

**ATTACHMENT 4.1 MANDATORY TECHNICAL CRITERIA – THE BIDDER
WORKSTREAM 2: ORACLE SOA/BPM SUITE**

Note to Bidders: A Word version of this document is available by sending a request by email to Rosanna.haroutounian@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>Using up to five reference contracts, the Bidder must demonstrate in its bid that in the past five years as of the initial publication date of this solicitation, it has provided informatics professional services as described below.</p> <p>1. Each contract identified must:</p> <ul style="list-style-type: none">a) Have been with a single client;b) Have an initial minimum contract value of \$1,000,000.00 (CAD) excluding applicable taxes, not including amendments;c) Have an initial minimum Contract Period of one year, not including amendments;d) Have been completed or ongoing in the last five years (as of the initial publication date of this solicitation);e) Have provided the following:<ul style="list-style-type: none">i) Resources providing services that are the same or similar to an Application/Software Architect, where one resource has 5 or more years of experience and a minimum of 80 billable days for a period of one year under the contract;ii) Resources providing services that are the same or similar to a Programmer/Software Developer, where one resource has 5 or more years of experience and a minimum of 80 billable days for a period of one year under the contract;iii) Resources providing services that are the same or similar to a Technology Architect, where one resource has 5 or more years of experience and a minimum of 80 billable days for a period of one year under the contract; andiv) Resources providing services that are the same or similar to a Project Manager, where one resource has 5 or more years of experience and a minimum of 80	

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	<p>billable days for a period of one year under the contract.</p> <p>2. For each resource that is the same or similar to an Application/Software Architect, a Programmer/Software developer, a Technology Architect, and a Project Manager identified in the reference contract(s) in response to item 1.e), the Bidder must demonstrate that the resource worked in at least one of the following technology suites:</p> <p>a) Oracle SOA Suite</p> <p>b) Oracle BMP Suite.</p> <p>3. 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 dates for the Initial Contract Period (dd-mm-yyyy to dd-mm-yyyy), not including amendments;</p> <p>f) The total initial minimum value (excluding applicable taxes) of the Initial Contract Period, not including amendments;</p> <p>g) A clear statement indicating whether the reference contract was procured through the TBIPS contracting vehicle;</p> <p>h) For each resource that is the same or similar to an Application/Software Architect, a Programmer/Software developer, a Technology Architect, and a Project Manager identified in the reference contract in response to item 1.e) above:</p> <p>i) The title of the resource;</p> <p>ii) The full name of the resource;</p> <p>iii) The start date and end date (dd-mm-yyyy to dd-mm-yyyy) of the one-year period in which the resource completed a minimum 80 billable days on the referenced Contract;</p> <p>iv) The total number of billable days completed by the resource on the referenced Contract during the one-year period;</p>	

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	<ul style="list-style-type: none"> v) A list of all the applicable technology suites the resource used while providing services under the referenced Contract; vi) 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; and i) A signed attestation from the Project Authority or Technical Authority for the contract certifying that the contract information provided is accurate. <p>To demonstrate a similar resource category, the Bidder must map at least 70% of the resource category 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 70% 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 70% aligned with the SOW tasks and deliverables of this requirement.</p> <p>For the purpose of this 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 11 of the category's SOW tasks and deliverables to meet the 70% mapping requirement (70% of 15 = 11).</p> <p>The information listed above should be submitted using Form M1-A for Workstream 2.</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 Contract(s) referenced in response to in MTC1-A, the Bidder must demonstrate the total minimum billable days performed by the resources in each of the resource categories, in the past five years as of the initial publication date of this solicitation, combined for all referenced contracts as follows:</p>	

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	Resource Category	Minimum Billable Days	
	Application/Software Architect	960	
	Programmer/Software developer	960	
	Technology Architect	960	
	Project Manager	960	
	For each resource used to demonstrate the minimum billable days in each resource category, the Bidder must provide:		
	<div>a) The Contract number or reference number of the contract referenced in response to MTC1-A under which the resource performed the billable days;</div> <div>b) The title of the resource;</div> <div>c) The full name of the resource;</div> <div>d) The start and end date (dd/mm/yyyy to dd/mm/yyyy) of the period of time during which the billable days were performed by the resource;</div> <div>e) The total number of billable days completed by the resource on the referenced Contract, in the past five years as of the initial publication date of this solicitation; and</div> <div>f) 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.</div>		
To demonstrate a similar resource category, the Bidder must map at least 70% of the resource category 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 70% 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 70% aligned with the SOW tasks and deliverables of this requirement.			
For the purpose of this 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 11 of the category's SOW			

