bidder will have the time period specified in writing by Canada to provide the necessary documentation. Failure to meet this deadline will result in the Bid being declared non-responsive.
- (d) The PBCP does not limit Canada's rights under Standard Acquisition Clauses and Conditions (SACC) 2003 (2020-05-28) Standard Instructions – Goods or Services – Competitive Requirements nor Canada's right to request or accept any information during the solicitation period or after bid solicitation closing in circumstances where the bid solicitation expressly provides for this right, or in the circumstances described in subsection (c).
- (e) Canada will send any Notice or CAR by any method Canada chooses, in its absolute discretion. The Bidder must submit its response by the method stipulated in the Notice or CAR. Responses are deemed to be received by Canada at the date and time they are delivered to Canada by the method and at the address specified in the Notice or CAR. An email response permitted by the Notice or CAR is deemed received by Canada on the date and time it is received in Canada's email inbox at Canada's email address specified in the Notice or CAR. A Notice or CAR sent by Canada to the Bidder at any address provided by the Bidder in or pursuant to the Bid is deemed received by the Bidder on the date it is sent by Canada. Canada is not responsible for late receipt by Canada of a response, however caused.

4.1.1.2 Phase I: Financial Bid

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

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

4.1.1.3 Phase II: Technical Bid

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

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

4.1.1.4 Phase III: Final Evaluation of the Bid

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

4.2 Technical Evaluation

A separate technical evaluation will be conducted for each Workstream

(a) Mandatory Technical Criteria:

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

- (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 4.1 Part B.

(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). A separate financial evaluation will be conducted for each Workstream.
- (b) There are two possible financial evaluation methods for this requirement. The first method will be used if three or more bids are determined responsive (see (c) Financial Evaluation - Method A below). The second method will be used if fewer than three bids are determined responsive (see (d) Financial Evaluation - Method B below).
- (c) **Financial Evaluation - Method A:** The following financial evaluation method will be used if three or more bids are determined responsive:
 - (i) **STEP 1 - ESTABLISHING THE LOWER AND UPPER MEDIAN BAND LIMITS FOR EACH PERIOD AND EACH RESOURCE CATEGORY:** The Contracting Authority will establish, for each period and each Resource Category of each Workstream, the median band limits based on the firm per diem rates provided by the technically responsive bids. For each such Resource Category the median will be calculated using the median function in Microsoft Excel and will represent a range that encompasses any rate to a value of minus (-) 10% of the median, and an upper median rate to a value of plus (+) 30% of the median. When an even number of technically responsive bids have been determined, an average of the middle two rates will be used to calculate the median band limits and for an odd number of technically responsive bids, the middle rate will be used.
 - (ii) **STEP 2 - POINTS ALLOCATION:** For each period and each Resource Category of each Workstream points will be allocated as follows:
 - (A) A Bidder's proposed firm per diem rate that is either lower than the established lower median band limit or higher than the established upper median band limit for that period and Resource Category will be allocated 0 points.
 - (B) A Bidder's proposed firm per diem rate falling within the upper and lower median band limits, for that period and Resource Category, will be allocated points using the following calculation, which will be rounded to two decimal places:

$$\frac{\text{Lowest proposed firm per diem rate within the median band limits}}{\text{Bidder's proposed firm per diem rate within the median band limits}} \times \text{Maximum Points Assigned at Table 1 below}$$
 - (C) A Bidder's proposed firm per diem rate falling within the established median band limits which is the lowest proposed firm per diem rate will be allocated the applicable maximum points assigned at Table 1 below.

TABLE 1 - MAXIMUM POINTS ASSIGNED						
WORKSTREAM 1 – APPLICATION SERVICES						
RESOURCE CATEGORIES	Contract Period Year 1	Contract Period Year 2	Contract Period Year 3	Option Period Year 4	Option Period Year 5	TOTAL POINTS
A.1 Application/Software Architect - Level 2	25	25	25	25	25	125
A.1 Application/Software Architect - Level 3	25	25	25	25	25	125

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A.1 Application/Software Architect - Specialist - Level 3	25	25	25	25	25	125
A.2 ERP Functional Analyst – Level 3	25	25	25	25	25	125
A.4 ERP System Analyst – Level 3	25	25	25	25	25	125
A.6 Programmer/Software Developer - Level 2	25	25	25	25	25	125
A.6 Programmer/Software Developer - Level 3	25	25	25	25	25	125
A.7 Programmer/Analyst - Level 2	25	25	25	25	25	125
A.7 Programmer/Analyst - Level 3	25	25	25	25	25	125
A.8 System Analyst - Level 3	25	25	25	25	25	125
A.9 System Auditor – Level 3	25	25	25	25	25	125
A.11 Tester – Level 3	25	25	25	25	25	125
A.16 Web Multi-media Content Consultant – Level 3	25	25	25	25	25	125
TOTAL	325	325	325	325	325	1,625

TABLE 1 - MAXIMUM POINTS ASSIGNED						
WORKSTREAM 2 – INFORMATION MANAGEMENT AND INFORMATION TECHNOLOGY SERVICES						
RESOURCE CATEGORIES	Contract Period Year 1	Contract Period Year 2	Contract Period Year 3	Option Period Year 4	Option Period Year 5	TOTAL POINTS
I.2 Database Administrator – Level 3	25	25	25	25	25	125
I.3 Database Analyst/Information Management Administrator – Level 2	25	25	25	25	25	125

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I.3 Database Analyst/Information Management Administrator – Level 3	25	25	25	25	25	125
I.5 Information Management Architect – Level 3	25	25	25	25	25	125
I.9 System Administrator – Level 3	25	25	25	25	25	125
I.10 Technical Architect – Level 2	25	25	25	25	25	125
I.10 Technical Architect – Level 3	25	25	25	25	25	125
I.11 Technology Architect – Level 2	25	25	25	25	25	125
I.11 Technology Architect – Level 3	25	25	25	25	25	125
TOTAL	225	225	225	225	225	1,125

TABLE 1 - MAXIMUM POINTS ASSIGNED						
WORKSTREAM 3 – BUSINESS MANAGEMENT SERVICES						
RESOURCE CATEGORIES	Contract Period Year 1	Contract Period Year 2	Contract Period Year 3	Option Period Year 4	Option Period Year 5	TOTAL POINTS
B.1 Business Analyst – Level 3	25	25	25	25	25	125
B.4 Business Continuity/Disaster Recovery Specialist – Level 3	25	25	25	25	25	125
B.6 Business System Analyst – Level 2	25	25	25	25	25	125
B.6 Business System Analyst – Level 3	25	25	25	25	25	125
B.9 Courseware Developer – Level 2	25	25	25	25	25	125

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B.10 Help Desk Specialist – Level 1	25	25	25	25	25	125
B.11 Instructor, Information Technology – Level 2	25	25	25	25	25	125
B.13 Operations Support Specialist – Level 2	25	25	25	25	25	125
B.13 Operations Support Specialist – Level 3	25	25	25	25	25	125
B.14 Technical Writer – Level 1	25	25	25	25	25	125
TOTAL	250	250	250	250	250	1,250

TABLE 1 - MAXIMUM POINTS ASSIGNED						
WORKSTREAM 4 – PROJECT MANAGEMENT SERVICES						
RESOURCE CATEGORIES	Contract Period Year 1	Contract Period Year 2	Contract Period Year 3	Option Period Year 4	Option Period Year 5	TOTAL POINTS
P.1 Change Management Consultant – Level 3	25	25	25	25	25	125
P.1 Change Management Consultant – Specialist – Level 3	25	25	25	25	25	125
P.2 Enterprise Architect – Level 2	25	25	25	25	25	125
P.2 Enterprise Architect – Level 3	25	25	25	25	25	125
P.2 Enterprise Architect - Specialist – Level 3	25	25	25	25	25	125
P.4 Organizational Development Consultant – Level 3	25	25	25	25	25	125
P.5 Project Executive – Level 3	25	25	25	25	25	125
P.5 Project Executive - Specialist – Level 3	25	25	25	25	25	125

P.8 Project Leader – Level 3	25	25	25	25	25	125
P.9 Project Manager – Level 2	25	25	25	25	25	125
P.9 Project Manager – Level 3	25	25	25	25	25	125
P.9 Project Manager - Specialist – Level 3	25	25	25	25	25	125
P.11 QA Specialist/Analyst – Level 3	25	25	25	25	25	125
TOTAL	325	325	325	325	325	1,625

TABLE 1 - MAXIMUM POINTS ASSIGNED						
WORKSTREAM 5 – CYBER PROTECTION SERVICES						
RESOURCE CATEGORIES	Contract Period Year 1	Contract Period Year 2	Contract Period Year 3	Option Period Year 4	Option Period Year 5	TOTAL POINTS
C.3 Information Technology Security Threat and Risk Assessment (TRA) and Certification and Accreditation (C&A) Analyst – Level 3	25	25	25	25	25	125
C.6 IT Security Engineer – Level 3	25	25	25	25	25	125
C.8 Network Security Analyst – Level 3	25	25	25	25	25	125
TOTAL	75	75	75	75	75	375

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

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

TABLE 2 - EXAMPLE OF A FINANCIAL EVALUATION USING METHOD A:				
	Max. Points	Bidder 1	Bidder 2	Bidder 3

Resource Category		Year 1	Year 2	Year 1	Year 2	Year 1	Year 2
Programmer	150 (75 pts. per year)	\$400.00	\$400.00	\$420.00	\$440.00	\$450.00	\$450.00
Business Analyst	100 (50 pts. per year)	\$600.00	\$600.00	\$600.00	\$620.00	\$650.00	\$680.00
Project Manager	50 (25 pts. per year)	\$555.00	\$580.00	\$750.00	\$785.00	\$700.00	\$735.00
TOTAL	300						
STEP 1 - Establishing the lower and upper median band limits for each year and each resource category							
(Median 1)	For the Programmer Resource Category, the year 1 median would be \$420.00. The lower median band limit would be \$378.00 and higher median band limit would be \$546.00.						
(Median 2)	For the Programmer Resource Category, the year 2 median would be \$440.00. The lower median band limit would be \$396.00 and higher median band limit would be \$572.00.						
(Median 3)	For the Business Analyst Resource Category, the year 1 median would be \$600.00. The lower median band limit would be \$540.00 and higher median band limit would be \$780.00.						
(Median 4)	For the Business Analyst Resource Category, the year 2 median would be \$620.00. The lower median band limit would be \$558.00 and higher median band limit would be \$806.00.						
(Median 5)	For the Project Manager Resource Category, the year 1 median would be \$700.00. The lower median band limit would be \$630.00 and higher median band limit would be \$910.00.						
(Median 6)	For the Project Manager Resource Category, the year 2 median would be \$735.00. The lower median band limit would be \$661.50 and higher median band limit would be \$955.50.						
STEP 2 - Points Allocation:							
Bidder 1:							
Programmer Year 1 = 75 points (lowest rate within the lower and upper median band limits)							
Programmer Year 2 = 75 points (lowest rate within the lower and upper median band limits)							
Business Analyst Year 1 = 50 points (lowest rate within the lower and upper median band limits)							
Business Analyst Year 2 = 50 points (lowest rate within the lower and upper median band limits)							
Project Manager Year 1 = 0 points (outside the lower and higher median band limits)							
Project Manager Year 2 = 0 points (outside the lower and higher median band limits)							
Bidder 2:							

Programmer Year 1 =	71.43 points (based on the following calculation = (Lowest rate of \$400.00 / Bidder's proposed rate of \$420.00) Multiplied by 75 pts)
Programmer Year 2 =	68.18 points (based on the following calculation = (Lowest rate of \$400.00 / Bidder's proposed rate of \$440.00) Multiplied by 75 pts)
Business Analyst Year 1 =	50 points (lowest price within the lower and upper median band limits)
Business Analyst Year 2 =	48.39 points (based on the following calculation = (Lowest rate of \$600.00 / Bidder's proposed rate of \$620.00) Multiplied by 50 pts)
Project Manager Year 1 =	23.33 points (based on the following calculation = (Lowest rate of \$700.00 / Bidder's proposed rate of \$750.00) Multiplied by 25 pts)
Project Manager Year 2 =	23.41 points (based on the following calculation = (Lowest rate of \$735.00 / Bidder's proposed rate of \$785) Multiplied by 25 pts)
Bidder 3:	
Programmer Year 1 =	66.67 points (based on the following calculation = (Lowest rate of \$400.00 / Bidder's proposed rate of \$450.00) Multiplied by 75 pts)
Programmer Year 2 =	66.67 points (based on the following calculation = (Lowest rate of \$400.00 / Bidder's proposed rate of \$450.00) Multiplied by 75 pts)
Business Analyst Year 1 =	46.15 points (based on the following calculation = (Lowest rate of \$600.00 / Bidder's proposed rate of \$650.00) Multiplied by 50 pts)
Business Analyst Year 2 =	44.12 points (based on the following calculation = (Lowest rate of \$600 / Bidder's proposed rate of \$680.00) Multiplied by 50 pts)
Project Manager Year 1 =	25 points (lowest price within the lower and upper median band limits)
Project Manager Year 2 =	25 points (lowest price within the lower and upper median band limits)
STEP 3 - Financial Score:	
Bidder 1:	75 + 75 + 50 + 50 + 0 + 0 = Total Financial Score of 250.00 points out of a possible 300 points
Bidder 2:	71.43 + 68.18 + 50 + 48.39 + 23.33 + 23.41 = Total Financial Score of 284.74 points out of a possible 300 points
Bidder 3:	66.67 + 66.67 + 46.15 + 44.12 + 25 + 25 = Total Financial Score of 273.61 points out of a possible 300 points

- (d) **Financial Evaluation - Method B:** The following financial evaluation method will be used if less than three bids are determined responsive:
- (i) **STEP 1 - POINTS ALLOCATION:** For each period and each Resource Category of each Workstream points will be allocated as follows:
- (A) Points will be established based on the following calculation, with points rounded to two decimal places:
- $$\frac{\text{Lowest proposed firm per diem rate}}{\text{Bidder's proposed firm per diem rate}} \times \text{Maximum Points Assigned at Table 3 below}$$
- The Bidder with the lowest proposed firm per diem rate will be allocated the applicable maximum points assigned at Table 3 below.

TABLE 3 - MAXIMUM POINTS ASSIGNED

WORKSTREAM 1 – APPLICATION SERVICES						
RESOURCE CATEGORIES	Contract Period Year 1	Contract Period Year 2	Contract Period Year 3	Option Period Year 4	Option Period Year 5	TOTAL POINTS
A.1 Application/Software Architect - Level 2	25	25	25	25	25	125
A.1 Application/Software Architect - Level 3	25	25	25	25	25	125
A.1 Application/Software Architect - Specialist - Level 3	25	25	25	25	25	125
A.2 ERP Functional Analyst – Level 3	25	25	25	25	25	125
A.4 ERP System Analyst – Level 3	25	25	25	25	25	125
A.6 Programmer/Software Developer - Level 2	25	25	25	25	25	125
A.6 Programmer/Software Developer - Level 3	25	25	25	25	25	125
A.7 Programmer/Analyst - Level 2	25	25	25	25	25	125
A.7 Programmer/Analyst - Level 3	25	25	25	25	25	125
A.8 System Analyst - Level 3	25	25	25	25	25	125
A.9 System Auditor – Level 3	25	25	25	25	25	125
A.11 Tester – Level 3	25	25	25	25	25	125
A.16 Web Multi-media Content Consultant – Level 3	25	25	25	25	25	125
TOTAL	325	325	325	325	325	1,625

<p>TABLE 3 - MAXIMUM POINTS ASSIGNED</p> <p>WORKSTREAM 2 – INFORMATION MANAGEMENT AND INFORMATION TECHNOLOGY SERVICES</p>

RESOURCE CATEGORIES	Contract Period Year 1	Contract Period Year 2	Contract Period Year 3	Option Period Year 4	Option Period Year 5	TOTAL POINTS
I.2 Database Administrator – Level 3	25	25	25	25	25	125
I.3 Database Analyst/Information Management Administrator – Level 2	25	25	25	25	25	125
I.3 Database Analyst/Information Management Administrator – Level 3	25	25	25	25	25	125
I.5 Information Management Architect – Level 3	25	25	25	25	25	125
I.9 System Administrator – Level 3	25	25	25	25	25	125
I.10 Technical Architect – Level 2	25	25	25	25	25	125
I.10 Technical Architect – Level 3	25	25	25	25	25	125
I.11 Technology Architect – Level 2	25	25	25	25	25	125
I.11 Technology Architect – Level 3	25	25	25	25	25	125
TOTAL	225	225	225	225	225	1,125

TABLE 3 - MAXIMUM POINTS ASSIGNED						
WORKSTREAM 3 – BUSINESS MANAGEMENT SERVICES						
RESOURCE CATEGORIES	Contract Period Year 1	Contract Period Year 2	Contract Period Year 3	Option Period Year 4	Option Period Year 5	TOTAL POINTS
B.1 Business Analyst – Level 3	25	25	25	25	25	125

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B.4 Business Continuity/Disaster Recovery Specialist – Level 3	25	25	25	25	25	125
B.6 Business System Analyst – Level 2	25	25	25	25	25	125
B.6 Business System Analyst – Level 3	25	25	25	25	25	125
B.9 Courseware Developer – Level 2	25	25	25	25	25	125
B.10 Help Desk Specialist – Level 1	25	25	25	25	25	125
B.11 Instructor, Information Technology – Level 2	25	25	25	25	25	125
B.13 Operations Support Specialist – Level 2	25	25	25	25	25	125
B.13 Operations Support Specialist – Level 3	25	25	25	25	25	125
B.14 Technical Writer – Level 1	25	25	25	25	25	125
TOTAL	250	250	250	250	250	1,250

TABLE 3 - MAXIMUM POINTS ASSIGNED						
WORKSTREAM 4 – PROJECT MANAGEMENT SERVICES						
RESOURCE CATEGORIES	Contract Period Year 1	Contract Period Year 2	Contract Period Year 3	Option Period Year 4	Option Period Year 5	TOTAL POINTS
P.1 Change Management Consultant – Level 3	25	25	25	25	25	125
P.1 Change Management Consultant – Specialist – Level 3	25	25	25	25	25	125
P.2 Enterprise Architect – Level 2	25	25	25	25	25	125
P.2 Enterprise Architect – Level 3	25	25	25	25	25	125

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Amendment Number:

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P.2 Enterprise Architect - Specialist – Level 3	25	25	25	25	25	125
P.4 Organizational Development Consultant – Level 3	25	25	25	25	25	125
P.5 Project Executive – Level 3	25	25	25	25	25	125
P.5 Project Executive - Specialist – Level 3	25	25	25	25	25	125
P.8 Project Leader – Level 3	25	25	25	25	25	125
P.9 Project Manager – Level 2	25	25	25	25	25	125
P.9 Project Manager – Level 3	25	25	25	25	25	125
P.9 Project Manager - Specialist – Level 3	25	25	25	25	25	125
P.11 QA Specialist/Analyst – Level 3	25	25	25	25	25	125
TOTAL	325	325	325	325	325	1,625

TABLE 3 - MAXIMUM POINTS ASSIGNED						
WORKSTREAM 5 – CYBER PROTECTION SERVICES						
RESOURCE CATEGORIES	Contract Period Year 1	Contract Period Year 2	Contract Period Year 3	Option Period Year 4	Option Period Year 5	TOTAL POINTS
C.3 Information Technology Security Threat and Risk Assessment (TRA) and Certification and Accreditation (C&A) Analyst – Level 3	25	25	25	25	25	125
C.6 IT Security Engineer – Level 3	25	25	25	25	25	125
C.8 Network Security Analyst – Level 3	25	25	25	25	25	125
TOTAL	75	75	75	75	75	375

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

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

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

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

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

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

Score obtained for the point-rated technical criteria using the following formula, rounded to two decimal places:

$$\frac{\text{Technical Score}}{\text{Maximum Technical Points (Bidders, please refer to the maximum technical points for each Workstream at Attachment 4,1 Part B)}} \times 70 = \text{Total Technical Score}$$

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

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

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

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

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

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

- (i) in the event that only one contract is awarded for a Workstream, the amount of the Limitation of Expenditure will be determined at Canada's discretion;
- (ii) where for a Workstream 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

Note to Bidders: Any resulting contract would only list the applicable Workstream(s) above that are awarded to the successful bidder(s) in accordance with the evaluation methodology set out in this bid solicitation.

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 Correctional Service of 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 (not applicable to Workstream 5):** More than one Contract has been awarded for this requirement. As a result, the Task Authorizations issued under this series of contracts will be allocated in accordance with the following:
 - (i) Canada will send the first draft Task Authorization to the Contractor ranked first as determined under the evaluation process in the bid solicitation that resulted in the award of this series of contracts. Subsequent TAs will be proportionally allocated, based on the percentage values determined by the Contract Fund allocation Formula, to all Contractor's in the Workstream.
 - (ii) The Contractor sent a draft TA will have the time set out further below under the sub-paragraph entitled "Contractor's Response to Draft Task Authorization" to respond to the Contracting Authority.

- (iii) 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 Contractor under the same allocation process. The process of sending out a draft TA to the next contractor under the allocation process 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.
 - (iv) 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).
 - (v) Canada will make a reasonable effort to ensure that the dollar value of the TAs issued to the Contractors are proportionally balanced throughout the Contract Period based on the percentage values determined by the Contract Fund allocation Formula in the bid solicitation. A review of TAs issued to the Contractors will be conducted at six-month intervals and at the beginning of each fiscal year to confirm proportional utilization and distribution of the TAs.
- (c) **Assessment of Resources Proposed at TA Stage:** Processes for issuing, responding to and assessing Task Authorizations are further detailed in Appendices A, B, C and D of Annex A.
- (d) **Form and Content of draft Task Authorization:**
- (i) The Technical Authority will provide the Contractor with a description of the task in a draft Task Authorization using the form specified in Annex A.
 - (ii) The draft Task Authorization will contain the details of the activities to be performed, and must also contain the following information:
 - (A) the 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.
- (e) **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 well as confirmation that within an additional three working days, it will submit the following:
- (i) the total estimated cost proposed for performing the task or, as applicable, revised task;
 - (ii) a breakdown of that cost established in accordance with the Basis of Payment; and
 - (iii) 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.

The Contractor will not be paid for preparing or providing its response or for providing other information required to prepare and validly issue the TA.

- (f) **Task Authorization Limit and Authorities for Validly Issuing Task Authorizations:**
- 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.

- (g) **Periodic Usage Reports:**
- (i) The Contractor must compile and maintain records on its provision of services to the federal government under Task Authorizations validly issued under the Contract. The Contractor must provide this data to Canada in accordance with the reporting requirements detailed below. If some data is not available, the reason must be indicated. If services are not provided during a given period, the Contractor must still provide a "NIL" report. The data must be submitted on a quarterly basis to the Contracting Authority. From time to time, the Contracting Authority may also require an interim report during a reporting period.
 - (ii) The quarterly periods are defined as follows:
 - (A) 1st quarter: April 1 to June 30;
 - (B) 2nd quarter: July 1 to September 30;
 - (C) 3rd quarter: October 1 to December 31; and
 - (D) 4th quarter: January 1 to March 31.

The data must be submitted to the Contracting Authority no later than 10 calendar days after the end of the reporting period.
 - (iii) Each report must contain the following information for each validly issued TA (as amended):
 - (A) the Task Authorization number and the Task Authorization Revision number(s), if applicable;

- (B) a title or a brief description of each authorized task;
 - (C) the name, Resource category and level of each resource involved in performing the TA, as applicable;
 - (D) the total estimated cost specified in the validly issued TA of each task, exclusive of Applicable Taxes;
 - (E) the total amount, exclusive of Applicable Taxes, expended to date against each authorized task;
 - (F) the start and completion date for each authorized task; and
 - (G) the active status of each authorized task, as applicable (e.g., indicate whether work is in progress or if Canada has cancelled or suspended the TA, etc.).
- (iv) Each report must also contain the following cumulative information for all the validly issued TA's (as amended):
- (A) the amount, exclusive of Applicable Taxes, specified in the Contract (as last amended, as applicable) as Canada's total liability to the Contractor for all validly issued TA's; and
 - (B) the total amount, exclusive of Applicable Taxes, expended to date against all validly issued TA's.
- (h) **Refusal of Task Authorizations or Submission of a Response which is not Valid:** The Contractor is not required to submit a response to every draft TA sent to it by Canada. However, in addition to Canada's other rights to terminate the Contract, Canada may immediately, and without further notice, terminate the Contract for default in accordance with the General Conditions if the Contractor 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.
- (i) 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.
- (j) **Consolidation of TA's for Administrative Purposes:** The Contract may be amended from time to time to reflect all validly issued Task Authorizations to date, to document the Work performed under those TA's for administrative purposes.
- (k) **Suspension of Eligibility for Future TAs:**
- (i) Canada may, by sending written notice to the Contractor, suspend the Contractor's eligibility for receiving TAs under the Contract for maximum period of six months or timeframe otherwise specified by Canada under any of the following circumstances:
 - (A) the Contractor is in default in carrying out any of its obligations under the contract, including paragraph 05 of General Conditions 2035 (date), Conduct of the Work;
 - (B) the Contractor has documented performance issues that impact the delivery of the Work required under one or more TAs. This could include demonstrated inability to provide or maintain qualified resources, replacing resources repeatedly, or providing qualified resource replacements in a timely manner, any of which impact on the delivery of the Work;

- (C) Canada has imposed measures on the Contractor under the Vendor Performance Corrective Measure Policy (or such similar policy that may be in place from time to time).
- (ii) Suspension of the Contractor's eligibility to receive TAs under the Contract will not affect the right of Canada to pursue other remedies or measures that may be available. It will not, on its own, affect any TA entered into before the issuance of the notice.
- (iii) The duration of the suspension and the conditions, if applicable, which may be required by Canada to lift the suspension will be communicated in writing. The Contractor must submit a written action plan describing measures it will implement or actions it will undertake to eliminate the performance issues. If Canada deems there are issues not addressed within the action plan, Canada may express its concerns in writing. The Contractor will have five working days from the date that the written communication is sent to deliver an action plan to the Client and the Contracting Authority and 20 working days to rectify the underlying problem.

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 (2020-05-28), 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 Contract Security Program (CSP), Public Works and Government Services Canada (PWGSC).
- (b) The Contractor personnel requiring access to PROTECTED information, assets or sensitive site(s) must EACH hold a valid RELIABILITY STATUS, granted or approved by the CSP, PWGSC.
- (c) The Contractor MUST NOT remove any PROTECTED information or assets from the identified 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 the CSP, 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 Use of individual protective equipment and Occupational Health and Safety (OHS) guidelines

- (a) The Contractor must comply with Government of Canada onsite requirements in respect of individual Protective Pieces of Equipment (PPE) and adhere to Occupational Health and Safety (OHS) guidelines in force in the workplace.
- (b) The Contractor will provide its resources the following individual PPE for working on site: prescribed face covering mask, gloves, protective shield, and anything else that is required as a pre-requisite to entry and to work on Government of Canada premises. Canada reserves the right

to modify the list of PPE and OHS guidelines, if required, to include any future recommendations proposed by the Public Health Agencies.

- (c) The Contractor warrants that its resources will wear the PPE mentioned above when onsite and follow at all times the Occupational Health and Safety (OHS) guidelines in force in the workplace during the contract period. If resources are not wearing the prescribed PPE and/or are not following the Occupational Health and Safety (OHS) guidelines in force in the workplace, they will not be permitted access to government of Canada sites.

7.7 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 three years later; and
- (ii) The period during which the Contract is extended, if Canada chooses to exercise any options set out in the Contract.

- (b) **Option to Extend the Contract:**

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

7.8 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-pwgscc.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)

7.9 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.

