

APPENDIX C.R1 – TECHNICAL EVALUATION CRITERIA

Evaluation Criteria – Technical Evaluation Process

The technical evaluation for the development of a National Technical Specification (TS) will consist of four (4) parts:

1. A determination of the compliance of each bid with the mandatory requirements stated in Part A below.
2. Each proposal that meets the stated mandatory requirements will be evaluated against the point-rated technical selection criteria. Bidders must achieve a minimum score of 70% (70 points of a possible 100 points) for the point-rated technical criteria as stated in Part B below. Only proposals meeting these requirements will be considered and allocated points in the financial evaluation.
3. In the financial evaluation, with a maximum 15 points available, tendered prices of the qualified bids will be computed as follows:
 - 5 points will be allocated to the cost of the project. The scoring for this section (F) will be calculated as follows: $F = 5 * Z$
Where,
B = Bid cost before subsidy (R2 value in Financial template from appendix D)
A = Average bid price (\sum of all bid prices considered in financial evaluation / number of bids considered in financial evaluation)
Z = % of average bid ($1 - \left| \frac{B-A}{A} \right|$) (min=0%, max=100%)
 - 10 points will be allocated to the level of effort dedicated to the project following a scale of least to most, evaluated on the quality and the reasonableness of the level of effort required to deliver on each of the milestones of the project.
 - To allow the financial evaluation of a bid, bidders are required to complete in Appendix D:
 - The Financial Proposal, even if the bid is at no cost. Cost ranges (e.g., \$10-\$13) are not acceptable.
 - Sources of subsidy if other than SCC.
 Excluding this information will result in automatic rejection.
4. The highest-ranked Bidder will be determined using the highest combined rating of technical merit (85%) and financial (15%). In the event of a tie, the proposal receiving the highest score for the technical evaluation will be selected.

An Evaluation Committee, consisting of at least three (3) SCC or SCC-appointed representatives, will be formed to assess all bids received in response to SCC RFP# 2021-11. The committee will be dissolved after the successful completion of their duties in selecting the Bidder with whom SCC will contract for the delivery of the National Technical Specification (TS) for the following: **Digital credentials and digital trust services.**

PART A: Mandatory Requirements

Proposals will be assessed by an SCC Evaluation Committee to determine whether they meet mandatory requirements pertaining to:

- The Bidder, and
- The Project Team.

The Bidder

Each Bidder submitting a response to this TS for **digital credentials and digital trust services** must demonstrate to the satisfaction of the Evaluation Committee that:

- The Bidder has the qualifications to develop normative-type documents. Among other ways to demonstrate compliance to SCC's guidelines, the bidder can submit 2 copies of a previously published technical specifications, or like deliverables; or, if applicable, an accredited SDO may submit a copy of their accreditation certificate that indicates their good standing with their standards development accreditor.
- The Bidder will demonstrate how they will respect/follow SCC's Technical Specification guidelines.
- The Bidder is capable of establishing a prioritization of applicable resources for the Technical Specifications development work, and to seek efficiencies where possible.
- The Bidder agrees to Terms and Conditions in General Services Agreement (Appendix E).

The Project Team

Each Bidder must agree to populate their Project Team with the following mandatory requirements:

- At least one (1) Project Manager (no more than two) with at least three (3) years' experience in overseeing multi-year standard development or normative-type document initiatives in Canada; and
- At least one (1) Technical Committee Manager (no more than three) with at least one (1) year experience managing committees of volunteer experts in the development of consensus-based standards or normative-type document or similar deliverables for use in Canada.

As part of the proposal, the Bidder must include the following information for each Team Member (resource):

- a) Name of the proposed Team Member and the resource category (Project Manager or Technical Committee Manager) for which they are proposed.
- b) A list of qualifications directly related to the requirements of the specific resources category.
- c) Chronological work experience.
- d) A detailed list of relevant academic and professional attainments.

Only those proposals that are judged by the Evaluation Committee to have met all stipulated mandatory criteria will receive further consideration.