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	<p>tasks and deliverables to meet the 70% mapping requirement (70% of 15 = 11).</p> <p>The information listed above should be submitted using Form M1-B for Workstream 2.</p>	
MTC2	<p>CLIENT DEMAND MANAGER</p> <p>a) The Bidder must identify in its bid by name and position title an individual that will be designated as the ESDC Client Demand Manager. A Client Demand Manager is the Bidder's representative responsible for providing qualified resources in response to a client's requests and managing any contractual issues or disputes that may arise. A copy of the Client Demand Manager's resume must be provided with the bid, demonstrating that the Client Demand Manager assigned to this requirement has a minimum of five years of experience in this role.</p> <p>b) Using one or more reference contract(s) for informatics professional services, the Bidder must demonstrate that the Client Demand Manager identified above simultaneously managed at least 25 individual resources for a continuous six-month period. The 25 resources must have been managed in the last 5 years from the initial publication date of this solicitation.</p> <p>To demonstrate this experience, the following information must be provided:</p> <p>1. A copy of the Client Manager's resume must be provided with the bid.</p> <p>2. The Bidder must indicate the start and end date (day, month and year) of the continuous six-month period during which the Client Demand Manager simultaneously managed a minimum of 25 resources within the past five years as of the initial publication date of this solicitation.</p> <p>For the purposes of this criterion, a month includes the first date and last date of the respective month. For example, January 1 to 31 is a calendar month. January 5 to February 4 is not a calendar month.</p>	

MTC#	Mandatory Technical Criteria	Bidder's Response (Reference to Substantiating Materials Included in Bid)
	<p>3. The Bidder must provide the following information for each reference Contract under which the resources were managed by the Client Demand Manager during the continuous six-month period:</p> <ul style="list-style-type: none">a) The Contract number(s) or reference number(s);b) The start and end dates of the contract(s) (dd-mm-yyyy to dd-mm-yyyy);c) The name of the client organization(s);d) At a minimum, the client's full name and email address for each referenced contract. Bidders are also requested to include the title of the client; ande) The total number of resources simultaneously managed under each contract during each calendar month by the Client Manager during the continuous six-month period. <p>The information listed above should be submitted using Form M2 for Workstream 2.</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>	
MTC3	<p>CONTRACT MANAGEMENT PLAN</p> <p>The Bidder must provide in its bid its contract management plan that describes how it will address the following elements if it is awarded a contract:</p> <ul style="list-style-type: none">a) How the Bidder will manage the transition between the resources that are currently under contract with the client and the Bidder's resources;b) How the Bidder will identify, select and deploy the required resources in a timely manner;c) What quality assurance practices the Bidder will apply to ensure that qualified and competent resources are provided to the client; andd) How the Bidder will manage replacement of personnel, if required, in a manner that minimizes a negative impact to the client's operational requirements.	

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	The information listed above should be submitted using Form M3 for Workstream 2.	

**FORM M1-A FOR WORKSTREAM 2
BIDDER'S EXPERIENCE**

In accordance with the requirements of mandatory evaluation criterion MTC1-A for Workstream 2, 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) 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 (dd-mm-yyyy to dd-mm-yyyy), not including amendments;
- f) The total initial minimum value (excluding applicable taxes) of the Initial Contract Period, not including amendments;
- g) A clear statement indicating whether the reference contract was procured through the TBIPS contracting vehicle;
- h) For each resource that is the same or similar to an Application/Software Architect, a Programmer/Software developer, a Technology Architect, and a Project Manager identified in the reference contract in response to item 1. e) in MTC1-A:
 - i) The title of the resource;
 - ii) The full name of the resource;
 - iii) The start date and end date (dd-mm-yyyy to dd-mm-yyyy) of the one-year period in which the resource completed a minimum 80 billable days on the referenced Contract;
 - iv) The total number of billable days completed by the resource on the referenced Contract during the one-year period;
 - v) A list of all the technology applicable suites the resource used while providing services under the referenced contract in the referenced Contract;
 - vi) 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; and
- i) A signed attestation from the Project Authority or Technical Authority for the contract certifying that the contract information provided is accurate.