7.10 Payment

(a) **Basis of Payment**

- (i) **Professional Services provided under a Task Authorization with a Maximum Price:** For professional services requested by Canada, in accordance with a validly issued Task Authorization, Canada will pay the Contractor, in arrears, up to the Maximum Price for the TA, for actual time worked and any resulting deliverables in accordance with the firm all-inclusive per diem rates set out in Annex B, Basis of Payment, Applicable Taxes extra. Partial days will be prorated based on actual hours worked based on a 7.5-hour workday.
- (ii) **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.
- (iii) **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.
- (iv) **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.
- (i) If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority a written estimate for the additional funds required. Providing this information does not increase Canada's liability.
- (c) **Method of Payment for Task Authorizations with a Maximum Price:** For each Task Authorization validly issued under the Contract that contains a maximum price:
- (i) Canada will pay the Contractor no more frequently than once a month in accordance with the Basis of Payment. The Contractor must submit time sheets for each resource showing the days and hours worked to support the charges claimed in the invoice.
 - (ii) Once Canada has paid the maximum TA price, Canada will not be required to make any further payment, but the Contractor must complete all the work described in the TA, all of which is required to be performed for the maximum TA price. If the work described in the TA is completed in less time than anticipated, and the actual time worked (as supported by the time sheets) at the rates set out in the Contract is less than the maximum TA price, Canada is only required to pay for the time spent performing the work related to that TA.
- (d) **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:**
 - (A) If the Contractor does not provide a required professional services resource that has all the required qualifications within the time prescribed by the Contract, the Contractor must credit to Canada an amount equal to the per diem rate (based on a 7.5-hour workday) of the required resource for each day (or partial day) of delay in providing the resource, up to a maximum of 10 days.
 - (B) **Corrective Measures:** If credits are payable under this Article for two consecutive months or for three months in any 12-month period, the Contractor must submit a written action plan describing measures it will implement or actions it will undertake to eliminate the recurrence of the problem. The Contractor will have five working days to deliver the action plan to the Client and the Contracting Authority and 20 working days to rectify the underlying problem.
 - (C) **Termination for Failure to Meet Availability Level:** In addition to any other rights it has under the Contract, Canada may terminate the Contract for default in accordance with the General Conditions by giving the Contractor three months' written notice of its intent, if any of the following apply:
 - (1) the total amount of credits for a given monthly billing cycle reach a level of 10% of the total billing for that month; or
 - (2) the corrective measures required of the Contractor described above are not met.

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

- (ii) **Credits Apply during Entire Contract Period:** The Parties agree that the credits apply throughout the Contract Period.
- (iii) **Credits represent Liquidated Damages:** The Parties agree that the credits are liquidated damages and represent their best pre-estimate of the loss to Canada in the event of the applicable failure. No credit is intended to be, nor will it be construed as, a penalty.
- (iv) **Canada's Right to Obtain Payment:** The Parties agree that these credits are a liquidated debt. To collect the credits, Canada has the right to hold back, draw back, deduct or set off from and against any money Canada owes to the Contractor from time to time.
- (v) **Canada's Rights & Remedies not Limited:** The Parties agree that nothing in this Article limits any other rights or remedies to which Canada is entitled under the Contract (including the right to terminate the Contract for default) or under the law generally.
- (vi) **Audit Rights:** The Contractor's calculation of credits under the Contract is subject to verification by government audit, at the Contracting Authority's discretion, before or after payment is made to the Contractor. The Contractor must cooperate fully with Canada during the conduct of any audit by providing Canada with access to any records and systems that Canada considers necessary to ensure that all credits have been accurately credited to Canada in the Contractor's invoices. If an audit demonstrates that past invoices contained errors in the calculation of the credits, the Contractor must pay to Canada the amount the audit reveals was required to be credited to Canada, plus interest, from the date Canada remitted the excess payment until the date of the refund (the interest rate is the Bank of Canada's discount annual rate of interest in effect on the date the credit was first owed to Canada, plus 1.25% per year). If, as a result of conducting an audit, Canada determines that the Contractor's records or systems for identifying, calculating or recording the credits are inadequate, the Contractor must implement any additional measures required by the Contracting Authority.
- (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

7.11 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.

7.12 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.

7.13 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.

7.14 Applicable Laws

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

7.15 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 (2020-05-28), 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.

7.16 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.*

7.17 Foreign Nationals (Foreign Contractor)

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

7.18 Insurance Requirements

(a) **Compliance with Insurance Requirements**

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

(b) **Commercial General Liability Insurance**

- (i) The Contractor must obtain Commercial General Liability Insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature, but for not less than \$2,000,000 per accident or occurrence and in the annual aggregate.
- (ii) The Commercial General Liability policy must include the following:
- (A) Additional Insured: Canada is added as an additional insured, but only with respect to liability arising out of the Contractor's performance of the Contract. The interest of Canada should read as follows: Canada, as represented by Public Works and Government Services Canada.
- (B) Bodily Injury and Property Damage to third parties arising out of the operations of the Contractor.
- (C) Products and Completed Operations: Coverage for bodily injury or property damage arising out of goods or products manufactured, sold, handled, or distributed by the Contractor and/or arising out of operations that have been completed by the Contractor.
- (D) Personal Injury: While not limited to, the coverage must include Violation of Privacy, Libel and Slander, False Arrest, Detention or Imprisonment and Defamation of Character.
- (E) Cross Liability/Separation of Insureds: Without increasing the limit of liability, the policy must protect all insured parties to the full extent of coverage provided.

Further, the policy must apply to each Insured in the same manner and to the same extent as if a separate policy had been issued to each.

- (F) Blanket Contractual Liability: The policy must, on a blanket basis or by specific reference to the Contract, extend to assumed liabilities with respect to contractual provisions.
- (G) Employees and, if applicable, Volunteers must be included as Additional Insured.
- (H) Employers' Liability (or confirmation that all employees are covered by Worker's compensation (WSIB) or similar program)
- (I) Broad Form Property Damage including Completed Operations: Expands the Property Damage coverage to include certain losses that would otherwise be excluded by the standard care, custody or control exclusion found in a standard policy.
- (J) Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of policy cancellation.
- (K) If the policy is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.
- (L) Owners' or Contractors' Protective Liability: Covers the damages that the Contractor becomes legally obligated to pay arising out of the operations of a subcontractor.
- (M) Advertising Injury: While not limited to, the endorsement must include coverage for piracy or misappropriation of ideas, or infringement of copyright, trademark, title or slogan.

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

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

Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of cancellation.

7.19 Limitation of Liability - Information Management/Information Technology

- (a) This section applies despite any other provision of the Contract and replaces the section of the general conditions entitled "Liability". Any reference in this section to damages caused by the Contractor also includes damages caused by its employees, as well as its subcontractors, agents, and representatives, and any of their employees. This section applies regardless of whether the claim is based in contract, tort, or another cause of action. The Contractor is not liable to Canada with respect to the performance of or failure to perform the Contract, except as described in this section and in any section of the Contract pre-establishing any liquidated damages. The Contractor is only liable for indirect, special or consequential damages to the extent described in this Article, even if it has been made aware of the potential for those damages.
- (b) **First Party Liability:**

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

In any case, the total liability of the Contractor under subparagraph (v) will not exceed the total estimated cost (as defined above) for the Contract or \$1,000,000.00, whichever is more.
 - (vi) If Canada's records or data are harmed as a result of the Contractor's negligence or willful act, the Contractor's only liability is, at the Contractor's own expense, to restore Canada's records and data using the most recent back-up kept by Canada. Canada is responsible for maintaining an adequate back-up of its records and data.
- (c) **Third Party Claims:**
- (i) Regardless of whether a third party makes its claim against Canada or the Contractor, each Party agrees that it is liable for any damages that it causes to any third party in connection with the Contract as set out in a settlement agreement or as finally determined by a court of competent jurisdiction, where the court determines that the Parties are jointly and severally liable or that one Party is solely and directly liable to the third party. The amount of the liability will be the amount set out in the settlement agreement or determined by the court to have been the Party's portion of the damages to the third party. No settlement agreement is binding on a Party unless its authorized representative has approved the agreement in writing.

- (ii) If Canada is required, as a result of joint and several liability or joint and solidarily liable, to pay a third party in respect of damages caused by the Contractor, the Contractor must reimburse Canada by the amount finally determined by a court of competent jurisdiction to be the Contractor's portion of the damages to the third party. However, despite Sub-article (i), with respect to special, indirect, and consequential damages of third parties covered by this Section, the Contractor is only liable for reimbursing Canada for the Contractor's portion of those damages that Canada is required by a court to pay to a third party as a result of joint and several liability that relate to the infringement of a third party's intellectual property rights; physical injury of a third party, including death; damages affecting a third party's real or tangible personal property; liens or encumbrances on any portion of the Work; or breach of confidentiality.
- (iii) The Parties are only liable to one another for damages to third parties to the extent described in this Sub-article (c).

7.20 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.*

7.21 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.

7.22 Safeguarding Electronic Media

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

7.23 Representations and Warranties

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

7.24 Access to Canada's Property and Facilities

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

7.25 Implementation

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.

7.26 Dispute Resolution

- (a) The parties agree to maintain open and honest communication about the Work throughout and after the performance of the contract.
- (b) The parties agree to consult and co-operate with each other in the furtherance of the contract and promptly notify the other party or parties and attempt to resolve problems or differences that may arise.
- (c) If the parties cannot resolve a dispute through consultation and cooperation, the parties agree to consult a neutral third party offering alternative dispute resolution services to attempt to address the dispute.

- (d) Options of alternative dispute resolution services can be found on Canada's Buy and Sell website under the heading "Dispute Resolution".

7.27 Identification Protocol Responsibilities

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

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

ANNEX A STATEMENT OF WORK

1.0 TITLE

Correctional Service Canada – Informatics Professional Services

Workstreams:

1. Workstream 1 – Application Services
2. Workstream 2 – IM/IT Services
3. Workstream 3 – Business Services
4. Workstream 4 – Project Management Services
5. Workstream 5 – Cyber Protection Services

2.0 BACKGROUND

Correctional Service Canada (CSC) contributes to public safety by actively encouraging and assisting offenders to become law-abiding citizens, while exercising reasonable, safe, secure, and humane control. CSC is the federal government agency responsible for administering sentences of a term of two years or more, as imposed by the court. CSC is responsible for managing institutions of various security levels and supervising offenders under conditional release in the community.

CSC and its partners, such as Parole Board of Canada (PBC), use a diverse set of mission critical and non-mission critical software applications and systems to meet their business needs. CSC Information Management Services (IMS) Sector supports these applications and systems for all its users internal to CSC, as well as, in some cases, for external partners. Any disruptions in service to operations can have an impact on public safety. Virtually every communication and business process transacted daily throughout CSC and PBC requires a viable infrastructure of hardware, software, and telecommunications to enable it or support it. This infrastructure support and evolution is provided by Shared Services Canada (SSC), which was created to simultaneously operate and transform the government's IT infrastructure.

IMS continues to provide IM/IT services to ensure the delivery of mission critical and non-mission critical solutions and services to meet CSC, PBC, and their partners' business needs. This requires the use of advanced database technology; system and information management; IM/IT administration; and other capabilities that complement the functions provided by SSC.

3.0 OBJECTIVE

The purpose of this requirement is to support and maintain CSC IMS' business needs and transformation initiatives so that there is minimal impact to CSC, PBC and other CSC partners, internal and external clients, and stakeholders. The objective will be met through the provisions of Application Services, IM/IT Services, Business Services, Project Management Services, and Cyber Protection Services.

4.0 SCOPE OF WORK

The Contractor must provide informatics professional services to CSC on an "as and when requested" basis as initiated through Task Authorizations (TAs). TAs may be issued for any of the resource categories identified in the tables in section 5.2 Resource Requirements.

5.0 REQUIREMENT

5.1 TECHNICAL ENVIRONMENT

Desktop Workstation:

Windows 10 Enterprise
Internet Explorer 11
Microsoft Office Professional Plus 2016

The Offender Management System (OMS) is a CSC legacy system that requires updates. The Contractor may be required to maintain the current system, plan and install upgrades, as well as support the development and implementation of a new OMS system.

Note: CSC IM/IT Infrastructure will change with time.

5.2 RESOURCE REQUIREMENTS:

Workstream 1: Application Services	Level
A.1 Application/Software Architect	2,3
A.1 Application/Software Architect – Specialist	3
A.2 ERP Functional Analyst	3
A.4 ERP System Analyst	3
A.6 Programmer/Software Developer	2,3
A.7 Programmer/Analyst	2,3
A.8 System Analyst	3
A.9 System Auditor	3
A.11 Tester	3
A.16 Web Multi-media Content Consultant	3

Workstream 2: Information Management/Information Technology (IM/IT) Services	Level
I.2 Database Administrator	3
I.3 Database Analyst/Information Management Administrator	2,3
I.5 Information Management Architect	3
I.9 System Administrator	3
I.10 Technical Architect	2,3
I.11 Technology Architect	2,3

Workstream 3: Business Services	Level
B.1 Business Analyst	3
B.4 Business Continuity/Disaster Recovery Specialist	3
B.6 Business System Analyst	2,3
B.9 Courseware Developer	2
B.10 Help Desk Specialist	1
B.11 Instructor, Information Technology	2
B.13 Operations Support Specialist	2,3
B.14 Technical Writer	1

Workstream 4: Project Management Services	Level
P.1 Change Management Consultant	3
P.1 Change Management Consultant - Specialist	3
P.2 Enterprise Architect	2,3
P.2 Enterprise Architect - Specialist	3
P.4 Organizational Development Consultant	3
P.5 Project Executive	3

P.5 Project Executive - Specialist	3
P.8 Project Leader	3
P.9 Project Manager	2,3
P.9 Project Manager - Specialist	3
P.11 Quality Assurance Specialist/Analyst	3

Workstream 5: Cyber Protection Services	Level
C.3 Information Technology Security Threat and Risk Assessment (TRA) and Certification and Accreditation (C&A) Analyst	3
C.6 IT Security Engineer	3
C.8 Network Security Analyst	3

5.3 TASKS AND DELIVERABLES

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.

5.3.1 WORKSTREAM 1: APPLICATION SERVICES

A.1 Application/Software Architect, Levels 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 business and application requirements;
- b. Support the implementation, integration, and maintenance of mission critical and non-mission critical solutions and systems;
- c. Identify the policies and requirements that drive out a particular solution;
- d. Analyze and evaluate alternative technology solutions to meet business problems;
- e. Ensure the integration of all aspects of technology solutions;
- f. Monitor industry trends to ensure that solutions fit with government and industry directions for technology;
- g. Analyze functional requirements to identify information, procedures and decision flows;
- h. Evaluate existing procedures and methods, identify and document database content, structure, and application sub-systems, and develop data dictionary;
- i. Define and document interfaces of manual to automated operations within application sub-systems, to external systems and between new and existing systems;
- j. Define input/output sources, including detailed plan for technical design phase, and obtain approval of the system proposal;
- k. Identify and document system specific standards relating to programming, documentation and testing, covering program libraries, data dictionaries, naming conventions, etc.; and
- l. Design sustainable and cost effective solutions.

Deliverables will be specified in each TA and may include:

- i. Report on possible solutions to business problems;
- ii. Report on implementation and testing of solutions;
- iii. Document industry trends to ensure that solutions fit with government and industry directions for technology;
- iv. Document interfaces of manual to automated operations within application sub-systems, to external systems and between new and existing systems;
- v. Detailed plan for technical design phase; and
- vi. Detailed Options Analysis.

A.1 Application/Software Architect - Specialist, Level 3

Tasks include but are not limited to:

- a. Assist the Technical Authority in the preparation of the relevant project documentation (upgrades, migrations, onboarding, etc.). This includes presenting options, developing application architectural strategies, planning and estimating the work that will be required;
- b. Support the Technical Authority throughout the various phases of projects (upgrades, migrations, onboarding, etc.);
- c. Collect and analyze technical information regarding projects (upgrades, migrations, onboarding, etc.);
- d. Assist in the development and verification of projects (upgrades, migrations, onboarding, etc.) planning;
- e. Assist in the development of resource plans, including the identification of the skill sets or expertise required to execute work packages;
- f. Provide detailed advice and guidance regarding projects (upgrades, migrations, onboarding, etc.);
- g. Develop strategies for potential move to new solutions;
- h. Propose options and upgrade strategies with respect to technical environments;
- i. Provide technical expertise to the Technical Authority, as well as to members of technical and functional teams, regarding projects (upgrades, migrations, onboarding, etc.);
- j. Participate in weekly status meetings of the technical team;
- k. Attend weekly status meeting of the functional team;
- l. Provide weekly status reports to the Technical Authority;
- m. Provide related briefings and status reports to management;
- n. Execute the various tasks to upgrade / onboard application; and
- o. Mentor and assist the technical team in performing upgrade processes.

Deliverables will be specified in each TA and may include:

- i. Report on possible solutions to business problems;
- ii. Report on implementation and testing of solutions;
- iii. Document industry trends to ensure that solutions fit with government and industry directions for technology;
- iv. Document interfaces of manual to automated operations within application sub-systems, to external systems and between new and existing systems;
- v. Publish a detailed plan for technical design phase; and
- vi. Document a detailed Options Analysis.

A.2 Enterprise Resource Planning (ERP) Functional Analyst, Level 3

Tasks include but are not limited to:

- a. Develop and document ERP functional, business, and/or system requirements specifications;
- b. Develop and document screen, report and interface requirements;
- c. Develop functional, business, and/or system interface or capability interaction;
- d. Gather and analyze information to establish the functional needs of a system or project;
- e. Design methods and procedures for computer systems, and sub-systems of larger systems;
- f. Develop, test and implement small computer systems, and sub-systems of larger systems;
- g. Document forms, manuals, programs, data files, and procedures;
- h. Implementation oversight of Cloud Governance Teams and Processes;
- i. Cloud Advisory role in the Cloud CoE and Cloud Core Team;
- j. Implementation oversight of the Organizational Change Managements components including the Organisational Change Management Plan, Communication Plan, and Training Plans;

- k. Implementation oversight of the Cloud Services Design components especially the Multi-Cloud Management, Container Management, Infrastructure as Code, and Cost Management tools;
- l. Implementation oversight of the DevSecOps Methodology and associated CI/CD Tool chain;
- m. Implementation oversight of Cloud Ops integration components for Systems, Service, and Security Management;
- n. Assist with SSC Interaction to implement required Cloud Network Connectivity Perimeter Security, and Identity Federation;
- o. Review and update Cloud Intake Process;
- p. Develop Cloud Charter to better refine this strategic initiative;
- q. Assist in writing Process and Procedures for cloud based operations;
- r. Provide assessment of possible move to SaaS, PaaS or IaaS;
- s. Participate in Cloud working group activities;
- t. Contribute to and/or review and/or analyze Project Charters, Business Cases, detailed project plans to ensure dependencies between projects are considered;
- u. Provide recommendations for the design, development, test, and implementation of project solution as related to the modernization and foundational projects; and
- v. Contribute to ensuring compliance with portfolio-wide standards for architecture, engineering and business transformation.

Deliverables will be specified in each TA and may include:

- i. Cloud adoption Communications Strategy;
- ii. Documented cloud business objectives and KPIs;
- iii. Updated CSC Cloud Intake Process and associated forms;
- iv. Cloud Charter;
- v. Cloud onboarding templates;
- vi. Refined cloud adoption plan/roadmap;
- vii. Contribute to Org Change Management Plan, Communication Plan, and Training Plans;
- viii. Document Cloud Network Connectivity Perimeter Security, and Identity Federation;
- ix. Risk Assessment for each of the options; and
- x. Assigned portions of the Business Case per the project work plan.

A.4 ERP System Analyst, Level 3

Tasks include but are not limited to:

- a. Develop requirements, feasibility, cost, design, and specification documents for ERP systems;
- b. Implement ERP systems to support projects, departments, organizations or businesses;
- c. Translate ERP business requirements into systems design and specifications;
- d. Analyze and recommend alternatives and options for solutions; and
- e. Develop technical specifications for ERP systems development, design and implementation.

Deliverables will be specified in each TA and may include:

- i. System design and specifications;
- ii. Options feasibility assessments;
- iii. Systems requirements;
- iv. Cost analysis;
- v. Feasibility analysis;
- vi. System design;
- vii. Technical specifications;
- viii. Technical design; and
- ix. Implementation plan

A.6 Programmer/Software Developer, Levels 2 and 3

Tasks include but are not limited to:

- a. Develop solutions for business and technical problems to support the implementation, integration and maintenance of mission critical and non-mission critical solutions and systems;
- b. Develop and prepare diagrammatic plans for solution of business, scientific and technical problems by means of computer systems of significant size and complexity;
- c. 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;
- d. Select and incorporate available software programs;
- e. 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;
- f. Translate detailed flow charts into coded machine instructions and confer with technical personnel in planning programs;
- g. Verify accuracy and completeness of programs by preparing sample data, and testing them by means of system acceptance test runs made by operating personnel;
- h. Correct program errors by revising instructions or altering the sequence of operations; and
- i. Test instructions, and assemble specifications, flow charts, diagrams, layouts, programming and operating instructions to document applications for later modification or reference.

Deliverables will be specified in each TA and may include:

- i. Report on business/technical solutions;
- ii. Problems analysis;
- iii. Programs, flow charts, and diagrams indicating mathematical computation and sequence of machine operations necessary to copy and process data and print the results; and
- iv. Test reports.

A.7 Programmer Analyst, Levels 2 and 3

Tasks include but are not limited to:

- a. Provide programming support for the development, implementation, integration and maintenance of systems of IM/IT infrastructure and operations;
- b. Develop solutions across the full technology stack (UI, logic, data services (API), and database) following a service oriented architecture approach;
- c. Create and modify code and software of existing systems;
- d. Create and modify screens and reports;
- e. Gather and analyze data for the conduct of studies to establish the technical and economic feasibility of proposed computer systems, and for the development of functional and system design specifications;
- f. Design methods and procedures for applications, and sub-system of larger systems;
- g. Develop, test and implement applications, and sub-systems of larger systems;
- h. Produce forms, manuals, programs, data files, and procedures for systems and/or applications;
- i. Host design and code walkthroughs;
- j. Implement test-driven design for all elements of the technology stack;
- k. Implement automated testing, integration, containerization, and deployment pipelines using platforms such as Azure DevOps;
- l. Fully document all solutions at the code level and in common Wiki or knowledge bases; and
- m. Work collaboratively with peers on implementing solutions that are sustainable and reliable.

Deliverables will be specified in each TA and may include:

- i. Summary report on code and other working code elements (algorithms, functions, procedures, modules, etc.);
- ii. Documentation on solutions;
- iii. Testing plan, end-to-end testing, and test driven development results;
- iv. Weekly project progress reports;
- v. Testing reports/results as required;
- vi. Monthly data analysis reports; and
- vii. Draft and final forms, manuals, programs, data files and procedures.

A.8 System Analyst, Level 3

Tasks include but are not limited to:

- a. Support systems of IM/IT infrastructure and operations;
- b. Develop requirements, feasibility, cost, design, and specification documents for systems;
- c. Implement systems to support projects, departments, organizations or businesses;
- d. Translate business requirements into systems design and specifications;
- e. Analyze and recommend alternatives and options for solutions; and
- f. Develop technical specifications for systems development, design and implementation.

Deliverables will be specified in each TA and may include:

- i. Initial report on current CSC IM/IT systems structure;
- ii. Documentation on support systems and solutions;
- iii. Systems design and specifications;
- iv. Weekly project progress reports; and
- v. Testing reports/results as required.

A.9 System Auditor, Level 3

Tasks include but are not limited to:

- a. Review organizational IT policy, standards and procedures and provide advice on their adequacy;
- b. Conduct systems under development reviews by reviewing project documentation, conducting interviews, assessing work completed, and, based on findings, reporting on compliance with policy, standards and procedures, and progress against plan;
- c. Conduct reviews of systems recently implemented and reporting on:
 - i. benefits actually achieved versus projected benefits;
 - ii. features actually delivered versus stated requirements;
 - iii. the adequacy of controls and system security features;
 - iv. user satisfaction based on surveys or interviews; and
 - v. system performance and reliability;
- d. Review systems that have been in production status for some time and report on issues, deficiencies, and shortcomings.

Deliverables will be specified in each TA and may include:

- i. Document reviews and analysis;
- ii. Systems reviews;
- iii. Development and deployment progress reports;
- iv. Systems benefits analysis;
- v. Comparison between system delivered vs requirements;
- vi. User satisfaction analysis and report; and
- vii. Review and analysis of systems in production.

A. 11 Tester, Level 3

Tasks include but are not limited to:

- a. Test planning and coordination of systems of IM/IT infrastructure and operations;
- 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. Status reporting;
- 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.

Deliverables will be specified in each TA and may include:

- i. Status report on testing;
- ii. Source code library; and
- iii. Formalized testing procedures.

A.16 Web Multi-media Content Consultant, Level 3

Tasks include but are not limited to:

- a. Create web pages including multi-media design;
- b. Develop and implement usability tests, analyze results and modify design accordingly;
- c. Develop flowcharts (web site flow maps) depicting navigation and basic content;
- d. Develop line drawings or block diagrams illustrating the priority of information, links, navigation and space requirements;
- e. Develop content diagrams showing the interactive connection between web pages; and
- f. Develop interactive prototypes showing basic form and functionality used for both usability testing and presentations

Deliverables will be specified in each TA and may include:

- i. Accessible web pages;
- ii. Navigation flowcharts;
- iii. Content diagrams; and
- iv. Web page interactive prototypes.

5.3.2 Workstream 2: IM/IT Services

1.2 Database Administrator, Level 3

Tasks include but are not limited to:

- a. Customize database conversion routines;
- b. Finalize Conversion Strategy;

- c. Generate new database with the client;
- d. Maintain data dictionaries;
- e. Develop and implement procedures that will ensure the accuracy, completeness, and timeliness of data stored in the database;
- f. Develop and implement security procedures for the database, including access and user account management;
- g. Advise programmers, analysts, and users about the efficient use of data;
- h. Maintain configuration control of the database;
- i. Perform and/or coordinate updates to the database design;
- j. Control and coordinate changes to the database, including the deletion of records, changes to the existing records, additions to the database; and
- k. Develop and coordinate back-up, disaster recovery and virus protection procedures.

Deliverables will be specified in each TA and include:

- i. Security procedures for the database;
- ii. Backup procedures;
- iii. Disaster recovery procedures;
- iv. Security patching procedures; and
- v. Incident reports

1.3 Database Analyst/Information Management Administrator, Level 2 and 3

Tasks include but are not limited to:

- a. Define new database structures;
- b. Define data conversion strategy;
- c. Define database conversion specifications;
- d. Finalize Conversion Strategy;
- e. Work very closely with the users in order to maintain and safeguard the database;
- f. Identify requirements for improvements to existing databases by determining users' information requirements and system performance and functional requirements;
- g. Develop and implement procedures that will ensure the accuracy, completeness, and timeliness of data stored in the database;
- h. Mediates and resolves conflicts among users' needs for data; and
- i. Advise programmers, analysts, and users about the efficient use of data.

Deliverables will be specified in each TA and include:

- i. Conceptual, Logical and Physical entity relationship modeling;
- ii. Data conversion strategy and mapping;
- iii. Database conversion specifications; and
- iv. Data Dictionary.

1.5 Information Management Architect, Level 3

Tasks include but are not limited to:

- a. Analyze existing capabilities and requirements, develop redesigned frameworks and recommend areas for improved capability and integration. 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 tradeoff 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.

Deliverables will be specified in each TA and include:

- i. Framework designs;
- ii. Report on existing capabilities and requirements vs requirements;
- iii. Interfaces documentation;
- iv. Report on Information modelling; and
- v. Cost/benefit analysis.

1.9 System Administrator, Level 3

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.

Deliverables will be specified in each TA and include:

- i. Progress reports;
- ii. Plans and schedule for installation, monitoring schedule;
- iii. Backup and recovery strategy, plan, and schedule; and
- iv. Reports on proposed improvements, including impact analysis and schedule.

1.10 Technical Architect, Levels 2 and 3

Tasks include but are not limited to:

- a. Provide architecture support to the development, implementation, integration, and maintenance of the systems of IM/IT infrastructure and operations;
- b. Develop technical architectures, frameworks and strategies, for CSC's projects/systems, to meet the business and application requirements;
- c. Identify policies and requirements that drive out a particular solution;
- d. Conduct research on technologies, including an examination of open source repositories;
- e. Analyze and evaluate alternative technology solutions to meet operational problems;
- f. Ensure the integration of all aspects of technology solutions;
- g. Evaluate hardware and software relative to their ability to support specified requirements and, by determining potential and actual bottlenecks, improve system performance through recommended hardware changes;
- h. Review computer software systems and data requirements as well as communication and response needs and determine operating systems and languages needed to support them;
- i. Calculate total cost of ownership as part of the decision-making;
- j. Lead agile design sessions for the development of proof of concepts or prototypes;

- k. Fully document software development lifecycle deliverables;
- l. Research and present options for management decisions;
- m. Record and document decisions from project architecture work groups;
- n. Align to TBS standards and CSC enterprise architecture standards, to be provided upon issuance of a Task Authorization;
- o. Align solutions to the latest technology stacks including JavaScript-based MEAN stack;
- p. Create documented and detailed diagrams for on-prem, cloud, mobile, and hybrid solutions; and
- q. Participate in change impact analysis and change management activities.