PART B: Point-Rated Requirements

Each proposal must demonstrate to the satisfaction of the Evaluation Committee that all stipulated mandatory requirements can be substantiated through the evaluation of the point-rated requirements in the following six (6) categories:

| Category | | Max. Points |
|------------------------------|---|--------------------|
| I. | Experience/competence of the bidding organization in similar types of work creating standards or normative-type documents | 18 |
| II. | Project team experience in type of work being proposed | 18 |
| III. | Normative-type documents development process | 26 |
| IV. | Distribution and outreach strategy | 12 |
| V. | Project schedule | 18 |
| VI. | Quality of the proposal | 8 |
| Total Possible Points | | 100 |

The point-rated requirements correspond to specific criteria, which have been identified as forming the basis for the accumulation of points in each of the six (6) categories. Each proposal must include a response to each category.

70 of the possible 100 points must be achieved (70%) in order for the financial elements of the bid to be evaluated.

I. Experience/competence of the bidding organization in similar types of work creating standards or normative-type documents

The Evaluation Committee will assess the experience and competence of the Bidding Organization (“the Bidder”) with respect to RFP# 2021-11, working with the network of Canadian, regional and international stakeholders/organizations involved in relevant and related subject matter expertise pertaining to **digital credentials, including digital trust services**, as well as the Bidders’ approach to contingency planning.

The Bidder must provide examples that demonstrate the extent to which they meet each criterion. The same example may be used to meet various criteria but must be revised accordingly to highlight the context within which it applies. The basis for scoring each criterion is provided in the table below.

“Recent”, unless otherwise stated means within the last five years.

| Criterion | Basis for Scoring | Possible Points |
|---|---|-----------------|
| <p>I.A The Bidder is asked to provide two (2) current or recent examples that demonstrate experience in the development or renewal of standards or normative-type documents within the field of digital credentials.</p> | <p>For each example, points will be awarded as follows:</p> <ul style="list-style-type: none"> - up to two (2) points if the experience is implied; - up to three (3) points if the experience is explicit and indirectly related to digital credentials; - up to four (4) points if the experience is explicit and directly related to digital credentials (including digital trust services). | <p>8</p> |
| <p>I.B The Bidder is asked to provide one (1) example within the past three (3) years that demonstrates they have active relationships with organizations central to digital credentials (including digital trust services), and demonstrate a vetting process on how experts are deemed suitable for the development of a normative-type document.</p> | <p>For each example, points will be awarded as follows:</p> <ul style="list-style-type: none"> - up to one (1) point if the example convincingly demonstrates meaningful communication with the organization but does not demonstrate a process to identify and select experts; - up to two (2) points if the example convincingly demonstrates a relationship that involves active collaboration with the organization but does not demonstrate a process to identify and select experts. - up to four (4) points if the example convincingly demonstrates a relationship that involves active collaboration with the organization and demonstrates a process to identify and select experts | <p>4</p> |
| <p>I.C The Bidder is asked to describe the main elements of their contingency planning process for the project, and how it has proven effective for similar projects in the past.</p> | <p>Points will be awarded as follows:</p> <ul style="list-style-type: none"> - up to three (3) points if the plan is both reactive and proactive but does not provide evidence of how it has proven effective in the past; - up to six (6) points if the plan is both reactive and proactive and includes strong evidence of how it has proven effective in the past. | <p>6</p> |

II. Project team/resource experience in type of work being proposed

The Evaluation Committee will assess the experience and competence of the Bidder’s proposed Project Team members with respect to the range of activities required for the development of a TS in the context of RFP# 2021-11.

The Bidder must provide examples that demonstrate the extent to which they meet each criterion. The same example may be used to meet various criteria but must be revised accordingly to highlight the context within which it applies. The basis for scoring each criterion is provided in the table below.