For the purpose of this 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 11 of the category's SOW tasks and deliverables to meet the 70% mapping requirement (70% of 15 = 11).

TABLE 1

Table 1 is provided to assist Bidders in structuring the required information for MTC1-A Workstream 2. 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. The full name of the resource:	
4. The start date and end date (dd-mm-yyyy to dd-mm-yyyy) of the one-year period in which the resource completed a minimum 80 billable days on the referenced Contract:	
5. The total number of billable days completed by the resource on the referenced Contract during the one-year period:	
6. Indicate the applicable technology domains used by the resource in the referenced Contract:	Select only those which apply: <input type="checkbox"/> Oracle SOA Suite <input type="checkbox"/> Oracle BMP Suite
7. 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. OR 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.	Resource Category: Insert the applicable statement in its entirety:

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OR 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.	
8. SOW Tasks including Deliverables for the Resource Category from this solicitation	Tasks for Resource Category from Reference Contract
a) (Insert Task from SOW)	(Insert Task from Reference Contract) Example of text to be inserted: "Maps to SOW Task a)"
b) (Insert Task from SOW)	(Insert Task from Reference Contract)
c) (Insert Task from SOW)	(Insert Task from Reference Contract)
d) (Insert Task from SOW)	(Insert Task from Reference Contract)
e) (Insert Task from SOW)	(Insert Task from Reference Contract)
f) (Insert Task from SOW)	(Insert Task from Reference Contract)
etc.	etc.
Number of tasks and deliverables mapped:	
9. Client Contact Information: This form must be signed by the Project Authority or Technical Authority for the contract and provided with the Bid to certify that the contract information provided is accurate. By signing below, the Client attests that the information provided in this form as it pertains to contract number (INSERT) is accurate.	
Signature of Client :	Name: _____
	Title: _____
	Date: _____

**FORM M1-B FOR WORKSTREAM 2
BIDDER'S EXPERIENCE**

In accordance with the requirements of mandatory evaluation criterion MTC1-B Workstream 2, provide the following information for each resource that is the same or similar to an Application/Software Architect, a Programmer/Software developer, a Technology Architect, and a Project Manager used to demonstrate the minimum billable days in each resource category:

- a) The Contract number or reference number of the contract referenced in response to MTC1-A under which the resource performed the billable days;
- b) The title of the resource;
- c) The full name of the resource;
- d) The start and end date (dd/mm/yyyy to dd/mm/yyyy) of the period of time during which the billable days were performed by the resource;
- e) The total number of billable days completed by the resource on the referenced Contract, in the past five years as of the initial publication date of this solicitation; and
- f) 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.

For the purpose of this 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 11 of the category's SOW tasks and deliverables to meet the 70% mapping requirement (70% of 15 = 11).

TABLE 2

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

Specify the resource category from this solicitation's SOW: _____

1. Reference Contract Number	No.:
2. The full name of the resource:	
3. The start and end date (dd/mm/yyyy to dd/mm/yyyy) of the period of time during which the billable days were performed by the resource:	
4. The total number of billable days completed by the resource on the referenced Contract, in the past five years as of the initial publication date of this solicitation:	
5. Specify the resource category identified in the reference contract Select the applicable statement:	Resource Category:

<p>Statement A: This resource category was procured through the TBIPS contracting vehicle and is the same as the TBIPS resource category named at the top of this table.</p> <p style="text-align: center;">OR</p> <p>Statement B: This resource category was procured through the TBIPS contracting vehicle and is similar to the TBIPS resource category named at the top of this table.</p> <p style="text-align: center;">OR</p> <p>Statement C: This resource category was procured outside the TBIPS contracting vehicle and is similar to the TBIPS resource category named at the top of this table.</p>	<p>Insert the applicable statement in its entirety:</p>
<p>6. 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)</p>	<p>(Insert Task from Reference Contract)</p> <p>Example of text to be inserted: "Maps to SOW Task a)"</p>
<p>b) (Insert Task from SOW)</p>	<p>(Insert Task from Reference Contract)</p>
<p>c) (Insert Task from SOW)</p>	<p>(Insert Task from Reference Contract)</p>
<p>d) (Insert Task from SOW)</p>	<p>(Insert Task from Reference Contract)</p>
<p>e) (Insert Task from SOW)</p>	<p>(Insert Task from Reference Contract)</p>
<p>f) (Insert Task from SOW)</p>	<p>(Insert Task from Reference Contract)</p>
<p>etc.</p>	<p>etc.</p>
<p>Number of tasks and deliverables mapped:</p>	

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Total number of billable days for the resource category, combined for all referenced contracts:	
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**FORM M2 FOR WORKSTREAM 2
CLIENT DEMAND MANAGER**

In accordance with the requirements of mandatory evaluation criterion MTC2 Workstream 2, provide the following information for the Client Demand Manager:

1.

- a) The full name of the individual that will be designated as the ESDC Client Demand 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 Demand Manager's resume, demonstrating that the Client Demand Manager assigned to this requirement has a minimum of five years of experience in this role.

2. In accordance with the requirements of mandatory evaluation criterion MTC2 for Workstream 2, provide the following information for each Contract under which the resources were managed by the Client Demand Manager during the continuous six-month period:

- a) The Contract number(s) or reference number(s);
- b) The start and end dates of the contract(s) (dd-mm-yyyy to dd-mm-yyyy);
- c) The name of the client organization(s);
- d) At a minimum, the client's full name and email address. Bidders are also requested to include the title of the client; and
- e) The total number of resources simultaneously managed under each contract during each calendar month by the Client Manager during the continuous six-month period.

For the purposes of this criterion, a month includes the first date and last date of the respective month. For example, January 1 to 31 is a calendar month. January 5 to February 4 is not a calendar month.

TABLE 3

Table 3 is provided to assist Bidders in structuring the required information for MTC2 Workstream 2, point 3. Bidders should replicate Table 3 below as needed to provide the required information.

	<u>Contract 1</u>	<u>Contract 2</u>	<u>Contract 3</u>	
	Number: Client organization: Client full name: Client e-mail: Client title: Start and end date: (dd-mm-yyyy to dd-mm-yyyy)	Number: Client organization: Client full name: Client e-mail: Client title: Start and end date: (dd-mm-yyyy to dd-mm-yyyy)	Number: Client organization: Client full name: Client e-mail: Client title: Start and end date: (dd-mm-yyyy to dd-mm-yyyy)	Insert total number of resources simultaneously managed
<u>Month 1</u>				
Calendar month:	(number of resources)	(number of resources)	(number of resources)	
Year:				
<u>Month 2</u>				
Calendar month:	(number of resources)	(number of resources)	(number of resources)	
Year:				
<u>Month 3</u>				
Calendar month:	(number of resources)	(number of resources)	(number of resources)	
Year:				
<u>Month 4</u>				
Calendar month:	(number of resources)	(number of resources)	(number of resources)	
Year:				
<u>Month 5</u>				
Calendar month:	(number of resources)	(number of resources)	(number of resources)	
Year:				
<u>Month 6</u>				
Calendar month:	(number of resources)	(number of resources)	(number of resources)	
Year:				

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**FORM M3 FOR WORKSTREAM 2
CONTRACT MANAGEMENT PLAN**

In accordance with the requirements of mandatory evaluation criterion MTC3 Workstream 2 provide, at a minimum, the following information for the Contract Management Plan:

- a) How the Bidder will manage the transition between the resources that are currently under contract with the client and the Bidder's resources;
- b) How the Bidder will identify, select and deploy the required resources in a timely manner;
- c) What quality assurance practices the Bidder will apply to ensure that qualified and competent resources are provided to the client; and
- d) How the Bidder will manage replacement of personnel, if required, in a manner that minimizes a negative impact to the client's operational requirements.