Deliverables will be specified in each TA and include:

- i. Report on the feasibility of migrating from the current state to the target state;
- ii. Report on architecture impact analysis on new or planned changes to architectures and designs; and
- iii. Transition plan to move from current to future state.

1.11 Technology Architect, Levels 2 and 3

Tasks include but are not limited to:

- a. Provide architecture support to the development, implementation, integration, and maintenance of mission critical and non-mission critical solutions and systems;
- b. Develop technical architectures, frameworks and strategies, either for an organization or for a major application area, to meet the business and application requirements;
- c. Identify the policies and requirements that drive out a particular solution;
- d. Analyze and evaluate alternative technology solutions to meet business problems;
- e. Ensure the integration of all aspects of technology solutions;
- f. Monitor industry trends to ensure that solutions fit with government and industry directions for technology;
- g. Provide information, direction and support for emerging technologies;
- h. Perform impact analysis of technology changes;
- i. Provide support to applications and/or technical support teams in the proper application of existing infrastructure;
- j. Review application and program design or technical infrastructure design to ensure adherence to standards and to recommend performance improvements;
- k. Identify industry standards and demonstrate how these architectures are used to meet business needs;
- l. Report on recommended detailed solution architecture;
- m. Report on recommended end-state application landscape; and
- n. Prepare Software Development Lifecycle documents.

Deliverables will be specified in each TA and may include:

- i. Report on the new technical architecture strategies;
- ii. Draft and final report on the alternative solutions; and
- iii. Report on integration requirements and performance.

5.3.3 Workstream 3: Business Services

B.1 Business Analyst, Level 3

Tasks include but are not limited to:

- a. Develop and document statements of requirements for considered alternatives;
- b. Perform business analyses of functional requirements to identify information, procedures, and decision flows;

- c. Evaluate existing procedures and methods, identify and document items such as database content, structure, application subsystems;
- d. Define and document interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems;
- e. Establish acceptance test criteria with client; and
- f. Support and use the selected departmental methodologies.

Deliverables will be specified in each TA and may include:

- i. Business Requirements Document;
- ii. Use case documents and diagrams;
- iii. Agile user stories and epics;
- iv. Business cases; and
- v. Functional & non-functional specifications

B.4 Business Continuity/Disaster Recovery Specialist, Level 3

Tasks include but are not limited to:

- a. Support the implementation of business and technology continuity plans;
- b. Develop and implement business and technology continuity plans;
- c. Develop technology and business continuity and disruption recovery strategies;
- d. Develop crisis communication planning strategies;
- e. Identify past and potential impact resulting from disruptions;
- f. Develop techniques to identify and evaluate potential disruptions;
- g. Develop and implement backup, replication and redundancy strategies as required;
- h. Develop awareness, training, and communication programs with both internal staff and other stakeholders;
- i. Establish coordination activities with internal and external stakeholders and establish actual and potential dependencies; and
- j. Develop and implement monitoring activities and performance management.

Deliverables will be specified in each TA and may include:

- i. Weekly progress report;
- ii. Draft and final continuity plans;
- iii. Draft and final impact analysis report; and
- iv. Report on current procedures.

B.6 Business System Analyst, Level 2 and 3

Tasks include but are not limited to:

- a. Provide leadership and planning support in the development, implementation, and integration of systems of IM/IT project and operations;
- b. Develop and document a detailed statement of requirements for the proposed alternative recommended in the preliminary analysis report;
- c. Perform business analyses of functional requirements to identify information, procedures, and decision flows;
- d. Evaluate existing procedures and methods, identify and document items such as database content, structure, application subsystems, and develop data dictionary;
- e. Define and document interfaces of manual to automated operations within application subsystems, to external systems, and between new and existing systems;
- f. Identify candidate business processes for re-design, prototype potential solutions, provide trade-off information and suggest a recommended course of action;
- g. Identify the modifications to the automated processes;

- h. Support and use the selected departmental methodologies; and
- i. Identify opportunities for robotic process automation or artificial intelligence.

Deliverables will be specified in each TA and may include:

- i. Weekly project progress report;
- ii. Draft and final statement of requirement;
- iii. Draft and final business analysis report;
- iv. Report on current procedures; and
- v. Draft and final data dictionary.

B.9 Courseware Developer, Level 2

Tasks include but are not limited to:

- a. Perform needs assessment/analysis for training purposes;
- b. Plan and monitor training projects;
- c. Perform job, task, and/or content analysis;
- d. Write criterion-referenced, performance-based objectives;
- e. Recommend instructional media and strategies;
- f. Develop performance measurement standards;
- g. Develop training materials;
- h. Prepare end-users for implementation of courseware materials; and
- i. Communicate effectively by visual, oral, and written form with individuals, small group, and in front of large audience.

Deliverables will be specified in each TA and may include:

- i. Training plans; and
- ii. Performance reports.

B.10 Help Desk Specialist, Level 1

Tasks include but are not limited to:

- a. Provide support to operational systems;
- b. Perform initial problem analysis and triage problem to other appropriate staff when appropriate;
- c. Maintain liaison with network users and technical staff to communicate the status of problem resolution to network users; log and track requests for assistance;
- d. Develop, implement, and/or participate in the preparation of procedure manuals and documentation for help desk use; conduct periodic user satisfaction surveys and track user problem trends;
- e. Make recommendations for improvements to the network systems and create reports based on information provided from user surveys and trends;
- f. Develop, implement, and/or participate in the distribution of network related information to users to include information such as help desk procedures and network handbooks;
- g. Participate in the development of a comprehensive training plan for help desk procedures; assist in training personnel providing backup coverage; and
- h. Participate in on-site installations of network systems for users.

Deliverables will be specified in each TA and may include:

- i. Report trends in problems in the operational systems; and
- ii. Draft amendments to procedure manuals.

B.11 Instructor Technology, Level 2

Tasks include but are not limited to:

- a. Assess the relevant characteristics of a target audience;
- b. Prepare end-users for implementation of courseware materials;
- c. Conduct training courses; and
- d. Communicate effectively by visual, oral, and written form with individuals, small groups, and in front of large audiences.

Deliverables will be specified in each TA and may include:

- i. Lesson plans; and
- ii. Course reports.

B.13 Operations Support Specialist, Level 2 and 3

Tasks include but are not limited to:

- a. Provide administration and systems support to IM/IT projects and operations;
- b. Provide systems administration and systems operations support, including setting up user access, user profiles, backup and recovery, day-to-day computer systems operations;
- c. Perform software upgrades, and apply patches;
- d. Provide customer interface to ensure requested changes are implemented; and
- e. Monitor computer workload trends and make adjustments to ensure optimum utilization of computer resources.

Deliverables will be specified in each TA and may include:

- i. Weekly action log report; and
- ii. Upgrade reports.

B.14 Technical Writer, Level 1

Tasks include but are not limited to:

- a. Support the development, implementation, and integration of the systems of IM/IT projects and operations;
- b. Document help text, user manuals, technical documentation, web page content, etc.;
- c. Review documentation standards and the existing project documentation;
- d. Determine documentation requirements and makes plans for meeting them;
- e. Gather information concerning the features and functions provided by the developers;
- f. Assess the audience for the documents/manuals which are required and prepare a statement of purpose and scope for each;
- g. Develop a table of content for each document/manual and write or edit the required content;
- h. Investigate the accuracy of the information collected by making direct use of the material being documented;
- i. Prepare or coordinate the preparation of any required illustrations and diagrams;
- j. Design the layout of the documents/manuals; and
- k. Use word-processing, desk-top publishing and graphics software packages to produce final copy.

Deliverables will be specified in each TA and may include:

- i. Draft and final user manuals, technical documentation, web page content, etc.; and
- ii. Draft and final camera ready copies of documents/manuals.

5.3.4 Workstream 4: Project Management Services

P.1 Change Management Consultant, Level 3

Tasks include but are not limited to:

- a. Support the development, implementation, and integration of mission critical and non-mission critical solutions and systems;
- b. Analysis and development of business critical success factors;
- c. Analysis and development of architecture requirements design, process development, process mapping and training;
- d. Responsible for leading other functional staff to define business strategy and processes in support of transformation and change management activities;
- e. Participate in change impact analysis and change management activities;
- f. Participate in organizational realignment (job re-design organizational re-structuring);
- g. Coordinate development of training and coordination with other stakeholders; and
- h. Create presentations and present to various stakeholders, and facilitate meetings and discussions.

Deliverables will be specified in each TA and may include:

- i. Reports on change management activities and impacts;
- ii. Reports on training; and
- iii. Reports on success factors.

P.1 Change Management Consultant - Specialist, Level 3

Tasks include but are not limited to:

- a. Perform impact assessment and stakeholder analysis;
- b. Conduct sponsorship assessment;
- c. Create change management strategy;
- d. Develop communications strategy and plans;
- e. Support plan implementation;
- f. Develop communication, engagement and training products;
- g. Facilitate engagement for the review and validation of various assessments and resulting strategy;
- h. Work collaboratively with Management Team to create integrated delivery and change management plans;
- i. Update strategies and plans to support planning and performance measurement program and processes;
- j. Create lessons learned approach, report, and recommendations for senior management;
- k. Identify the most expected and potential points of resistance to change. Develop counter strategies to reduce the resistance and address the doubts and uncertainty surrounding the change to foster a positive acceptance of change;
- l. Create specific change management plans with respect to training and orientation of employees for each major change/project;
- m. Develop a detailed work plan based on the change agenda and how the various changes will need to be implemented;
- n. Establish parameters to measure the early adoption, effective utilization and proficiency to new change initiatives for individual employees and organizational units;
- o. Assessment of change impact and requirements;
- p. Identify deviations in performance from the change standards and implement strategies for corrective action to achieve full organizational adoption to change;

- q. Establish and maintain a close engagement with specialists from stakeholder branches to ensure a smooth transition to change and organization-wide successful implementation of these change initiatives;
- r. Support the execution of a talent management program to recruit, retain, and develop employees;
- s. Support the organization in building the necessary skills and capabilities to support transformational effort;
- t. Facilitate the development of a long term organizational structure to support future state; and
- u. Provide communication and stakeholder support to the client.

Deliverables will be specified in each TA and may include:

- i. Reports on change management activities and impacts;
- ii. Reports on training;
- iii. Reports on success factors;
- iv. Reports of progress on change implementation;
- v. Strategy for change management;
- vi. Bi-weekly status report documenting the progress of the work described in the work plan and above in Tasks, including difficulties, which may affect overall schedule and planned tasks for the next reporting period. The status report must include:
 - (i) Activities completed within the reporting period;
 - (ii) Planned activities for the next reporting period; and
 - (iii) Risks/issues that will require the attention of the Project Authority;
- vii. Interview guides and supporting workshop materials;
- viii. Change impact assessment including comprehensive stakeholder analysis;
- ix. Change management strategy and plan including cost estimates, change implementation schedule and roles and responsibilities;
- x. Executive and staff level presentations for regular communications and product launch purposes;
- xi. Ad hoc presentations and reports as requested by the Project Authority and within the approved work plan;
- xii. Change management plan and work plan;
- xiii. Sponsorship assessment;
- xiv. Change management strategy and plans;
- xv. Various communication products;
- xvi. Engagement plan tactics and products;
- xvii. Training products;
- xviii. Lessons learned framework;
- xix. Organizational Design plans;
- xx. Talent Management plans; and
- xxi. Recommendations on skills and capability.

P.2 Enterprise Architect, Levels 2 and 3

Tasks include but are not limited to:

- a. Evaluate architectures and system problems to support the implementation, integration, and maintenance of mission critical and non-mission critical solutions and systems;
- b. Evaluate the enterprise'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 policies, directives, standards, and programs and recommend changes to the business/ICT architecture to improve its alignment with these external factors;
- c. Identify future business/ICT requirements against the current enterprise architecture, perform gap analyses, develop Requirements for Technology Architectures (RTA), and prepare migration strategies;

- d. 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;
- e. 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;
- f. Produce an architectural evolution plan, recommend prioritization of architecture evolution initiatives, and develop and/or implement an architecture evolution plan;
- g. Manage the development and implementation of an architectural improvement plan; and
- h. Coach, mentor and train the organization.

Deliverables will be specified in each TA and may include:

- i. Enterprise alignment report;
- ii. Transition plan; and
- iii. Implementation, testing and training plans.

P.2 Enterprise Architect - Specialist, Level 3

Tasks include but are not limited to:

- a. Conduct ongoing discovery sessions with various groups of stakeholders to evaluate their current business processes, as well as the organization's current strategic imperatives, to determine how the enterprise architecture will need to change in order to improve the efficiency and effectiveness of its enterprise-wide business processes;
- b. Support the definition of business processes to be implemented in order for CSC to meet its evolving mandate;
- c. Review alternatives for enterprise architecture solutions that will enable those process changes, and present them to stakeholders;
- d. Make recommendations on a best-fit approach to enable the most effective migration from current state architecture/processes to a future state;
- e. Provide input for the Offender Management System (OMS) enterprise architectural evolution plan, especially in the area of business processes and how they are gathered;
- f. Work with CSC business stakeholders, and IMS executives, to ensure enterprise architectures are produced in alignment with business process organizational goals and performance mandates, and stakeholders are kept up to date on project progress, challenges and risks;
- g. Mentor CSC Enterprise Architects to continue to drive future evolution of the enterprise architecture;
- h. Contribute to Information Governance development;
- i. Create Enterprise Data Architecture and Framework (including roadmaps for development);
- j. Create Database standards, ensuring the right database for the right purpose (Transactional information, Media information, Offender information);
- k. Create standards for Master and Reference Data Management;
- l. Identify (other) Information Domain standards to be developed based on identification of gaps, and subsequent prioritization;
- m. Contribute to the creation of a central knowledge-base for standards;
- n. Contribute to development of Data and Information Strategies;
- o. Evaluate architectures, business, and system problems to support the implementation, integration, and maintenance of mission critical and non-mission critical solutions and systems;
- p. Evaluate the enterprise'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 policies, directives, standards, and programs and recommend changes to the business/ICT architecture to improve its alignment with these external factors;

- q. Identify future requirements against the current enterprise architecture, perform gap analyses, develop requirements for architectures, and prepare migration strategies;
- r. 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;
- s. Identify business and technology trends that create opportunities for business improvement;
- t. Advise CSC Senior Executives on IM/IT trends and emerging technologies and the impact on the organization's and government IM/IT architectures and business strategies, model "What if" scenarios and recommend appropriate changes to the existing architecture and IM/IT infrastructure, and recommend alternative solutions, methodologies and strategies;
- u. Produce an architectural evolution plan for the overall Enterprise Architecture, recommend prioritization of architecture evolution initiatives, and develop and/or implement an architecture evolution plan;
- v. Manage the development and implementation of an architectural improvement plan; and
- w. Coach, mentor and train the organization.

Deliverables will be specified in each TA and may include:

- i. Architectures, frameworks, methodologies, roadmaps and strategies;
- ii. Enterprise Data Architecture;
- iii. Database standards;
- iv. Standards for Master and Reference Data Management;
- v. Reports on future requirements;
- vi. Feasibility studies;
- vii. Reports on trends and emerging technologies;
- viii. Presentation materials;
- ix. Reports on the feasibility of migrating from the current state to the target state;
- x. Reports, business and architecture impact analysis on new or planned changes to architectures and designs;
- xi. Development of transition plans and/or architectures to move from current to future states; and
- xii. Participation in change impact analysis and change management activities.

P.4 Organizational Development Consultant, Level 3

Tasks include but are not limited to:

- a. Enable, facilitate, and mediate the evolution of the various organizational or departmental structures toward the organization's desired outcome or structure;
- b. Assist with organizational needs assessment and strategic planning to ensure development of human capital to meet business objectives and goals;
- c. Provide advice, support and consultation to senior staff, business unit requests, and front line management to achieve strategic initiatives and goals;
- d. Research, design, implement and maintain employee development programs including leadership development and other management development programs;
- e. Develop and implement processes to measure the effectiveness of development and learning efforts to ensure performance improvements are focused on measurable and attainable results;
- f. Serve as an expert resource by collaborating with HR and business unit executives to ensure clear standards and metrics linked to talent reviews and employee development plans;
- g. Develop strategic partnerships with other internal project managers to identify and consult on change management initiatives to support strategic projects requiring organizational culture change;
- h. Proactively address and respond to Organizational Development issues by bringing key stakeholders together to assess root causes and performance gaps and recommend appropriate interventions;
- i. Practice continuous improvement processes and procedures, eliminating non-value added activities;

- j. Conduct focus groups and/or process improvement sessions as needed;
- k. Implement and manage the organization's training to ensure cost effective employee development activities that support the organization's strategic initiatives; and
- l. Manage and facilitate organizational initiatives and projects as requested.

Deliverables will be specified in each TA and may include:

- i. Report on development programs;
- ii. Transition plans; and
- iii. Issues and problems report.

P.5 Project Executive, Level 3

Tasks include but are not limited to:

- a. Provide program management support in the evaluation of business organizations and Information and Communications Technology strategies, projects, and operations;
- b. Manage several Project Managers, each responsible for an element of the project and its associated project team;
- c. Define and document project objectives, and determine budget requirements;
- d. Meet with other organizational executives to ensure all organizational (internal and external) stakeholders are committed and moving forward on project and organizational goals;
- e. Resolve issues related to the project;
- f. Prepare plans, charts, tables and diagrams to assist in analyzing or displaying problems;
- g. Work with a variety of project management tools; and
- h. Project sign-off.

Deliverables will be specified in each TA and may include:

- i. Draft and final program management plan, program progress reports;
- ii. Draft and final budget forecasts reports; and
- iii. Program risk reports.

P.5 Project Executive - Specialist, Level 3

Tasks include but are not limited to:

- a. Identify key communications objectives, strategies, and activities to promote dialogue and action related to the Office of Project Management and the IM/IT Portfolio Governance Model and how they relate to employees' day-to-day activities in running the business;
- b. Leverage existing and propose new communications vehicles (informal and formal) to communicate effectively and consistently across multiple-levels within CSC and its partner organizations;
- c. Manage several Project Managers, each responsible for an element of the project and its associated targeted interviews with the Office of Project Management, IMS Project Managers and Client Relationship Officers to better understand their requirements;
- d. Work with director-level and higher executive management to define and document IM/IT project objectives, determine budget requirement, establish and deliver project status reporting and build and manage project teams;
- e. Meet with other organizational executives to ensure all organizational (internal and external) stakeholders are committed and moving forward on project and organizational goals;
- f. Resolve issues related to the project;
- g. Prepare plans, charts, tables and diagrams to assist in analyzing or displaying problems;
- h. Work with a variety of project management tools;

- i. Provide support and guidance, as well as mentoring to CSC's team, including multiple project managers and multiple team leads, through all phases of the design, implementation, and in the delivery of various initiatives in support of new systems;
- j. Develop and align change management resource work effort to change management strategy for implementation of projects deployed to internal and external clients;
- k. Assist the design / operations teams with strategic planning sessions to develop the AS-IS and To-Be processes and subsequent changes to roles;
- l. Lead public engagement strategy, and develop communication plan;
- m. Support and consult on defining new organizational roles and responsibilities as they related to the project;
- n. Conduct change impact assessments and identify training requirements;
- o. Develop employee transition plan identifying the key training and communication components to support and motivate them through the change;
- p. Create engagement plans for program management to establish ways to engage and motivate program staff; and
- q. Develop and present change management plans and training plans to senior officials.

Deliverables will be specified in each TA and may include:

- i. Communication Strategy;
- ii. Change Management strategy;
- iii. Employee transition plan;
- iv. Change impact assessment;
- v. Training needs analysis and plans;
- vi. Engagement strategy;
- vii. Status update; and
- viii. Gap analysis

P.8 Project Leader, Level 3

Tasks include but are not limited to:

- a. Provide leadership and planning support in the development of general requirements for systems of IM/IT projects and operations;
- b. 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;
- c. Analyze 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;
- d. Produce overall plan, a detailed plan for the functional analysis phase, and obtain approval of preliminary analysis;
- e. Plan, direct and control the activities of a system development team within scheduled time and cost parameters;
- f. Evaluate proposed computer applications to determine technical, operational and economic feasibility;
- g. 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;
- h. Monitor the design, implementation and operations start-up of the proposed system against established goals, objectives and milestones;
- i. 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;
- j. Analyze 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;
- k. Produce overall plan, a detailed plan for the functional analysis phase, and obtain approval of preliminary analysis;

- l. Plan, direct and control the activities of a system development team within scheduled time and cost parameters;
- m. Evaluate proposed computer applications to determine technical, operational and economic feasibility;
- n. 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;
- o. Monitor the design, implementation and operations start-up of the proposed system against established goals, objectives and milestones;
- p. Design and test systems development environment infrastructure and tooling to comply with established SDLC, Software Configuration Management practices, Continuous integration, and Continuous Delivery;
- q. Ensure deployment of deliverables into the required environments such as development, quality control, testing, integration, user acceptance as planned for successful delivery to business users;
- r. Work with a variety of software and environment management tools; and
- s. Provide support on technical deliverables forecasting, tracking and implementation.

Deliverables will be specified in each TA and may include:

- i. Report on system requirements;
- ii. Cost/Benefit and impact analysis reports;
- iii. Program progress reports;
- iv. SDLC adaptation plan;
- v. Iteration plan and reports;
- vi. Development, quality assurance and production configuration management plan;
- vii. Technical solution implementation report;
- viii. Problem report; and
- ix. Weekly time reports.

P.9 Project Manager, Level 2 and 3

Tasks include but are not limited to:

- a. Provide leadership and planning support in the development, implementation, and integration of systems of IM/IT projects and operations;
- b. Follow CSC's established and documented Project Management Lifecycle and System Development Lifecycle including tools to be identified by the Technical Authority;
- c. Manage several Project Managers, each responsible for an element of the project and its associated project team;
- d. Manage the project during the development, implementation and operations startup by identifying which resources are required to complete the project and that the project is developed and is fully operational within previously agreed time, cost and performance parameters;
- e. Formulate statements of problems;
- f. Establish procedures for the development and implementation of significant, new or modified project elements to solve these problems, and obtain approval thereof;
- g. Define and document the objectives for the project;
- h. Determine budgetary requirements, the composition, roles and responsibilities, and terms of reference for the project team;
- i. Report progress of the project on an ongoing basis and at scheduled points in the life cycle, including the completion of all mandatory project and software development artifacts;
- j. Meet with stakeholders and other project managers and state problems in a form capable of being solved;
- k. Prepare plans, charts, tables and diagrams to assist in analyzing or displaying problems;
- l. Work with a variety of project management tools;
- m. Ensure that all deliverables receive the required project sign-off;
- n. Prepare executive level reporting; and

- o. Deliver required baseline change requests when approved by senior management.

Deliverables will be specified in each TA and may include:

- i. Report on project artifacts and deliverables including conducting quality assurance for governance deliverables;
- ii. Weekly project progress reports;
- iii. Monthly risk reports; and
- iv. Monthly schedule updates.

P.9 Project Manager - Specialist, Level 3

Tasks include but are not limited to:

- a. Support the client in determining project organization structure, roles and responsibilities;
- b. Define change management and communication plan;
- c. Develop project charter and implementation plan;
- d. Identify and obtain support from other functions where required;
- e. Prepare overall project required initiation deliverables;
- f. Support the development of the work plan, schedule and budget;
- g. Support the client in the development of project kick-off activities;
- h. Deliver required baseline change requests when approved by senior management;
- i. Develop objectives, activity plan and schedule;
- j. Review reports and communications;
- k. Schedule and conduct consultations;
- l. Consolidate consultations findings and assess strengths, weaknesses and opportunities;
- m. Plan and facilitate program implementation;
- n. Define and document project team's development objectives;
- o. Determine resource requirements (HR and financial), project management office composition, roles, responsibilities and terms of reference for the team;
- p. Design, implement and monitor operations of the project office against established goals, objectives and milestones as defined in the project charter and implementation plan;
- q. Coach, mentor and direct project staff in project management processes (as defined by the Project Management Institute), good practices, methodologies, tools, and requirements as defined within the departmental IMP;
- r. Develop results based management framework with identified Key Performance Indicators (KPIs) to measure the effectiveness of the project office and its supporting processes;
- s. Create the data collection methodology, calculate and report on the KPIs identified in the results based management framework;
- t. Contribute to the organization's strategic and business planning initiatives, including the directorate's operational plan, if necessary;
- u. Develop and document project office control and reporting procedures to manage changes in the PMO implementation plan;
- v. Develop and document control and reporting procedures and the change control process for all projects (as applicable);
- w. Develop and document the risk and issue management processes to be used by the project;
- x. Identify, treat, and manage risks and issues;
- y. Establish quality control processes by which the project will be managed and must adhere to;
- z. Monitor all aspects of the project;
- aa. Transfer functional and technical knowledge to the departmental project teams through individual and group training, demonstrations, written instructions and documents on an ongoing basis throughout the life of the project; and
- bb. Maintain all project artifacts as per established document management requirements for the department and TB policy;

Deliverables will be specified in each TA and may include:

- i. Project kick-off report;
- ii. Governance and team structure;
- iii. Communication Plan;
- iv. Change Management Plan;
- v. Project charter;
- vi. Implementation plan including sub-plans on risk management, schedule, scope, cost and time management;
- vii. Fully documented operational processes and practices of how the projects or set of projects will operate and guidance provided to project managers on the project management processes to deliver the identified projects consistent with the departmental requirements and which support effective senior management oversight;
- viii. Quality management framework by which each project will be managed;
- ix. Monthly reporting framework for all projects;
- x. Project document management processes – consistent with TB and departmental policy requirements;
- xi. Standard resource load report to be used by all project managers (as applicable by branch). This report must be designed in such a way as to identify resource loads, resource conflicts, risks, and interdependencies including but not limited to resource allocation and work analysis, and resource load so as to identify risks, gaps, conflicts, inter-dependencies not met to aid in the identification of slippage; and
- xii. Bi-weekly status report documenting the progress of the work described above in Tasks, including difficulties which may affect overall schedule and planned tasks for the next reporting period. The status report must include:
 - (i) Activities completed within the reporting period;
 - (ii) Planned activities for the next reporting period;
 - (iii) Risks/issues that will require the attention of the Project Authority;
 - (iv) Corrective actions required; and
 - (v) Cost and schedule performance of the project and/or PMO.

P.11 Quality Assurance (QA) Specialist/Analyst, Level 3

Tasks include but are not limited to:

- a. Provide quality assurance support in the evaluation of Information and Communications Technology strategies, projects, and operations;
- b. Lead development of test plans, test scripts and test data;
- c. Participate in functional and technical design reviews, perform integration/functional and system testing, and verify test results;
- d. Identify and document software defects;
- e. Participate with other project resources to resolve defects;
- f. Perform regression testing of software applications;
- g. Implement automated testing processes;
- h. Ensure that end-to-end testing and test-driven design processes are followed;
- i. Utilize automation tools such as Azure DevOps for testing; and
- j. Fully document all QA activities.

Deliverables will be specified in each TA and may include:

- i. Draft and final test plans report;
- ii. Draft and final test results report;
- iii. Defect reports; and
- iv. Test-driven-design results report.

5.3.5 Workstream 5: Cyber Protection Services

C.3 Information Technology Security Threat and Risk Assessment (TRA) and Certification and Accreditation (C&A) Analyst, Level 3

Tasks include but are not limited to:

- a. Review, analyze, and/or apply Federal, Provincial or Territorial IT Security policies, System IT Security Certification & Accreditation processes, IT Security products, safeguards and best practices, and the IT Security risk mitigation strategies;
- b. Identify threats to, and vulnerabilities of operating systems (such as MS, Unix, Linux, and Novell), and wireless architectures;
- c. Identify personnel, technical, physical, and procedural threats to and vulnerabilities of IT systems;
- d. Develop reports such as: data security analysis, concepts of operation, Statements of Sensitivity (SoSs), threat assessments, Privacy Impact Assessments (PIAs), non-technical vulnerability assessments, risk assessments, IT Security threat, vulnerability and/or risk briefings;
- e. Conduct certification activities such as:
 - i. Develop Security Certification Plans;
 - ii. Verify that security safeguards meet the applicable policies and standards;
 - iii. Validate the security requirements by mapping the system-specific security policy to the functional security requirements, and mapping the security requirements through the various stages of design documents;
 - iv. Verify that security safeguards have been implemented correctly and that assurance requirements have been met. This includes confirming that the system has been properly configured, and establishing that the safeguards meet applicable standards;
 - v. Conduct security testing and evaluation (ST&E) to determine if the technical safeguards are functioning correctly; and
 - vi. Assess the residual risk provided by the risk assessment to determine if it meets an acceptable level of risk;
- f. Conduct accreditation activities such as:
 - i. Review certification results to ensure that:
 - (i) the system will operate with an acceptable level of risk; and
 - (ii) the system complies with the departmental and system security policies and standards; and
 - ii. Identify the conditions under which a system is to operate (for approval purposes); and
- g. Develop and deliver training material.