NOTE: Unless otherwise specified, in cases where more than one Team Member (Resource) is proposed for a specific resource category, an average of the individual scores will be used as the score for that particular category. *As per the mandatory requirements, no more than two project managers and three Technical Committee managers are to be included.*

| Resource Category | Criterion | Basis for Scoring | Possible Points |
|--------------------|--|--|-----------------|
| Project Manager(s) | II.A For each resource proposed, the Bidder is asked to provide one (1) example that demonstrates the resource has experience with the oversight of logistics and finances for the development of standards or normative-type documents related to digital credentials (including digital trust services). | Points will be awarded as follows: <ul style="list-style-type: none"> - up to two (2) points if the example convincingly demonstrates oversight of the development of standards or normative-type documents that are indirectly related to digital credentials; - up to four (4) points if the example convincingly demonstrates oversight of the development of standards or normative-type documents that are directly related to digital credentials (including digital trust services). | 4 |
| | II.B The Bidder is asked to provide a total of two (2) recent examples that demonstrate that the proposed resource(s) served as a primary liaison between a standards development or normative-type development organization and stakeholders that are relevant to IT, across the following categories: <ul style="list-style-type: none"> - Enterprises, including SMEs; - professional association(s); and, - other relevant stakeholders. | For each example, points will be awarded as follows: <ul style="list-style-type: none"> - up to one (1) point for convincingly demonstrating that the liaison was of a sustained nature and that it was of consequence to the development of the standard or normative-type documents; - up to one (1) additional point if the stakeholder is indirectly relevant to digital credentials. - up to one (1) additional point if the stakeholder is directly relevant to digital credentials (including digital trust services). <p>Note: If the Bidder provides more than two (2) examples, only the first two (2) examples will be scored in the order they appear. Thus, if two (2) examples are provided for a first proposed resource, 0 examples will be scored for a second proposed resource. If one example is</p> | 6 |

| Resource Category | Criterion | Basis for Scoring | Possible Points |
|--------------------------------|---|--|-----------------|
| | | provided for one proposed resource, only one example will be scored for the second proposed resource, in the order they are listed. | |
| Technical Committee Manager(s) | II.C The Bidder is asked to provide two (2) recent examples that demonstrate that the proposed resource(s) has managed volunteer expert committees responsible for the development of standards or normative-type documents related to digital credentials (including digital trust services). | <p>For each example, points will be awarded as follows:</p> <ul style="list-style-type: none"> - up to two (2) points if the standard or normative-type documents was indirectly related to digital credentials. - up to four (4) points if the standard or normative-type documents was directly related to digital credentials (including digital trust services). <p>Note: If the Bidder provides more than two (2) examples, only the first two (2) examples will be scored in the order they appear.</p> | 8 |

III. Standards or normative-type documents solution development process

Evaluation of each Bidder’s proposed standards or normative-type documents solution development process will be based on the Bidder’s description of how its existing processes will be used to best meet the needs of the target audience.

The Bidder must provide examples that demonstrate the extent to which they meet each criterion. The basis for scoring with respect to each criterion is also provided in the table below.

| Phase of Project | Criterion | Basis for Scoring | Possible Points |
|--------------------|--|--|-----------------|
| Project Initiation | III.A The Bidder is asked to demonstrate that upon completion of this phase of the project, the Project Team will have developed a strong understanding of the Technical Specifications (TS) objectives, key stakeholders, and the provisional scope, focus, and target audience of the proposed TS. | <p>Points will be awarded as follows:</p> <ul style="list-style-type: none"> - two (2) points for a basic initiation plan that identifies certain important steps; - four (4) points for an adequate initiation plan that addresses all the main expected steps; - eight (8) points for a thorough initiation plan that addresses all the main expected steps and explains how they would contribute to a strong understanding of the TS’s objectives, key stakeholders, and the provisional scope, focus, and target audience of the proposed TS. | 10 |