Deliverables will be specified in each TA and may include:

- i. Reports on threats and vulnerabilities;
- ii. Data Security Analysis;
- iii. Concepts of operation;
- iv. Statements of Sensitivity (SoSs);
- v. Threat assessments;
- vi. Privacy Impact Assessments (PIAs);
- vii. Non-technical Vulnerability Assessments;
- viii. Risk assessments;
- ix. IT Security threat, vulnerability and/or risk briefings
- x. Security Certification Plans;
- xi. Certification results review; and
- xii. Training material.

C.6 Information Technology (IT) Security Engineer, Level 3

Tasks include but are not limited to:

- a. Review, analyze and/or apply CSC IT/IM Systems;
- b. Identify the technical threats to, and vulnerabilities of, networks;
- c. Manage the IT Security configuration;
- d. Analyze IT Security tools and techniques;
- e. Analyze the security data and provide advisories and reports;
- f. Analyze IT Security statistics;
- g. Prepare technical reports such as IT Security Solutions option analysis and implementation plans;
- h. Provide Independent Verification and Validation (IV&V) support to IT Security related projects including:
 - i. IT Security audits, including applicable reports, presentations and other documentation;
 - ii. Review of contingency plans, Business Continuity Plans and Disaster Response Plans;
 - iii. Design/development and conduct IT Security protocols tests and exercises; and
 - iv. Project oversight;
- i. Develop and deliver training material.

Deliverables will be specified in each TA and may include:

- i. Reports on threats and vulnerabilities;
- ii. IT Security Configuration documentation;
- iii. Recommendation on IT Security tools and techniques;
- iv. Security data analysis;
- v. IT statistics analysis;
- vi. IT Security Solutions option analysis;
- vii. Implementation plans;
- viii. IT Security audit report;
- ix. IT Security protocol tests and exercises; and
- x. Training material.

C.8 Network Security Analyst, Level 3

Tasks include but are not limited to:

- a. Provide cyber protection support to the development, implementation, integration and maintenance of IT projects and systems;
- b. Review, analyze, and/or apply:
 - i. Internet security protocols such as SSL, S-HTTP, S-MIME, IPsec, SSH;
 - ii. TCP/IP, UDP, DNS, SMTP, SNMP;
 - iii. Approved GC Cryptographic Algorithms;
 - iv. Directory Standards such as X.400, X.500, and SMTP;
 - v. Networking Protocols (for example, HTTP, FTP, Telnet);
 - vi. Network hardening (for example: shell scripting, service identification);
 - vii. Technical IT Security safeguards;
 - viii. IT Security tools and techniques;
 - ix. Operating Systems such as MS, Unix, Linux, and Novell;
 - x. Intrusion detection systems and firewalls;
 - xi. Network routers, multiplexers and switches; and
 - xii. Wireless technology.
- c. Analyze security data and provide advisories and reports;
- d. Conduct impact analysis for new software implementations, major configuration changes and patch management;
- e. Develop proof-of-concept models and trials for IT Security;
- f. Design/develop IT Security protocols;
- g. Identify and analyze technical threats to, and vulnerabilities of, networks;

- h. Analyze IT Security tools and techniques;
- i. Complete tasks related to authorization and authentication in physical and logical environments;
- j. Prepare tailored IT Security alerts and advisories from open and closed sources;
- k. Complete tasks directly supporting the departmental IT Security and Cyber Protection Program (provided upon issuance of TA); and
- l. Develop and deliver training material relevant to the resource category.

Deliverables will be specified in each TA and may include:

- i. Security data advisories and reports;
- ii. Impact analysis for new software implementation, major configuration changes, and patch management;
- iii. Proof-of-concept models and trials;
- iv. IT Security protocols;
- v. Technical threats analysis;
- vi. Tailored IT Security alerts and advisories; and
- vii. Training material.

6.0 TASKS/RESPONSIBILITIES – GENERAL

The Contractor must provide the services under the Contract on an as-and-when requested basis. A Task Authorization will be used to request tasks during the life of this contract. The following includes, but does not limit, the tasks associated with any task authorization. The Technical Authority will identify and authorize the specific tasks required. The Contractor must:

- a. Supply resources specified via a task authorization in the resource categories described in this Statement of Work;
- b. Provide Quality Assurance monitoring on all deliverables via unit testing of components;
- c. Work in conjunction with CSC IM/IT personnel, including other project management, functional and technical resources, and any other stakeholders (such as user communities), as identified by the CSC Technical Authority;
- d. Complete assigned work according to pre-defined schedules and standards, as outlined in each TA;
- e. Confirm with the CSC Technical Authority, in writing, the receipt and successful completion of all TA requests; and
- f. Liaise with the CSC Technical Authority for meetings, project reviews, and other related project management activities.

7.0 DELIVERABLES - GENERAL

- a. Deliverables will be specified within each resulting Task Authorization. The scope of work attached to each TA will identify the particular deliverable(s), tasks, and other relevant areas of consideration that are required to be implemented by the Contractor in the provision of services;
- b. All deliverables must be provided in English;
- c. All text deliverables must be delivered in electronic copy;
- d. All deliverables must be done with Microsoft Suite products and other formats to be specified in the TAs; and
- e. The Contractor must ensure that all written deliverables and services provided are in conformance with CSC's applications development standards (copies of any relevant documents or links will be provided at the time of Contract Award or upon issuance of TA).

8.0 REPORTING REQUIREMENTS

- a. Reporting requirements, timing and format of any required reports will be stipulated within any TA issued to the Contractor;
- b. The Contractor must provide other ad hoc written or oral status updates upon request from the CSC Technical Authority in relation to any and all TAs issued to the Contractor; and
- c. The Contractor must immediately notify the Technical Authority of any issues, problems, or areas of concern as they arise in relation to any of the services being completed under a TA.

9.0 CONSTRAINTS

- a. Working Hours:

Normal business hours are from 07:00 to 17:00, Monday through Friday where the Contractor's resources will be expected to work 7.5 hours each day between these hours.

From time to time, the Contractor's resource(s) may be required to work outside these hours, or on weekends and holidays.

The Contractor's resources must account for time worked following the CSC IMS contractor time recording procedure, provided by the Technical Authority after issuance of a Task Authorization.

- b. Location:

All work is to be performed at CSC facilities in the National Capital Region or remotely at the Contractor's site. Exact location to be determined at the time of issuance of the Task Authorization.. Travel costs outside or within the NCR will not be reimbursed.

- c. CSC Technology Environment

All work will be required to meet:

- i. The current TBS standards and policies related to the Policy on the Management of Projects;
- ii. The Standard for Project Complexity and Risk;
- iii. The Guide to Project Gating for IT-Enabled Projects;
- iv. CSC's current applications development standards; and
- v. Any related Communications Security Establishment (CSE) Information Technology Standard Guidelines (ITSG).

Copies of these documents will be provided at the time of Contract Award or upon issuance of TA.

10.0 RESOURCE SKILLS AND UPGRADE TRAINING

All resources may be required to work in an agile software environment using design thinking principles.

The CSC IM/IT technical architecture is dynamic and in line with CSC's business requirements and adaption of new technologies.

The resources will accumulate knowledge and experience of the CSC IM/IT environment. This is a key factor in maintaining service levels and client satisfaction. CSC and the Contractor must work together to minimize resource turnover and to ensure the resources' knowledge and skill remain relevant to current and planned technologies in the CSC IM/IT environment.

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The CSC Technical Authority will provide the Contractor with an overview of current and planned technology within CSC. Updates will be provided on an ad-hoc basis as the need arises. The Contractor must provide details of training plans within 15 calendar days of being provided this information. The resources must also attend CSC information sessions and the Contractor's presentations on new technologies as required.

The Contractor is responsible for all costs related to the training of resources required by the CSC Technical Authority.

11.0 LANGUAGE OF WORK

The language of work and correspondence for this requirement is English.

APPENDIX A TO ANNEX A

TASKING ASSESSMENT PROCEDURE

1. Where a requirement for a specific task is identified, a draft Task Authorization Form (TA Form) as attached at Appendix B to Annex A will be provided to the Contractor in accordance with the allocation methodology stated in the Contract Article titled "Allocation of Task Authorizations". Once a draft TA Form is received, the Contractor must submit to the Technical Authority a quotation of rates to supply the requested Resource Categories based on the information identified in the TA Form, as well as its corresponding proposed resource(s). The quotation must be signed and submitted to Canada within the time for response identified in the TA Form. The Contractor will be given a minimum of 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. 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. Knowledge Testing: The Contractor's resource(s) that is submitted with the draft TA and evaluated may be required to attend a mandatory knowledge test at the Client's location. This knowledge test will be related to the mandatory criteria detailed in Appendix C of Annex A. The resource(s) must pass the knowledge test in order for the Contractor to be deemed responsive. If the Contractor's resource(s) does not pass the mandatory knowledge test, the Contractor will be deemed non-responsive and the evaluation will proceed to the next Contractor. This process will continue until a responsive Contractor is determined. Should all Contractors be deemed non-responsive, Canada reserves the right to use other methods of supply.
7. 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)			
<p>Description of the Project / Work Required:</p> <p>BACKGROUND</p> <p>TASKS</p> <p>DELIVERABLES</p> <p>RESOURCE ESSENTIAL TECHNOLOGY REQUIREMENT(S)</p> <p>() (To be identified in TA) () (To be identified in TA)</p>			
2. PERIOD OF SERVICES		FROM (DATE):	TO (DATE):
3. Work Location:			
4. Invoice sent to:		CSC Invoicing: Send copy to Carole.Holden@tpsgc-pwgsc.gc.ca	
5. Travel Requirements:			
6. Language Requirements:			
7. Other Conditions / Constraints:			
8. Level of Security Clearance Required for the Contractor Personnel:			
9. Contractor's Response:			

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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):			

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 (type or print)	Signature: _____ Date: _____
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11. Approval – Signing Authority

Signatures (Client)

Name, Title and Signature of Technical Authority to Sign on Behalf of CSC (type or print)	Signature: _____ Date: _____
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Name, Title and Signature of CSC Procurement Representative to Sign on Behalf of CSC (type or print)	Signature: _____ Date: _____
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Signatures (PWGSC)

Name, Title and Signature of *Contracting Authority to Sign on Behalf of Public Works and Government Services Canada (type or print)	Signature: _____ Date: _____
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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
WORKSTREAM 1 – APPLICATION SERVICES

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 résumé. Only the specific answer should be provided.

Mandatory Criteria A.1 Application/Software Architect, Level 2, and 3		Statement of Compliance and Cross Reference to Written Proposal / Résumé
M1	<p>The proposed resource must have a University Degree or College/CEGEP Diploma related to computer science, information technology, or engineering from a recognized post-secondary institution.</p> <p>A copy of each degree or diploma must be provided.</p>	
M2	<p>The Contractor must demonstrate, using one or more 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 style="margin-left: 40px;">a) Level 2 Resource: Five years within the past nine years.</p> <p style="margin-left: 40px;">b) Level 3 Resource: Ten years within the past fifteen years.</p> <p>The Project(s) must demonstrate that the resource provided services the same or similar to tasks a, b, d, and k listed in Annex A – Statement of Work for the resource category identified in the TA.</p>	
M3	<p>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 seven years, as follows:</p> <p style="margin-left: 40px;">a) Level 2 Resource: Three projects each with a minimum duration of six months. If the project involved “new technologies” as indicated on the TA, then one project with a minimum duration of four months is acceptable.</p> <p style="margin-left: 40px;">b) Level 3 Resource: Five projects each with a minimum duration of six months. If the project</p>	

	involved “new technologies” as indicated on the TA, then one project with a minimum duration of four months is acceptable.	
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Mandatory Criteria A.1 Application/Software Architect – Specialist Level 3		Statement of Compliance and Cross Reference to Written Proposal / Résumé
M1	<p>The proposed resource must have a University Degree or College/CEGEP Diploma related to computer science, information technology, or engineering from a recognized post-secondary institution.</p> <p>A copy of each degree or diploma must be provided.</p>	
M2	<p>The Contractor must demonstrate, using one or more 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 style="padding-left: 40px;">a) Level 3 Specialist Resource: Ten years within the past fifteen years.</p> <p>The Project(s) must demonstrate that the resource provided services the same or similar to tasks a, b, c, d, e, g, h, and i listed in Annex A – Statement of Work for the resource category identified in the TA.</p>	
M3	<p>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 seven years, as follows:</p> <p style="padding-left: 40px;">a) Level 3 Specialist Resource: Seven projects each with a minimum duration of six months. If the project involved “new technologies” as indicated on the TA, then one project with a minimum duration of four months is acceptable.</p>	

Mandatory Criteria A.2 ERP Functional Analyst, Level 3		Statement of Compliance and Cross Reference to Written Proposal / Résumé

M1	<p>The proposed resource must have a University Degree or College/CEGEP Diploma related to computer science, information technology, finance, business, or commerce from a recognized post-secondary institution.</p> <p>A copy of each degree or diploma must be provided.</p>	
M2	<p>The Contractor must demonstrate, using one or more 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>Level 3 Resource: Ten years within the past fifteen years.</p> <p>The Project(s) must demonstrate that the resource provided services the same or similar to tasks a, c, d, e, and g listed in Annex A – Statement of Work for the resource category identified in the TA.</p>	
M3	<p>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 seven years, as follows:</p> <p>Level 3 Resource: Five projects each with a minimum duration of six months. If the project involved “new technologies” as indicated on the TA, then one project with a minimum duration of four months is acceptable.</p>	

<p align="center">Mandatory Criteria A.4 ERP System Analyst, Level 3</p>		<p align="center">Statement of Compliance and Cross Reference to Written Proposal / Résumé</p>
M1	<p>The proposed resource must have a University Degree or College/CEGEP Diploma related to computer science, information technology, or engineering from a recognized post-secondary institution.</p> <p>A copy of each degree or diploma must be provided.</p>	
M2	<p>The Contractor must demonstrate, using one or more 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>Level 3 Resource: Ten years within the past fifteen years.</p>	

	The Project(s) must demonstrate that the resource provided services the same or similar to tasks a, b, c, and d listed in Annex A – Statement of Work for the resource category identified in the TA.	
M3	<p>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 seven years, as follows:</p> <p>Level 3 Resource: Five projects each with a minimum duration of six months. If the project involved “new technologies” as indicated on the TA, then one project with a minimum duration of four months is acceptable.</p>	

Mandatory Criteria A.6 Programmer/Software Developer, Level 2 and 3		Statement of Compliance and Cross Reference to Written Proposal / Résumé
M1	<p>The proposed resource must have a University Degree or College/CEGEP Diploma related to computer science, information technology, or engineering from a recognized post-secondary institution.</p> <p>A copy of each degree or diploma must be provided.</p>	
M2	<p>The Contractor must demonstrate, using one or more projects, that 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 nine years.</p> <p>b) Level 3 Resource: Ten years within the past fifteen years.</p> <p>The Project(s) must demonstrate that the resource provided services the same or similar to tasks a, b, c, and g listed in Annex A – Statement of Work for the resource category identified in the TA.</p>	
M3	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 seven years, as follows:	

	<p>a) Level 2 Resource: Three projects each with a minimum duration of six months. If the project involved “new technologies” as indicated on the TA, 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” as indicated on the TA, then one project with a minimum duration of four months is acceptable.</p>	
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Mandatory Criteria A.7 Programmer/Analyst, Level 2 and 3		Statement of Compliance and Cross Reference to Written Proposal / Résumé
M1	<p>The proposed resource must have a University Degree or College/CEGEP Diploma related to computer science, information technology, or engineering from a recognized post-secondary institution.</p> <p>A copy of each degree or diploma must be provided.</p>	
M2	<p>The Contractor must demonstrate, using one or more 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 nine years.</p> <p>b) Level 3 Resource: Ten years within the past fifteen years.</p> <p>The Project(s) must demonstrate that the resource provided services the same or similar to tasks b, c, d, and f listed in Annex A – Statement of Work for the resource category identified in the TA.</p>	
M3	<p>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 seven 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” as indicated on the TA, 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” as indicated on</p>	

	the TA, then one project with a minimum duration of four months is acceptable.	
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Mandatory Criteria A.8 System Analyst, Level 3		Statement of Compliance and Cross Reference to Written Proposal / Résumé
M1	<p>The proposed resource must have a University Degree or College/CEGEP Diploma related to computer science, information technology, or engineering from a recognized post-secondary institution.</p> <p>A copy of each degree or diploma must be provided.</p>	
M2	<p>The Contractor must demonstrate, using one or more 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>Level 3 Resource: Ten years within the past fifteen years.</p> <p>The Project(s) must demonstrate that the resource provided services the same or similar to tasks b, c, d, and e listed in Annex A – Statement of Work for the resource category identified in the TA.</p>	
M3	<p>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 seven years, as follows:</p> <p>Level 3 Resource: Five projects each with a minimum duration of six months. If the project involved “new technologies” as indicated on the TA, then one project with a minimum duration of four months is acceptable.</p>	

Mandatory Criteria A.9 System Auditor, Level 3		Statement of Compliance and Cross Reference to Written Proposal / Résumé
M1	<p>The proposed resource must have a University Degree or College/CEGEP Diploma related to computer science, information technology, or engineering from a recognized post-secondary institution.</p> <p>A copy of each degree or diploma must be provided.</p>	
M2	<p>The Contractor must demonstrate, using one or more projects, that the proposed resource has the minimum number of years of experience specified below for the</p>	

	<p>resource category identified in the Task Authorization (TA).</p> <p>Level 3 Resource: Ten years within the past fifteen years.</p> <p>The Project(s) must demonstrate that the resource provided services the same or similar to tasks a, b, c, and d listed in Annex A – Statement of Work for the resource category identified in the TA.</p>	
M3	<p>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 seven years, as follows:</p> <p>Level 3 Resource: Five projects each with a minimum duration of six months. If the project involved “new technologies” as indicated on the TA, then one project with a minimum duration of four months is acceptable.</p>	

Mandatory Criteria A.11 Tester, Level 3		Statement of Compliance and Cross Reference to Written Proposal / Résumé
M1	<p>The proposed resource must have a University Degree or College/CEGEP Diploma related to computer science, information technology, or engineering from a recognized post-secondary institution.</p> <p>A copy of each degree or diploma must be provided.</p>	
M2	<p>The Contractor must demonstrate, using one or more 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>Level 3 Resource: Ten years within the past fifteen years.</p> <p>The Project(s) must demonstrate that the resource provided services the same or similar to tasks a, b, c, and d listed in Annex A – Statement of Work for the resource category identified in the TA.</p>	
M3	<p>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 seven years, as follows:</p> <p>Level 3 Resource: Five projects each with a minimum duration of six months. If the project involved “new</p>	

	technologies” as indicated on the TA, then one project with a minimum duration of four months is acceptable.	
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Mandatory Criteria A.16 Web Multi-media Content Consultant, Level 3		Statement of Compliance and Cross Reference to Written Proposal / Résumé
M1	<p>The proposed resource must have a University Degree or College/CEGEP Diploma related to computer science, information technology, communications, or graphic design from a recognized post-secondary institution.</p> <p>A copy of each degree or diploma must be provided.</p>	
M2	<p>The Contractor must demonstrate, using one or more 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>Level 3 Resource: Ten years within the past fifteen years.</p> <p>The Project(s) must demonstrate that the resource provided services the same or similar to tasks a, b, c, d, and e listed in Annex A – Statement of Work for the resource category identified in the TA.</p>	
M3	<p>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 seven years, as follows:</p> <p>Level 3 Resource: Five projects each with a minimum duration of six months. If the project involved “new technologies” as indicated on the TA, then one project with a minimum duration of four months is acceptable.</p>	

APPENDIX C TO ANNEX A
RESOURCES ASSESSMENT CRITERIA AND RESPONSE TABLE
WORKSTREAM 2 – INFORMATION MANAGEMENT AND INFORMATION
TECHNOLOGY SERVICES

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 résumé. Only the specific answer should be provided.

Mandatory Criteria I.2 Database Administrator, Level 3		Statement of Compliance and Cross Reference to Written Proposal / Résumé
M1	<p>The proposed resource must have a University Degree or College/CEGEP Diploma related to computer science, information technology, or engineering from a recognized post-secondary institution.</p> <p>A copy of each degree or diploma must be provided.</p>	
M2	<p>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>Level 3 Resource: Ten years within the past fifteen years.</p> <p>The Project(s) must demonstrate that the resource provided services the same or similar to tasks a, b, c, d, e and f listed in Annex A – Statement of Work for the resource category identified in the TA.</p>	
M3	<p>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 seven years, as follows:</p> <p>Level 3 Resource: Five projects each with a minimum duration of six months. If the project involved “new technologies” as indicated on the TA, then one project with a minimum duration of four months is acceptable.</p>	

Mandatory Criteria I.3 Database Analyst/Information Management Administrator, Level 2 and 3		Statement of Compliance and Cross Reference to Written Proposal / Résumé
M1	<p>The proposed resource must have a University Degree or College/CEGEP Diploma related to computer science, information technology, or engineering from a recognized post-secondary institution.</p> <p>A copy of each degree or diploma must be provided.</p>	
M2	<p>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 style="padding-left: 40px;">a) Level 2 Resource: Five years within the past nine years.</p> <p style="padding-left: 40px;">b) Level 3 Resource: Ten years within the past fifteen years.</p> <p>The Project(s) must demonstrate that the resource provided services the same or similar to tasks a, b, e, f and g listed in Annex A – Statement of Work for the resource category identified in the TA.</p>	
M3	<p>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 seven years, as follows:</p> <p style="padding-left: 40px;">a) Level 2 Resource: Three projects each with a minimum duration of six months. If the project involved “new technologies” as indicated on the TA, then one project with a minimum duration of four months is acceptable.</p> <p style="padding-left: 40px;">b) Level 3 Resource: Five projects each with a minimum duration of six months. If the project involved “new technologies” as indicated on the TA, then one project with a minimum duration of four months is acceptable.</p>	

Mandatory Criteria I.5 Information Management Architect, Level 3		Statement of Compliance and Cross Reference to Written Proposal / Résumé
M1	<p>The proposed resource must have a University Degree or College/CEGEP Diploma related to computer science, information technology, or engineering from a recognized post-secondary institution.</p> <p>A copy of each degree or diploma must be provided.</p>	
M2	<p>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>Level 3 Resource: Ten years within the past fifteen years.</p> <p>The Project(s) must demonstrate that the resource provided services the same or similar to tasks a, b, c, f and g listed in Annex A – Statement of Work for the resource category identified in the TA.</p>	
M3	<p>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 seven years, as follows:</p> <p>Level 3 Resource: Five projects each with a minimum duration of six months. If the project involved “new technologies” as indicated on the TA, then one project with a minimum duration of four months is acceptable.</p>	

Mandatory Criteria I.9 System Administrator, Level 3		Statement of Compliance and Cross Reference to Written Proposal / Résumé
M1	<p>The proposed resource must have a University Degree or College/CEGEP Diploma related to computer science, information technology, or engineering from a recognized post-secondary institution.</p> <p>A copy of each degree or diploma must be provided.</p>	
M2	<p>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>Level 3 Resource: Ten years within the past fifteen years.</p>	

	The Project(s) must demonstrate that the resource provided services the same or similar to tasks a, b, c, d, e and f listed in Annex A – Statement of Work for the resource category identified in the TA.	
M3	<p>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 seven years, as follows:</p> <p>Level 3 Resource: Five projects each with a minimum duration of six months. If the project involved “new technologies” as indicated on the TA, then one project with a minimum duration of four months is acceptable.</p>	

Mandatory Criteria I.10 Technical Architect, Level 2 and 3		Statement of Compliance and Cross Reference to Written Proposal / Résumé
M1	The Contactor’s proposed resource must have an Information Technology Infrastructure Library (ITIL) certification at the Foundation level.	
M2	<p>The proposed resource must have a University Degree or College/CEGEP Diploma related to computer science, information technology, or engineering from a recognized post-secondary institution.</p> <p>A copy of each degree or diploma must be provided.</p>	
M3	<p>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 nine years.</p> <p>b) Level 3 Resource: Ten years within the past fifteen years.</p> <p>The Project(s) must demonstrate that the resource provided services the same or similar to tasks b, d, e, and f listed in Annex A – Statement of Work for the resource category identified in the TA.</p>	
M4	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 seven years, as follows:	

	<p>a) Level 2 Resource: Three projects each with a minimum duration of six months. If the project involved “new technologies” as indicated on the TA, 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” as indicated on the TA, then one project with a minimum duration of four months is acceptable.</p>	
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Mandatory Criteria I.11 Technology Architect, Level 2 and 3		Statement of Compliance and Cross Reference to Written Proposal / Résumé
M1	<p>The proposed resource must have a University Degree or College/CEGEP Diploma related to computer science, information technology, or engineering from a recognized post-secondary institution.</p> <p>A copy of each degree or diploma must be provided.</p>	
M2	<p>The Contractor must demonstrate, using one or more 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 nine years.</p> <p>b) Level 3 Resource: Ten years within the past fifteen years.</p> <p>The Project(s) must demonstrate that the resource provided services the same or similar to tasks d, g, h, and I listed in Annex A – Statement of Work for the resource category identified in the TA.</p>	
M3	<p>The Contractor must demonstrate, using one or more 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 seven 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” as indicated on the TA, then one project with a minimum duration of four months is acceptable.</p>	

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	b) Level 3 Resource: Five projects each with a minimum duration of six months. If the project involved "new technologies" as indicated on the TA, then one project with a minimum duration of four months is acceptable.	
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APPENDIX C TO ANNEX A
RESOURCES ASSESSMENT CRITERIA AND RESPONSE TABLE
WORKSTREAM 3 – BUSINESS MANAGEMENT SERVICES

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 résumé. Only the specific answer should be provided.