| Phase of Project | Criterion | Basis for Scoring | Possible Points |
|--|--|---|-----------------|
| | | <ul style="list-style-type: none"> - Ten (10) points for a thorough and efficient initiation plan that addresses all the main expected steps and explains how they would contribute to a strong understanding of the TS's objectives, key stakeholders, and the provisional scope, focus, and target audience of the proposed TS. | |
| <p>TS Development:</p> <ul style="list-style-type: none"> • Preliminary Stage • Proposal Stage • Preparatory Stage • Committee Stage • Enquiry Stage • Approval Stage • Publication and maintenance | <p>III.B The Bidder is asked to demonstrate that the Project Team will use the TS development process outlined in the Canadian procedural documents <i>Canadian Standards Development National Technical Specifications</i> that will result in products that are of high technical quality, as well as relevant, well accepted, and implementable. This requires the Bidder describe key steps relating to, <u>at a minimum</u>:</p> <ul style="list-style-type: none"> • Assessment of existing documentation (including any requirements for a seed document); • Potential composition of Technical Committee (including stakeholder groups); • Activities to support the functioning of the Technical Committee and Working Group (including Terms of Reference, member orientation, proposed number of meetings, and relevant proactive communications); | <p>Points will be awarded as follows:</p> <ul style="list-style-type: none"> - up to four (4) points for plans that address some elements of this phase of work with a basic level of detail or insight; - up to six (6) points for plans that address some of the key elements of this phase of work with an adequate level of detail or insight, including deliverables; - up to ten (10) points for plans that address all key elements of this phase of work with an adequate level of detail or insight, including deliverables; - up to fourteen (14) points for plans that address all key elements of this phase of work with thorough detail and insight, including deliverables and key assumptions. - Up to sixteen (16) points for plans that address all key elements of this phase of work with thorough detail and insight, including deliverables and key assumptions, that is efficient to support the compressed timelines for the project. | <p>16</p> |

| Phase of Project | Criterion | Basis for Scoring | Possible Points |
|------------------|--|-------------------|-----------------|
| | <ul style="list-style-type: none"> • Reports and updates to SCC at mid-stage and stage completion; • The peer review process (including demonstration on how the peer reviewers will be selected and that peer review will not be conducted by technical committee members) • Consideration, disposition and accommodation of peer review comments; and • Editing, layout and production of final documents. | | |

IV. Outreach strategy

The Successful Bidder will plan and implement an outreach strategy to be approved by SCC in advance that will increase awareness of the Technical Specification (TS). This may involve the development of additional materials to facilitate a greater understanding of the TS by end users.

Evaluation of each Bidder’s proposed outreach strategy will be based on the Bidder’s preliminary understanding of and connections with the target audience for the TS.

In particular, the Evaluation Committee will assess the depth of the Bidder’s understanding of and connections with the target audience, proposed method(s) of communication, and any proposed complementary materials to facilitate greater awareness, understanding and application of the TS across Canada. The Bidder may propose collaboration with the Technical Committee and/or other relevant contacts within the target audience, which includes enterprises, government agencies, professional associations, and other relevant stakeholders. The Bidder must provide examples that demonstrate the extent to which they meet each criterion. The basis for scoring with respect to each criterion is also provided in the table below.

| Component | Criterion | Basis for Scoring | Possible Points |
|--|--|---|-----------------|
| Target audience for National Technical Specification | IV.A The Bidder is asked to demonstrate an understanding of and connections with the target audience. | <p>Points will be awarded as follows:</p> <ul style="list-style-type: none"> - up to two (2) points for a breakdown of the target audience into relevant organizational categories, including enterprises, government agencies, professional associations, and other relevant stakeholders; - up to four (4) points for a breakdown of the target audience into relevant organizational categories, including enterprises, government agencies, professional associations, and other relevant stakeholders, listing up to two (2) active contacts in some of the organizational categories with whom the Bidder has an active relationship (including the contact's name, title, and organization); - up to six (6) points for a detailed breakdown of the target audience into relevant organizational categories, enterprises, government agencies, professional associations, and other relevant stakeholders, listing up to two (2) active contacts in each organizational category with whom the Bidder has an active relationship (including the contact's name, title, and organization) | 6 |
| Methodology | IV.B The Bidder is asked to provide an example of experience promoting normative-type documents or experience promoting normative-type documents and developing complementary guidance materials that support the application of technical information | <p>Points will be awarded as follows:</p> <ul style="list-style-type: none"> - up to one (1) point for demonstrating experience promoting normative-type documents; - up to two (2) points for demonstrating experience promoting normative-type documents and developing complementary guidance materials; - up to four (4) points for demonstrating experience promoting normative-type documents and developing complementary guidance materials for stakeholders that are also target audiences for the proposed technical specification. | 4 |