Mandatory Criteria B.1 Business Analyst, Level 3		Statement of Compliance and Cross Reference to Written Proposal / Résumé
M1	<p>The proposed resource must have a University Degree or College/CEGEP Diploma related to information system management, business, business administration, commerce, computer science, information technology, or science from a recognized post-secondary institution.</p> <p>A copy of each degree or diploma must be provided.</p>	
M2	<p>The Contractor must demonstrate, using one or more 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>Level 3 Resource: Ten years within the past fifteen years.</p> <p>The Project(s) must demonstrate that the resource provided services the same or similar to tasks a, b, d, and e listed in Annex A – Statement of Work for the resource category identified in the TA.</p>	
M3	<p>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 seven years, as follows:</p> <p>Level 3 Resource: Five projects each with a minimum duration of six months. If the project involved “new technologies” as indicated on the TA, then one project with a minimum duration of four months is acceptable.</p>	

Mandatory Criteria B.4 Business Continuity/Disaster Recovery Specialist, Level 3		Statement of Compliance and Cross Reference to Written Proposal / Résumé
M1	<p>The proposed resource must have a University Degree or College/CEGEP Diploma related to computer</p>	

	<p>science, information technology, or engineering from a recognized post-secondary institution.</p> <p>A copy of each degree or diploma must be provided.</p>	
M2	<p>The Contractor must demonstrate, using one or more 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>Level 3 Resource: Ten years within the past fifteen years.</p> <p>The Project(s) must demonstrate that the resource provided services the same or similar to tasks b, c, e, and g listed in Annex A – Statement of Work for the resource category identified in the TA.</p>	
M3	<p>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 seven years, as follows:</p> <p>Level 3 Resource: Five projects each with a minimum duration of six months. If the project involved “new technologies” as indicated on the TA, then one project with a minimum duration of four months is acceptable.</p>	

Mandatory Criteria B.6 Business System Analyst, Level 2 and 3		Statement of Compliance and Cross Reference to Written Proposal / Résumé
M1	<p>The proposed resource must have a University Degree or College/CEGEP Diploma related to commerce, business administration, information system management, computer science, information technology, engineering, or science. from a recognized post-secondary institution.</p> <p>A copy of each degree or diploma must be provided.</p>	
M2	<p>The Contractor must demonstrate, using one or more 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 nine years</p>	

	<p>b) Level 3 Resource: Ten years within the past fifteen years.</p> <p>The Project(s) must demonstrate that the resource provided services the same or similar to tasks b, c, e, and g listed in Annex A – Statement of Work for the resource category identified in the TA.</p>	
M3	<p>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 seven 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” as indicated on the TA, 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” as indicated on the TA, then one project with a minimum duration of four months is acceptable.</p>	

Mandatory Criteria B.9 Courseware Developer, Level 2		Statement of Compliance and Cross Reference to Written Proposal / Résumé
M1	<p>The Contactor must demonstrate, using one or more 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>Level 2 Resource: Five years within the past nine years</p> <p>The Project(s) must demonstrate that the resource provided services the same or similar to tasks a, b, c, f, g and h listed in Annex A – Statement of Work for the resource category identified in the TA.</p>	

Mandatory Criteria B.10 Help Desk Specialist, Level 1		Statement of Compliance and Cross Reference to Written Proposal / Résumé
M1	<p>The Contactor must demonstrate, using one or more 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>Level 1 Resource: Three years of experience within</p>	

	<p>the past five years.</p> <p>The Project(s) must demonstrate that the resource provided services the same or similar to tasks b and c listed in Annex A – Statement of Work for the resource category identified in the TA.</p>	
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Mandatory Criteria B.11 Instructor Technology, Level 2		Statement of Compliance and Cross Reference to Written Proposal / Résumé
M1	<p>The Contactor must demonstrate, using one or more 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>Level 2 Resource: Five years within the past nine years</p> <p>The Project(s) must demonstrate that the resource provided services the same or similar to tasks b and c listed in Annex A – Statement of Work for the resource category identified in the TA.</p>	

Mandatory Criteria B.13 Operations Support Specialist, Level 2 and 3		Statement of Compliance and Cross Reference to Written Proposal / Résumé
M1	<p>The Contactor must demonstrate, using one or more projects, that the proposed resource has the combined 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 2 Resource: Five years within the past nine years b) Level 3 Resource: Ten years within the past fifteen years. <p>The Project(s) must demonstrate that the resource provided services the same or similar to tasks a, b, c, and e listed in Annex A – Statement of Work for the resource category identified in the TA.</p>	

Mandatory Criteria B.14 Technical Writer, Level 1		Statement of Compliance and Cross Reference to Written Proposal / Résumé
M1	<p>The Contactor must demonstrate, using one or more projects, that the proposed resource has the combined minimum number of years of experience</p>	

	<p>specified below for the resource category identified in the Task Authorization (TA).</p> <p>Level 1 Resource: Three years within the past five years.</p> <p>The Project(s) must demonstrate that the resource provided services the same or similar to tasks a, b, and e listed in Annex A – Statement of Work for the resource category identified in the TA.</p>	
M2	<p>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 seven years, as follows:</p> <p>Level 1 Resource: Three projects each with a minimum duration of six months. If the project involved “new technologies” as indicated on the TA, then one project with a minimum duration of four months is acceptable.</p>	

APPENDIX C TO ANNEX A
RESOURCES ASSESSMENT CRITERIA AND RESPONSE TABLE
WORKSTREAM 4 – PROJECT MANAGEMENT SERVICES

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 résumé. Only the specific answer should be provided.

Mandatory Criteria P.1 Change Management Consultant, Level 3		Statement of Compliance and Cross Reference to Written Proposal / Résumé
M1	<p>The Contractor must demonstrate, using one or more 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 style="padding-left: 40px;">a) Level 3 Resource: Ten years within the past fifteen years.</p> <p>The Project(s) must demonstrate that the resource provided services the same or similar to tasks b, c, d, e, and f listed in Annex A – Statement of Work for the resource category identified in the TA.</p>	
M2	<p>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 seven years, as follows:</p> <p style="padding-left: 40px;">a) Level 3 Resource: Five projects each with a minimum duration of six months. If the project involved “new technologies” as indicated on the TA, then one project with a minimum duration of four months is acceptable.</p>	

Mandatory Criteria P.1 Change Management Consultant, - Specialist, Level 3		Statement of Compliance and Cross Reference to Written Proposal / Résumé
M1	<p>The Contractor must demonstrate, using one or more 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) Specialist Resource: Ten years within the past fifteen years.</p> <p>The Project(s) must demonstrate that the resource provided services the same or similar to tasks a, b, c, f, g, k, n, and p listed in Annex A – Statement of Work for the resource category identified in the TA.</p>	
M2	<p>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 seven years, as follows:</p> <p>a) Level 3 Specialist Resource: Seven projects each with a minimum duration of six months. If the project involved “new technologies” as indicated on the TA, then one project with a minimum duration of four months is acceptable.</p>	

Mandatory Criteria P.2 Enterprise Architect, Level 2, and 3		Statement of Compliance and Cross Reference to Written Proposal / Résumé
M1	<p>The Contactor’s proposed resource must have Information Technology Infrastructure Library (ITIL) certification.</p>	
M2	<p>The Contactor must demonstrate that the proposed resource has completed one project in which they produced an enterprise infrastructure architecture which includes a data access layer for a Microsoft-based legacy application which accesses multiple large-scale relational database management system (RDBMS) technologies.</p> <p><u>Large-scale RDBMS is defined as:</u></p> <ul style="list-style-type: none"> a) Robust: continuous, real-time data taking; b) Has a minimum of 400 tables; c) Has a minimum of 2,500 concurrent users; d) Has a minimum size of 100 GB; e) Data distribution is in multiple regions; and f) Heterogeneous environment which contains at least 3 of the following operating systems: Windows, HP-UX, OpenVMS, and Linux. <p>The proposed resource’s experience must have been acquired in the past ten (10) years.</p>	
M3	<p>The Contractor must demonstrate, using project descriptions, that the proposed resource has demonstrated experience in each of the technologies,</p>	

	<p>software, tools and techniques identified in the TA as essential within the last seven 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” as indicated on the TA, 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” as indicated on the TA, then one project with a minimum duration of four months is acceptable. 	
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Mandatory Criteria P.2 Enterprise Architect – Specialist, Level 3		Statement of Compliance and Cross Reference to Written Proposal / Résumé
M1	<p>The Contactor’s proposed resource must have Information Technology Infrastructure Library (ITIL) certification.</p>	
M2	<p>The Contactor must demonstrate that the proposed resource has completed one project in which they produced an enterprise infrastructure architecture which includes a data access layer for a Microsoft-based legacy application which accesses multiple large-scale relational database management system (RDBMS) technologies.</p> <p><u>Large-scale RDBMS is defined as:</u></p> <ul style="list-style-type: none"> a) Robust: continuous, real-time data taking; b) Has a minimum of 400 tables; c) Has a minimum of 2,500 concurrent users; d) Has a minimum size of 100 GB; e) Data distribution is in multiple regions; and f) Heterogeneous environment which contains at least 3 of the following operating systems: Windows, HP-UX, OpenVMS, and Linux. <p>The proposed resource’s experience must have been acquired in the past ten (10) years.</p>	
M3	<p>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 seven years, as follows:</p>	

	<p>a) Level 3 Specialist Resource: Seven projects each with a minimum duration of six months. If the project involved “new technologies” as indicated on the TA, then one project with a minimum duration of four months is acceptable.</p>	
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Mandatory Criteria P.4 Organizational Development Consultant, Level 3		Statement of Compliance and Cross Reference to Written Proposal / Résumé
M1	<p>The proposed resource must have a University Degree or College/CEGEP Diploma related to Commerce, Business Administration, Business Management, or Organizational Development.</p> <p>A copy of each degree or diploma must be provided.</p>	
M2	<p>The Contractor must demonstrate, using one or more 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>Level 3 Resource: Ten years within the past fifteen years.</p> <p>The Project(s) must demonstrate that the resource provided services the same or similar to tasks c, d, and l listed in Annex A – Statement of Work for the resource category identified in the TA.</p>	
M3	<p>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 seven years, as follows:</p> <p>Level 3 Resource: Five projects each with a minimum duration of six months. If the project involved “new technologies” as indicated on the TA, then one project with a minimum duration of four months is acceptable.</p>	

Mandatory Criteria P.5 Project Executive, Level 3		Statement of Compliance and Cross Reference to Written Proposal / Résumé
M1	<p>The proposed resource must have a University Degree or College/CEGEP Diploma related to computer science, information technology, business administration, commerce, project management, or</p>	

	<p>engineering from a recognized post-secondary institution.</p> <p>A copy of each degree or diploma must be provided.</p>	
M2	<p>The Contractor must demonstrate, using one or more 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(s) must demonstrate that the resource provided services the same or similar to tasks c, d, e, and f listed in Annex A – Statement of Work for the resource category identified in the TA.</p>	
M3	<p>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 seven 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” as indicated on the TA, then one project with a minimum duration of four months is acceptable.</p>	

Mandatory Criteria P.5 Project Executive – Specialist, Level 3		Statement of Compliance and Cross Reference to Written Proposal / Résumé
M1	<p>The proposed resource must have a University Degree or College/CEGEP Diploma related to computer science, information technology, business administration, commerce, project management, or engineering from a recognized post-secondary institution.</p> <p>A copy of each degree or diploma must be provided.</p>	
M2	<p>The Contractor must demonstrate, using one or more 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 Specialist Resource: Ten years within the past fifteen years.</p>	

	The Project(s) must demonstrate that the resource provided services the same or similar to tasks a, c, d, f, g, i, k, and m listed in Annex A – Statement of Work for the resource category identified in the TA.	
M3	<p>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 seven years, as follows:</p> <p>a) Level 3 Specialist Resource: Seven projects each with a minimum duration of six months. If the project involved “new technologies” as indicated on the TA, then one project with a minimum duration of four months is acceptable.</p>	

Mandatory Criteria P.8 Project Leader, Level 3		Statement of Compliance and Cross Reference to Written Proposal / Résumé
M1	<p>The proposed resource must have a University Degree or College/CEGEP Diploma related to computer science, information technology, project management, or engineering from a recognized post-secondary institution.</p> <p>A copy of each degree or diploma must be provided.</p>	
M2	<p>The Contractor must demonstrate, using one or more 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>Level 3 Resource: Ten years within the past fifteen years.</p> <p>The Project(s) must demonstrate that the resource provided services the same or similar to tasks b, c, e, and f listed in Annex A – Statement of Work for the resource category identified in the TA.</p>	
M3	<p>The Contractor must demonstrate, using project descriptions, that the proposed resource has completed enterprise-level projects in which the resource was responsible for specifying system requirements, alternatives, and feasibility, as follows:</p> <p>Level 3 Resource: Five projects each with a minimum duration of six months.</p>	

Mandatory Criteria P.9 Project Manager, Level 2 and 3		Statement of Compliance and Cross Reference to Written Proposal / Résumé
M1	<p>The proposed resource must have a University Degree or College/CEGEP Diploma related to computer science, information technology, project management, or engineering from a recognized post-secondary institution.</p> <p>A copy of each degree or diploma must be provided.</p>	
M2	<p>The Contractor must demonstrate, using one or more 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 style="margin-left: 40px;">a) Level 2 Resource: Five years within the past nine years.</p> <p style="margin-left: 40px;">b) Level 3 Resource: Ten years within the past fifteen years.</p> <p>The Project(s) must demonstrate that the resource provided services the same or similar to tasks d, f, g, and h listed in Annex A – Statement of Work for the resource category identified in the TA.</p>	
M3	<p>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 seven years, as follows:</p> <p style="margin-left: 40px;">a) Level 2 Resource: Three projects each with a minimum duration of six months. If the project involved “new technologies” as indicated on the TA, then one project with a minimum duration of four months is acceptable.</p> <p style="margin-left: 40px;">b) Level 3 Resource: Five projects each with a minimum duration of six months. If the project involved “new technologies” as indicated on the TA, then one project with a minimum duration of four months is acceptable.</p>	

Mandatory Criteria P.9 Project Manager - Specialist, Level 3		Statement of Compliance and Cross Reference to Written Proposal / Résumé
M1	<p>The proposed resource must have a University Degree or College/CEGEP Diploma related to computer science, information technology, project management,</p>	

	<p>or engineering from a recognized post-secondary institution.</p> <p>A copy of each degree or diploma must be provided.</p>	
M2	<p>The Contractor must demonstrate, using one or more 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 Specialist Resource: Ten years within the past fifteen years.</p> <p>The Project(s) must demonstrate that the resource provided services the same or similar to tasks o, p, q, r, s, u, w, x, and y listed in Annex A – Statement of Work for the resource category identified in the TA.</p>	
M3	<p>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 seven years, as follows:</p> <p>a) Level 3 Specialist Resource: Seven projects each with a minimum duration of six months. If the project involved “new technologies” as indicated on the TA, then one project with a minimum duration of four months is acceptable.</p>	

Mandatory Criteria P.11 QA Specialist/Analyst, Level 3		Statement of Compliance and Cross Reference to Written Proposal / Résumé
M1	<p>The proposed resource must have a University Degree or College/CEGEP Diploma related to computer science, information technology, or engineering from a recognized post-secondary institution.</p> <p>A copy of each degree or diploma must be provided.</p>	
M2	<p>The Contractor must demonstrate, using one or more 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>Level 3 Resource: Ten years within the past fifteen years.</p> <p>The Project(s) must demonstrate that the resource provided services the same or similar to tasks b, c,</p>	

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	and f listed in Annex A – Statement of Work for the resource category identified in the TA.	
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APPENDIX C TO ANNEX A
RESOURCES ASSESSMENT CRITERIA AND RESPONSE TABLE
WORKSTREAM 5 – CYBER PROTECTION SERVICES

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 résumé. Only the specific answer should be provided.

Mandatory Criteria C.3 Information Technology Security Threat and Risk Assessment (TRA) and Certification and Accreditation (C&A) Analyst, Level 3		Statement of Compliance and Cross Reference to Written Proposal / Résumé
M1	<p>The proposed resource must have a University Degree or College/CEGEP Diploma related to computer science, information technology, or engineering from a recognized post-secondary institution.</p> <p>A copy of each degree or diploma must be provided.</p>	
M2	<p>The Contractor must demonstrate, using one or more 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>Level 3 Resource: Ten years within the past fifteen years.</p> <p>The Project(s) must demonstrate that the resource provided services the same or similar to tasks a, b, c, d, e and f listed in Annex A – Statement of Work for the resource category identified in the TA.</p>	
M3	<p>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 seven years, as follows:</p> <p>Level 3 Resource: Five projects each with a minimum duration of six months. If the project involved “new technologies” as indicated on the TA, then one project with a minimum duration of four months is acceptable.</p>	

Mandatory Criteria C.6 Information Technology (IT) Security Engineer, Level 3		Statement of Compliance and Cross Reference to Written Proposal / Résumé
M1	<p>The proposed resource must have a University Degree or College/CEGEP Diploma related to computer science, information technology, or engineering from a recognized post-secondary institution.</p> <p>A copy of each degree or diploma must be provided.</p>	
M2	<p>The Contractor must demonstrate, using one or more 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>Level 3 Resource: Ten years within the past fifteen years.</p> <p>The Project(s) must demonstrate that the resource provided services the same or similar to tasks a, b, c, d, e, f and g listed in Annex A – Statement of Work for the resource category identified in the TA.</p>	
M3	<p>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 seven years, as follows:</p> <p>Level 3 Resource: Five projects each with a minimum duration of six months. If the project involved “new technologies” as indicated on the TA, then one project with a minimum duration of four months is acceptable.</p>	

Mandatory Criteria C.8 Network Security Analyst, Level 3		Statement of Compliance and Cross Reference to Written Proposal / Résumé
M1	<p>The proposed resource must have a University Degree or College/CEGEP Diploma related to computer science, information technology, or engineering from a recognized post-secondary institution.</p> <p>A copy of each degree or diploma must be provided.</p>	
M2	<p>The Contractor must demonstrate, using one or more 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>Level 3 Resource: Ten years within the past fifteen years.</p> <p>The Project(s) must demonstrate that the resource provided services the same or similar to tasks a, b, c, and d listed in Annex A – Statement of Work for the resource category identified in the TA.</p>	
M3	<p>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 seven years, as follows:</p> <p>Level 3 Resource: Five projects each with a minimum duration of six months. If the project involved “new technologies” as indicated on the TA, then one project with a minimum duration of four months is acceptable.</p>	

**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

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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
WORKSTREAM 1 – APPLICATION SERVICES

INITIAL CONTRACT PERIOD:

Resource Category	Level of Expertise	Firm Per Diem Rate		
		Year 1	Year 2	Year 3
A.1 Application/Software Architect	Level 2			
A.1 Application/Software Architect	Level 3			
A.1 Application/Software Architect – Specialist	Level 3			
A.2 ERP Functional Analyst	Level 3			
A.4 ERP System Analyst	Level 3			
A.6 Programmer/Software Developer	Level 2			
A.6 Programmer/Software Developer	Level 3			
A.7 Programmer/Analyst	Level 2			
A.7 Programmer/Analyst	Level 3			
A.8 System Analyst	Level 3			
A.9 System Auditor	Level 3			
A.11 Tester	Level 3			
A.16 Web Multi-media Content Consultant	Level 3			

OPTION PERIODS:

Resource Category	Level of Expertise	Firm Per Diem Rate	
		Year 4	Year 5
A.1 Application/Software Architect	Level 2		
A.1 Application/Software Architect	Level 3		
A.1 Application/Software Architect – Specialist	Level 3		
A.2 ERP Functional Analyst	Level 3		
A.4 ERP System Analyst	Level 3		
A.6 Programmer/Software Developer	Level 2		
A.6 Programmer/Software Developer	Level 3		
A.7 Programmer/Analyst	Level 2		

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A.7 Programmer/Analyst	Level 3		
A.8 System Analyst	Level 3		
A.9 System Auditor	Level 3		
A.11 Tester	Level 3		
A.16 Web Multi-media Content Consultant	Level 3		

ANNEX B
BASIS OF PAYMENT
WORKSTREAM 2 – INFORMATION MANAGEMENT AND INFORMATION
TECHNOLOGY SERVICES

INITIAL CONTRACT PERIOD:

Resource Category	Level of Expertise	Firm Per Diem Rate		
		Year 1	Year 2	Year 3
I.2 Database Administrator	Level 3			
I.3 Database Analyst/Information Management Administrator	Level 2			
I.3 Database Analyst/Information Management Administrator	Level 3			
I.5 Information Management Architect	Level 3			
I.9 System Administrator	Level 3			
I.10 Technical Architect	Level 2			
I.10 Technical Architect	Level 3			
I.11 Technology Architect	Level 2			
I.11 Technology Architect	Level 3			

OPTION PERIODS:

Resource Category	Level of Expertise	Firm Per Diem Rate	
		Year 4	Year 5
I.2 Database Administrator	Level 3		
I.3 Database Analyst/Information Management Administrator	Level 2		
I.3 Database Analyst/Information Management Administrator	Level 3		
I.5 Information Management Architect	Level 3		
I.9 System Administrator	Level 3		
I.10 Technical Architect	Level 2		
I.10 Technical Architect	Level 3		
I.11 Technology Architect	Level 2		
I.11 Technology Architect	Level 3		

ANNEX B
BASIS OF PAYMENT
WORKSTREAM 3 – BUSINESS MANAGEMENT SERVICES

INITIAL CONTRACT PERIOD:

Resource Category	Level of Expertise	Firm Per Diem Rate		
		Year 1	Year 2	Year 3
B.1 Business Analyst	Level 3			
B.4 Business Continuity/Disaster Recovery Specialist	Level 3			
B.6 Business System Analyst	Level 2			
B.6 Business System Analyst	Level 3			
B.9 Courseware Developer	Level 2			
B.10 Help Desk Specialist	Level 1			
B.11 Instructor, Information Technology	Level 2			
B.13 Operations Support Specialist	Level 2			
B.13 Operations Support Specialist	Level 3			
B.14 Technical Writer	Level 1			

OPTION PERIODS:

Resource Category	Level of Expertise	Firm Per Diem Rate	
		Year 4	Year 5
B.1 Business Analyst	Level 3		
B.4 Business Continuity/Disaster Recovery Specialist	Level 3		
B.6 Business System Analyst	Level 2		
B.6 Business System Analyst	Level 3		
B.9 Courseware Developer	Level 2		
B.10 Help Desk Specialist	Level 1		
B.11 Instructor, Information Technology	Level 2		
B.13 Operations Support Specialist	Level 2		
B.13 Operations Support Specialist	Level 3		
B.14 Technical Writer	Level 1		

ANNEX B
BASIS OF PAYMENT
WORKSTREAM 4 – PROJECT MANAGEMENT SERVICES

INITIAL CONTRACT PERIOD:

Resource Category	Level of Expertise	Firm Per Diem Rate		
		Year 1	Year 2	Year 3
P.1 Change Management Consultant	Level 3			
P.1 Change Management Consultant - Specialist	Level 3			
P.2 Enterprise Architect	Level 2			
P.2 Enterprise Architect	Level 3			
P.2 Enterprise Architect - Specialist	Level 3			
P.4 Organizational Development Consultant	Level 3			
P.5 Project Executive	Level 3			
P.5 Project Executive - Specialist	Level 3			
P.8 Project Leader	Level 3			
P.9 Project Manager	Level 2			
P.9 Project Manager	Level 3			
P.9 Project Manager - Specialist	Level 3			
P.11 Quality Assurance Specialist/Analyst	Level 3			

OPTION PERIODS:

Resource Category	Level of Expertise	Firm Per Diem Rate	
		Year 4	Year 5
P.1 Change Management Consultant	Level 3		
P.1 Change Management Consultant - Specialist	Level 3		
P.2 Enterprise Architect	Level 2		
P.2 Enterprise Architect	Level 3		
P.2 Enterprise Architect - Specialist	Level 3		
P.4 Organizational Development Consultant	Level 3		
P.5 Project Executive	Level 3		
P.5 Project Executive - Specialist	Level 3		

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P.8 Project Leader	Level 3		
P.9 Project Manager	Level 2		
P.9 Project Manager	Level 3		
P.9 Project Manager - Specialist	Level 3		
P.11 Quality Assurance Specialist/Analyst	Level 3		

ANNEX B
BASIS OF PAYMENT
WORKSTREAM 5 – CYBER PROTECTION SERVICES

INITIAL CONTRACT PERIOD:

Resource Category	Level of Expertise	Firm Per Diem Rate		
		Year 1	Year 2	Year 3
C.3 Information Technology Security Threat and Risk Assessment (TRA) and Certification and Accreditation (C&A) Analyst	Level 3			
C.6 IT Security Engineer	Level 3			
C.8 Network Security Analyst	Level 3			

OPTION PERIODS:

Resource Category	Level of Expertise	Firm Per Diem Rate	
		Year 4	Year 5
C.3 Information Technology Security Threat and Risk Assessment (TRA) and Certification and Accreditation (C&A) Analyst	Level 3		
C.6 IT Security Engineer	Level 3		
C.8 Network Security Analyst	Level 3		

ANNEX C SECURITY REQUIREMENTS CHECK LIST

COMMON-PS-SRCL#6 **DSD-NHQ3562**



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Security Classification / Classification de sécurité UNCLASSIFIED

TBIPS Requirement: EN578-170432/B

RW

PART A (continued) / PARTIE A (suite)	
8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets? Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS? If Yes, indicate the level of sensitivity: Dans l'affirmative, indiquer le niveau de sensibilité:	<input checked="" type="checkbox"/> Yes / Oui <input type="checkbox"/> No / Non
9. Will the supplier require access to extremely sensitive INFOSEC information or assets? Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate? Short Title(s) of material / Titres(s) abrégé(s) du matériel: Document Number / Numéro du document:	<input checked="" type="checkbox"/> Yes / Oui <input type="checkbox"/> No / Non
PART B - PERSONNEL (SUPPLIER) / PARTIE B - PERSONNEL (FOURNISSEUR)	
10. a) Personnel security screening level required / Niveau de contrôle de la sécurité du personnel requis	
<input checked="" type="checkbox"/> RELIABILITY STATUS / COTE DE FIABILITE <input type="checkbox"/> TOP SECRET - SIGINT / TRÈS SECRET - SIGINT <input type="checkbox"/> SITE ACCESS / ACCÈS AUX EMPLACEMENTS	<input type="checkbox"/> CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/> NATO CONFIDENTIAL / NATO CONFIDENTIEL
<input type="checkbox"/> SECRET / SECRET <input type="checkbox"/> NATO SECRET / NATO SECRET	<input type="checkbox"/> TOP SECRET / TRÈS SECRET <input type="checkbox"/> COSMIC TOP SECRET / COSMIC TRÈS SECRET
Special comments / Commentaires spéciaux: _____ NOTE: If multiple levels of screening are identified, a Security Classification Guide must be provided. REMARQUE: Si plusieurs niveaux de contrôle de sécurité sont requis, un guide de classification de la sécurité doit être fourni.	
10. b) May unscreened personnel be used for portions of the work? Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail? If Yes, will unscreened personnel be escorted? Dans l'affirmative, le personnel en question sera-t-il escorté?	<input checked="" type="checkbox"/> Yes / Oui <input type="checkbox"/> No / Non <input checked="" type="checkbox"/> Yes / Oui <input type="checkbox"/> No / Non
PART C - SAFEGUARDS (SUPPLIER) / PARTIE C - MESURES DE PROTECTION (FOURNISSEUR)	
INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS	
11. a) Will the supplier be required to receive and store PROTECTED and/or CLASSIFIED information or assets on its site or premises? Le fournisseur sera-t-il tenu de recevoir et d'entreposer sur place des renseignements ou des biens PROTÉGÉS et/ou CLASSIFIÉS?	<input checked="" type="checkbox"/> Yes / Oui <input type="checkbox"/> No / Non
11. b) Will the supplier be required to safeguard COMSEC information or assets? Le fournisseur sera-t-il tenu de protéger des renseignements ou des biens COMSEC?	<input checked="" type="checkbox"/> Yes / Oui <input type="checkbox"/> No / Non
PRODUCTION	
11. c) Will the production (manufacture, and/or repair and/or modification) of PROTECTED and/or CLASSIFIED material or equipment occur at the supplier's site or premises? Les installations du fournisseur serviront-elles à la production (fabrication et/ou réparation et/ou modification) de matériel PROTÉGÉ et/ou CLASSIFIÉ?	<input checked="" type="checkbox"/> Yes / Oui <input type="checkbox"/> No / Non
INFORMATION TECHNOLOGY (IT) MEDIA / SUPPORT RELATIF À LA TECHNOLOGIE DE L'INFORMATION (TI)	
11. d) Will the supplier be required to use its IT systems to electronically process, produce or store PROTECTED and/or CLASSIFIED information or data? Le fournisseur sera-t-il tenu d'utiliser ses propres systèmes informatiques pour traiter, produire ou stocker électroniquement des renseignements ou des données PROTÉGÉS et/ou CLASSIFIÉS?	<input checked="" type="checkbox"/> Yes / Oui <input type="checkbox"/> No / Non
11. e) Will there be an electronic link between the supplier's IT systems and the government department or agency? Disposera-t-on d'un lien électronique entre le système informatique du fournisseur et celui du ministère ou de l'agence gouvernementale?	<input checked="" type="checkbox"/> Yes / Oui <input type="checkbox"/> No / Non

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité
UNCLASSIFIED



COMMON-PS-SRCL#6 DSD-NHQ3562



Gouvernement
of Canada / Gouvernement
du Canada

TBIPS Requirement: EN578-170432/B

RW

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

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

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

SUMMARY CHART / TABLEAU RÉCAPITULATIF

Category / Catégorie	PROTECTED / PROTÉGÉE			CLASSIFIED / CLASSIFIÉE			NATO				COMSEC					
	A	B	C	CONFIDENTIAL / CONFIDENTIEL	SECRET / SECRET	TOP SECRET / TRÈS SECRET	NATO Restricted / NATO CONFIDENTIAL	NATO CONFIDENTIAL	NATO SECRET	COMINT / COMSEC TOP SECRET / TRÈS SECRET	PROTECTED / PROTÉGÉE			CONFIDENTIAL / CONFIDENTIEL	SECRET / SECRET	TOP SECRET / TRÈS SECRET
											A	B	C			
Facilities / Ateliers Reproduction / Réimpression																
IT Assets / Support IT																
IT Tools / Logiciels																

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

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

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

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

ATTACHMENT 3.1

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

	<p>Is the Bidder a FPS who received a lump sum payment under the terms of the Work Force Adjustment Directive?</p> <p>Yes ____ No ____</p> <p>If yes, provide the information required by the Article in Part 2 entitled "Former Public Servant"</p>	
<p>Security Clearance Level of Bidder</p> <p>[include both the level and the date it was granted]</p> <p>[Note to Bidders: Please ensure that the security clearance matches the legal name of the Bidder. If it does not, the security clearance is not valid for the Bidder.]</p>		
<p>Workstream covered by this bid: Bidders should indicate which Workstream they are proposing to supply in this bid (If the bidder has submitted bid for one or more Workstreams, please only indicate the Workstream covered by this bid).</p>	<p>Workstream</p>	<p>Yes/No</p>
	<p>Workstream 1 – Application Services</p>	
	<p>Workstream 2 – IM/IT Services</p>	
	<p>Workstream 3 – Business Management Services</p>	
	<p>Workstream 4 – Project Management Services</p>	
	<p>Workstream 5 – Cyber Protection Services</p>	
<p>On behalf of the Bidder, by signing below, I confirm that I have read the entire bid solicitation including the documents incorporated by reference into the bid solicitation and I certify that:</p> <ol style="list-style-type: none"> 1. The Bidder considers itself and its proposed resources able to meet all the mandatory requirements described in the bid solicitation; 2. This bid is valid for the period requested in the bid solicitation; 3. All the information provided in the bid is complete, true and accurate; and 4. If the Bidder is awarded a contract, it will accept all the terms and conditions set out in the resulting contract clauses included in the bid solicitation. 		
<p>Signature of Authorized Representative of Bidder</p>		

ATTACHMENT 4.1 TECHNICAL CRITERIA
WORKSTREAM 1 – APPLICATION SERVICES
PART A: MANDATORY CORPORATE EXPERIENCE – THE BIDDER

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-A	<p>BIDDER'S EXPERIENCE</p> <p>The Bidder must demonstrate in its bid, that it has provided Application Services in the past five years as of the initial publication date of this solicitation as follows:</p> <ol style="list-style-type: none"> 1. Using one reference Contract, the Bidder must demonstrate that it has provided services that are the same or similar to an Application/Software Architect in which one individual filling the position of a single resource has a minimum of 120 billable days for a period of one year. To demonstrate a similar resource category, the Bidder must map at least 50% of the Application/Software Architect's SOW tasks and deliverables of this requirement to the tasks and/or deliverables of the resource category identified in the reference contract. In the event that 50% of the tasks and deliverables results in a decimal (for example 4.5 tasks and deliverables), the number of tasks and deliverables would be rounded down (i.e. 4 tasks would be accepted as being equivalent). For the same resource category, Canada will automatically consider the referenced resource category, procured through the TBIPS contracting vehicle, to be 50% aligned with the SOW tasks and deliverables of this requirement. <p>The Contract identified must:</p> <ol style="list-style-type: none"> a) Have been with a single client; b) Have a minimum value of \$5,000,000.00 CDN (amendments and applicable taxes included); c) Have an initial minimum Contract Period of one year, not including amendments; and d) Have been completed or ongoing in the last five years (as of the initial publication date of this solicitation). <ol style="list-style-type: none"> 2. Using the same reference Contract from 1. above or a second contract, the Bidder must demonstrate that it has provided services 	

MTC#	Mandatory Technical Criteria	Bidder's Response (Reference to Substantiating Materials Included in Bid)
	<p>that are the same or similar to a Programmer/Analyst in which one individual filling the position of a single resource has a minimum of 120 billable days for a period of one year. To demonstrate a similar resource category, the Bidder must map at least 50% of the Programmer/Analyst's SOW tasks and deliverables of this requirement to the tasks and/or deliverables of the resource category identified in the reference contract. In the event that 50% of the tasks and deliverables results in a decimal (for example 4.5 tasks and deliverables), the number of tasks and deliverables would be rounded down (i.e. 4 tasks would be accepted as being equivalent). For the same resource category, Canada will automatically consider the referenced resource category, procured through the TBIPS contracting vehicle, to be 50% aligned with the SOW tasks and deliverables of this requirement.</p> <p>If the Bidder identifies a second reference Contract, that Contract must meet the requirements of 1. a) to d) above.</p> <p>Note: For the purpose of this MTC1-A criterion, a single resource is defined as one individual filling the position of that resource category.</p> <p>Note: For the purpose of this MTC1-A criterion the term 'task' includes the deliverables identified in the SOW for the resource category. For example: If a SOW category identifies 11 tasks and 4 deliverables, the bidder must use any combination of 7 of the category's SOW tasks and deliverables to meet the 50% mapping requirement (50% of 15 = 7).</p> <p>If the Bidder's reference contract does not have a Statement of Work with a list of detailed tasks, the Bidder must provide a list of tasks performed under the reference contract that can be confirmed and validated by the Client for the reference contract. The Bidder must clearly demonstrate that the list of tasks provided maps to at least 50% of the resource category's SOW tasks and deliverables.</p> <p>3. The Bidder must provide the following information for each Contract identified:</p> <ul style="list-style-type: none"> a) The name of the client organization; b) The project name under which services were provided (if applicable); c) At a minimum, the client's full name and email address. Bidders are also requested to include the title of the client; d) The Contract number or reference number; e) The start and end dates for the Initial Contract Period, not including amendments; 	

MTC#	Mandatory Technical Criteria	Bidder's Response (Reference to Substantiating Materials Included in Bid)
	<p>f) The value of the Contract (amendments and applicable taxes included);</p> <p>g) The full name of the resource, the title of the resource, and the one-year period in which the 120 billable days for the resource category identified in the reference contract was completed;</p> <p>h) A clear statement indicating whether the reference contract was procured through the TBIPS contracting vehicle; and</p> <p>i) For similar categories, the mapping of the SOW tasks and deliverables of this requirement to the tasks and/or deliverables of the resource category identified in the reference contract.</p> <p>The information listed above should be submitted using Form M1-A.</p> <p>Note to Bidder: The reference Contract(s) must have been contracted with the Bidder submitting a bid for this requirement. "Bidder" means the person or entity (or, in the case of a joint venture, the persons or entities) submitting a bid to perform a Contract for goods, services or both. It does not include the parent, subsidiaries or other affiliates of the Bidder, or its subcontractors.</p>	
MTC1-B	<p>Using the reference Contract(s) in MTC1-A, the Bidder must demonstrate in its bid that the reference Contract(s) have a cumulative total of at least 2,000 billable days for the resource categories including Application/Software Architect and Programmer/Analyst covering a period not more than three years.</p> <p>The Bidder must provide the following information:</p> <p>a) The start and end date of the three-year period;</p> <p>b) The title of the resource categories provided under the Contract(s);</p> <p>c) The full names of each resource provided under the Contract(s); and</p> <p>d) The total number of days billed per resource under the Contract(s).</p> <p>The information listed above should be submitted using Form M1-B.</p>	
MTC2	<p>CLIENT MANAGER</p> <p>The Bidder must identify in its bid, the full name and position title of the individual that will be designated as the CSC Client Manager responsible</p>	

MTC#	Mandatory Technical Criteria	Bidder's Response (Reference to Substantiating Materials Included in Bid)
	<p>for resource and contract management associated with the resulting contract.</p> <p>A copy of the Client Manager's resume must be provided with the bid.</p> <p>The information listed above should be submitted using Form M2.</p>	
MTC3	<p>RISK MITIGATION STRATEGY</p> <p>The Bidder must provide in its bid, the Risk Mitigation Strategy it proposes to implement in the resulting Contract. The Strategy must at a minimum include:</p> <ul style="list-style-type: none"> a) The approach the Bidder will take to identify potential risks arising while performing the Contract; b) The approach the Bidder will take to deal with difficult and unexpected situations; and c) The approach the Bidder will take to ensure that it is able to manage large groups of diverse resources in support of a single client. <p>The information listed above should be submitted using Form M3.</p>	
MTC4	<p>CONTRACT MANAGEMENT STRATEGY</p> <p>The Bidder must provide in its bid the Contract Management Strategy it proposes to implement in the resulting Contract. The proposed Contract Management Strategy must at a minimum include how the Bidder will address the following:</p> <ul style="list-style-type: none"> a) Provide fully qualified resources to CSC within five days of receipt of a Task Authorization request; b) Manage the process of transitioning between existing contracted resources and the new contract; c) Manage the process of transitioning between contract resources during the term of the contract; d) Manage quality assurance practices in providing resources for tasking; and e) Manage contingency plans or practices to ensure resource availability and resource replacement. <p>The information listed above should be submitted using Form M4.</p>	

MTC#	Mandatory Technical Criteria	Bidder's Response (Reference to Substantiating Materials Included in Bid)
MTC5	<p>TECHNICAL ENVIRONMENT</p> <p>Using three separate IM/IT *projects, the Bidder must demonstrate in its bid that it has provided informatics professional services for an IM/IT system in the past five years as of the initial publication date of this solicitation. The Bidder must demonstrate that each project was executed in a technical environment of 2,000 or more users.</p> <p>*Project is defined as a series of tasks that need to be completed in order to reach a specific outcome.</p> <p>The Bidder must provide the following information for each project identified:</p> <ul style="list-style-type: none"> a) The name of the client organization; b) The project name and the number of users the project serviced; c) At a minimum, the client's full name and email address. Bidders are also requested to include the title of the client; d) The Contract number or reference number under which the project was executed; e) The start and end dates for each project; and f) A description of each project identified that describes how the project served an environment of 2,000 users or more. <p>The information listed above should be submitted using Form M5.</p> <p>Note to Bidder: The identified projects must have been contracted with the Bidder submitting a bid for this requirement. "Bidder" means the person or entity (or, in the case of a joint venture, the persons or entities) submitting a bid to perform a Contract for goods, services or both. It does not include the parent, subsidiaries or other affiliates of the Bidder, or its subcontractors.</p>	

ATTACHMENT 4.1 TECHNICAL CRITERIA

WORKSTREAM 1 – APPLICATION SERVICES

PART B: POINT RATED CORPORATE EXPERIENCE – THE BIDDER

RTC#	Rated Technical Criteria	Maximum Points	Points Allocation	Bidder's Response (Reference to Substantiating Materials Included in Bid)
RTC1	<p>BILLABLE DAYS: APPLICATION/SOFTWARE ARCHITECT AND PROGRAMMER/ANALYST</p> <p>Using the contract(s) the Bidder referenced in response to MTC1-A and MTC1-B:</p> <ol style="list-style-type: none"> The Bidder should demonstrate that the services provided by the resource in the Bidder's response to MTC1-A that is the same or similar to an Application/Software Architect, exceeds the 120 billable day minimum specified in MTC1-A. The Bidder may use one additional Contract to demonstrate that a single resource that is the same or similar to an Application/Software Architect in each contract exceeds the 120 billable day minimum specified in MTC1-A. The Bidder must demonstrate that the second Contract for this resource category meets the requirements of MTC1-A. The information for the second Contract for this resource category should be submitted using Form MTC1-A. The services must have been provided in the past five years as of the initial publication date of this solicitation. The Bidder should demonstrate that the services provided by the resource in the Bidder's response to MTC1-A that is the same or similar to a Programmer/Analyst, exceeds the 120 billable day minimum specified in MTC1-A. The Bidder may use one additional Contract to demonstrate that a single resource that is the same or similar to a Programmer/Analyst in each contract exceeds the 120 billable day minimum specified in MTC1-A. The Bidder must demonstrate that the second Contract for this resource category meets the requirements of MTC1-A. The information for the second Contract for this resource category should be 	<p>10</p> <p>10</p>	<p>Application/Software Architect:</p> <ul style="list-style-type: none"> 121 days to 239 days = 2 points 240 days to 479 days = 4 points 480 days to 719 days = 6 points 720 days to 959 days = 8 points 960 days or more = 10 points <p>Programmer/Analyst:</p> <ul style="list-style-type: none"> 121 days to 239 days = 2 points 240 days to 479 days = 4 points 480 days to 719 days = 6 points 720 days to 959 days = 8 points 960 days or more = 10 points 	

RTC#	Rated Technical Criteria	Maximum Points	Points Allocation	Bidder's Response (Reference to Substantiating Materials Included in Bid)
	<p>submitted using Form MTC1-A. The services must have been provided in the past five years as of the initial publication date of this solicitation.</p> <p>The information listed above should be submitted with the bid using Form R1.</p> <p>In situations where a resource was replaced, the Bidder must include the names of the replacement resources, the start and end dates of each resource (DD/MM/YYYY), and the respective billable days.</p> <p>For the purpose of this RTC1 criterion, a single resource is defined as one role for that resource category which multiple individuals may fill, but not simultaneously.</p> <p>Note to Bidder: The reference Contract(s) must have been contracted with the Bidder submitting a bid for this requirement. "Bidder" means the person or entity (or, in the case of a joint venture, the persons or entities) submitting a bid to perform a Contract for goods, services or both. It does not include the parent, subsidiaries or other affiliates of the Bidder, or its subcontractors.</p>			
RTC2	<p>CLIENT MANAGER</p> <p>Using one or more reference contract(s), the Bidder should demonstrate the following for the CSC Client Manager named in response to MTC2:</p> <ol style="list-style-type: none"> 1. The name of the CSC Client Manager named in response to MTC2; 2. The number of years of experience serving as a Client Manager; and 3. The total number of resources simultaneously managed by the Client Manager under any contract(s) for twelve months (consecutive or non-consecutive) within the past five years as of the initial publication date of this solicitation. 	5	<ul style="list-style-type: none"> • One point for each year of experience exceeding three years serving as a Client Manager on contracts (up to a maximum of 5 points) 	

RTC#	Rated Technical Criteria	Maximum Points	Points Allocation	Bidder's Response (Reference to Substantiating Materials Included in Bid)
	<p>b) The project name under which services were provided (if applicable);</p> <p>c) At a minimum, the client's full name and email address. Bidders are also requested to include the title of the client;</p> <p>d) The Contract number or reference number;</p> <p>e) The start and end date of the Initial Contract Period, not including amendments ;</p> <p>f) A description of how the Risk Mitigation Strategy as outlined in MTC3 a) to c) was implemented; and</p> <p>g) The total initial minimum value (excluding applicable taxes) of the Initial Contract Period, not including amendments.</p> <p>2. The Bidder should include a signed statement from the Project Authority, Technical Authority, or Contracting Authority that the Risk Mitigation Strategy was actually implemented as proposed for the reference Contract.</p> <p>The information listed above should be submitted with the bid using Form R3.</p> <p>Note to Bidder: The reference Contract must have been contracted with the Bidder submitting a bid for this requirement. "Bidder" means the person or entity (or, in the case of a joint venture, the persons or entities) submitting a bid to perform a Contract for goods, services or both. It does not include the parent, subsidiaries or other affiliates of the Bidder, or its subcontractors.</p>		<p>Risk Mitigation Strategy was actually implemented as proposed for the reference Contract, an additional five points will be allocated (up to a maximum of fifteen points and an overall Criteria maximum of thirty points).</p>	
RTC4	<p>CONTRACT MANAGEMENT STRATEGY</p> <p>1. Using up to three reference Contracts, the Bidder should demonstrate that its proposed Contract Management Strategy in MTC4 has been implemented in IT Professional Services Contracts within the past seven years as of the initial publication date of this solicitation. Each Contract identified must :</p> <p>a) Have been with a single client;</p> <p>b) Have an initial minimum value of \$1,000,000.00 (CDN) excluding applicable taxes, not including amendments;</p>	15	<ul style="list-style-type: none"> Five points will be allocated for each Contract in the last seven years in which the Bidder has implemented the proposed Contract Management Strategy (up to a maximum of fifteen points). 	

RTC#	Rated Technical Criteria	Maximum Points	Points Allocation	Bidder's Response (Reference to Substantiating Materials Included in Bid)
	<p>c) Have an initial minimum Contract Period of one year, not including amendments; and</p> <p>d) Have been completed or ongoing in the last seven years as of the initial publication date of this solicitation.</p> <p>The Bidder must provide the following information for each Contract identified:</p> <p>a) The name of the client organization;</p> <p>b) The project name under which services were provided (if applicable);</p> <p>c) At a minimum, the client's full name and email address. Bidders are also requested to include the title of the client;</p> <p>d) The Contract number or reference number;</p> <p>e) The start and end date of the Initial Contract Period, not including amendments ;</p> <p>f) A description of how the Contract Management Strategy as outlined in MTC4 a) to e) was implemented; and</p> <p>g) The total initial minimum value (excluding applicable taxes) of the Initial Contract Period, not including amendments.</p> <p>2. The Bidder should include a signed statement from the Project Authority, Technical Authority, or Contracting Authority that the Contract Management Strategy was actually implemented as proposed for the reference Contract.</p> <p>The information listed above should be submitted with the bid using Form R4.</p> <p>Note to Bidder: The reference Contract must have been contracted with the Bidder submitting a bid for this requirement. "Bidder" means the person or entity (or, in the case of a joint venture, the persons or entities) submitting a bid to perform a Contract for goods, services or both. It does not include the parent, subsidiaries or other affiliates of the Bidder, or its subcontractors.</p>	15	<ul style="list-style-type: none"> If the Bidder includes a signed statement from the Project Authority, Technical Authority, or Contracting Authority that the Contract Management Strategy was actually implemented as proposed for the reference Contract, an additional five points will be allocated (up to a maximum of fifteen points and an overall Criteria maximum of thirty points). 	
RTC5	<p>BIDDER EXPERIENCE WITH NEW TECHNOLOGIES AND NEW METHODOLOGIES</p>	10	Five points for each reference Contract that demonstrates experience providing	

RTC#	Rated Technical Criteria	Maximum Points	Points Allocation	Bidder's Response (Reference to Substantiating Materials Included in Bid)
	<p>uses the new technology or the new methodology does not demonstrate that the bidder or its resources provided services for the new technology or the new methodology.</p> <p>The information listed above should be submitted with the bid using Form R5.</p> <p>Note to Bidder: The reference Contract must have been contracted with the Bidder submitting a bid for this requirement. "Bidder" means the person or entity (or, in the case of a joint venture, the persons or entities) submitting a bid to perform a Contract for goods, services or both. It does not include the parent, subsidiaries or other affiliates of the Bidder, or its subcontractors.</p>			
Maximum Points Available:			127	
Minimum Points Required:			77	

ATTACHMENT 4.1 TECHNICAL CRITERIA

WORKSTREAM 2 – IM/IT SERVICES

PART A: MANDATORY CORPORATE EXPERIENCE – THE BIDDER

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-A	<p>BIDDER'S EXPERIENCE</p> <p>The Bidder must demonstrate in its bid, that it has provided Information Management and Information Technology Services in the past five years as of the initial publication date of this solicitation as follows:</p> <ol style="list-style-type: none"> 1. Using one reference Contract, the Bidder must demonstrate that it has provided services that are the same or similar to a Technical Architect in which one individual filling the position of a single resource has a minimum of 120 billable days for a period of one year. To demonstrate a similar resource category, the Bidder must map at least 50% of the Technical Architect's SOW tasks and deliverables of this requirement to the tasks and/or deliverables of the resource category identified in the reference contract. In the event that 50% of the tasks and deliverables results in a decimal (for example 4.5 tasks and deliverables), the number of tasks and deliverables would be rounded down (i.e. 4 tasks would be accepted as being equivalent). For the same resource category, Canada will automatically consider the referenced resource category, procured through the TBIPS contracting vehicle, to be 50% aligned with the SOW tasks and deliverables of this requirement. <p>The Contract identified must:</p> <ol style="list-style-type: none"> a) Have been with a single client; b) Have a minimum value of \$5,000,000.00 CDN (amendments and applicable taxes included); c) Have an initial minimum Contract Period of one year, not including amendments; and d) Have been completed or ongoing in the last five years (as of the initial publication date of this solicitation). <ol style="list-style-type: none"> 2. Using the same reference Contract from 1. above or a second contract, the Bidder must demonstrate that it has provided services that are the same or similar to a Technology Architect in which one individual filling the position of a single resource has a minimum of 120 billable days for a period of one year. To demonstrate a similar 	

MTC#	Mandatory Technical Criteria	Bidder's Response (Reference to Substantiating Materials Included in Bid)
	<p>resource category, the Bidder must map at least 50% of the Technology Architect's SOW tasks and deliverables of this requirement to the tasks and/or deliverables of the resource category identified in the reference contract. In the event that 50% of the tasks and deliverables results in a decimal (for example 4.5 tasks and deliverables), the number of tasks and deliverables would be rounded down (i.e. 4 tasks would be accepted as being equivalent). For the same resource category, Canada will automatically consider the referenced resource category, procured through the TBIPS contracting vehicle, to be 50% aligned with the SOW tasks and deliverables of this requirement.</p> <p>If the Bidder identifies a second reference Contract, that Contract must meet the requirements of 1. a) to d) above.</p> <p>Note: For the purpose of this MTC1-A criterion, a single resource is defined as one individual filling the position of that resource category.</p> <p>Note: For the purpose of this MTC1-A criterion the term 'task' includes the deliverables identified in the SOW for the resource category. For example: If a SOW category identifies 11 tasks and 4 deliverables, the bidder must use any combination of 7 of the category's SOW tasks and deliverables to meet the 50% mapping requirement (50% of 15 = 7).</p> <p>If the Bidder's reference contract does not have a Statement of Work with a list of detailed tasks, the Bidder must provide a list of tasks performed under the reference contract that can be confirmed and validated by the Client for the reference contract. The Bidder must clearly demonstrate that the list of tasks provided maps to at least 50% of the resource category's SOW tasks and deliverables.</p> <p>3. The Bidder must provide the following information for each Contract identified:</p> <ul style="list-style-type: none"> a) The name of the client organization; b) The project name under which services were provided (if applicable); c) At a minimum, the client's full name and email address. Bidders are also requested to include the title of the client; d) The Contract number or reference number; e) The start and end dates for the Initial Contract Period, not including amendments; f) The value of the Contract (amendments and applicable taxes included); 	

MTC#	Mandatory Technical Criteria	Bidder's Response (Reference to Substantiating Materials Included in Bid)
	<p>g) The full name of the resource, the title of the resource, and the one-year period in which the 120 billable days for the resource category identified in the reference contract was completed;</p> <p>h) A clear statement indicating whether the reference contract was procured through the TBIPS contracting vehicle; and</p> <p>i) For similar categories, the mapping of the SOW tasks and deliverables of this requirement to the tasks and/or deliverables of the resource category identified in the reference contract.</p> <p>The information listed above should be submitted using Form M1-A.</p> <p>Note to Bidder: The reference Contract(s) must have been contracted with the Bidder submitting a bid for this requirement. "Bidder" means the person or entity (or, in the case of a joint venture, the persons or entities) submitting a bid to perform a Contract for goods, services or both. It does not include the parent, subsidiaries or other affiliates of the Bidder, or its subcontractors.</p>	
MTC1-B	<p>Using the reference Contract(s) in MTC1-A, the Bidder must demonstrate in its bid that the reference Contract(s) have a cumulative total of at least 2,000 billable days for the resource categories including Technical Architect and Technology Architect covering a period not more than three years.</p> <p>The Bidder must provide the following information:</p> <p>a) The start and end date of the three-year period;</p> <p>b) The title of the resource categories provided under the Contract(s);</p> <p>c) The full names of each resource provided under the Contract(s); and</p> <p>d) The total number of days billed per resource under the Contract(s).</p> <p>The information listed above should be submitted using Form M1-B.</p>	
MTC2	<p>CLIENT MANAGER</p> <p>The Bidder must identify in its bid, the full name and position title of the individual that will be designated as the CSC Client Manager responsible for resource and contract management associated with the resulting contract.</p>	

MTC#	Mandatory Technical Criteria	Bidder's Response (Reference to Substantiating Materials Included in Bid)
	<p>A copy of the Client Manager's resume must be provided with the bid.</p> <p>The information listed above should be submitted using Form M2.</p>	
MTC3	<p>RISK MITIGATION STRATEGY</p> <p>The Bidder must provide in its bid, the Risk Mitigation Strategy it proposes to implement in the resulting Contract. The Strategy must at a minimum include:</p> <ul style="list-style-type: none"> a) The approach the Bidder will take to identify potential risks arising while performing the Contract; b) The approach the Bidder will take to deal with difficult and unexpected situations; and c) The approach the Bidder will take to ensure that it is able to manage large groups of diverse resources in support of a single client. <p>The information listed above should be submitted using Form M3.</p>	
MTC4	<p>CONTRACT MANAGEMENT STRATEGY</p> <p>The Bidder must provide in its bid the Contract Management Strategy it proposes to implement in the resulting Contract. The proposed Contract Management Strategy must at a minimum include how the Bidder will address the following:</p> <ul style="list-style-type: none"> a) Provide fully qualified resources to CSC within five days of receipt of a Task Authorization request; b) Manage the process of transitioning between existing contracted resources and the new contract; c) Manage the process of transitioning between contract resources during the term of the contract; d) Manage quality assurance practices in providing resources for tasking; and e) Manage contingency plans or practices to ensure resource availability and resource replacement. <p>The information listed above should be submitted using Form M4.</p>	

MTC#	Mandatory Technical Criteria	Bidder's Response (Reference to Substantiating Materials Included in Bid)
MTC5	<p>TECHNICAL ENVIRONMENT</p> <p>Using three separate IM/IT *projects, the Bidder must demonstrate in its bid that it has provided informatics professional services for an IM/IT system in the past five years as of the initial publication date of this solicitation. The Bidder must demonstrate that each project was executed in a technical environment of 2,000 or more users.</p> <p>*Project is defined as a series of tasks that need to be completed in order to reach a specific outcome.</p> <p>The Bidder must provide the following information for each project identified:</p> <ul style="list-style-type: none"> a) The name of the client organization; b) The project name and the number of users the project serviced; c) At a minimum, the client's full name and email address. Bidders are also requested to include the title of the client; d) The Contract number or reference number under which the project was executed; e) The start and end dates for each project; and f) A description of each project identified that describes how the project served an environment of 2,000 users or more. <p>The information listed above should be submitted using Form M5.</p> <p>Note to Bidder: The identified projects must have been contracted with the Bidder submitting a bid for this requirement. "Bidder" means the person or entity (or, in the case of a joint venture, the persons or entities) submitting a bid to perform a Contract for goods, services or both. It does not include the parent, subsidiaries or other affiliates of the Bidder, or its subcontractors.</p>	

ATTACHMENT 4.1 TECHNICAL CRITERIA

WORKSTREAM 2 – IM/IT SERVICES

PART B: POINT RATED CORPORATE EXPERIENCE – THE BIDDER

RTC#	Rated Technical Criteria	Maximum Points	Points Allocation	Bidder's Response (Reference to Substantiating Materials Included in Bid)
RTC1	<p>BILLABLE DAYS: TECHNICAL ARCHITECT AND TECHNOLOGY ARCHITECT</p> <p>Using the contract(s) the Bidder referenced in response to MTC1-A and MTC1-B:</p> <ol style="list-style-type: none"> The Bidder should demonstrate that the services provided by the resource in the Bidder's response to MTC1-A that is the same or similar to a Technical Architect, exceeds the 120 billable day minimum specified in MTC1-A. The Bidder may use one additional Contract to demonstrate that a single resource that is the same or similar to a Technical Architect in each contract exceeds the 120 billable day minimum specified in MTC1-A. The Bidder must demonstrate that the second Contract for this resource category meets the requirements of MTC1-A. The information for the second Contract for this resource category should be submitted using Form MTC1-A. The services must have been provided in the past five years as of the initial publication date of this solicitation. The Bidder should demonstrate that the services provided by the resource in the Bidder's response to MTC1-A that is the same or similar to a Technology Architect, exceeds the 120 billable day minimum specified in MTC1-A. The Bidder may use one additional Contract to demonstrate that a single resource that is the same or similar to a Technology Architect in each contract exceeds the 120 billable day minimum specified in MTC1-A. The Bidder must demonstrate that the second Contract for this resource category meets the requirements of MTC1-A. The information for the second Contract for this resource category should be submitted using Form MTC1-A. The 	<p>10</p> <p>10</p>	<p>Technical Architect:</p> <ul style="list-style-type: none"> • 121 days to 239 days = 2 points • 240 days to 479 days = 4 points • 480 days to 719 days = 6 points • 720 days to 959 days = 8 points • 960 days or more = 10 points <p>Technology Architect:</p> <ul style="list-style-type: none"> • 121 days to 239 days = 2 points • 240 days to 479 days = 4 points • 480 days to 719 days = 6 points • 720 days to 959 days = 8 points • 960 days or more = 10 points 	

RTC#	Rated Technical Criteria	Maximum Points	Points Allocation	Bidder's Response (Reference to Substantiating Materials Included in Bid)
	<p>c) At a minimum, the client's full name and email address. Bidders are also requested to include the title of the client;</p> <p>d) The Contract number or reference number;</p> <p>e) The start and end date of the Initial Contract Period, not including amendments ;</p> <p>f) A description of how the Risk Mitigation Strategy as outlined in MTC3 a) to c) was implemented; and</p> <p>g) The total initial minimum value (excluding applicable taxes) of the Initial Contract Period, not including amendments.</p> <p>2. The Bidder should include a signed statement from the Project Authority, Technical Authority, or Contracting Authority that the Risk Mitigation Strategy was actually implemented as proposed for the reference Contract.</p> <p>The information listed above should be submitted with the bid using Form R3.</p> <p>Note to Bidder: The reference Contract must have been contracted with the Bidder submitting a bid for this requirement. "Bidder" means the person or entity (or, in the case of a joint venture, the persons or entities) submitting a bid to perform a Contract for goods, services or both. It does not include the parent, subsidiaries or other affiliates of the Bidder, or its subcontractors.</p>		<p>implemented as proposed for the reference Contract, an additional five points will be allocated (up to a maximum of fifteen points and an overall Criteria maximum of thirty points).</p>	
RTC4	<p>CONTRACT MANAGEMENT STRATEGY</p> <p>1. Using up to three reference Contracts, the Bidder should demonstrate that its proposed Contract Management Strategy in MTC4 has been implemented in IT Professional Services Contracts within the past seven years as of the initial publication date of this solicitation.</p> <p>Each Contract identified must :</p> <p>a) Have been with a single client;</p> <p>b) Have an initial minimum value of \$1,000,000.00 (CDN) excluding applicable taxes, not including amendments;</p>	15	<ul style="list-style-type: none"> Five points will be allocated for each Contract in the last seven years in which the Bidder has implemented the proposed Contract Management Strategy (up to a maximum of fifteen points). 	