| Component | Criterion | Basis for Scoring | Possible Points |
|---------------|---|--|-----------------|
| | by providing easily understood guidance. | | |
| Outreach Plan | <p>IV.C The Bidder is asked to identify short-term activities for promotion and outreach to facilitate awareness, distribution and understanding of the technical specification by the target audience including:</p> <ul style="list-style-type: none"> • Distribution (promotional) efforts that will increase awareness of the technical specification; • Development of additional materials if required; • Proposed opportunities to collaborate with the TS Technical Committee and/or other relevant contacts within the target audience. | <p>Points will be awarded as follows:</p> <ul style="list-style-type: none"> - up to one (1) point for an outreach plan with minimal detail or insight; - up to four (2) points for a detailed outreach plan that demonstrates understanding of the needs and characteristics of the target audience. | 2 |

V. Project schedule

The Bidder is required to provide a proposed (preliminary) schedule for development of the Technical Specification (TS) so that the Evaluation Committee may assess whether the Bidder has a realistic and well-ordered plan for the coordination of development work within the 8-month window, from start to finish. Because the project has an accelerated timeline, further points will be given if the proposed project schedule can complete the development of the TS in a shorter time. The basis for scoring the proposed schedule is provided in the table below.

| Criterion | Basis for Scoring | Possible Points |
|--|--|-----------------|
| <p>V.A The schedule demonstrates that the Bidder has a clear and feasible plan for developing the TS within a 8-month timeframe and conducting distribution and outreach activities by mapping out the critical path including provisional dates.</p> <p>If a chart or image is included in the response, the resolution must be high enough such that all labels are clearly readable.</p> <p>A narrative should accompany the schedule, with explanation of how the timelines were determined, including key underlying assumptions.</p> | <ul style="list-style-type: none"> - up to two (2) points if the schedule addresses some main elements of the critical path, but without explanation of how the timelines were determined; - up to four (4) points if the schedule addresses some main elements of the critical path, with some explanation of how the timelines were determined; - up to six (6) points if the schedule addresses nearly all main elements of the critical path, with some explanation of how the timelines were determined; - up to eight (8) points if the schedule addresses all or nearly all main elements of the critical path, with thorough explanation of how the timelines were determined; - up to ten (10) points if the schedule addresses all main elements of the critical path, with thorough explanation of how the timelines were determined, including key underlying assumptions. | 10 |
| <p>V.B The schedule provided by the bidder demonstrates that the bidder can complete the development of the Technical Specification in less than 9 months.</p> | <ul style="list-style-type: none"> - up to three (4) points if the schedule demonstrates that the Technical Specification can be developed within 9 months; - up to six (8) points if the schedule demonstrates that the Technical Specification can be developed within 6 months; | 8 |

VI. Quality of the proposal

The Evaluation Committee will assess the quality of the proposal to determine whether the information organized within the proposal is presented in a clear and comprehensive fashion.

| Criterion | Basis for Scoring | Possible Points |
|--|---|-----------------|
| <p>VI.A The Bidder is asked to assure that material within the proposal is formatted, organized and written in</p> | <p>Points will be awarded as follows:</p> | 8 |

| Criterion | Basis for Scoring | Possible Points |
|---|--|-----------------|
| <p>such a way as to make clear to the reviewer where responses to mandatory and point-rated requirements are located. The writing should also be concise, easy-to-read, and edited for typos.</p> | <ul style="list-style-type: none"> - no more than two (2) points if the proposal is poorly organized, difficult to read, and contains frequent typos; - up to four (4) points if the proposal is generally well-organized but is somewhat difficult to read and contains some typos; - up to eight (8) points if the proposal is highly organized, concise, clearly written, and contains very few to no typos. | |