RTC#	Rated Technical Criteria	Maximum Points	Points Allocation	Bidder's Response (Reference to Substantiating Materials Included in Bid)
	<p>c) Have an initial minimum Contract Period of one year, not including amendments; and</p> <p>d) Have been completed or ongoing in the last seven years as of the initial publication date of this solicitation.</p> <p>The Bidder must provide the following information for each Contract identified:</p> <p>a) The name of the client organization;</p> <p>b) The project name under which services were provided (if applicable);</p> <p>c) At a minimum, the client's full name and email address. Bidders are also requested to include the title of the client;</p> <p>d) The Contract number or reference number;</p> <p>e) The start and end date of the Initial Contract Period, not including amendments ;</p> <p>f) A description of how the Contract Management Strategy as outlined in MTC4 a) to e) was implemented; and</p> <p>g) The total initial minimum value (excluding applicable taxes) of the Initial Contract Period, not including amendments.</p> <p>2. The Bidder should include a signed statement from the Project Authority, Technical Authority, or Contracting Authority that the Contract Management Strategy was actually implemented as proposed for the reference Contract.</p> <p>The information listed above should be submitted with the bid using Form R4.</p> <p>Note to Bidder: The reference Contract must have been contracted with the Bidder submitting a bid for this requirement. "Bidder" means the person or entity (or, in the case of a joint venture, the persons or entities) submitting a bid to perform a Contract for goods, services or both. It does not include the parent, subsidiaries or other affiliates of the Bidder, or its subcontractors.</p>	15	<ul style="list-style-type: none"> If the Bidder includes a signed statement from the Project Authority, Technical Authority, or Contracting Authority that the Contract Management Strategy was actually implemented as proposed for the reference Contract, an additional five points will be allocated (up to a maximum of fifteen points and an overall Criteria maximum of thirty points). 	
RTC5	BIDDER EXPERIENCE WITH NEW TECHNOLOGIES AND NEW METHODOLOGIES		Five points for each reference Contract that demonstrates	

Solicitation Number:
21120-194545/A

Amendment Number:

Buyer ID:
626ZM

RTC#	Rated Technical Criteria	Maximum Points	Points Allocation	Bidder's Response (Reference to Substantiating Materials Included in Bid)
	<p>methodology does not demonstrate that the bidder or its resources provided services for the new technology or the new methodology</p> <p>The information listed above should be submitted with the bid using Form R5.</p> <p>Note to Bidder: The reference Contract must have been contracted with the Bidder submitting a bid for this requirement. "Bidder" means the person or entity (or, in the case of a joint venture, the persons or entities) submitting a bid to perform a Contract for goods, services or both. It does not include the parent, subsidiaries or other affiliates of the Bidder, or its subcontractors.</p>			
Maximum Points Available:			127	
Minimum Points Required:			77	

ATTACHMENT 4.1 TECHNICAL CRITERIA
WORKSTREAM 3 – BUSINESS MANAGEMENT SERVICES
PART A: MANDATORY CORPORATE EXPERIENCE – THE BIDDER

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-A	<p>BIDDER'S EXPERIENCE</p> <p>The Bidder must demonstrate in its bid, that it has provided Business Management Services in the past five years as of the initial publication date of this solicitation as follows:</p> <ol style="list-style-type: none"> 1. Using one reference Contract, the Bidder must demonstrate that it has provided services that are the same or similar to a Business System Analyst in which one individual filling the position of a single resource has a minimum of 120 billable days for a period of one year. To demonstrate a similar resource category, the Bidder must map at least 50% of the Business System Analyst's SOW tasks and deliverables of this requirement to the tasks and/or deliverables of the resource category identified in the reference contract. In the event that 50% of the tasks and deliverables results in a decimal (for example 4.5 tasks and deliverables), the number of tasks and deliverables would be rounded down (i.e. 4 tasks would be accepted as being equivalent). For the same resource category, Canada will automatically consider the referenced resource category, procured through the TBIPS contracting vehicle, to be 50% aligned with the SOW tasks and deliverables of this requirement. <p>The Contract identified must:</p> <ol style="list-style-type: none"> a) Have been with a single client; b) Have a minimum value of \$5,000,000.00 CDN (amendments and applicable taxes included); c) Have an initial minimum Contract Period of one year, not including amendments; and d) Have been completed or ongoing in the last five years (as of the initial publication date of this solicitation). <ol style="list-style-type: none"> 2. Using the same reference Contract from 1. above or a second contract, the Bidder must demonstrate that it has provided services that are the same or similar to an Operations Support Specialist in which one individual filling the position of a single resource has a minimum of 120 billable days for a period of one year. To 	

MTC#	Mandatory Technical Criteria	Bidder's Response (Reference to Substantiating Materials Included in Bid)
	<p>demonstrate a similar resource category, the Bidder must map at least 50% of the Operations Support Specialist's SOW tasks and deliverables of this requirement to the tasks and/or deliverables of the resource category identified in the reference contract. In the event that 50% of the tasks and deliverables results in a decimal (for example 4.5 tasks and deliverables), the number of tasks and deliverables would be rounded down (i.e. 4 tasks would be accepted as being equivalent). For the same resource category, Canada will automatically consider the referenced resource category, procured through the TBIPS contracting vehicle, to be 50% aligned with the SOW tasks and deliverables of this requirement.</p> <p>If the Bidder identifies a second reference Contract, that Contract must meet the requirements of 1. a) to d) above.</p> <p>Note: For the purpose of this MTC1-A criterion, a single resource is defined as one individual filling the position of that resource category.</p> <p>Note: For the purpose of this MTC1-A criterion the term 'task' includes the deliverables identified in the SOW for the resource category. For example: If a SOW category identifies 11 tasks and 4 deliverables, the bidder must use any combination of 7 of the category's SOW tasks and deliverables to meet the 50% mapping requirement (50% of 15 = 7).</p> <p>If the Bidder's reference contract does not have a Statement of Work with a list of detailed tasks, the Bidder must provide a list of tasks performed under the reference contract that can be confirmed and validated by the Client for the reference contract. The Bidder must clearly demonstrate that the list of tasks provided maps to at least 50% of the resource category's SOW tasks and deliverables.</p> <p>3. The Bidder must provide the following information for each Contract identified:</p> <ul style="list-style-type: none"> a) The name of the client organization; b) The project name under which services were provided (if applicable); c) At a minimum, the client's full name and email address. Bidders are also requested to include the title of the client; d) The Contract number or reference number; e) The start and end dates for the Initial Contract Period, not including amendments; f) The value of the Contract (amendments and applicable taxes included); 	

MTC#	Mandatory Technical Criteria	Bidder's Response (Reference to Substantiating Materials Included in Bid)
	<p>g) The full name of the resource, the title of the resource, and the one-year period in which the 120 billable days for the resource category identified in the reference contract was completed;</p> <p>h) A clear statement indicating whether the reference contract was procured through the TBIPS contracting vehicle; and</p> <p>i) For similar categories, the mapping of the SOW tasks and deliverables of this requirement to the tasks and/or deliverables of the resource category identified in the reference contract.</p> <p>The information listed above should be submitted using Form M1-A.</p> <p>Note to Bidder: The reference Contract(s) must have been contracted with the Bidder submitting a bid for this requirement. "Bidder" means the person or entity (or, in the case of a joint venture, the persons or entities) submitting a bid to perform a Contract for goods, services or both. It does not include the parent, subsidiaries or other affiliates of the Bidder, or its subcontractors.</p>	
MTC1-B	<p>Using the reference Contract(s) in MTC1-A, the Bidder must demonstrate in its bid that the reference Contract(s) have a cumulative total of at least 2,000 billable days for the resource categories including Business System Analyst and Operations Support Specialist covering a period not more than three years.</p> <p>The Bidder must provide the following information:</p> <p>a) The start and end date of the three-year period;</p> <p>b) The title of the resource categories provided under the Contract(s);</p> <p>c) The full names of each resource provided under the Contract(s); and</p> <p>d) The total number of days billed per resource under the Contract(s).</p> <p>The information listed above should be submitted using Form M1-B.</p>	
MTC2	<p>CLIENT MANAGER</p> <p>The Bidder must identify in its bid, the full name and position title of the individual that will be designated as the CSC Client Manager responsible for resource and contract management associated with the resulting contract.</p>	

MTC#	Mandatory Technical Criteria	Bidder's Response (Reference to Substantiating Materials Included in Bid)
	<p>A copy of the Client Manager's resume must be provided with the bid.</p> <p>The information listed above should be submitted using Form M2.</p>	
MTC3	<p>RISK MITIGATION STRATEGY</p> <p>The Bidder must provide in its bid, the Risk Mitigation Strategy it proposes to implement in the resulting Contract. The Strategy must at a minimum include:</p> <ul style="list-style-type: none"> a) The approach the Bidder will take to identify potential risks arising while performing the Contract; b) The approach the Bidder will take to deal with difficult and unexpected situations; and c) The approach the Bidder will take to ensure that it is able to manage large groups of diverse resources in support of a single client. <p>The information listed above should be submitted using Form M3.</p>	
MTC4	<p>CONTRACT MANAGEMENT STRATEGY</p> <p>The Bidder must provide in its bid the Contract Management Strategy it proposes to implement in the resulting Contract. The proposed Contract Management Strategy must at a minimum include how the Bidder will address the following:</p> <ul style="list-style-type: none"> a) Provide fully qualified resources to CSC within five days of receipt of a Task Authorization request; b) Manage the process of transitioning between existing contracted resources and the new contract; c) Manage the process of transitioning between contract resources during the term of the contract; d) Manage quality assurance practices in providing resources for tasking; and e) Manage contingency plans or practices to ensure resource availability and resource replacement. <p>The information listed above should be submitted using Form M4.</p>	

MTC#	Mandatory Technical Criteria	Bidder's Response (Reference to Substantiating Materials Included in Bid)
MTC5	<p>TECHNICAL ENVIRONMENT</p> <p>Using three separate IM/IT *projects, the Bidder must demonstrate in its bid that it has provided informatics professional services for an IM/IT system in the past five years as of the initial publication date of this solicitation. The Bidder must demonstrate that each project was executed in a technical environment of 2,000 or more users.</p> <p>*Project is defined as a series of tasks that need to be completed in order to reach a specific outcome.</p> <p>The Bidder must provide the following information for each project identified:</p> <ul style="list-style-type: none"> a) The name of the client organization; b) The project name and the number of users the project serviced; c) At a minimum, the client's full name and email address. Bidders are also requested to include the title of the client; d) The Contract number or reference number under which the project was executed; e) The start and end dates for each project; and f) A description of each project identified that describes how the project served an environment of 2,000 users or more. <p>The information listed above should be submitted using Form M5.</p> <p>Note to Bidder: The identified projects must have been contracted with the Bidder submitting a bid for this requirement. "Bidder" means the person or entity (or, in the case of a joint venture, the persons or entities) submitting a bid to perform a Contract for goods, services or both. It does not include the parent, subsidiaries or other affiliates of the Bidder, or its subcontractors.</p>	

RTC#	Rated Technical Criteria	Maximum Points	Points Allocation	Bidder's Response (Reference to Substantiating Materials Included in Bid)
	<p>c) At a minimum, the client's full name and email address. Bidders are also requested to include the title of the client;</p> <p>d) The Contract number or reference number;</p> <p>e) The start and end date of the Initial Contract Period, not including amendments ;</p> <p>f) A description of how the Risk Mitigation Strategy as outlined in MTC3 a) to c) was implemented; and</p> <p>g) The total initial minimum value (excluding applicable taxes) of the Initial Contract Period, not including amendments.</p> <p>2. The Bidder should include a signed statement from the Project Authority, Technical Authority, or Contracting Authority that the Risk Mitigation Strategy was actually implemented as proposed for the reference Contract.</p> <p>The information listed above should be submitted with the bid using Form R3.</p> <p>Note to Bidder: The reference Contract must have been contracted with the Bidder submitting a bid for this requirement. "Bidder" means the person or entity (or, in the case of a joint venture, the persons or entities) submitting a bid to perform a Contract for goods, services or both. It does not include the parent, subsidiaries or other affiliates of the Bidder, or its subcontractors.</p>		<p>implemented as proposed for the reference Contract, an additional five points will be allocated (up to a maximum of fifteen points and an overall Criteria maximum of thirty points).</p>	
RTC4	<p>CONTRACT MANAGEMENT STRATEGY</p> <p>1. Using up to three reference Contracts, the Bidder should demonstrate that its proposed Contract Management Strategy in MTC4 has been implemented in IT Professional Services Contracts within the past seven years as of the initial publication date of this solicitation. Each Contract identified must :</p> <p>a) Have been with a single client;</p> <p>b) Have an initial minimum value of \$1,000,000.00 (CDN) excluding applicable taxes, not including amendments;</p> <p>c) Have an initial minimum Contract Period of one year, not including amendments; and</p>	15	<ul style="list-style-type: none"> Five points will be allocated for each Contract in the last seven years in which the Bidder has implemented the proposed Contract Management Strategy (up to a maximum of fifteen points). 	

RTC#	Rated Technical Criteria	Maximum Points	Points Allocation	Bidder's Response (Reference to Substantiating Materials Included in Bid)
	<p>d) Have been completed or ongoing in the last seven years as of the initial publication date of this solicitation.</p> <p>The Bidder must provide the following information for each Contract identified:</p> <ol style="list-style-type: none"> a) The name of the client organization; b) The project name under which services were provided (if applicable); c) At a minimum, the client's full name and email address. Bidders are also requested to include the title of the client; d) The Contract number or reference number; e) The start and end date of the Initial Contract Period, not including amendments ; f) A description of how the Contract Management Strategy as outlined in MTC4 a) to e) was implemented; and g) The total initial minimum value (excluding applicable taxes) of the Initial Contract Period, not including amendments. <p>2. The Bidder should include a signed statement from the Project Authority, Technical Authority, or Contracting Authority that the Contract Management Strategy was actually implemented as proposed for the reference Contract.</p> <p>The information listed above should be submitted with the bid using Form R4.</p> <p>Note to Bidder: The reference Contract must have been contracted with the Bidder submitting a bid for this requirement. "Bidder" means the person or entity (or, in the case of a joint venture, the persons or entities) submitting a bid to perform a Contract for goods, services or both. It does not include the parent, subsidiaries or other affiliates of the Bidder, or its subcontractors.</p>	15	<ul style="list-style-type: none"> • If the Bidder includes a signed statement from the Project Authority, Technical Authority, or Contracting Authority that the Contract Management Strategy was actually implemented as proposed for the reference Contract, an additional five points will be allocated (up to a maximum of fifteen points and an overall Criteria maximum of thirty points). 	
RTC5	<p>BIDDER EXPERIENCE WITH NEW TECHNOLOGIES AND NEW METHODOLOGIES</p> <ol style="list-style-type: none"> 1. Using one or more reference Contract(s) that have been completed or are ongoing in the last seven years as of the initial publication date of 	10	Five points for each reference Contract that demonstrates experience providing services for cloud technologies to a	

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Amendment Number:

Buyer ID:
626ZM

RTC#	Rated Technical Criteria	Maximum Points	Points Allocation	Bidder's Response (Reference to Substantiating Materials Included in Bid)
	<p>The information listed above should be submitted with the bid using Form R5.</p> <p>Note to Bidder: The reference Contract must have been contracted with the Bidder submitting a bid for this requirement. "Bidder" means the person or entity (or, in the case of a joint venture, the persons or entities) submitting a bid to perform a Contract for goods, services or both. It does not include the parent, subsidiaries or other affiliates of the Bidder, or its subcontractors.</p>			
Maximum Points Available:			127	
Minimum Points Required:			77	

ATTACHMENT 4.1 TECHNICAL CRITERIA
WORKSTREAM 4 – PROJECT MANAGEMENT SERVICES
PART A: MANDATORY CORPORATE EXPERIENCE – THE BIDDER

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-A	<p>BIDDER'S EXPERIENCE</p> <p>The Bidder must demonstrate in its bid, that it has provided Project Management Services in the past five years as of the initial publication date of this solicitation as follows:</p> <ol style="list-style-type: none"> 1. Using one reference Contract, the Bidder must demonstrate that it has provided services that are the same or similar to an Enterprise Architect in which one individual filling the position of a single resource has a minimum of 120 billable days for a period of one year. To demonstrate a similar resource category, the Bidder must map at least 50% of the Enterprise Architect's SOW tasks and deliverables of this requirement to the tasks and/or deliverables of the resource category identified in the reference contract. In the event that 50% of the tasks and deliverables results in a decimal (for example 4.5 tasks and deliverables), the number of tasks would and deliverables be rounded down (i.e. 4 tasks would be accepted as being equivalent). For the same resource category, Canada will automatically consider the referenced resource category, procured through the TBIPS contracting vehicle, to be 50% aligned with the SOW tasks and deliverables of this requirement. <p>The Contract identified must:</p> <ol style="list-style-type: none"> a) Have been with a single client; b) Have a minimum value of \$5,000,000.00 CDN (amendments and applicable taxes included); c) Have an initial minimum Contract Period of one year, not including amendments; and d) Have been completed or ongoing in the last five years (as of the initial publication date of this solicitation). <ol style="list-style-type: none"> 2. Using the same reference Contract from 1. above or a second contract, the Bidder must demonstrate that it has provided services that are the same or similar to a Project Manager in which one individual filling the position of a single resource has a minimum of 120 billable days for a period of one year. To demonstrate a similar 	

MTC#	Mandatory Technical Criteria	Bidder's Response (Reference to Substantiating Materials Included in Bid)
	<p>resource category, the Bidder must map at least 50% of the Project Manager's SOW tasks and deliverables of this requirement to the tasks and/or deliverables of the resource category identified in the reference contract. In the event that 50% of the tasks and deliverables results in a decimal (for example 4.5 tasks and deliverables), the number of tasks would and deliverables be rounded down (i.e. 4 tasks would be accepted as being equivalent). For the same resource category, Canada will automatically consider the referenced resource category, procured through the TBIPS contracting vehicle, to be 50% aligned with the SOW tasks and deliverables of this requirement.</p> <p>If the Bidder identifies a second reference Contract, that Contract must meet the requirements of 1. a) to d) above.</p> <p>Note: For the purpose of this MTC1-A criterion, a single resource is defined as one individual filling the position of that resource category.</p> <p>Note: For the purpose of this MTC1-A criterion the term 'task' includes the deliverables identified in the SOW for the resource category. For example: If a SOW category identifies 11 tasks and 4 deliverables, the bidder must use any combination of 7 of the category's SOW tasks and deliverables to meet the 50% mapping requirement (50% of 15 = 7).</p> <p>If the Bidder's reference contract does not have a Statement of Work with a list of detailed tasks, the Bidder must provide a list of tasks performed under the reference contract that can be confirmed and validated by the Client for the reference contract. The Bidder must clearly demonstrate that the list of tasks provided maps to at least 50% of the resource category's SOW tasks and deliverables.</p> <p>3. The Bidder must provide the following information for each Contract identified:</p> <ul style="list-style-type: none"> a) The name of the client organization; b) The project name under which services were provided (if applicable); c) At a minimum, the client's full name and email address. Bidders are also requested to include the title of the client; d) The Contract number or reference number; e) The start and end dates for the Initial Contract Period, not including amendments; f) The value of the Contract (amendments and applicable taxes included); 	

MTC#	Mandatory Technical Criteria	Bidder's Response (Reference to Substantiating Materials Included in Bid)
	<p>g) The full name of the resource, the title of the resource, and the one-year period in which the 120 billable days for the resource category identified in the reference contract was completed;</p> <p>h) A clear statement indicating whether the reference contract was procured through the TBIPS contracting vehicle; and</p> <p>i) For similar categories, the mapping of the SOW tasks and deliverables of this requirement to the tasks and/or deliverables of the resource category identified in the reference contract.</p> <p>The information listed above should be submitted using Form M1-A.</p> <p>Note to Bidder: The reference Contract(s) must have been contracted with the Bidder submitting a bid for this requirement. "Bidder" means the person or entity (or, in the case of a joint venture, the persons or entities) submitting a bid to perform a Contract for goods, services or both. It does not include the parent, subsidiaries or other affiliates of the Bidder, or its subcontractors.</p>	
MTC1-B	<p>Using the reference Contract(s) in MTC1-A, the Bidder must demonstrate in its bid that the reference Contract(s) have a cumulative total of at least 2,000 billable days for the resource categories including Enterprise Architect and Project Manager covering a period not more than three years.</p> <p>The Bidder must provide the following information:</p> <p>a) The start and end date of the three-year period;</p> <p>b) The title of the resource categories provided under the Contract(s);</p> <p>c) The full names of each resource provided under the Contract(s); and</p> <p>d) The total number of days billed per resource under the Contract(s).</p> <p>The information listed above should be submitted using Form M1-B.</p>	
MTC2	<p>CLIENT MANAGER</p> <p>The Bidder must identify in its bid, the full name and position title of the individual that will be designated as the CSC Client Manager responsible for resource and contract management associated with the resulting contract.</p>	

MTC#	Mandatory Technical Criteria	Bidder's Response (Reference to Substantiating Materials Included in Bid)
	<p>A copy of the Client Manager's resume must be provided with the bid.</p> <p>The information listed above should be submitted using Form M2.</p>	
MTC3	<p>RISK MITIGATION STRATEGY</p> <p>The Bidder must provide in its bid, the Risk Mitigation Strategy it proposes to implement in the resulting Contract. The Strategy must at a minimum include:</p> <ul style="list-style-type: none"> a) The approach the Bidder will take to identify potential risks arising while performing the Contract; b) The approach the Bidder will take to deal with difficult and unexpected situations; and c) The approach the Bidder will take to ensure that it is able to manage large groups of diverse resources in support of a single client. <p>The information listed above should be submitted using Form M3.</p>	
MTC4	<p>CONTRACT MANAGEMENT STRATEGY</p> <p>The Bidder must provide in its bid the Contract Management Strategy it proposes to implement in the resulting Contract. The proposed Contract Management Strategy must at a minimum include how the Bidder will address the following:</p> <ul style="list-style-type: none"> a) Provide fully qualified resources to CSC within five days of receipt of a Task Authorization request; b) Manage the process of transitioning between existing contracted resources and the new contract; c) Manage the process of transitioning between contract resources during the term of the contract; d) Manage quality assurance practices in providing resources for tasking; and e) Manage contingency plans or practices to ensure resource availability and resource replacement. <p>The information listed above should be submitted using Form M4.</p>	

MTC#	Mandatory Technical Criteria	Bidder's Response (Reference to Substantiating Materials Included in Bid)
MTC5	<p>TECHNICAL ENVIRONMENT</p> <p>Using three separate IM/IT *projects, the Bidder must demonstrate in its bid that it has provided informatics professional services for an IM/IT system in the past five years as of the initial publication date of this solicitation. The Bidder must demonstrate that each project was executed in a technical environment of 2,000 or more users.</p> <p>*Project is defined as a series of tasks that need to be completed in order to reach a specific outcome.</p> <p>The Bidder must provide the following information for each project identified:</p> <ul style="list-style-type: none"> a) The name of the client organization; b) The project name and the number of users the project serviced; c) At a minimum, the client's full name and email address. Bidders are also requested to include the title of the client; d) The Contract number or reference number under which the project was executed; e) The start and end dates for each project; and f) A description of each project identified that describes how the project served an environment of 2,000 users or more. <p>The information listed above should be submitted using Form M5.</p> <p>Note to Bidder: The identified projects must have been contracted with the Bidder submitting a bid for this requirement. "Bidder" means the person or entity (or, in the case of a joint venture, the persons or entities) submitting a bid to perform a Contract for goods, services or both. It does not include the parent, subsidiaries or other affiliates of the Bidder, or its subcontractors.</p>	

RTC#	Rated Technical Criteria	Maximum Points	Points Allocation	Bidder's Response (Reference to Substantiating Materials Included in Bid)
	<p>c) At a minimum, the client's full name and email address. Bidders are also requested to include the title of the client;</p> <p>d) The Contract number or reference number;</p> <p>e) The start and end date of the Initial Contract Period, not including amendments ;</p> <p>f) A description of how the Risk Mitigation Strategy as outlined in MTC3 a) to c) was implemented; and</p> <p>g) The total initial minimum value (excluding applicable taxes) of the Initial Contract Period, not including amendments.</p> <p>2. The Bidder should include a signed statement from the Project Authority, Technical Authority, or Contracting Authority that the Risk Mitigation Strategy was actually implemented as proposed for the reference Contract.</p> <p>The information listed above should be submitted with the bid using Form R3.</p> <p>Note to Bidder: The reference Contract must have been contracted with the Bidder submitting a bid for this requirement. "Bidder" means the person or entity (or, in the case of a joint venture, the persons or entities) submitting a bid to perform a Contract for goods, services or both. It does not include the parent, subsidiaries or other affiliates of the Bidder, or its subcontractors.</p>		<p>Risk Mitigation Strategy was actually implemented as proposed for the reference Contract, an additional five points will be allocated (up to a maximum of fifteen points and an overall Criteria maximum of thirty points).</p>	
RTC4	<p>CONTRACT MANAGEMENT STRATEGY</p> <p>1. Using up to three reference Contracts, the Bidder should demonstrate that its proposed Contract Management Strategy in MTC4 has been implemented in IT Professional Services Contracts within the past seven years as of the initial publication date of this solicitation. Each Contract identified must :</p> <p>a) Have been with a single client;</p> <p>b) Have an initial minimum value of \$1,000,000.00 (CDN) excluding applicable taxes, not including amendments;</p> <p>c) Have an initial minimum Contract Period of one year, not including amendments; and</p>	15	<ul style="list-style-type: none"> Five points will be allocated for each Contract in the last seven years in which the Bidder has implemented the proposed Contract Management Strategy (up to a maximum of fifteen points). 	

RTC#	Rated Technical Criteria	Maximum Points	Points Allocation	Bidder's Response (Reference to Substantiating Materials Included in Bid)
	<p>d) Have been completed or ongoing in the last seven years as of the initial publication date of this solicitation.</p> <p>The Bidder must provide the following information for each Contract identified:</p> <ul style="list-style-type: none"> a) The name of the client organization; b) The project name under which services were provided (if applicable); c) At a minimum, the client's full name and email address. Bidders are also requested to include the title of the client; d) The Contract number or reference number; e) The start and end date of the Initial Contract Period, not including amendments ; f) A description of how the Contract Management Strategy as outlined in MTC4 a) to e) was implemented; and g) The total initial minimum value (excluding applicable taxes) of the Initial Contract Period, not including amendments. <p>2. The Bidder should include a signed statement from the Project Authority, Technical Authority, or Contracting Authority that the Contract Management Strategy was actually implemented as proposed for the reference Contract.</p> <p>The information listed above should be submitted with the bid using Form R4.</p> <p>Note to Bidder: The reference Contract must have been contracted with the Bidder submitting a bid for this requirement. "Bidder" means the person or entity (or, in the case of a joint venture, the persons or entities) submitting a bid to perform a Contract for goods, services or both. It does not include the parent, subsidiaries or other affiliates of the Bidder, or its subcontractors.</p>	15	<ul style="list-style-type: none"> • If the Bidder includes a signed statement from the Project Authority, Technical Authority, or Contracting Authority that the Contract Management Strategy was actually implemented as proposed for the reference Contract, an additional five points will be allocated (up to a maximum of fifteen points and an overall Criteria maximum of thirty points). 	
RTC5	<p>BIDDER EXPERIENCE WITH NEW TECHNOLOGIES AND NEW METHODOLOGIES</p> <p>1. Using one or more reference Contract(s) that have been completed or are ongoing in the last seven years as of the initial publication date of</p>	10	Five points for each reference Contract that demonstrates experience providing	

RTC#	Rated Technical Criteria	Maximum Points	Points Allocation	Bidder's Response (Reference to Substantiating Materials Included in Bid)
	<p>this solicitation, the Bidder should demonstrate that it has experience providing services for the following new technologies and new methodologies:</p> <ul style="list-style-type: none"> a) Cloud technologies; b) User Experience (UX) Services; and c) Agile Software Development. <p>Each Contract identified must:</p> <ul style="list-style-type: none"> a) Have been with a single client; b) Have an initial minimum value of \$1,000,000.00 (CDN) excluding applicable taxes, not including amendments; c) Have an initial minimum Contract Period of one year, not including amendments; and d) Have been completed or ongoing in the last seven years as of the initial publication date of this solicitation. <p>2. The Bidder must provide the following information for each Contract identified:</p> <ul style="list-style-type: none"> a) The name of the client organization; b) The project name under which services were provided (if applicable); c) At a minimum, the client's full name and email address. Bidders are also requested to include the title of the client; d) The Contract number or reference number; e) The start and end date of the Initial Contract Period, not including amendments; f) The total initial minimum value (excluding applicable taxes) of the Initial Contract Period, not including amendments; g) The new technology or new methodology used in the Contract; and h) A description of the work undertaken that includes how the work relates to providing services for the new technology or the new methodology. Note to Bidder: Simply stating that the Bidder worked in an environment that uses the new technology or the new methodology does not demonstrate that the bidder or its resources provided services for the new technology or the new methodology. 	<p>10</p> <p>10</p>	<p>services for cloud technologies to a maximum of ten points.</p> <p>Five points for each reference Contract that demonstrates experience providing services for UX Services to a maximum of ten points.</p> <p>Five points for each reference Contract that demonstrates experience providing services for Agile Software Development to a maximum of ten points.</p>	

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Amendment Number:

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RTC#	Rated Technical Criteria	Maximum Points	Points Allocation	Bidder's Response (Reference to Substantiating Materials Included in Bid)
	<p>The information listed above should be submitted with the bid using Form R5.</p> <p>Note to Bidder: The reference Contract must have been contracted with the Bidder submitting a bid for this requirement. "Bidder" means the person or entity (or, in the case of a joint venture, the persons or entities) submitting a bid to perform a Contract for goods, services or both. It does not include the parent, subsidiaries or other affiliates of the Bidder, or its subcontractors.</p>			
Maximum Points Available:			127	
Minimum Points Required:			77	

ATTACHMENT 4.1 TECHNICAL CRITERIA
WORKSTREAM 5 – CYBER PROTECTION SERVICES
PART A: MANDATORY CORPORATE EXPERIENCE – THE BIDDER

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-A	<p>BIDDER'S EXPERIENCE</p> <p>The Bidder must demonstrate in its bid, that it has provided Cyber Protection Services in the past five years as of the initial publication date of this solicitation as follows:</p> <ol style="list-style-type: none"> 1. Using one reference Contract, the Bidder must demonstrate that it has provided services that are the same or similar to a Network Security Analyst in which one individual filling the position of a single resource has a minimum of 120 billable days for a period of one year. To demonstrate a similar resource category, the Bidder must map at least 50% of the Network Security Analyst's SOW tasks and deliverables of this requirement to the tasks and/or deliverables of the resource category identified in the reference contract. In the event that 50% of the tasks and deliverables results in a decimal (for example 4.5 tasks and deliverables), the number of tasks and deliverables would be rounded down (i.e. 4 tasks would be accepted as being equivalent). For the same resource category, Canada will automatically consider the referenced resource category, procured through the TBIPS contracting vehicle, to be 50% aligned with the SOW tasks and deliverables of this requirement. <p>The Contract identified must:</p> <ol style="list-style-type: none"> a) Have been with a single client; b) Have a minimum value of \$2,000,000.00 CDN (amendments and applicable taxes included); c) Have an initial minimum Contract Period of one year, not including amendments; and d) Have been completed or ongoing in the last five years (as of the initial publication date of this solicitation). <ol style="list-style-type: none"> 2. Using the same reference Contract from 1. above or a second contract, the Bidder must demonstrate that it has provided services that are the same or similar to a Privacy Impact Assessment Specialist in which one individual filling the position of a single resource has a minimum of 120 billable days for a period of one 	

MTC#	Mandatory Technical Criteria	Bidder's Response (Reference to Substantiating Materials Included in Bid)
	<p>year. To demonstrate a similar resource category, the Bidder must map at least 50% of the Privacy Impact Assessment Specialist's SOW tasks and deliverables of this requirement to the tasks and/or deliverables of the resource category identified in the reference contract. In the event that 50% of the tasks and deliverables results in a decimal (for example 4.5 tasks and deliverables), the number of tasks and deliverables would be rounded down (i.e. 4 tasks would be accepted as being equivalent). For the same resource category, Canada will automatically consider the referenced resource category, procured through the TBIPS contracting vehicle, to be 50% aligned with the SOW tasks and deliverables of this requirement.</p> <p>If the Bidder identifies a second reference Contract, that Contract must meet the requirements of 1. a) to d) above.</p> <p>Note: For the purpose of this MTC1-A criterion, a single resource is defined as one individual filling the position of that resource category.</p> <p>Note: For the purpose of this MTC1-A criterion the term 'task' includes the deliverables identified in the SOW for the resource category. For example: If a SOW category identifies 11 tasks and 4 deliverables, the bidder must use any combination of 7 of the category's SOW tasks and deliverables to meet the 50% mapping requirement (50% of 15 = 7).</p> <p>If the Bidder's reference contract does not have a Statement of Work with a list of detailed tasks, the Bidder must provide a list of tasks performed under the reference contract that can be confirmed and validated by the Client for the reference contract. The Bidder must clearly demonstrate that the list of tasks provided maps to at least 50% of the resource category's SOW tasks and deliverables.</p> <p>3. The Bidder must provide the following information for each Contract identified:</p> <ul style="list-style-type: none"> a) The name of the client organization; b) The project name under which services were provided (if applicable); c) At a minimum, the client's full name and email address. Bidders are also requested to include the title of the client; d) The Contract number or reference number; e) The start and end dates for the Initial Contract Period, not including amendments; f) The value of the Contract (amendments and applicable taxes included); 	

MTC#	Mandatory Technical Criteria	Bidder's Response (Reference to Substantiating Materials Included in Bid)
	<p>g) The full name of the resource, the title of the resource, and the one-year period in which the 120 billable days for the resource category identified in the reference contract was completed;</p> <p>h) A clear statement indicating whether the reference contract was procured through the TBIPS contracting vehicle; and</p> <p>i) For similar categories, the mapping of the SOW tasks and deliverables of this requirement to the tasks and/or deliverables of the resource category identified in the reference contract.</p> <p>The information listed above should be submitted using Form M1-A.</p> <p>Note to Bidder: The reference Contract(s) must have been contracted with the Bidder submitting a bid for this requirement. "Bidder" means the person or entity (or, in the case of a joint venture, the persons or entities) submitting a bid to perform a Contract for goods, services or both. It does not include the parent, subsidiaries or other affiliates of the Bidder, or its subcontractors.</p>	
MTC1-B	<p>Using the reference Contract(s) in MTC1-A, the Bidder must demonstrate in its bid that the reference Contract(s) have a cumulative total of at least 2,000 billable days for the resource categories including Network Security Analyst and Privacy Impact Assessment Specialist covering a period not more than three years.</p> <p>The Bidder must provide the following information:</p> <p>a) The start and end date of the three-year period;</p> <p>b) The title of the resource categories provided under the Contract(s);</p> <p>c) The full names of each resource provided under the Contract(s); and</p> <p>d) The total number of days billed per resource under the Contract(s).</p> <p>The information listed above should be submitted using Form M1-B.</p>	
MTC2	<p>CLIENT MANAGER</p> <p>The Bidder must identify in its bid, the full name and position title of the individual that will be designated as the CSC Client Manager responsible for resource and contract management associated with the resulting contract.</p>	

MTC#	Mandatory Technical Criteria	Bidder's Response (Reference to Substantiating Materials Included in Bid)
	<p>A copy of the Client Manager's resume must be provided with the bid.</p> <p>The information listed above should be submitted using Form M2.</p>	
MTC3	<p>RISK MITIGATION STRATEGY</p> <p>The Bidder must provide in its bid, the Risk Mitigation Strategy it proposes to implement in the resulting Contract. The Strategy must at a minimum include:</p> <ul style="list-style-type: none"> a) The approach the Bidder will take to identify potential risks arising while performing the Contract; b) The approach the Bidder will take to deal with difficult and unexpected situations; and c) The approach the Bidder will take to ensure that it is able to manage large groups of diverse resources in support of a single client. <p>The information listed above should be submitted using Form M3.</p>	
MTC4	<p>CONTRACT MANAGEMENT STRATEGY</p> <p>The Bidder must provide in its bid the Contract Management Strategy it proposes to implement in the resulting Contract. The proposed Contract Management Strategy must at a minimum include how the Bidder will address the following:</p> <ul style="list-style-type: none"> a) Provide fully qualified resources to CSC within five days of receipt of a Task Authorization request; b) Manage the process of transitioning between existing contracted resources and the new contract; c) Manage the process of transitioning between contract resources during the term of the contract; d) Manage quality assurance practices in providing resources for tasking; and e) Manage contingency plans or practices to ensure resource availability and resource replacement. <p>The information listed above should be submitted using Form M4.</p>	

MTC#	Mandatory Technical Criteria	Bidder's Response (Reference to Substantiating Materials Included in Bid)
MTC5	<p>TECHNICAL ENVIRONMENT</p> <p>Using three separate IM/IT *projects, the Bidder must demonstrate in its bid that it has provided informatics professional services for an IM/IT system in the past five years as of the initial publication date of this solicitation. The Bidder must demonstrate that each project was executed in a technical environment of 2,000 or more users.</p> <p>*Project is defined as a series of tasks that need to be completed in order to reach a specific outcome.</p> <p>The Bidder must provide the following information for each project identified:</p> <ul style="list-style-type: none"> a) The name of the client organization; b) The project name and the number of users the project serviced; c) At a minimum, the client's full name and email address. Bidders are also requested to include the title of the client; d) The Contract number or reference number under which the project was executed; e) The start and end dates for each project; and f) A description of each project identified that describes how the project served an environment of 2,000 users or more. <p>The information listed above should be submitted using Form M5.</p> <p>Note to Bidder: The identified projects must have been contracted with the Bidder submitting a bid for this requirement. "Bidder" means the person or entity (or, in the case of a joint venture, the persons or entities) submitting a bid to perform a Contract for goods, services or both. It does not include the parent, subsidiaries or other affiliates of the Bidder, or its subcontractors.</p>	

RTC#	Rated Technical Criteria	Maximum Points	Points Allocation	Bidder's Response (Reference to Substantiating Materials Included in Bid)
	<p>b) The project name under which services were provided (if applicable);</p> <p>c) At a minimum, the client's full name and email address. Bidders are also requested to include the title of the client;</p> <p>d) The Contract number or reference number;</p> <p>e) The start and end date of the Initial Contract Period, not including amendments ;</p> <p>f) A description of how the Risk Mitigation Strategy as outlined in MTC3 a) to c) was implemented; and</p> <p>g) The total initial minimum value (excluding applicable taxes) of the Initial Contract Period, not including amendments.</p> <p>2. The Bidder should include a signed statement from the Project Authority, Technical Authority, or Contracting Authority that the Risk Mitigation Strategy was actually implemented as proposed for the reference Contract.</p> <p>The information listed above should be submitted with the bid using Form R3.</p> <p>Note to Bidder: The reference Contract must have been contracted with the Bidder submitting a bid for this requirement. "Bidder" means the person or entity (or, in the case of a joint venture, the persons or entities) submitting a bid to perform a Contract for goods, services or both. It does not include the parent, subsidiaries or other affiliates of the Bidder, or its subcontractors.</p>		<p>Technical Authority, or Contracting Authority that the Risk Mitigation Strategy was actually implemented as proposed for the reference Contract, an additional five points will be allocated (up to a maximum of fifteen points and an overall Criteria maximum of thirty points).</p>	
RTC4	<p>CONTRACT MANAGEMENT STRATEGY</p> <p>1. Using up to three reference Contracts, the Bidder should demonstrate that its proposed Contract Management Strategy in MTC4 has been implemented in IT Professional Services Contracts within the past seven years as of the initial publication date of this solicitation. Each Contract identified must :</p> <p>a) Have been with a single client;</p> <p>b) Have an initial minimum value of \$1,000,000.00 (CDN) excluding applicable taxes, not including amendments;</p>	15	<ul style="list-style-type: none"> Five points will be allocated for each Contract in the last seven years in which the Bidder has implemented the proposed Contract Management Strategy (up to a maximum of fifteen points). 	

RTC#	Rated Technical Criteria	Maximum Points	Points Allocation	Bidder's Response (Reference to Substantiating Materials Included in Bid)
	<p>c) Have an initial minimum Contract Period of one year, not including amendments; and</p> <p>d) Have been completed or ongoing in the last seven years as of the initial publication date of this solicitation.</p> <p>The Bidder must provide the following information for each Contract identified:</p> <p>a) The name of the client organization;</p> <p>b) The project name under which services were provided (if applicable);</p> <p>c) At a minimum, the client's full name and email address. Bidders are also requested to include the title of the client;</p> <p>d) The Contract number or reference number;</p> <p>e) The start and end date of the Initial Contract Period, not including amendments ;</p> <p>f) A description of how the Contract Management Strategy as outlined in MTC4 a) to e) was implemented; and</p> <p>g) The total initial minimum value (excluding applicable taxes) of the Initial Contract Period, not including amendments.</p> <p>2. The Bidder should include a signed statement from the Project Authority, Technical Authority, or Contracting Authority that the Contract Management Strategy was actually implemented as proposed for the reference Contract.</p> <p>The information listed above should be submitted with the bid using Form R4.</p> <p>Note to Bidder: The reference Contract must have been contracted with the Bidder submitting a bid for this requirement. "Bidder" means the person or entity (or, in the case of a joint venture, the persons or entities) submitting a bid to perform a Contract for goods, services or both. It does not include the parent, subsidiaries or other affiliates of the Bidder, or its subcontractors.</p>	15	<ul style="list-style-type: none"> If the Bidder includes a signed statement from the Project Authority, Technical Authority, or Contracting Authority that the Contract Management Strategy was actually implemented as proposed for the reference Contract, an additional five points will be allocated (up to a maximum of fifteen points and an overall Criteria maximum of thirty points). 	
RTC5	<p>BIDDER EXPERIENCE WITH NEW TECHNOLOGIES AND NEW METHODOLOGIES</p>	10	Five points for each reference Contract that demonstrates experience providing	

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RTC#	Rated Technical Criteria	Maximum Points	Points Allocation	Bidder's Response (Reference to Substantiating Materials Included in Bid)
	<p>methodology does not demonstrate that the bidder or its resources provided services for the new technology or the new methodology.</p> <p>The information listed above should be submitted with the bid using Form R5.</p> <p>Note to Bidder: The reference Contract must have been contracted with the Bidder submitting a bid for this requirement. "Bidder" means the person or entity (or, in the case of a joint venture, the persons or entities) submitting a bid to perform a Contract for goods, services or both. It does not include the parent, subsidiaries or other affiliates of the Bidder, or its subcontractors.</p>			
Maximum Points Available:			127	
Minimum Points Required:			77	

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).

**FORM M1-A
BIDDER'S EXPERIENCE**

In accordance with the requirements of mandatory evaluation criterion MTC1-A, provide the following information for each Contract identified:

- a) The name of the client organization;
- b) The project name under which services were provided (if applicable);
- c) The client's full name, email address, and title;
- d) The Contract number or reference number;
- e) The start and end dates for the Initial Contract Period, not including amendments;
- f) The value of the Contract (amendments and applicable taxes included);
- g)
 - (i) The full name of the resource;
 - (ii) the title of the resource; and
 - (iii) the one-year period in which the 120 billable days for the resource category identified in the reference contract was completed (DD/MM/YYYY – DD/MM/YYYY);
- h) A clear statement indicating whether the reference contract was procured through the TBIPS contracting vehicle;
- i) For similar categories (as described in MTC1-A), the mapping of the tasks and deliverables of the SOW resource category of this requirement to the tasks and/or deliverables of the resource category identified in the reference contract.

For the purpose of this MTC1-A criterion, the term 'task' includes the deliverables identified in the SOW for the resource category. For example: If a SOW category identifies 11 tasks and 4 deliverables, the Bidder must use any combination of 7 of the category's SOW tasks and deliverables to meet the 50% mapping requirement (50% of 15 = 7).

TABLE 1

Table 1 is provided to assist Bidders in structuring the required information for MTC1-A. Bidders should replicate Table 1 below as needed to provide the required information.

1. Reference Contract Number	No.:
2. Specify the resource category from this solicitation's SOW	Resource Category:
3. Specify the resource category identified in the reference contract Select the applicable statement: Statement A: This resource category was procured through the TBIPS contracting vehicle and is the same as the TBIPS resource category named in item 2 above.	Resource Category: Insert the applicable statement in its entirety:

<p>OR</p> <p>Statement B: This resource category was procured through the TBIPS contracting vehicle and is similar to the TBIPS resource category named in item 2 above.</p> <p>OR</p> <p>Statement C: This resource category was procured outside the TBIPS contracting vehicle and is similar to the TBIPS resource category named in item 2 above.</p>	
<p>4. SOW Tasks including Deliverables for the Resource Category from this solicitation</p>	<p>Tasks for Resource Category from Reference Contract</p>
<p>a. (Insert Task from SOW in its entirety)</p>	<p>(Insert Task from Reference Contract)</p> <p>Example of text to be inserted:</p> <p>“Maps to SOW Task a)”</p>
<p>b. (Insert Task from SOW in its entirety)</p>	<p>(Insert Task from Reference Contract)</p>
<p>c. (Insert Task from SOW in its entirety)</p>	<p>(Insert Task from Reference Contract)</p>
<p>d. (Insert Task from SOW in its entirety)</p>	<p>(Insert Task from Reference Contract)</p>
<p>e. (Insert Task from SOW in its entirety)</p>	<p>(Insert Task from Reference Contract)</p>
<p>f. (Insert Task from SOW in its entirety)</p>	<p>(Insert Task from Reference Contract)</p>
<p>etc.</p>	<p>etc.</p>
<p>Number of tasks and deliverables mapped:</p>	

**FORM M1-B
BIDDER'S EXPERIENCE**

In accordance with the requirements of mandatory evaluation criterion MTC1-B, provide the following information for the identified Contract(s):

- a) The start and end date of the three-year period;
- b) The title of the resource categories provided under the Contract(s);
- c) The full name of each resource provided under the Contract(s); and
- d) The total number of days billed per resource under the Contract(s).

TABLE 2

Table 2 is provided to assist Bidders in structuring the required information for MTC1-B. Bidders should replicate Table 2 below as needed to provide the required information.

Specify the start and end date of the three-year period in which the billable days were completed for each contract:			Contract #: _____ DD/MM/YYYY – DD/MM/YYYY
			Contract #: _____ DD/MM/YYYY – DD/MM/YYYY
Contract Number	Full Name of Resource	Title	Number of Billable Days
Total number of billable days:			

**FORM M2
CLIENT MANAGER**

In accordance with the requirements of mandatory evaluation criterion MTC2, provide the following information for the Client Manager:

- a) The full name of the individual that will be designated as the CSC Client Manager responsible for resource and contract management associated with the resulting contract;
- b) The position title of the individual named above; and
- c) A copy of the Client Manager's resume must be provided with the bid.

**FORM M3
RISK MITIGATION STRATEGY**

In accordance with the requirements of mandatory evaluation criterion MTC3 provide, at a minimum, the following information for the Risk Management Strategy:

- a) The approach the Bidder will take to identify potential risks arising while performing the Contract;

- b) The approach the Bidder will take to deal with difficult and unexpected situations; and

- c) The approach the Bidder will take to ensure that it is able to manage large groups of diverse resources in support of a single client.

**FORM M4
CONTRACT MANAGEMENT STRATEGY**

In accordance with the requirements of mandatory evaluation criterion MTC4 provide, at a minimum, how the Bidder will address the following information for the Contract Management Strategy:

- a) Provide fully qualified resources to CSC within five days of receipt of a Task Authorization request;
- b) Manage the process of transitioning between existing contracted resources and the new contract;
- c) Manage the process of transitioning between contract resources during the term of the contract;
- d) Manage quality assurance practices in providing resources for tasking; and
- e) Manage contingency plans or practices to ensure resource availability and resource replacement.

**FORM M5
TECHNICAL ENVIRONMENT**

In accordance with the requirements of mandatory evaluation criterion MTC5, provide the following information for each project identified:

- a) The name of the client organization;
- b) The project name and the number of users the project serviced;
- c) The client's full name, email address, and title;
- d) The Contract number or reference number under which the project was executed;
- e) The start and end dates for the project; and
- f) A description of the project (1-2 paragraphs) that describes how the project served an environment of 2,000 users or more.

**FORM R1
BIDDER'S EXPERIENCE**

In accordance with the requirements of rated evaluation criterion RTC1, provide the following information:

Tables 3 and 4 are provided to assist Bidders in structuring the required information for RTC1. Bidders should replicate Tables 3 and 4 below as needed to provide the required information.

Table 3: Name of the Resource Category from RTC1: _____

Specify the start and end date within the past five years as of the initial publication date of this solicitation in which the services provided by the resource exceed the 120 billable day minimum specified in MTC1-A:				
Contract Number	Full Name of Resource	Title	Resource start and end dates (DD/MM/YYYY) - (DD/MM/YYYY)	Number of Billable Days
Total number of billable days:				

Table 4: Name of the Resource Category from RTC1: _____

Specify the start and end date within the past five years as of the initial publication date of this solicitation in which the services provided by the resource exceed the 120 billable day minimum specified in MTC1-A:				
Contract Number	Full Name of Resource	Title	Resource start and end dates (DD/MM/YYYY) - (DD/MM/YYYY)	Number of Billable Days
Total number of billable days:				

**FORM R2
CLIENT MANAGER**

1. In accordance with the requirements of rated evaluation criterion RTC2, provide the following information for the CSC Client Manager named in response to MTC2:
 - a) The full name of the Client Manager; and
 - b) The number of years the individual named above has served as a Client Manager.

2. In accordance with the requirements of RTC2, the Bidder should demonstrate the total number of resources simultaneously managed by the Client Manager for 12 months (consecutive or non-consecutive) within the past five years as of the initial publication date of this solicitation.

Table 5

Table 5 is provided to assist Bidders in structuring the required information for RTC2, 3. Bidders should replicate Table 5 below as needed to provide the required information.

Solicitation Number:
21120-194545/A

Amendment Number:
626ZM

Buyer ID:

	<u>Contract 1</u>	<u>Contract 2</u>	<u>Contract 3</u>	Insert total number of resources simultaneously managed
	Number: Client: Start and end date:	Number: Client: Start and end date:	Number: Client: Start and end date:	
<u>Month 1</u> Calendar month: Year:	(number of resources)	(number of resources)	(number of resources)	
<u>Month 2</u> Calendar month: Year:	(number of resources)	(number of resources)	(number of resources)	
<u>Month 3</u> Calendar month: Year:	(number of resources)	(number of resources)	(number of resources)	
<u>Month 4</u> Calendar month: Year:	(number of resources)	(number of resources)	(number of resources)	
<u>Month 5</u> Calendar month: Year:	(number of resources)	(number of resources)	(number of resources)	
<u>Month 6</u> Calendar month: Year:	(number of resources)	(number of resources)	(number of resources)	
<u>Month 7</u> Calendar month: Year:	(number of resources)	(number of resources)	(number of resources)	
<u>Month 8</u> Calendar month: Year:	(number of resources)	(number of resources)	(number of resources)	
<u>Month 9</u> Calendar month: Year:	(number of resources)	(number of resources)	(number of resources)	
<u>Month 10</u> Calendar month: Year:	(number of resources)	(number of resources)	(number of resources)	
<u>Month 11</u> Calendar month: Year:	(number of resources)	(number of resources)	(number of resources)	
<u>Month 12</u> Calendar month: Year:	(number of resources)	(number of resources)	(number of resources)	

**FORM R3
RISK MITIGATION STRATEGY**

1. In accordance with the requirements of rated evaluation criterion RTC3, provide the following information for each Contract identified:

- a) The name of the client organization;
- b) The project name under which services were provided (if applicable);
- c) The client's full name, email address, and title;
- d) The Contract number or reference number;
- e) The start and end date of the Initial Contract Period, not including amendments;
- f) A description of how the Risk Mitigation Strategy as outlined in MTC3, a) to c) was implemented; and
- g) The total initial minimum value (excluding applicable taxes) of the Initial Contract Period, not including amendments.

2. The Bidder should include a signed statement from the Project Authority, Technical Authority, or Contracting Authority that the Risk Mitigation Strategy was actually implemented as proposed for the reference Contract. The following statement is an example of an acceptable signed statement:

The signature below confirms that [Insert Bidder's name] has actually implemented the Risk Mitigation Strategy, as proposed for the reference Contract [Insert contract number].

**FORM R4
CONTRACT MANAGEMENT STRATEGY**

1. In accordance with the requirements of rated evaluation criterion RTC4, provide the following information for each Contract identified:

- a) The name of the client organization;
- b) The project name under which services were provided (if applicable);
- c) The client's full name, email address, and title;
- d) The Contract number or reference number;
- e) The start and end date of the Initial Contract Period, not including amendments;
- f) A description of how the Contract Management Strategy as outlined in MTC4, a) to e) was implemented; and
- g) The total initial minimum value (excluding applicable taxes) of the Initial Contract Period, not including amendments.

2. The Bidder should include a signed statement from the Project Authority, Technical Authority, or Contracting Authority that the Contract Management Strategy was actually implemented as proposed for the reference Contract. The following statement is an example of an acceptable signed statement:

The signature below confirms that [Insert Bidder's name] has actually implemented the Contract Management Strategy, as proposed for the reference Contract [Insert contract number].

FORM R5
BIDDER EXPERIENCE WITH NEW TECHNOLOGIES AND NEW METHODOLOGIES

In accordance with the requirements of rated evaluation criterion RTC5, provide the following information for each Contract identified for each of the new technologies and new methodologies:

- a) The name of the client organization;
- b) The project name under which services were provided (if applicable);
- c) The client's full name, email address, and title;
- d) The Contract number or reference number;
- e) The start and end date of the Initial Contract Period, not including amendments;
- f) The total initial minimum value (excluding applicable taxes) of the Initial Contract Period, not including amendments;
- g) The new technology or new methodology used in the Contract; and
- h) A description of the work undertaken that includes how the work relates to providing services for the new technology or the new methodology. **Note to Bidder:** Simply stating that the Bidder worked in an environment that uses the new technology or the new methodology does not demonstrate that the bidder or its resources provided services for the new technology or the new methodology.